

Future of Leeds City Centre and Local Centres

July 2021



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Executive Summary

Executive Summary

Covid-19 has brought unprecedented changes to cities, accelerating trends around digital transformation, remote working, health disparities, and the shift from bricks to clicks in retail. The long-term implications could transform how and where we live and work, posing huge questions for cities. Leeds will need to adapt and recover in the right way. The purpose of this project, in the context of the Leeds Economic Recovery Framework, is to understand how Local Centres and the City Centre in Leeds can adapt to the long-term transformational changes and challenges over the next ten years.

Main trends

The main trends and challenges that Leeds and other core cities face in the short and long term following Covid-19 have been summarised across five themes:

Living and Working

Changing working patterns including the rise of remote work and hybrid working, and the growth of the knowledge economy and innovation (based on face-to-face interactions and agglomeration in city centres) pose major questions for the future of Leeds City Centre. Rapid economic change means that people need to gain new skills to access good jobs. The concept of the 15-minute city could help reconnect communities within centres and enhance their attractiveness.

Leisure, Culture and Consumption

The shift from bricks and mortar retail to online retail is leading to some retail space and businesses becoming unviable. There is an important role for place-making, high quality distinctive retail, leisure, social and cultural experiences in differentiating centres from online consumption. Culture can support centres by bringing people together, boosting creativity and growth, and building social cohesion.

Social Value and Inclusive Growth

As the economy changes some people and places are being left behind. These changes are affecting the economic role and health of centres. The role of child and age friendly cities is becoming increasingly important. Health and wellbeing is a key priority and cities play a major role in delivering quality of life.

Mobility

Covid-19 has resulted in people turning to their personal vehicles, active travel and micro mobility options such as bikes and scooters for essential journeys. There is an opportunity for cities to shift transport choices to more environmentally and economically sustainable options.

Environment and Net Zero

Awareness of the impact of climate change on our cities and lives has risen, developing more environmentally sustainable attitudes and socially conscious consumers. Integrating the Covid-19 recovery with climate action could support economic development.

High Level Economic Scenarios

A series of high-level economic scenarios were developed to provide a hypothetical illustration of possible future scenarios that could occur following Covid-19 within the economic environment. Please note these scenarios are high level and illustrative with some limitations.

The four scenarios have illustrated that increased homeworking presents challenges for the city centre, as fewer office workers will inevitably impact demand within ‘face-to-face’ sectors (‘face-to-face’ sectors are considered as retail and other services¹, food and beverage, and entertainment. These sectors were chosen based on the high reliance that these establishments place on footfall. It is important to acknowledge that other ‘face-to-face’ jobs and delivery jobs are not reflected within these numbers).

With a clear need to attract people back into the city centre, there is an opportunity to drive growth, create resilience, and have a vibrant city centre through capitalising on the benefits associated with its concentration of people and businesses.

Scenario	Description	Implications
Baseline scenario	This scenario sets out the trends observed had Covid-19 not occurred	<ul style="list-style-type: none"> – Total Employment: maintains pre Covid trend – Office workers: five days in city centre – Total Leeds population: maintains pre Covid growth trend – City centre population: maintains pre Covid growth trend – Local centre population: maintains pre Covid growth trend
Bounce-back to a new normal	Employees ‘bounce back to a new normal’, working from home more frequently but still desiring the interaction, networking and spontaneity of a central office. There is a positive economic climate, employment increases and the population grows to 2030.	<ul style="list-style-type: none"> – Total Employment: returns to pre Covid levels by 2023 – Office workers: three days in city centre – Total Leeds population: maintains pre Covid growth trend – City centre population: maintains pre Covid growth trend – Local centre population: maintains pre Covid growth trend
Widespread homeworking	Employees use central offices primarily for collaborative interactions. Home working remains the norm for white collar workers and there is a notably lower number of city centre workers. The number of city centre residents is still assumed to increase but the city centre population in 2030 is assumed to be lower than is assumed under the baseline and ‘bounce-back’ scenarios.	<ul style="list-style-type: none"> – Total Employment: returns to pre Covid levels by 2023 – Office workers: two days in city centre – Total Leeds population: marginally higher growth rate than pre-covid due to higher local growth and inbound migration to Leeds, perhaps due to people relocating from London – City centre population: lower growth rate than pre Covid trend – Local centre population: higher growth rate than pre Covid trend
Significant headwinds	The economy undergoes measured growth. Home working remains the norm for white collar workers. The overall population in Leeds stagnates.	<ul style="list-style-type: none"> – Total Employment: only returns to pre Covid levels by 2028 – Office workers: two days in city centre – Total Leeds population: stagnates at same population as pre Covid (2019 levels) – City centre population: stagnates at same population as pre Covid – Local centre population: stagnates at same population as pre Covid

¹Examples of ‘other services’ includes, but is not limited to, ‘other personal service activities’ (such as hairdressing), veterinary activities and rental and leasing activities. Human health and social work activities are excluded as a ‘face-to-face’ sector for the purposes of this analysis.

Conclusions

Living and Working

1. Changing working patterns pose a risk to the trend of agglomeration in city centres, which has been a major factor in the economic success of Leeds in recent years.
2. With hybrid working the challenge and opportunity for Leeds is to achieve the best of both worlds: retaining the benefits of agglomeration alongside those of more flexible working.
3. It will be important for the Leeds economy to support the city centre to adapt by promoting its role for collaboration, supporting the right future supply of workspace, and backing innovation districts.
4. There are opportunities for employers to maximise the potential benefits of remote work, including increased flexibility, and the ability to access a skilled workforce across a wider geographic area.
5. Changing working practices could lead to an acceleration of northshoring of people and jobs.

6. There are opportunities but also risks associated with residential development in centres: good residential development can be beneficial, but there is a risk of poor-quality conversions under permitted development rights.
7. There is a significant opportunity for culture and leisure as part of the future role of centres.
8. The night-time economy has an important role to play in the success of centres.
9. Changing working and spending patterns could have major impacts on community cohesion and the labour market: job losses in retail; increasing polarisation between local centres (centres with relatively affluent catchments of people who can work from home will do better); and opportunities for centres to become more inclusive places.
10. There will be a continued need to support retail workers to find good alternative jobs, and to develop their skills to access opportunities in other sectors.
11. A high-quality transport network is essential to support centres to adapt, to attract people and to free-up roadspace for public realm.

Consumption

1. The role of centres will need to be less about retail consumption, and more about production, innovation, social interaction, living, education, culture and public services.
2. The challenge for centres and retail businesses will be to offer an attractive experience that is positively differentiated from online retail.
3. Centres and retailers need to adapt to the omni-channel future, combining in-person and online experiences and services.

Shaping and Engaging

1. The 15-minute city concept has many benefits but also some limitations, with aspects of the 15-minute city more relevant to local centres than city centres. Applying the 15-minute city concept will enable more people to access centres in a way that is easy and attractive to them. But in order to retain critical mass and the density of jobs and footfall, many centres and particularly the city centre need to attract people from a catchment far beyond 15 minutes travel time.
2. Successful centres can enable Leeds to respond to the challenges of climate change.
3. Centres should be at the heart of the city's approach to promoting inclusive growth. Supporting centres to adapt to new roles and supporting people that work/have worked in declining sectors to develop new skills and find new or better jobs will be essential. There are also opportunities through a wider range of uses in centres, better public space, more proactive animation of places, child-centred and age-friendly design and urban management, and through the 15-minute city concept for centres to be more inclusive.
4. There is an opportunity to work with communities to create a new vision for centres and build broad-based coalitions for positive change.

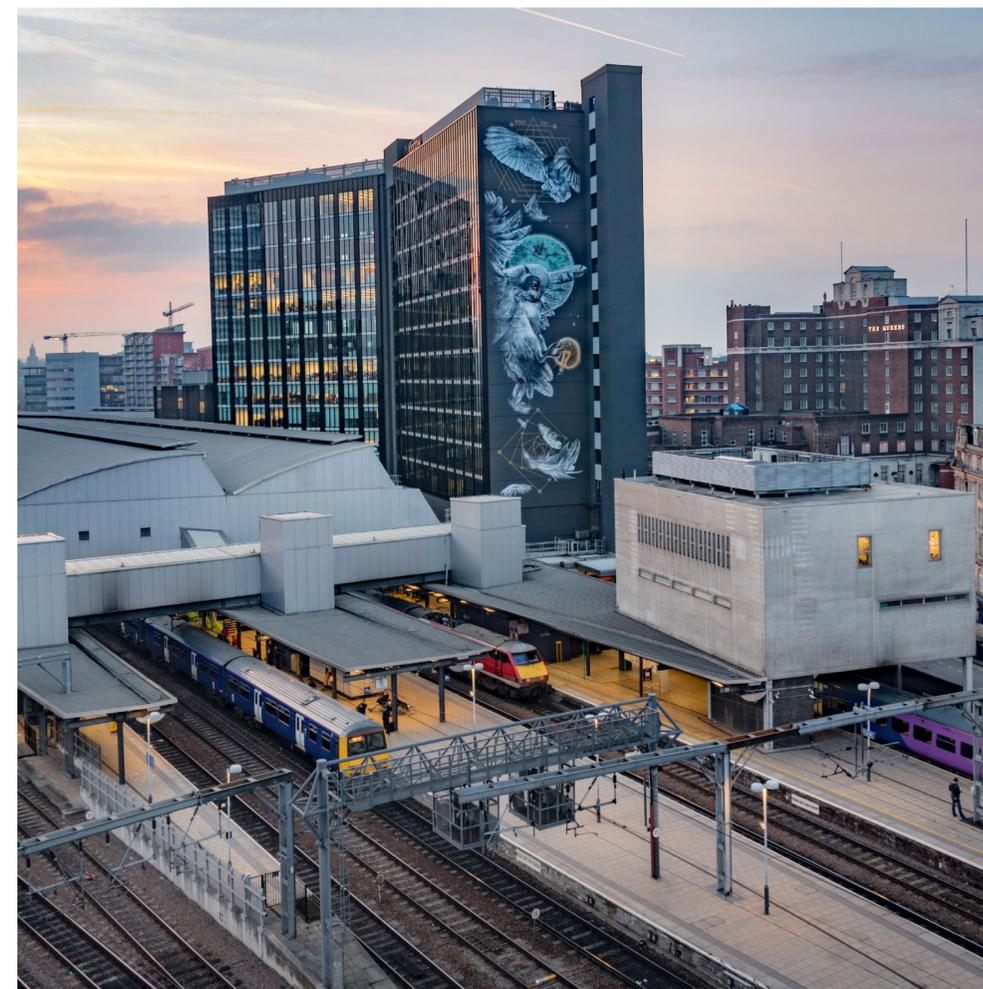
“Supporting centres to adapt to new roles and supporting people that work/have worked in declining sectors to develop new skills and find new or better jobs will be essential.”

Role of the Council

The Council has an important leadership, policy, investment, and place management role within centres. However within the context of austerity, the council should work with and through others, building partnerships, and mobilising business and community leaders to make a difference, while being proactive in exploring the opportunities that may come from leveraging external funding from government.

1. The Council has an important role in urban management in centres in terms of services such as cleaning, highways maintenance and community safety.
2. The Council could consider the impacts on and opportunities in centres as it reconfigures its assets.
3. Creating, managing and maintaining good quality public space – through tactical as well as more substantial interventions – can help centres adapt to a new future.
4. The Council also has an important leadership and enabling role: it should seek to maximise its impact, by working in a coordinated way with and through others.
5. The Council can create and champion transformational projects in centres and make them happen.

Our centres are facing increasingly rapid change, creating significant challenges as well as opportunities. Drawing on the trends, stakeholder engagement, the economic and population scenarios, and the conclusions, a series of potential areas for action have been identified. The suggested areas for action build on the current work the council are doing in responding to the rapid changes that are affecting centres, and the job they support; the opportunities for centres to develop roles focused more on production, creativity, innovation, and bringing people together, as well as their traditional roles around consumption; and the need for centres to be attractive, inclusive, vibrant places where people want to spend time, to positively differentiate centres from online retail and remote work.



“Drawing on the trends, stakeholder engagement, the economic and population scenarios, and the conclusions, a series of potential areas for action have been identified.”

Potential Areas for Action



1. Supporting people and business to respond and adapt to changes to the economy and jobs.

- 1.1 Providing support for people to adapt to the changing employment landscape, including retraining people in sectors most affected economically by Covid-19, to encourage recovery in the most sustainable sectors, and in improving digital skills across the workforce.
- 1.2 Stepping up – developing programmes to support in-work progression for people working in retail and hospitality.
- 1.3 Backing independents – supporting retail, food and drink and social entrepreneurs to start-up and grow successful businesses.
- 1.4 Connecting city centre businesses with schools and communities in nearby neighbourhoods to increase awareness of career opportunities, building on the learning from the Leeds Inclusive Anchors Programme.



2. Maximising health and well-being learning and community support by focusing facilities and services in centres.

- 2.1 Identifying and realising opportunities for facilities and initiatives in centres to improve health and well-being in centres, including preventative and public health.
- 2.2 Adopting a health-led approach to town and city centre design, to support physical activity and well-being.
- 2.3 Supporting community-led initiatives to provide services in centres, including through community shops and where appropriate Community Asset Transfers.
- 2.4 Making centres sociable and inclusive places, where people can meet and connect with each other, tackling isolation, and building social cohesion.



3. Creating child and age-friendly city and local centres.

- 3.1 Designing for children and older people – undertaking audits of parts of the city centre and local centres (involving people) of how well they meet the needs of young and older people, identifying opportunities.
- 3.2 Playful centres – initiatives to improve play facilities and to promote play in the city centre and town centres.
- 3.3 Making centres places for teenagers – identifying opportunities in centres for creating spaces and initiatives for teenagers to come together, to socialise, and to gain skills, support and confidence.
- 3.4 Placing centres at the heart of tackling loneliness, and in providing support for older people, creating spaces and initiatives to bring people together, and building on the neighbourhood networks.



4. Capitalising on culture and the creative industry assets to bring people together, shape place identity, and support communities.

- 4.1 Supporting grass roots bottom up cultural activities in local centres in a holistic and coordinated manner
- 4.2 Securing investment in continued improvements to landmark cultural facilities and destinations to attract tourism and provide hubs for learning and skills development for young people.
- 4.3 Protecting and bringing forward space for creatives and designers and use public sector assets as anchors for creative and cultural activities in local centres.



5. Safeguarding and enhancing the role of Leeds as a hub of the knowledge economy, backing innovators and entrepreneurs.

- 5.1 Supporting development of the right type of workspace, and wider quality of place to meet demand, addressing current shortages, and enabling creativity, collaboration, and innovation.
- 5.2 Backing innovators and entrepreneurs, enhancing networks of entrepreneurs, universities, corporates, the public sector and investors to build the ecosystem for innovation, and knowledge spillovers, developing workspaces and accelerators for start-ups and scale-ups.
- 5.3 Maintaining diversity of the city centre economy, and growth and inward investment in knowledge sectors, including financial and professional services, digital, creative, health innovation, screen industries, and built environment.

Potential Areas for Action



- 6. Curating a diverse mix of uses to attract people back into Leeds city centre to live, work, learn, create, shop, and play.**
- 6.1 Encouraging a diverse mix of uses in the city centre to create reasons to live, learn, visit, create, and work for all different profiles of users.
- 6.2 Improving the liveability of the city centre through a wide range of quality homes, quality of place, and the wider mix of uses. Adopting a proactive approach to repurposing retail and office buildings to residential, where appropriate, with an aim of supporting quality schemes (and responding to the risk of poor-quality conversions).
- 6.3 Supporting businesses in retail and hospitality to survive and adapt, as well as start-ups, including independents.
- 6.4 Adapting the city centre for omni-channel retail, including click-and-collect/return hubs to drive footfall.
- 6.5 Promoting Leeds as a data driven smart city 2.0, using data driven insight to adapt to rapidly changing economic context



- 7. Adapting local centres to new forms of working, living, and spending.**
- 7.1 Identifying the roles and functions that some centres play in the context of the local economy and viability of uses.
- 7.2 Widening the diversity of uses, encouraging suitable high-quality residential development, creating new workspaces and start up spaces, education, health & public & community services, comfortable and welcoming public spaces and seating, whilst protecting and enhancing an appropriate and viable scale of retail.
- 7.3 Supporting retail, food and drink and social entrepreneurs in centres to start-up and grow businesses and social enterprises, through advice and opportunities for test-trading through markets and pop-up units.
- 7.4 Prioritising investment and action for local centres that are struggling the most.



- 8. 15-minute city, 90-minute region. Connecting neighbourhoods with centres, and expanding the economic reach of the city centre.**
- 8.1 Connecting neighbourhoods to the city centre and local centres – the 15-minute city – through creating high quality walking routes, as well as cycle routes, to reduce severance.
- 8.2 Continuing to invest in public transport, and appropriate parking solutions (with EV charging), to enable people to access centres, to free up roadspace for people, and manage traffic better.
- 8.3 Place-shaping – building on recent schemes, future plans and the ambition set out in the Leeds Transport Strategy to enhance quality of place and public realm from well-designed transport and infrastructure investments. Consider design reviews/more design competitions.
- 8.4 Continuing to make the case for strategic connectivity to the city centre, including improving the station and rail links, which alongside hybrid working could attract a workforce across a wider area, placing Leeds at the centre of a “90 minute region”.



- 9. From grey to green. Bringing nature, and new and improved green spaces, into centres.**
- 9.1 Bringing places closer to nature, increasing environmental net gain through initiatives such as urban greening, pocket parks, green corridors, trees, and sustainable urban drainage. Establishing an ambitious plan on how to deliver environmental net gain across Leeds city and local centres.
- 9.2 Maximising the opportunity of the green economy, particularly clean tech, in terms of skills and jobs to drive our net zero ambitions and support economic growth.
- 9.3 Improving the Aire waterfront, building on recent waterfront improvement schemes, to develop an ambitious long-term plan to make the most of this huge opportunity for the city.
- 9.4 Identifying opportunities in centres for renewable energy generation and food production.



- 10. Leading and convening, creating partnerships, and mobilising the people that can make a difference.**
- 10.1 Creating local partnerships within local centres, that are flexible and fluid, bringing together council officers, local members, local businesses, community leaders and local people to develop shared visions and broad-based coalitions for change in centres.
- 10.2 Developing coherent investment plans for local centres, and parts of the city centre, identifying future funding opportunities. This may require some upfront investment, coordinating what the council are already doing.
- 10.3 Working with businesses and communities in the city centre to develop local partnerships for improving parts of the city centre not covered by the BID.
- 10.4 Bringing together cross-cutting teams from different Council services, and other public sector partners to provide an integrated approach to centres through coordination of existing resources.
- 10.5 Prioritising or phasing action on a few centres at a time, to focus resources.

Introduction

Introduction

The challenge

Covid-19 has brought unprecedented changes to cities, accelerating trends around digital transformation, remote working, and the shift from bricks to clicks in retail. The long-term implications could transform how and where we live and work, posing huge questions for cities. Leeds will need to adapt and recover in the right way to respond post-Covid-19 and post-Brexit. There is an opportunity to set a direction of travel for the city centre and local centres in Leeds that support the city’s ambitions and policies around economic competitiveness, skills, inclusive growth, culture, health and wellbeing, and responding to the climate emergency.

Project overview

The purpose of this project is to understand how Leeds City Centre and Local Centres can adapt to the long-term transformational changes and challenges over the next ten years. It aims to inform a future direction of travel for the city centre and local centres that support the city’s ambitions and policies around economic competitiveness, skills, inclusive growth, culture, and the climate emergency. This report suggests some future areas of action and key moves. It details the trends, opportunities, challenges, and future actions for Leeds City Centre and Local Centres. It will help inform policy interventions and set out ideas about how the council could organise its assets and resources; how the council could partner with others providing a leadership role; and how national government can play its part so Leeds can adapt and thrive. Whilst the relevant economic evidence and literature has been considered, the purpose of the work has not been to undertake a detailed look at the Leeds economy. The table outlines the main activities for this project.

The work was commissioned by Leeds City Council, following the publication of the Economic Recovery Framework, to understand how Covid-19 has impacted the economy and how Leeds can adapt to the long term transformational changes and challenges. The work has been undertaken by Arup’s Foresight and Integrated City Planning teams, guided by a reference group of Leeds City Council officers from a wide range of services. It should be noted that when referring to Local Centres this includes Town Centres in line with Leeds City Council Core Strategy.

Project Activities	Description
Horizon Scanning	Identify trends, challenges, opportunities, visions and policies relevant to the city centre local centres across five key themes.
Stakeholder Engagement	A workshop with stakeholders identifying the key trends driving change and the implications for Leeds City Centre and Local Centres.
Economic Scenarios	High level illustrative scenarios exploring return of workers to Leeds city centre and the associated economic impact.
Conclusions	Develop conclusions aligned with the project brief on how the council can adapt to the trends and their implications.
Future Action	Identify areas for priority action and how the council could organise its assets and resources and partner with others and how national government could help.

Local Centres

Leeds district is comprised of a network of neighbourhoods within the main urban area of Leeds, and also a series of local centres that are separate from the main urban area, in some cases with a strong local identity. The Leeds Core Strategy identifies 60 local centres. These are the focal points for surrounding communities, where people live, shop, work, socialise, use sports and leisure facilities, and access public and community services. They are the location for many local businesses, and important for the Leeds economy. The quality and vibrancy of these centres matters to people; local centres are an important bellwether for the success, prosperity and pride of place, while also representing distinct local character.

There are important differences between local centres in Leeds and in many ways they are much more diverse places compared to the city centre. Some centres have relatively affluent catchments, others are in areas with high levels of deprivation. Some local centres have traditionally had important comparison as well as convenience retail, others less so. All centres compete with out-of-centre, big-box retail locations; for some centres the proximity to these retail parks creates greater challenges, although there is also evidence that the presence of supermarkets and large retailers in or near centres can widen their retail catchment and benefit smaller retailers through linked trips. Some centres have purpose-built office space, although much of this is now dated, others do not (but may still have local businesses operating from offices above shops and converted buildings).

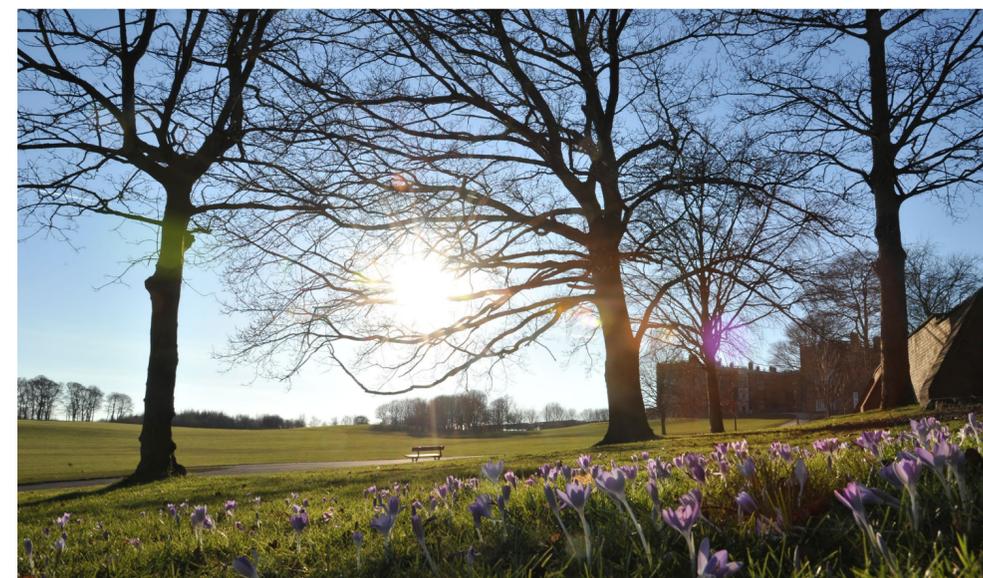
Many centres have attractive buildings, including historic buildings, and have received capital investment by the city council, and through other funding initiatives such as the Heritage Lottery Fund, and in the case of Morley the Stronger

Towns Fund. However, there are also physical challenges from less attractive buildings, and the impact of major roads and traffic, and in some cases anti-social behaviour.

There are some partnerships focused on improving and promoting local centres. There is a Business Improvement District in Otley, with one to be established in Armley, and in Morley (which is one of the 101 towns in England eligible for the Government's Stronger Towns Fund) a Town Board has been formed. However in the majority of centres there is not a formal partnership in place. For all centres, elected council ward members have an important role to play in providing leadership, alongside the council's Community Committees, and Localities teams.

Over a decade of austerity in the public sector has impacted public services and the use of public sector assets in local centres. In some cases, asset rationalisation and integration initiatives (as part of the principle of "one public estate") has brought public services together in new or improved facilities, such as Leeds City Council's community hubs. There have also been some positive examples of community responses to meeting local needs through Community Asset Transfers (for example Bramley Baths), or community run initiatives (such as Old Fire Station in Gipton, or Otley Courthouse) focused on providing community facilities, services, arts and culture, and training. Voluntary and community sector initiatives, supported by the city council, such as the neighbourhood networks often have a base in town and local centres.

“Over a decade of austerity in the public sector has impacted public services and the use of public sector assets in local centres.”



The shift to online retail creates significant challenges for local centres, particularly for comparison retailers. Some local centres have been able to respond by offering a distinctive local convenience retail offer, more cafes, bars and restaurants, and a social experience that cannot be replicated online. However, others have struggled, with a growing number of empty units, and a declining quality of retail and leisure offer.

There is some (mainly anecdotal) evidence that widespread home working during the Covid pandemic has benefited some local centres that have a catchment of workers that previously commuted to offices, who for the last year have been spending more money locally. These centres may be able to capitalise on higher local spending, and possibly new workspace developments, if widespread home-working or hybrid working continues. However other centres with more people who cannot work from home (and who have been more likely to lose their jobs, have had their hours reduced or be furloughed) have struggled in the pandemic, and are unlikely to benefit to the same extent in a future scenario of substantial home-working or hybrid working. It is clear that a proactive approach will be needed to support local centres and developing a toolbox of solutions will be multi-faceted with different approaches needing to be adopted for different centres. The 60 local centres play an important role in the place making of Leeds and the responses to rapid changes will need to address how and where people live, work, shop, access services, and continue to build their communities.

Leeds City Centre

Leeds City Centre has been transformed over the past decade. Major retail and leisure schemes such as Trinity Leeds, Victoria Leeds, and the first direct Arena and major office schemes such as Wellington Place and Sovereign Square helped Leeds recover strongly from the 2008 recession. Universities, colleges and schools have invested in a wide range of high quality new facilities. Connectivity has been improved by a new park-and-ride bus network, bus corridor improvements, new cycle routes, and the Leeds Station Southern Entrance. There is currently £60m being spent in the city centre, right now, on ‘Gateway’ schemes, improving public realm, planting trees, creating cycle routes, and improving bus waiting facilities. Inward investment into Leeds City Centre has accelerated rapidly in recent years. South Bank, one of Europe’s largest regeneration developments, will bring over 1000 businesses, 4000 homes and a new city park to the city centre, reweaving communities back into the centre. The cultural offer has improved through recent capital investments, with future ones planned such as such as British Library North and the National Poetry Centre, and a new creative vibrancy in part fostered by the Leeds 2023 initiative. A vibrant independent retail and food and drink scene has emerged, where the social experience is a major part of the offer. City centre residential development is picking up pace, with some high-quality schemes on site. The quality of place has improved significantly with new public realm and greenspaces, and with more planned including the extended City Square, and new Aire Park. The District Heating scheme and Leeds Flood Alleviation Scheme are enabling the city centre to respond to the challenges of climate change.



The city centre provides a concentration of skilled jobs in Knowledge Intensive Business Services (KIBS), the creative and digital sector, universities, healthcare and health innovation (including through Leeds Teaching Hospitals Trust, and the position of Leeds as the headquarters for the NHS and NHS Digital), and the public sector. These organisations and skilled workers benefit from the knowledge spillovers, the ecosystems, and the trust and relationships that high densities of face-to-face contact brings. This has been supported by the transport network which enables firms to access a workforce from across a wide area. This has led to significant increases in rail use into Leeds pre-Covid, which is one of the two busiest stations in the north of England.

The rise of remote working, or hybrid working (where people split their time between the workplace and working from home) pose major questions for city centres like Leeds. Will these trends negatively impact the role of the city centre as a hub for knowledge intensive jobs based on high densities of face to face interaction, and what would be the implications of this? Or will the many benefits of collaboration, knowledge spillovers and building of trust-based relationships mean that the city centre will remain a place where firms want to locate and people want to work, and if so how might the city centre need to adapt and change to thrive in the future?

Despite the successes of Leeds City Centre, there are challenges that existed before Covid in Leeds and UK wide. While spatial strategies have been in place for some time around improving connectivity, delivering a city park, and maximising land to south of river, there are still challenges in maximising these opportunities. Many communities who live in the neighbourhoods close to the city centre are not connected well to the opportunities it provides because of poor

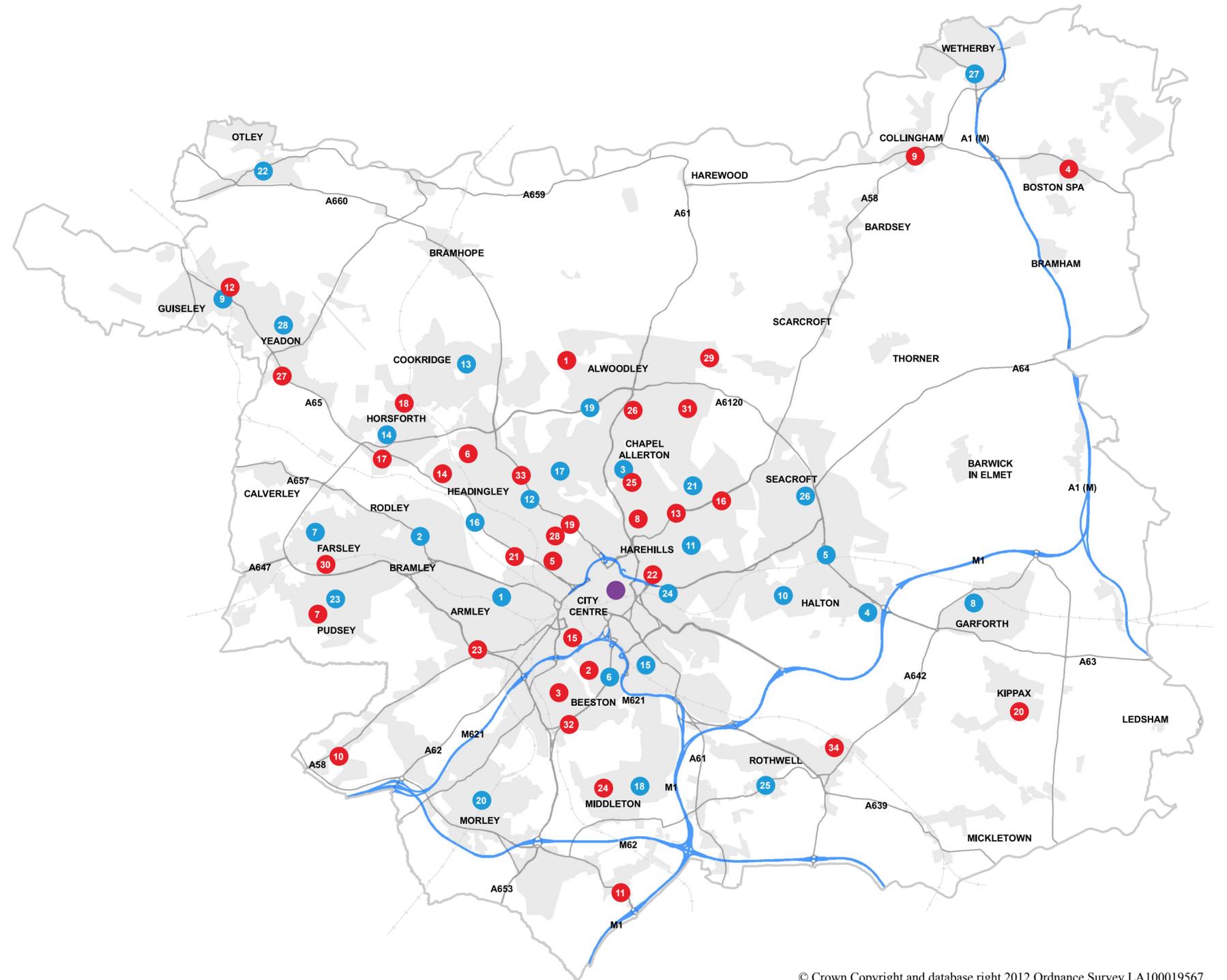
physical connectivity, skills gaps and limited awareness of job opportunities. The city centre has some fantastic buildings and public spaces; it also has a legacy of large highways and railways that cause severance, few green spaces, and a waterfront with huge potential that has yet to be realised fully. There is now a significant shortage of available Grade A office space in the city centre, with several firms with requirements that cannot be fulfilled currently. City centre residential development has lagged behind some other cities over the last decade, following the end of the owner occupied volume builder market which emerged in the 1990s, although this is now beginning to change with strategic housing and mixed use allocations through the Development Plan, significant numbers of pipeline schemes, significant investment in the quality of place and the delivery of Private Rented Sector and Purpose Built Student Accommodation schemes. Major city centre retail locations face reduced footfall from office workers, and the move to online retail. This may have implications for future planning policy and regeneration strategies for the retail core of Leeds City Centre, and is already leading developers to rethink plans for future schemes and propose residential conversions of retail space.

A city centre Business Improvement District (BID), Leeds BID, was created in 2015, and secured a further five year term in 2020. It is the third largest BID in the UK by rateable value, covering a wide range of sectors, including retail, hospitality, office, tourism, health and education. In addition, the BID works with the Leeds City Council's City Centre Management team. The BID does not cover the South Bank or Waterfront, or parts of the Innovation Local or East Side areas of the City Centre.

“Despite the successes of Leeds City Centre, there are challenges that existed before Covid in Leeds and UK wide. While spatial strategies have been in place for some time around improving connectivity, delivering a city park, and maximising land to south of river, there are still challenges in maximising these opportunities.”

Figure 1: Hierarchy of Centres

- **City Centre**
 - **Town Centres**
 - **Local Centres**
- | | |
|---|---|
| <ol style="list-style-type: none"> 1 Armley 2 Bramley 3 Chapel Allerton 4 Colton (Selby Road) 5 Cross Gates 6 Dewsbury Road 7 Farsley 8 Garforth 9 Guiseley, Otley Road 10 Halton 11 Harehills Lane 12 Headingley 13 Holt Park 14 Horsforth, Town Street 15 Hunslet 16 Kirkstall 17 Meanwood 18 Middleton Ring Road 19 Moor Allerton 20 Morley 21 Oakwood 22 Otley 23 Pudsey 24 Richmond Hill 25 Rothwell 26 Seacroft 27 Wetherby 28 Yeadon | <ol style="list-style-type: none"> 1 Alwoodley King Lane 2 Beeston Hill Local Centre 3 Beeston Local Centre 4 Boston Spa 5 Burley Lodge (Woodsley Road) Local Centre 6 Butcher Hill Local Centre 7 Chapeltown (Pudsey) Local Centre 8 Chapeltown Road Local Centre 9 Collingham Local Centre 10 Drighlington Local Centre 11 East Ardsley Local Centre 12 Guideley Oxford Road/Town Gate Town Centre 13 Harehills Corner 14 Hawksworth Estate Local Centre 15 Holbeck Local Centre 16 Hollins Park (Easterley Road) Local Centre 17 Horsforth New Road Side 18 Horsforth Station Road 19 Hyde Park Corner 20 Kippax 21 Kirkstall Road Local Centre 22 Lincoln Green Local Centre 23 Lower Wortley (Granny Lane) Local Centre 24 Middleton Park Circus Local Centre 25 Montreal (Harrogate Road) Local Centre 26 Moortown Road 27 Rawdon, Leeds Road 28 Royal Parks Local Centre 29 Slaid Hill Local Centre 30 Stanningley Botton Local Centre 31 Street lane S4 Local Centre 32 Tommy Wass (Dewsbury Road) Local Centre 33 Weetwood (Far Headingley) Local Centre 34 Woodlesford Local Centre |
|---|---|



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Horizon Scanning

Horizon Scanning

This section provides an overview of the main trends and challenges that Leeds and other core cities face in the short and long term following Covid-19.

Using local, national and global knowledge, the trends, challenges, opportunities, visions, and policies relevant to Leeds City Centre and Leeds local centres have been identified. This horizon scan focused on changes occurring since the start of the Covid-19 pandemic, capturing the acceleration of existing trends and associated implications as well as new trends that have emerged. This involved a review of a wide range of documents including literature covering relevant global, regional and local trends and developments (the list of documents reviewed can be found in Appendix B). The horizon scan looked across social, technological, environmental, economic and political/legal (STEEP) domains to ensure a holistic view was taken. The outputs of the horizon scan have been summarised in the following pages across the five key themes. Detailed descriptions of the trends can be found in Appendix A. The five themes are set out below.

The policy context for this work includes:

- The Leeds Inclusive Growth Strategy, published in 2018, which emphasises the importance of the city centre, and local centres;
- The Leeds Core Strategy, and other planning policy documents, including the South Bank Framework;
- The Leeds City Region HS2 Growth Strategy;
- The Leeds Culture Strategy 2017–2030;
- The emerging policy framework for Leeds City Centre, the Our Spaces document on public realm, and other council policy on regeneration of the city centre and local centres;
- The draft Leeds Transport Strategy;
- The declaration of a climate emergency by Leeds City Council, and;
- The Leeds Economic Recovery Framework.



Living and Working



Leisure, Culture, and Consumption



Social Value and Inclusive Growth



Mobility



Environment and Net Zero

Living and Working

The rise of remote, flexible working has accelerated due to Covid-19. The barriers between home and workspaces have blended raising questions on the future of the office. While it has been shown we can adapt to home working and use digital advances to connect remotely, the economic trends in the three decades before the pandemic point to the importance of high densities of face-to-face collaboration in workplaces and city centres.

The role of city centres in the knowledge economy

There is an important link between productivity growth and the agglomeration of knowledge-intensive functions and jobs in advanced economies. Work undertaken for Leeds City Council by [Volterra](#), and previous work by [Centre for Cities on Leeds City Centre](#), and work by [Cambridge Economic Associates](#) and [Cambridge Econometrics for CEG](#) have highlighted the importance of Knowledge Intensive Business Services (KIBS) along with other private sector services to the Leeds economy. This work shows that these KIBS sectors have been the main factor for the growth and success of the Leeds economy over recent decades, and these economic functions have been concentrating in Leeds City Centre. Recent analysis by Cambridge Econometrics

for CEG has shown that the recent growth in KIBS in Leeds City Centre has been faster than in other Core Cities. KIBS sectors benefit from the knowledge spill overs, the ecosystems, and the trust and relationships that face-to-face contact brings. Over 50% of the jobs in Leeds City Centre are in KIBS sectors, compared to 25% of jobs across Leeds City region as a whole. City centre locations enable these knowledge spillovers and relationships between people, firms, universities and other knowledge producers, and the public sector. Because they are also the hub of the transport network, city centres also enable firms to access a skilled workforce across a wide catchment. However it should be noted that knowledge intensive jobs pose the risk of widening inequalities in skills.

Agglomeration is associated with positive externalities giving rise to economic benefits for firms and individuals from co-locating. Productivity is positively affected by business concentration. The reasons for this include input-output linkages, labour market pooling, knowledge spillovers and urbanisation economies. As the economy has become more based on intangibles such as creativity, data, ideas, research, and software, knowledge spillovers enabled by face-to-face-collaboration have become hugely important.

This creates a virtuous cycle, where high densities of firms (and other knowledge-producing institutions) lead to high productivity, attracting in turn more firms to the area, further increasing productivity. There is a further positive feedback loop, where higher productivity leads to higher wages and a wider range of job opportunities which become pull factors for highly skilled workers, leading to further productivity gains, and so on. There is still a role for offices with extensive evidence showing the benefits of collaboration and face-to-face interaction on driving innovation, productivity and enabling knowledge spillovers.

The knowledge economy in Leeds City Centre is diversified; the main strengths and specialisms include: banking, digital (computer consulting, software development and telecoms), legal services, accounting and auditing, head office activities, engineering, advertising agencies, and management consultancies. Recent trends are of a further diversification with substantial levels of recent growth in digital sectors, TV and radio production and broadcasting, some specialist legal and financial services, engineering design and architecture, and other professional, scientific and technical activities. The recent announcement that LabCorp are developing a major drug discovery facility in the Temple District of Leeds City

Key Trends – Living and Working

Changing working patterns

Increasing remote and flexible working patterns, alongside the continued importance of face-to-face working, while also taking into account the impact of climate change on how organisations operate.

Knowledge economy and innovation

The growing importance of the knowledge economy and innovation districts in cities.

City Living

The growth in recent decades of city centre residential populations; people who value living near work and city centre amenities.

Future Skills

Increasing skills shortages alongside a changing demand for the types of skills needed, with the risk that knowledge intensive jobs widens skills inequalities.

15-minute neighbourhoods

The increasing desire for distributed hubs of mixed uses within a 15-minute walk or cycle.

Centre is an example of this diversification. This “related diversity” of different sub-sectors with important linkages and spillovers between them is a source of economic resilience and competitive strength.

Whilst there is a debate about the relative benefits to local economies of specialisation in particular sectors versus having a diverse economy, the evidence points to the benefits of a diverse range of sectors in urban economies. This is because it enables knowledge exchange to occur across as well as within industries, as it facilitates the “recombination” of knowledge present in different industries, leading to innovation. A diversified industrial structure reduces the potential impact on the local economy of an adverse shock to any particular sector. If such a shock occurs, diversified economies are in a better position to adapt and recover as there are several sectors that are developed enough to absorb newly redundant workers and expand. City centres also play a wider positive role for communities. They are hubs for local services, education, culture, and provide publicly accessible amenity space. Successful city centres are those that integrate these needs providing high quality public spaces and the right balance of commercial spaces.

Leeds City Centre currently has significant shortages of Grade A office space, however new offices are in the pipeline at City Park, CEG, and the old International Pool site. Despite the uncertainty caused by the pandemic, several employers within Leeds have unfulfilled requirements for new space, alongside the requirements of inward investors and public sector functions relocating to Leeds. The recent announcement by DLA Piper that they agreed a pre-let of 83,000 sq.ft. new office space shows there are still large requirements.

The rise of remote work

The trends of agglomeration could be impacted by the rise in remote working. The almost overnight shift to mass working from home, from office workers, at the start of the pandemic has accelerated hugely with the adoption and use of remote working technology and flexible working practices. Many employers are seeing an opportunity to permanently move to a “hybrid working” model where people split their time between the office (two or three days a week) and working from home most of the time, or in some cases moving to a predominant model of remote working with face-to-face gatherings on only an occasional basis.

Some commentators such as [Matt Clancy](#) believe that remote working technology and working practices have improved to the extent to which the link between face-to-face working and innovation has been broken, pointing to evidence on collaboration across large distances that have led to patents. Others also point to the benefits for firms in being able to attract staff and people being able to access jobs across a wider geographical area; if you do not need to commute daily, you could feasibly live further away from work. There are also benefits for people who prefer the flexibility, lack of commute, or simply enjoy working from home (although there are also many people who much prefer working in offices). Some employers believe that remote or hybrid working will reduce the amount of office space they need, leading to cost savings.

“Alongside supporting remote and hybrid working, some firms are also introducing policies to support more flexible working practices more generally, including working hours, and seeking to accelerate changes in corporate culture away from presenteeism towards greater trust and empowerment.”

Alongside supporting remote and hybrid working, some firms are also introducing policies to support more flexible working practices more generally, including working hours, and seeking to accelerate changes in corporate culture away from presenteeism towards greater trust and empowerment.

Remote or hybrid working could also change economic geography at a national level. Recent work by [Arup for the Greater London Authority](#) has considered the threats to the economy of central London, and there is a possibility that it could lead to increased (perhaps over longer distances) outmigration of skilled people, particularly families, from London, and decentralisation of jobs from central London. People and firms may want to locate in places with better affordability and higher quality of life, that still offer access to London by rail when needed. This trend has been happening for many decades across the wider South East (although in recent decades the people leaving London have been replaced by in-migration of younger people, and the jobs decentralising have been replaced by other jobs). What could be different now is that people and firms may move further, creating opportunities for well-connected Core Cities such as Leeds, building on the already strong economic linkages between Leeds and London. There is also a risk that firms and people will move out of Leeds at a faster rate, and highly skilled jobs may go to people that don’t live in the city, increasing inequality as organisations may reduce the number of days they need to be in the office.

Innovation Networks and Innovation Districts

As part of the trend of knowledge intensive jobs and functions locating in cities, over the past decade innovation districts have developed in major UK cities. These bring together knowledge producing organisations such as universities, research bodies, teaching hospitals, cultural institutions, and knowledge-intensive businesses. Innovation districts are becoming the locations of choice for spin-out, start-up, and scale-up science and technology driven firms, as well as for larger businesses undertaking research and development. Innovation locals are reshaping and regenerating parts of major UK cities, creating and attracting new high-quality jobs in accessible locations.

The Leeds Innovation District is emerging around the University of Leeds, Leeds Beckett University and the Leeds General Infirmary. The opening of the university-industry innovation service and building, Nexus, was an important milestone, and there is scope for progress to be accelerated as a result of the Leeds Hospitals of the Future scheme to rebuild the Leeds General Infirmary, freeing up sites and buildings for innovation uses. There is also the potential to create a second innovation local around the proposed British Library North at Temple Works in the Temple district in Holbeck.

Increasingly networks of different actors are necessary conditions for success in developing an economy based on innovation-led entrepreneurship. A team from Leeds and the City Region has participated in MIT's Regional Entrepreneurship Acceleration Programme (REAP), learning alongside other cities and regions across the world, about the lessons from successful innovation economies. The REAP framework identifies the role of universities, entrepreneurs, corporates, risk capital and government working together. This work has been taken forward as the Ide@ project to support innovators and entrepreneurs in Leeds.

There is the potential for a mission-orientated approach to future economic growth. It is in cities where we have the best prospects for the rapid innovation needed to tackle societal and health challenges our cities face, and where there are global markets and potential for positive disruption.

Innovation testbeds are being used by cities to enable innovators to test new technologies, products and processes, and their use cases, in real-world or close to real-world conditions. Smart city technologies such as sensors / the Internet of Things, 5G, and data are providing new opportunities to test new products and generate insights to support innovation.

City Living

A quality residential offer – the range of housing in terms of type, size, tenure and affordability, within a wider context of quality of place – is an important factor in the economic competitiveness of cities, and their ability to attract and retain a skilled workforce. Leeds is a city with a strong residential market in some suburbs, but also several neighbourhoods with high levels of deprivation, some of which are within walking distance of the city centre.

The development of city centre residential schemes has lagged behind other cities over the past decade, and it is clear Leeds has not fulfilled its potential for city centre residential-led regeneration, partly because previous schemes built in the 1980s and 90s were of poor quality and at the time created an over supply at the time and negative headlines in the national press, depressing demand and rental levels and affecting investor confidence. Over the past two years development trends have been more positive. Vacancy rates for city centre residential properties have been very low for some time. This, combined with the city's continued strong economy and improving cultural and amenity offer and public realm has led to some high quality schemes to be delivered or to start on site. In addition to innovative schemes delivered by local developers, such as Citu's Climate Innovation District, major Private Rented Sector developers and institutional investors are now developing schemes in Leeds, such as Legal and General (Mustard Wharf), Grainger (Yorkshire Post Site), Igloo (Iron Works), or Moda (SoYo).

“Innovation locals are reshaping and regenerating parts of major UK cities, creating and attracting new high-quality jobs in accessible locations.”

Affordability must be seen as part of a more sustainable, diverse, and resilient offer. High quality, mixed tenure schemes with strong place making, such as Guinness Homes in Leeds Docks and Clarion Housing, should be part of the offer creating a functional and diverse city centre residential market.

The continued delivery of well-designed, well specified residential schemes within attractive neighbourhoods and urban locals will be important in enabling Leeds City Centre to fulfil its huge potential as a residential location to meet housing need and to support the economy.

“Straying from the past century’s suburbanisation of cities and planning approach that separated work and residential spaces, this plan seeks to create mixed-use structures.”

Case Study: ‘15 Minute City’ Urban Planning Initiative

Mayor of Paris Anne Hidalgo’s re-election campaign centres around the ‘15 minute city’ – an ambitious plan to reorganise city neighbourhoods to ensure that citizens have access to all essentials for quality living (health, shopping, culture, work) within a 15 minute bike ride of their home. This would benefit public health through an increase in active travel, as well as improving local economies.

Similar initiatives have been enacted in cities around the world to combat climate change by reducing private vehicle emissions and to encourage sustainable city development. Mayor Hidalgo’s plan has been developed specifically for Paris with assistance from advisors including Paris-Sorbonne professor Carlos Moreno, and notably includes cycling as a key component. Straying from the past century’s suburbanisation of cities and planning approach that separated work and residential spaces, this plan seeks to create mixed-use structures (such as a school/sport centre or a coworking space/nightclub) and locals with a diverse retail, commercial, residential and leisure offer. This aims to support both shorter journeys and encourage less reliance on private vehicle use through improved bike infrastructure. If successful a multitude of goals can be accomplished, including reduced car use within Paris, lower carbon emissions, and an increase in the quality of life for city dwellers.

Implications

- Reduction of vehicles within the city makes it safer and healthier for pedestrians.
- Beneficial for those wanting a shorter commute or to work from home.
- The plan is not necessarily inclusive to out of town commuters or those living in more deprived locals beyond the city’s historic core.
- The plan may make neighbourhoods more desirable, but this could also raise rent prices, pushing current residents out.



Paris 15 Minute City Urban Planning Initiative

Leisure, Culture and Consumption

Our high streets were suffering before Covid-19 with the rise of online shopping, and consumer demand for speed and convenience. However, since Covid-19 city centre retail locations have been hit further by a double whammy of reduced footfall from office workers, and the further acceleration to online retail. Local centres have also been affected by the growth of online retail, although there is anecdotal evidence that some centres, particularly those with catchments with a large proportion of people who have been able to work from home in the pandemic, have benefitted from people working from home spending more time and money locally. The hospitality sector has been badly hit during Covid as a result of lockdowns and social distancing.

There is likely to be a continued role for the high street and physical stores. Major online brands such as Amazon are developing their own brick and mortar networks. Other retailers have reported a boost in local online sales following new store openings. This suggests the future of retail belongs to companies that can offer a true omnichannel experience where well located, well designed physical stores play multiple roles: as a point of sale; as a showroom to encourage online

purchases; and as a click and collect pick-up and return location. There is evidence that Leeds City Centre, as the principal regional retail centre, remains attractive to retail occupiers seeking to showcase their products.

In addition, there is an opportunity to cultivate and celebrate a more distinct and locally led high street in Leeds with high profile chain stores closing across UK high streets. This offer will create an appealing and diverse high street that is locally led.

Placemaking, identity and diversifying the uses of our high streets will be essential to create appealing places and reasons for consumers to visit. Retail needs to be complemented by mixed development, offering leisure facilities, co-working spaces, offices, dining, cultural activities and importantly residential. Flexible spaces and meanwhile uses can further inject new life into a place through pop up stores and flexible layouts that focus on consumer experience. Independent retail can offer a distinctiveness and experience that is difficult to replicate online, as well as the benefits from independents generally being locally owned with a strong ethos to support their local areas.

Leeds city centre and local centres provide vibrant and cultural spaces with a strong mix of retail and leisure. The city's retail offer has been transformed in recent years with Trinity Leeds, Victoria Gate in the city centre and Thorpe Park, and White Rose on the outskirts. The changes being seen in retail will have future implications for planning policy and regeneration strategies for the retail core of Leeds City Centre, with developers already rethinking plans for future schemes (i.e. Victoria Gate phase 2). For secondary town and local centres there may be an opportunity to capture more spend locally, but many of these locations are also challenged by the huge changes in the sector.

Culture has an important role to play in the city's economic and social recovery, bringing together communities together, supporting creativity and spin-offs into the wider economy, and strengthening the city's identity and brand. Leeds has a strong arts and culture offering with the creative and cultural industry accounting for 1 in 18 jobs in Leeds in 2017. This is a key strength for the city and in 2023 Leeds will celebrate a year of international culture, celebrating the city and providing new connections, experiences and reasons to visit. A recent report estimates the economic impact of Leeds 2023 will be over £140m direct revenue by 2030, creating 1620 new jobs.

“Placemaking, identity and diversifying the uses of our high streets will be essential to create appealing places and reasons for consumers to visit.”

Key Trends – Leisure, Culture, and Consumption

Shift to online retail

Struggling high streets and retail locations due to growing online retail.

Placemaking

Creating appealing places with mixed use offerings, quality public realm and green space.

Cultural life

Increasing recognition of the role of creative industries and culture in cities in bringing people together, fostering creativity and innovation and differentiating places from online experiences.

Consumer expectations

Consumers are expecting more convenient, sustainable omnichannel retail experiences.

Case Study: Sculptural Iridescent Beauty Pop-up

Huda Beauty's Covent Garden-based pop-up event provided an immersive, interactive experience for shoppers. The space and sci-fi-inspired pop-up manifested as a large sculpture-like structure of metallic multi-faceted shapes that people could enter; a diversion from more common temporary shop formats and an visual attraction in an age where physical retail spaces are often neglected in favour of online shopping. Further visual, participatory and social media-friendly elements were found inside, for example a throne visitors could sit in for a photograph, and mirrored, iridescent surfaces and decorations. The emphasis on dazzling visuals and opportunities for interaction suggests how future retail spaces might continue to draw customers into physical spaces.

Implications

- Pop-up events have an important role in activating spaces and announcing new brands.
- Reconceives how retail space might look, installing a magnetic, sculptural aesthetic.
- Design around social media-oriented photo opportunities can spark consumer interest, but may not provide a long-term strategy for continued engagement with retail space.

Case Study: Multipurpose Skate-park Retail Space

The House of Vans marries fashion retail space with entertainment and the arts, indicating how retail space can evolve to provide a more social and locally-relevant function. Situated below Waterloo Station, The House of Vans goes beyond selling Vans clothing and products to encompass a cinema, live music venue, cafe, art gallery and a skatepark. The 30,000 sq ft site demonstrates how retail space can go beyond product provision and lend itself to social and art-oriented events. These types of experiences attempt to draw in visitors at a time when online shopping threatens physical retail space. The scheme also highlights the use of live events to reflect a creatively engaged brand identity.

Implications

- Future retail space can offer its local context more than a conventional shopping experience, hosting events and social activities
- Indicates a general shift to multipurpose urban space, which could indicate an economic use of space and an increase in inclusive, accessible shopping spaces, compared to more exclusive boutique and pop-up spaces.

“The House of Vans goes beyond selling Vans clothing and products to encompass a cinema, live music venue, cafe, art gallery and a skatepark.”



Huda Beauty pop up



House of Vans multipurpose skate park

Social Value and Inclusive Growth

As the economy has changed and become more knowledge based, some people and places have been left behind. Despite the economic success of cities such as Leeds, not everyone is contributing to or benefiting from economic growth to their full potential. Major cities have widespread areas with high levels of deprivation. Over 160,000 people in Leeds live in neighbourhoods that are in the 10% most deprived in England. Poverty, which was once synonymous with unemployment, increasingly affects working people and families. The proportion of low paid, often part time and insecure, jobs has increased, along with increases in the proportion of high skilled, highly paid roles, but the proportion of mid-level jobs is not increasing to the same extent, and in some cases are projected to decrease. The rungs on the ladder of career progression for people are moving further apart. Through its work with Joseph Rowntree Foundation and the Leeds Inclusive Growth Strategy, Leeds has led the way in developing policies to support inclusive growth; taking an integrated approach to growing the economy and tackling poverty. Economic growth is still important, because in an era of ongoing austerity there are limits to what can be achieved through redistribution alone.

The Leeds Inclusive Anchors programme has worked with ten major public sector organisations and one major business in Leeds to maximise their positive impact in terms of inclusive growth through their roles as: employers; procurers of goods and services; developers and operators of buildings and estates; providers of services; and as civic partners.

Covid-19 has accelerated these challenges having a huge impact particularly on people working in retail and hospitality, and on children and young people. School closures and a lack of meaningful education has impacted their educational progress and their mental health. This has further highlighted and increased the disadvantages between communities with 40% of students in the UK not having access to reliable broadband. In addition, young workers entering employment have been set back, struggling to access jobs. There are concerns about the scale of youth unemployment, and its long-term scarring impact of youth unemployment; the evidence points to a long term impact on career prospects for people are unemployed when young.

The increased use of digital technologies during the Covid-19 pandemic across all aspects of society has highlighted issues of digital inclusion. Digital skills and connectivity are becoming



Kirkgate Market

Key Trends – Social Value and Inclusive Growth

Young people

The long-term impact of school closures on educational progress and mental health of young people.

Health and wellbeing

The increasing importance of health and wellbeing and reducing health inequalities.

Poverty

Poverty and income inequality is increasing.

Digital exclusion

The increasing use of digital technologies is highlighting issues of digital exclusion.

Child and age friendly cities

Cities that are child friendly and where people can age well.

ever more critical for individuals to access jobs and education, and benefit from the growing digital economy. Leeds City Council has been seeking to address this priority through the 100% Digital Leeds programme.

Health and wellbeing is a key priority and cities play a major role in delivering quality of life. However, today 40% of premature deaths in the developed world occur due to unhealthy behaviours, poor diet, and inactive lifestyles. Imbedding preventative health and wellbeing measures into the built environment, and the wider systems of support for people can help and also support the long-term economic growth and social cohesion of local communities. The impacts of Covid-19 have highlighted the interrelationships between ill-health, poverty, and the nature of work. Covid-19 has also highlighted the importance of our immediate neighbourhood, encouraging the concept of the 15-minute neighbourhood by providing distributed hubs of high quality mixed use development.



Fika North, Far Headingley

Leeds has an ambition to become a child-friendly city. There is increasing awareness globally of the importance and benefits of a children focused approach to designing cities. The benefits are widespread – covering health and well-being, the economy, stronger communities, safety, sustainability, and resilience. Creating a child-friendly city can be a catalyst for wider regeneration and place-shaping. The features of child-friendly cities have benefits for other groups, including older people, workers and visitors. In the context of the trend of family builders leaving cities which has increased since the pandemic – what has been described by the urban geographer Richard Florida as “accelerated family flight”, a child focused approach to designing and managing urban centres has become more important.

The ageing of the world population will be one of the defining megatrends of this century. For the first time in history, there are now more people aged over 65 than there are children under the age of five. Nowhere will this shift in demographics be felt more than in our cities. Designing cities and public services for ageing communities will be a major challenge. The factors for an age friendly urban environment include features that support autonomy and independence, health and well-being, social connectedness, and security and resilience. In Leeds, third sector and community led action such as The Leeds Neighbourhood Networks have supported elderly people to access services, and in tackling isolation before Covid, and their role has become even more important during the pandemic.

Case Study: ‘Social Prescribing’ Community Health Initiative

Social prescribing is advice given by medical professionals to their patients to engage in organised social events and community activity to alleviate symptoms. Rather than a conventional prescription for medication, social prescribing might include volunteering, art classes, cultural or outdoor sporting activities, and is intended to help with mental health and psycho-social problems such as loneliness, anxiety and stress. By utilising the existing local assets and groups to improve outcomes, the approach ultimately reduces the cost of treatment.

The concept has seen uptake in The Netherlands, Ireland and the UK, with the UK government establishing the National Academy for Social Prescribing in October 2019. The independent, non-profit organisation aims to create a network of social prescribing partners, fund community-based programmes, coordinate research and develop a network of advocates to better embed social prescribing nationally.

Implications

- Combines medical treatment with the psychological benefits of social activity, increasingly important given the growth in isolation in cities.
- Demonstrates the importance of diverse local assets and spaces to improve wellbeing.
- Should be used alongside rather than instead of clinical treatment.
- Can only be effective with properly-funded community services.

Mobility

Covid-19 has resulted in people turning to their personal vehicles, active travel and micro mobility options such as bikes and scooters for essential journeys. There is an opportunity for cities to shift transport choices to more environmentally and economically sustainable options. Public transport, cycling and walking, cycle parking, electric vehicles and the repurposing of roads all form part of this shift, ensuring planetary health and inclusive access to opportunities and employment.

The integration of new technology will help enable more seamless multi-modal journeys and encourage sustainable transport options. Mobility as a Service (Maas) could integrate every kind of transport into a single intuitive platform, Dynamic Demand Responsive Transport will provide flexible services for shared transport, and charging infrastructure will enable Electric Vehicle adoption.

Prior to the Covid-19 pandemic, the rise of e-commerce was increasing demand for last-mile journeys. This was intensifying traffic congestion with light goods vehicles experiencing 36.5% growth in vehicles miles between 2009 and 2019. Post Covid-19 this trend is anticipated to continue with 18% of UK shoppers of all ages saying they plan to buy more online after lockdown than they did before. This is leading to increased interest into the potential role of urban consolidation centres to enable multiple deliveries to be consolidated into single loads away from their final origin and destination, reducing the number of delivery vehicle trips. These could be complemented by other automated last mile solutions, such as electric delivery robots and pick-up points and greener forms of transport such as e-bikes.

The draft Leeds Transport Strategy sets out an ambition and set of policies to achieve mode-shift and to improve quality of place in centres by reallocating roadspace to public realm. This builds on a range of significant recent schemes to improve public realm in the city centre and local centres. Leeds has a legacy of large roads and highways, and many communities

who live in neighbourhoods surrounding the city centre are not physically connected well to the opportunities it provides. For safety reasons, public transport and mass transit systems have seen a sharp decline in usage during the Covid-19 pandemic. However, in the long-term these options will be essential to ensuring green and inclusive mobility.

Leeds is the main economic hub for Yorkshire, with the busiest transport hub in the north. Its regional role within the Northern Powerhouse means it is well placed, improving access to opportunities and skills and boosting productivity. This will be further strengthened through HS2 which will be a catalyst for growth, enabling people to have greater access to jobs and attract businesses to invest in Leeds. If workers spend more time remote working, commuting patterns may change and workers may be able to live further away from their workplaces. The future aspirations and plans for Leeds Railway Station will create a world class gateway for the Leeds City Region and drive regional economic growth. It will also be an opportunity to integrate and encourage sustainable travel options across the city.

Key Trends – Mobility

Green transport

The transport system is electrifying with the ban on sales of petrol and diesel vehicles coming into force in 2030.

Regional connectivity

Changing working patterns may increase the importance of regional connectivity.

Active travel

An increasing focus on active travel to help combat challenges such as obesity and air pollution.

“If workers spend more time remote working, commuting patterns may change and workers may be able to live further away from their workplaces.”

Case Study: Zero Emission Food Delivery

Launched in 2016, Amsterdam based company FOODLOGICA has begun transforming the last-mile delivery of food, utilising e-trikes and solar-powered shipping containers to transport food sustainably. As an example, the first station was positioned by the city's main distribution node – Amsterdam Food Centre.

Contributing to the localisation of food, FOODLOGICA offers an affordable carbon-neutral fleet of bicycles and vans for local sustainable food producers, restaurants and caterers to use. Their vehicles include solar-powered e-trikes of different sizes equipped with modular and refrigerated storage units that enable them to deliver a range of quantities and produce across multiple delivery stops. FOODLOGICA has installed key strategic hubs in the form of recycled shipping containers for deliveries to be carried out using their zero-emission fleet.

The start-up is helping to shorten the supply chain between local food producers and sellers, in turn also offering greater transparency. Following a successful initial pilot, FOODLOGICA is currently exploring expanding its model into transporting food waste.

Implications

- Advertising for sustainable businesses on the side of the bikes could promote more sustainable diets within the city, increasing customers for both FOODLOGICA and vendors.
- Could inspire other urban delivery services to use emission free bikes, solving traffic problems in cities with older infrastructure as well as lowering emissions.



Amsterdam zero emission food delivery

“The start-up is helping to shorten the supply chain between local food producers and sellers, in turn also offering greater transparency.”

Environment and Net Zero Carbon

Awareness of the impact of climate change on our cities and lives has risen, developing more environmentally sustainable attitudes and socially conscious consumers. This is partly down to increased media coverage for environmental movements such as FridaysForFuture, begun by Greta Thunberg, and the activities of the civil disobedience group Extinction Rebellion.

Cities have a significant role to play, in part because the population densities in cities mean public transport is viable and resources can be used more efficiently. The built environment is moving away from practices and designs that take from the planet (e.g. degenerate) towards net positive (e.g. net gain) practices that return more than they take. This can be achieved through providing more energy efficient buildings and integrating green infrastructure and urban greening into our spaces. This often not only delivers environmental benefits such biodiversity but social benefits such as increased health and wellbeing.

Leeds declared a climate emergency in March 2019 targeting carbon neutrality by 2030. Plans to achieve net zero carbon include a 19km local heating network which will provide sustainable heat and hot water to homes, businesses and civic buildings, developing a city centre park, converting from natural gas to hydrogen through Hydrogen 21 and a mass transit system. In addition, the Connecting Leeds Transport Strategy targets a 30% reduction in car journeys, which requires investment in rail, bus and mass transit alongside rapid de-carbonisation of the remaining vehicle fleet. Growing momentum around green finance initiatives may provide opportunities to unlock funding for ambitious plans. As well as climate mitigation, Leeds needs to focus on climate adaptation to be resilient to the ever-changing climate. Leeds already suffers from extreme weather events with extensive flooding impacting the wider region.

Integrating the Covid-19 recovery with climate action could support economic development, with 34,000 low carbon

and renewable energy jobs in Leeds expected by 2050. It is forecasted that 22.2% of jobs in Yorkshire could be affected by a transition to a greener economy, which poses questions about the type of new skills and training that will be required.

The built environment is moving towards practices that achieve biodiversity net gain. Solutions include integrating green and blue infrastructure and urban greening. This has environmental benefits such as carbon sequestration, biodiversity and combatting extreme weather events, as well as other social and economic. It is estimated in 2017, the removal of pollution by vegetation in the UK equated to a saving of £1.3 billion in health costs and the cooling shade of trees and water saved £248 million by maintaining productivity and lowering air conditioning costs. Leeds City Council already have plans in place to deliver environmental gains. An additional 1,250 hectares of woodland will be created over 25 years, doubling the amount of woodland in Leeds and transforming the way parks and green spaces are managed.

“Cities have a significant role to play, in part because the population densities in cities mean public transport is viable and resources can be used more efficiently.”

Key Trends – Environment and Net Zero Carbon

Net zero carbon

The UK and Leeds has committed to achieving net zero carbon by 2050 and 2030 respectively.

Climate adaptation

Climate change impacts, such as flooding, are becoming more prevalent and extreme.

Energy system transformation

Our energy system is decarbonising and becoming more decentralised and efficient.

Environmental net gain

The built environment is moving towards practices that deliver environmental net gains.

Case Study: “Treepedia” Urban Green Canopy Survey Tool

Street trees provide a number of benefits for urban areas. These include lowering inner-city temperatures, reducing stress, encouraging walking, improving local air quality and – through absorbing excess water – reducing the risk of flooding. They also provide shade for both people and buildings, helping to reduce energy use in the latter. The Green View Index (GVI), or ‘Treepedia’, has been developed by the MIT Senseable City Lab in collaboration with the World Economic Forum’s Global Agenda Council on the Future of Cities. The free online tool helps cities to measure and evaluate canopy cover, and to see how different cities compare. The platform provides a GVI score for each city, and a distribution curve. Twenty cities have been indexed so far. Instead of using top-down satellite imagery to identify trees, GVI uses panoramas from Google Street View, giving a more accurate human-centric perspective of tree coverage. This also means that parks and gardens are not included, but only those trees encountered at street level. There is a growing recognition of the role trees can play in both tackling climate change and improving the urban environment.

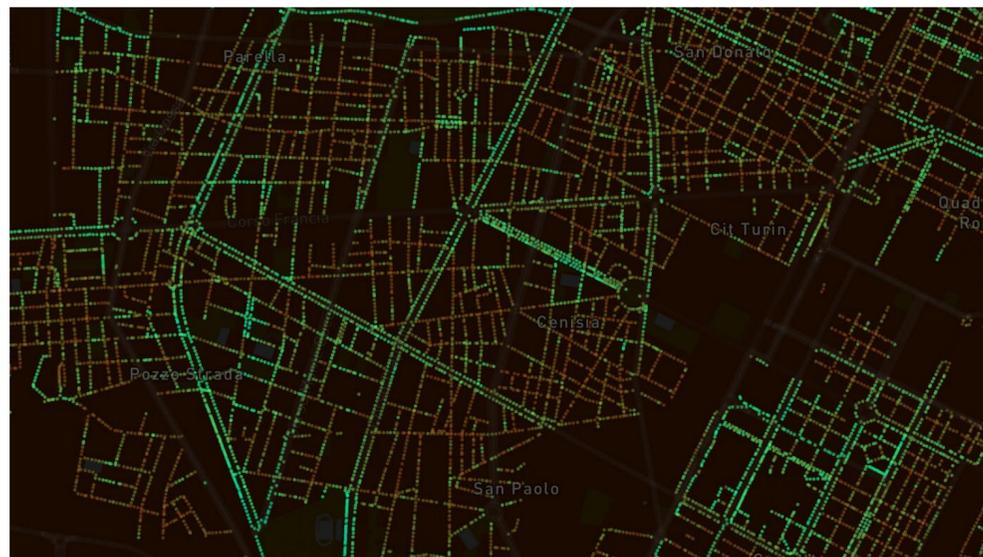
Case Study: Combined Storm Water and Leisure Urban Park

Bentemplein Water Square, Rotterdam, is the city’s first ‘water square’, designed to accommodate groundwater in the event of flash flooding or prolonged rainfall. Although predominantly a dry space, the square incorporates two shallow and one deep basin that can fill with excess surface water, relieving sewerage systems and helping to prevent flooding.

The team from De Urbanisten engaged future users of the square in its design, including youth groups, a local church, neighbouring residents and schools. The colour scheme reinforces the underlying purpose of the park’s design, with floodable areas painted blue and functional areas that transport water made in stainless steel. These include oversized gutters that funnel water into the basins, which also double as skate ramps. The design also incorporates a basketball court and sunken amphitheatre. The Bentemplein scheme is part of the Rotterdam Climate Initiative, which aims to make the low-lying city climate proof by 2025.



Rotterdam storm water and leisure urban park



Treepedia urban green canopy survey tool

“The Green View Index (GVI), or ‘Treepedia’, has been developed by the MIT Senseable City Lab in collaboration with the World Economic Forum’s Global Agenda Council on the Future of Cities.”

Stakeholder Engagement

Stakeholder Engagement

A key part of forming this thinking and future direction of Leeds was through engaging with key stakeholders and partners across the city. This section outlines the key outputs from our engagement.

Stakeholder workshop

It is important to ascertain the perspectives from different stakeholder across city and local centres to incorporate a range of views and insights into this report and considerations for future action. We therefore facilitated a workshop with partners from across the city, to assess and evaluate the key trends driving change and their associated challenges and opportunities for the city centre and local centres.

The key output from the workshop was a list of trends that were considered most likely to have the greatest impact on Leeds looking out to 2030 and associated challenges in terms of opportunities, risks and challenges. The outputs and statements from stakeholders in the workshop are summarised in the table across the next few pages, as well as perspectives obtained via email from those who could not attend. Please note these are the views of key stakeholders from across the city and a list of workshop attendees can be found in Appendix C.

Prioritised Trends	City Centre Implications	Local Centre Implications
Knowledge economy and innovation; Changing working patterns	Change and reduction in occupier demand	Need spaces to meet and network, new business hubs, mixed use spaces, co-working etc. Spoke and hub model
	Need quality workspaces and wider urban environments	Local centres should consider partnerships/BISs to come together and collaborate to manage place
	Spreading of peak transport flows	Facilitate knowledge spill overs and innovation in local centres – currently an issue
	Worker well-being and different attitudes with age	Uncertainty around the scale of opportunity around local employment hubs
	Loss in city centre trade/spending	There could be further polarisation across Leeds and wider sub-region as working from home not an option for many
	The use of the office will change. It will be set up collaborate, communicate and innovate, and weeks will be scheduled more effectively with structured collaboration and social time	Increase in activity and use of local facilities e.g. café
Future action	Skills need to be evolved through educational life	Need more vocational training
	Need to make connections with local education providers	New partnerships required for new training and skills hubs
15-minute neighbourhoods		Local centres have issues of air quality as are on busy roads
		These won't be tied around local primary school and library anymore
		Opportunity for workspaces, co-working
		Need to map out where these could be in Leeds

Leeds City Council senior stakeholders

We facilitated a session with senior stakeholders within Leeds City Council, to present our emerging findings and gather key perspectives and insights. We have incorporated their comments and insights throughout the report.

Leeds City Council ‘City Conversations’

Leeds City Council launched a ‘City and Local Centre Conversation’ survey to understand the changes and challenges across Leeds which has resulted in a period of unprecedented change since the Covid-19 pandemic began. The aim of the survey was to gather public views and thoughts on the changes that are taking place in our city and local centres. This was also to understand how and where people work, how and where they choose to spend money and travel, as well as how they will work, live and travel in future.

Some key headlines from the results include:

- The main reasons people visit their local centres are for retail, hospitality, and meeting friends. This is likely to stay the same in the next three years.
- Over the next 12 months people working from home could increase to 25%. The people who work from home part of the time will increase from 20% to over 50% of people.
- Walking has increased from 9% to 32% during the pandemic and could continue into the next 12 months.
- In two to three years, 41% state they will visit the city centre less than before.

The comments and insights from the stakeholder engagement have been incorporated throughout this report and have been considered when developing the policies, interventions and future considerations for action.

Prioritised Trends	City Centre Implications	Local Centre Implications
15-minute neighbourhoods		Some centres are much better than others at delivering enhancements, festival, shopping etc.
		Deliver healthy living services, health and other community buildings
Placemaking and city centre living	Heritage is important – museums, galleries etc.	Demand for space for people to meet and pause
	Convert redundant retail to residential	Being on major road interchanges is both an issue and opportunity as an integrated transport network
	Build on the already attractive and walkable city	Local centres need to move together on this to have more pace
	More pedestrian and cycle friendly	Taking through traffic from local centres increases shop spending (example Waltham forest)
	Risk to quality of space, environment and communal space	
	Need better use of open space and pedestrianised space. Space to meet, play and rest.	
	Issues of severance caused by roads	
	Students can bring vibrancy but don't invest in places in the same way as other residents	
Actively include children and young people. Being child/elderly friendly requires additional facilities – seats, play elements, toilets, sense of security		
Need better quality homes		
Shift to online retail	Need for workforce transition to switch occupations	Expensive to travel into town – issues of equality
	Mixed use approach combining cultural life/leisure and shopping together	Issue of last mile deliveries

Prioritised Trends	City Centre Implications	Local Centre Implications
Shift to online retail	Reduced polarisation between 'shopping destinations' and utility shopping	Opportunities for local retail with more people home based in the day. Need to reinvent themselves
	Congestion from online deliveries	Need to improve retail offer in local centres (currently quite poor)
	Repurposing retail is a big opportunity. How can we use redundant units?	
	Need to modernise opening hours and align with public transport offer	
	There are rates challenges for bricks and mortar	
	Uncertainty on the right amount of retail there should be in Leeds	
	Those reaching retirement, as well as young professionals, will likely continue to desire city living and the flexibility, leisure and convenience it brings. Whereas the 'middle aged' population will look for affordable green spaces with decent commuter links	
Need to deliver an offer that cannot be achieved online. The high street, much like the office, will be focussed more and more on experiences. Retailers that have neither the innovative teams, or resources in order to achieve this (potentially having been hit hard by the pandemic and so won't commit to such long sighted spends) will simply not survive		
Cultural life	We need a wide range of cultural events to drive tourism	We need to link cultural activities to active travel
	We need to bring culture out of the building	We need to curate local local cultural events e.g. Morley Arts festival
	Safe and accessible spaces to 'be'. Pedestrianise streets and create city centre parks etc.	Invest in heritage buildings as multi-use spaces

Prioritised Trends	City Centre Implications	Local Centre Implications
Cultural life	We need to create landmark destinations with supporting infrastructure such as skills development	Local centres to work together to deliver a holistic offer
Health and well-being	Greater impact on young people	Need to reduce inequalities between locals and within locals Looking after the needs of a growing elderly population
Poverty and inequality	Severance issues from railways, waterways, road. Could downgrade roads (see liveable Leeds website) Learn from education sector – what are educational institutions doing in their communities?	
Active travel; Green transport; Connectivity	Increased demand for cycle storage Need safe active travel routes to neighbourhood centres Issues of inclusivity – many people do not have access to range of mobility options	Local centres to be transport interchanges – creates opportunities for casual spend Increased demand for cycle storage Issues of severance
Environmental net gain	High demand/expectations from public on this agenda	Lack of understanding of how local centres can make a difference on this agenda Need to incorporate into every project
Net zero carbon; Energy system transformation	City centre will always be the most accessible location via low carbon mobility modes Introduce workplace parking level to fund public transport improvement Reduction of car parking provision required Expand PIPES network to deliver heat to more city centre buildings	Need to retrofit housing as people will spend more time at home New housing needs to be net zero carbon now

High Level Economic Scenarios

High Level Economic Scenarios

This section outlines the high-level economic scenarios we have developed to provide a hypothetical illustration of possible future scenarios that could occur following Covid-19. This is to be read alongside the rest of the report and research.

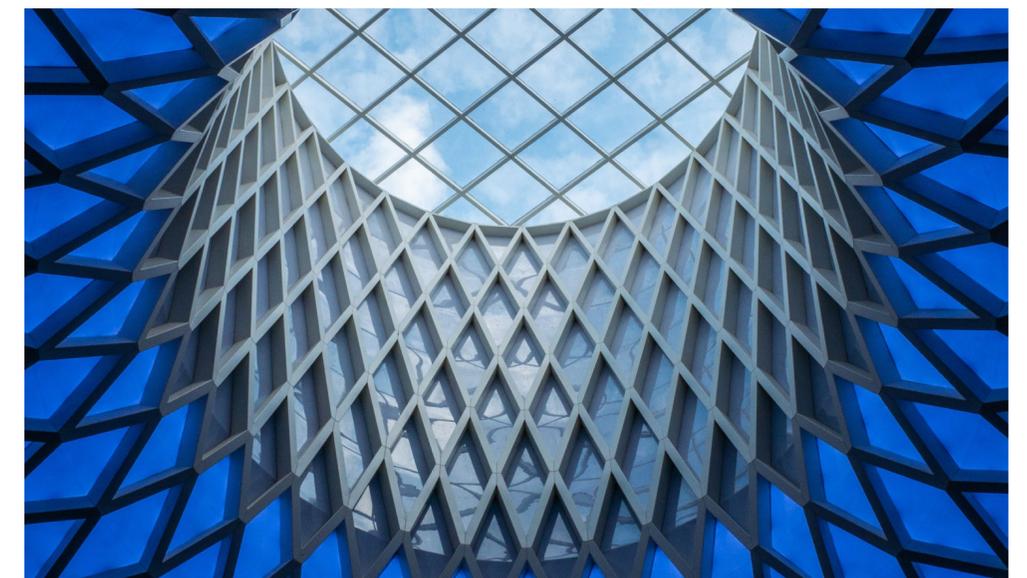
Scenario overview

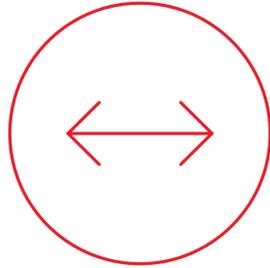
We have developed high level economic scenarios to provide a hypothetical illustration of possible futures that may occur within the economic environment. The model used considers the impact of each scenario on Leeds City Centre, the Local Centres and Leeds as a whole. In developing the scenarios, focus has been placed on the medium (from 2023) to long-term (looking out to 2030), rather than short-term recovery from Covid-19. We have utilised existing Arup work on London's Central Activities Zone (CAZ)¹ to develop these illustrative scenarios. Appendix D outlines the scenario methodology, assumptions and limitations related to the high-level economic scenarios.

The scenario inputs relate to external factors; key variables include assumptions on the economy, future population and office worker behaviour. For example, the scenarios explore different eventualities for workers returning to the city centre (three days a week vs two days a week) and the impact this may have on spending (local GVA) and 'jobs at risk'.

It is critical to emphasise that the calculations and resultant outputs are merely for illustration. The variables have been adjusted to illustrate what could happen, and the range of possibility, as opposed to what will happen.

The following page provides a high-level summary of the scenarios we have explored.





Baseline

This scenario sets out the trends observed had Covid-19 not occurred. Employment and population grows while workers use central offices five days a week.

- Total Employment: maintains pre Covid trend
- Office workers: five daysⁱⁱ in city centre
- Total Leeds population: maintains pre Covid growth trend
- City centre population: maintains pre Covid growth trend
- Local centre population: maintains pre Covid growth trend



Bounce-back to a new normal

Employees ‘bounce back to a new normal’, working from home more frequently but still desiring the interaction, networking and spontaneity of a central office. As well as the opportunities for collaboration with colleagues, which is of particular importance for knowledge-intensive business service professionals, workers enjoy the vast and vibrant entertainment offer within the city centre. There is a positive economic climate, employment increases and the population grows to 2030. The city centre remains an attractive place to live and work.

- Total Employment: returns to pre-covid levels by 2023
- Office workers: three days in city centre
- Total Leeds population: maintains pre Covid growth trend
- City centre population: maintains pre Covid growth trend
- Local centre population: maintains pre Covid growth trend



Widespread home working

Employees use central offices primarily for collaborative interactions. Home working remains the norm for white collar workers and there is a notably lower number of city centre workers. It is assumed that there is a correlation between a reduction in office working and the number of city centre residents. Under this scenario, the number of city centre residents is still assumed to increase but the city centre population in 2030 is assumed to be lower than is assumed under the baseline and ‘bounce-back’ scenarios. Increased homeworking means the local centres become more desirable places to live and work and attract citizens to live from both the city centre but outside of Leedsⁱⁱⁱ. There is a positive economic climate, employment increases and the population grows to 2030.

- Total Employment: returns to pre Covid levels by 2023
- Office workers: two days in city centre
- Total Leeds population: marginally higher growth rate than pre-covid due to higher local centre and inbound migration to Leeds, perhaps due to people relocating from London
- City centre population: lower growth rate than pre Covid trend
- Local centre population: higher growth rate than pre Covid trend



Significant headwinds

The economy undergoes measured growth. Home working remains the norm for white collar workers. The overall population in Leeds stagnates.

- Total Employment: only returns to pre Covid levels by 2028
- Office workers: two days in city centre
- Total Leeds population: stagnates at same population as pre Covid (2019 levels)
- City centre population: stagnates at same population as pre Covid
- Local centre population: stagnates at same population as pre Covid

ⁱⁱWhilst it is recognised that a proportion of people did some level of homeworking prior to Covid-19, for simplicity the model has assumed office workers spend five days in the office.

ⁱⁱⁱIt is important to emphasise that population growth may be lower than modelled due to potential out-migration of existing residents, and the assumptions used (see appendix D which notes the differential with ONS). Population could also be higher given that the inputs are merely assumptions.

Scenario Insights

Employment All Sectors

The following charts show the total employment (total number of FTE) for all sectors in the city and local centres under the different future scenarios.

Key Insight

All three scenarios assume more homeworking than prior to Covid-19. There is therefore a reduced number of FTE in the city centre and an increased number of FTE in the local centre compared to the 'Baseline' no Covid scenario when looking out to 2030.

Impact on Leeds Overall

Employment in Leeds overall is marginally different between 'Widespread Homeworking' and the 'Bounce-back to a new normal scenario' (see Figure 2), but there is significant differences in the distribution of these jobs between the city centre and the local centres differs under each scenario (see Figures 3 and 4). Although the gap does narrow over time, overall employment within Leeds is assumed to be lower under all scenarios compared to the no Covid baseline scenario.

Figure 2: Employment in Leeds

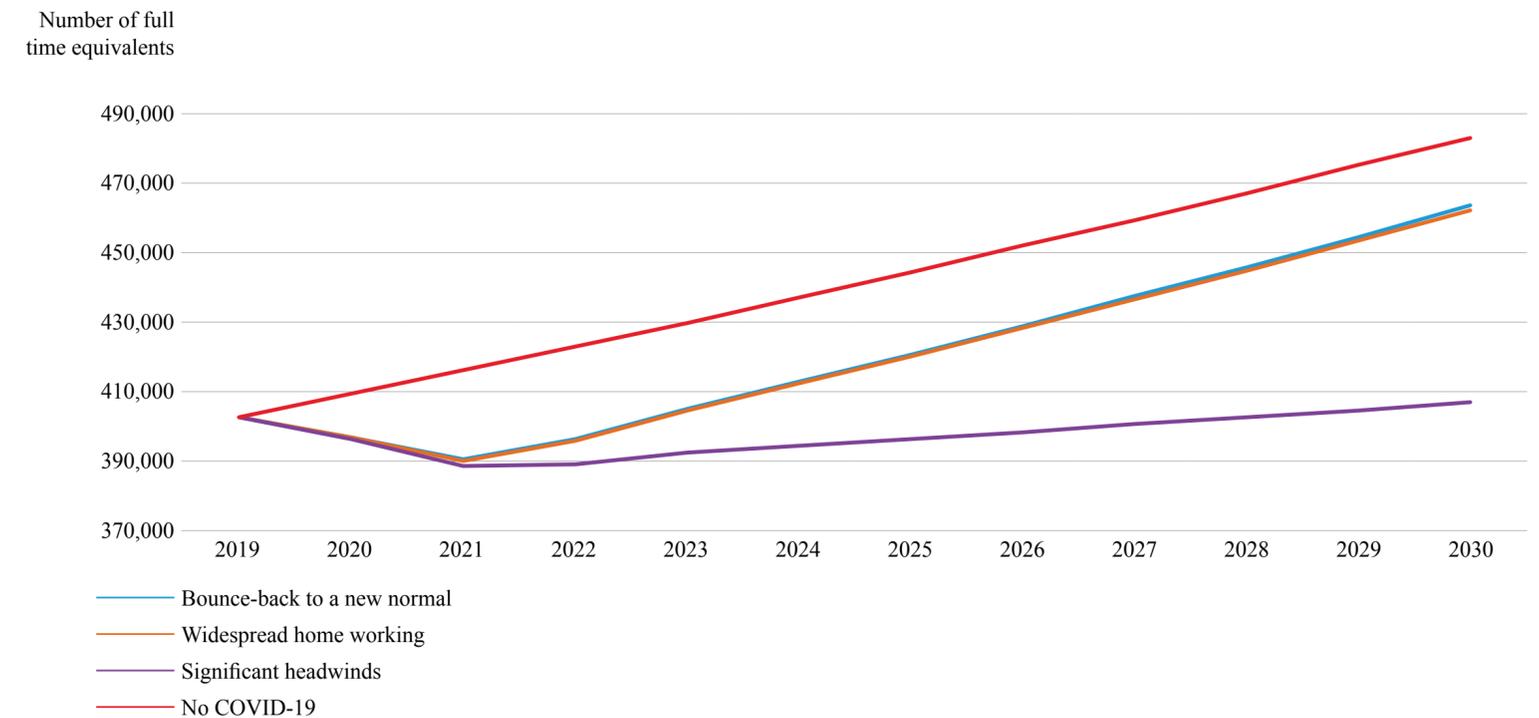


Figure 2 explained

Employment across all scenarios is lower than the projected baseline. This is due to the contraction in employment in 2020 and 2021 assumed under the Covid scenarios, whilst the baseline scenario assumes that employment growth continues at the pre-Covid rate.

Impact on the City Centre

The highest number of FTEs is in the ‘Bounce-back to a new normal’ scenario (see Figure 3).

Figure 3: Employment within Extended City Centre Boundary

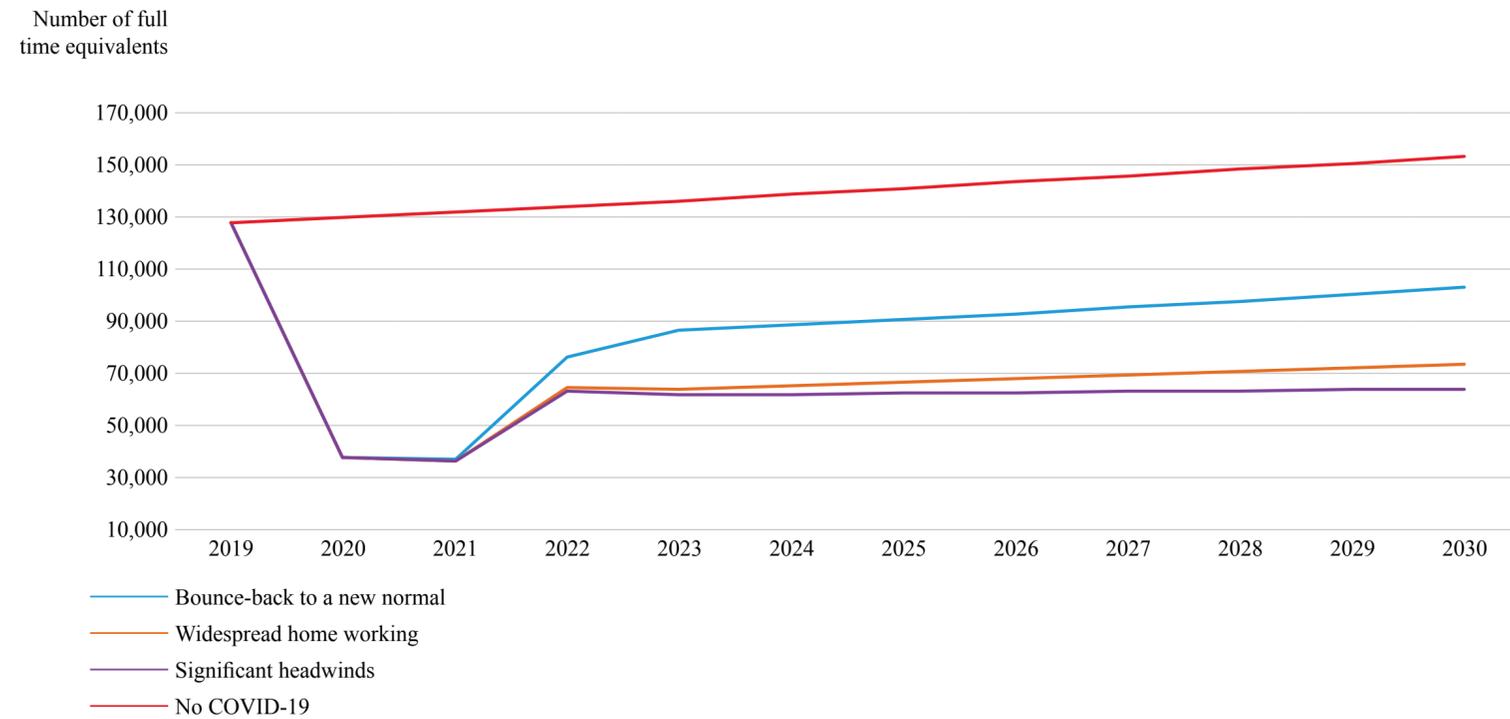


Figure 3 explained

‘Bounce-back to a new normal’ results in the highest levels of employment within the city centre, as more time is spent in the city-centre, driving footfall and spend in the centre of Leeds.

Impact Within the Local Centre

‘Widespread homeworking’ has the most favourable impact on employment in the local centres due to the higher level of footfall and spend in the local centres compared to all other scenarios. The graph considers local centres together and does not reflect the distribution of employment between the local centres.

Figure 4: Employment in District Centres

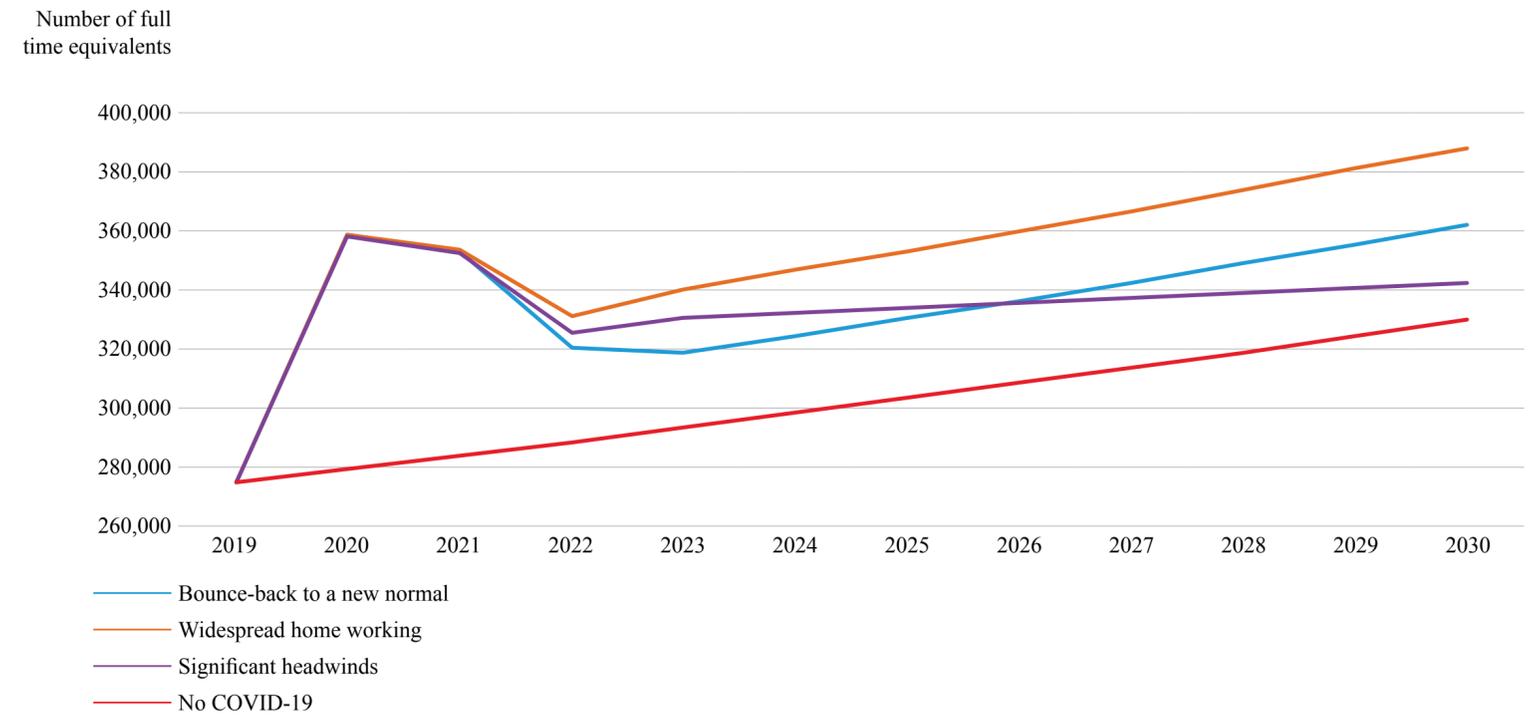


Figure 4 explained

In the medium-term, the ‘Bounce-back to a new normal’ scenario shows lower levels of employment in the local centres compared to ‘Significant headwinds’ scenario as more people go into the city centre (three days vs two days) instead of working from home. However, looking out to 2030, ‘Bounce-back to a new normal’ eventually results in higher levels of employment. This is due to the stagnation in Leeds’ population assumed under the ‘Significant headwinds’ scenario.

Jobs at Risk and in Demand in Face-to-Face sectors

The following charts show the jobs that are ‘in demand’ (positive values) and jobs that are ‘at risk’ (negative values) in ‘face to face’ sectors under different future scenarios. ‘Face-to-Face’ sectors are considered as retail and other services^{iv}, food and beverage, and entertainment. These sectors were chosen based on the high reliance that these establishments place on footfall. It is important to acknowledge that other ‘face-to-face’ jobs and delivery jobs are not reflected within these numbers. The numbers shown are relative to 2019.

Impact on Leeds Overall

In the medium-term, employment in the face-to-face sectors will recover under the ‘Bounce-back to a new normal’ and ‘Widespread Homeworking’ scenarios, with jobs created in food and beverage, entertainment and retail and other services (see Figure 5). Under the ‘significant headwinds’ scenario, jobs in face-to-face sectors remain at risk.

Figure 5: Jobs at risk and in demand in Face-to-Face Sectors within Leeds

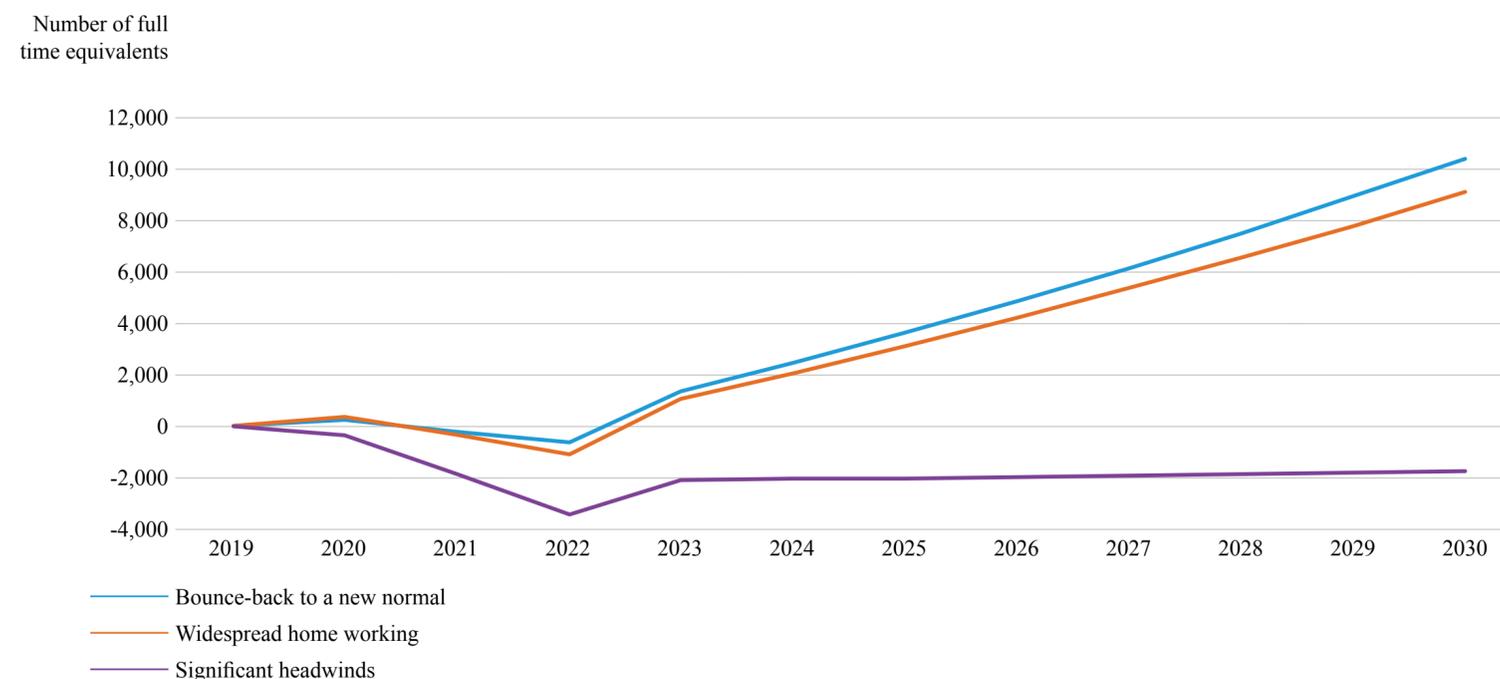


Figure 5 explained

The lack of jobs created in face to face sectors under the ‘significant headwinds scenario’ is driven by the assumption that the population within Leeds stagnates to 2030.

^{iv}Examples of ‘other services’ includes, but is not limited to, ‘other personal service activities’ (such as hairdressing), veterinary activities and rental and leasing activities. Human health and social work activities are excluded as a ‘face-to-face’ sector for the purposes of this analysis.

Impact on the City Centre

All scenarios illustrate that there will be jobs at risk in the short-term due to the lower levels of footfall in the City Centre. Whilst signs of recovery are seen across all scenarios, ‘Bounce-back to a new normal’ is the only scenario under which jobs are created in face to face sectors within the city centre (see Figure 6).

Figure 6: Jobs at risk and in demand in Face-to-Face Sectors Within Extended City Centre Boundary

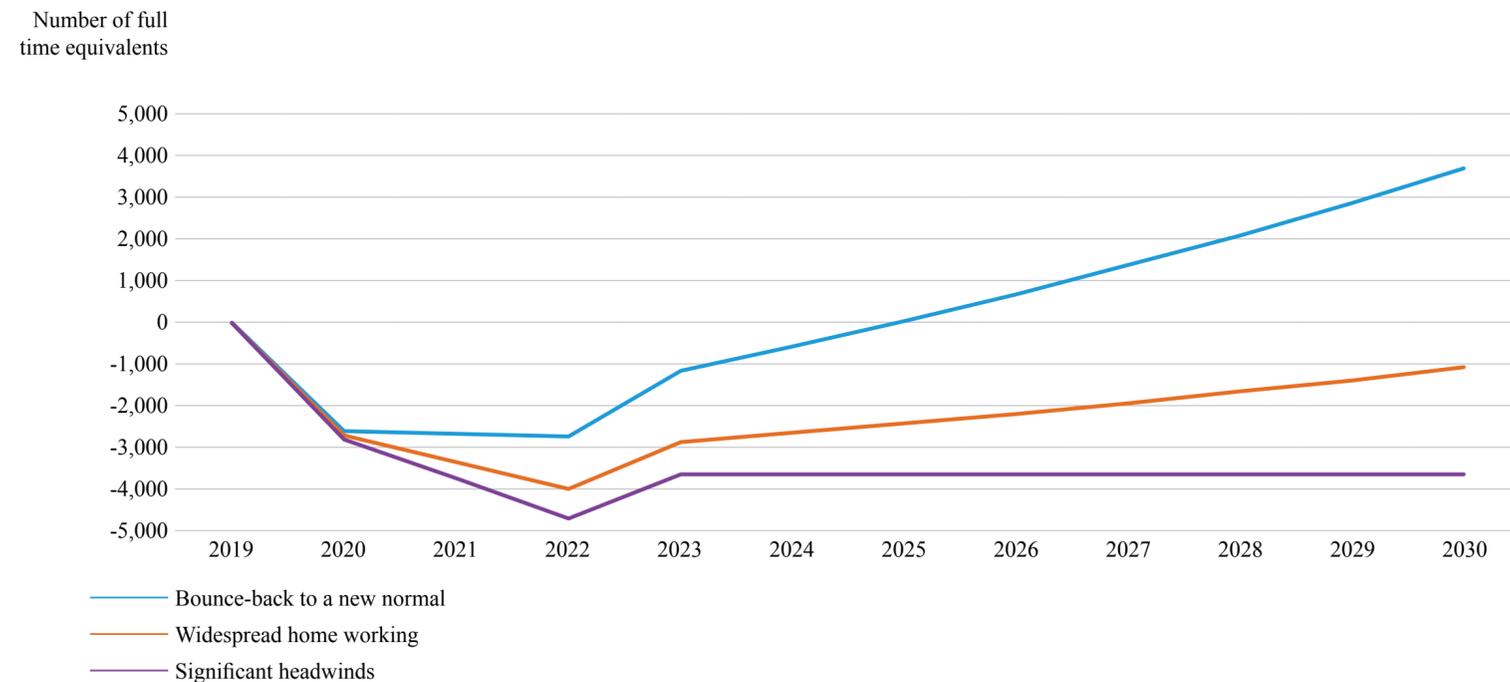


Figure 6 explained

‘Widespread home working’ and ‘Significant headwinds’ have a more detrimental impact on jobs in face-to-face sectors looking out to 2030. This is due to the assumptions made around more time spent at ‘home’ and outside of the city centre.

Impact Within the Local Centres

Jobs in face-to-face sectors are created in the local centres in all three scenarios (see Figure 7). This illustrates that the local centres will benefit from the higher level of homeworking, which is assumed to remain, to varying extents, across all scenarios.

Figure 7: Jobs at risk and in demand in Face-to-Face Sectors Within Local Centres

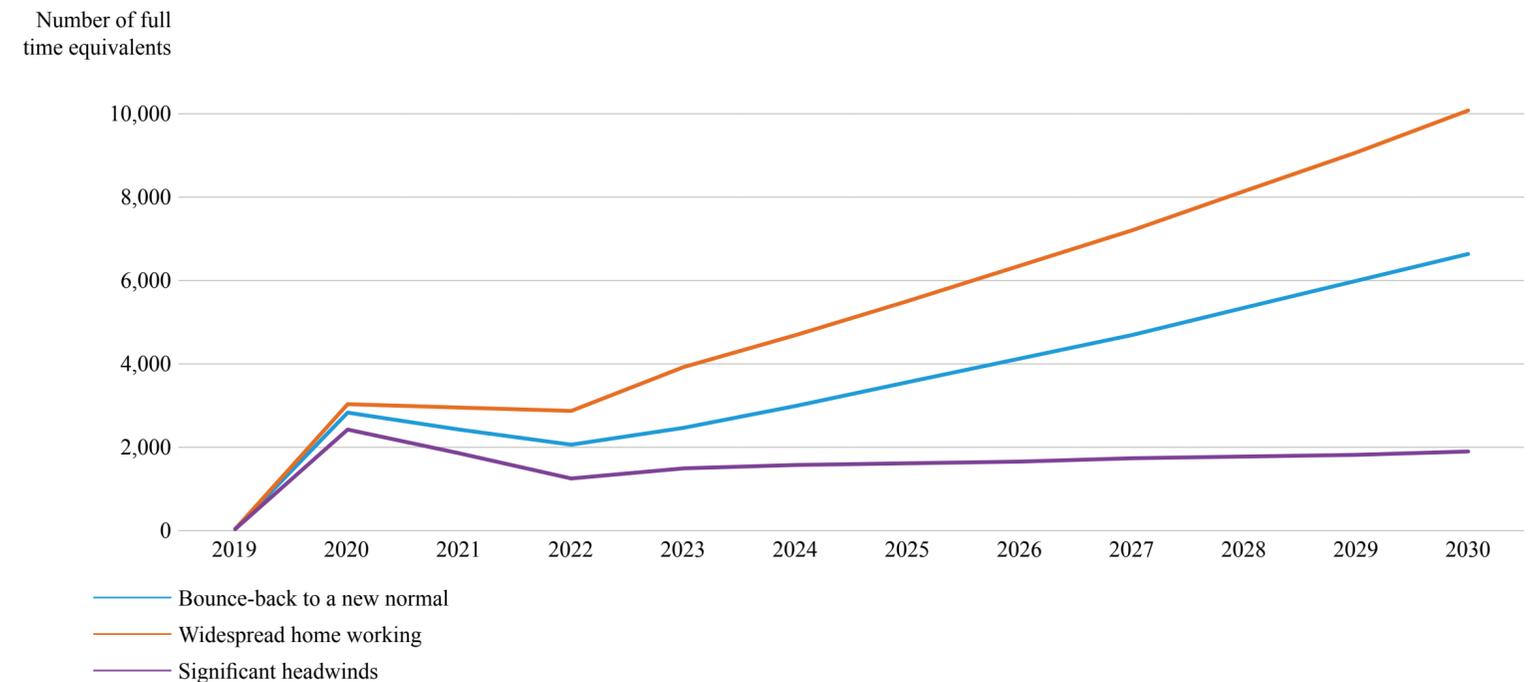


Figure 7 explained

‘Widespread homeworking’ has the most positive impact on face-to-face sector jobs created in the local centres. This is due to more time being spent working from home in local centres or in a local centre office (three days) in comparison to ‘Bounce-back to a new normal’ (two days).

Locally Produced Gross Value Added (GVA)

Key Insight

The ‘bounce-back to a new normal’ and ‘widespread homeworking scenarios’ show Leeds making a strong recovery. The distribution of GVA looks significantly different between the city centre and the local centres depending on the scenario.

Impact on Leeds Overall

Compared to the ‘Baseline’ no-covid scenario, locally produced GVA is lower in all scenarios (see Figure 8). The gap does reduce over time, with the ‘Bounce-back to a new normal’ and ‘Widespread Homeworking’ scenarios showing that Leeds could make a strong recovery by 2030.

Figure 8: Locally Produced Gross Value Added (GVA) In Leeds (City Centre and Local Centres)

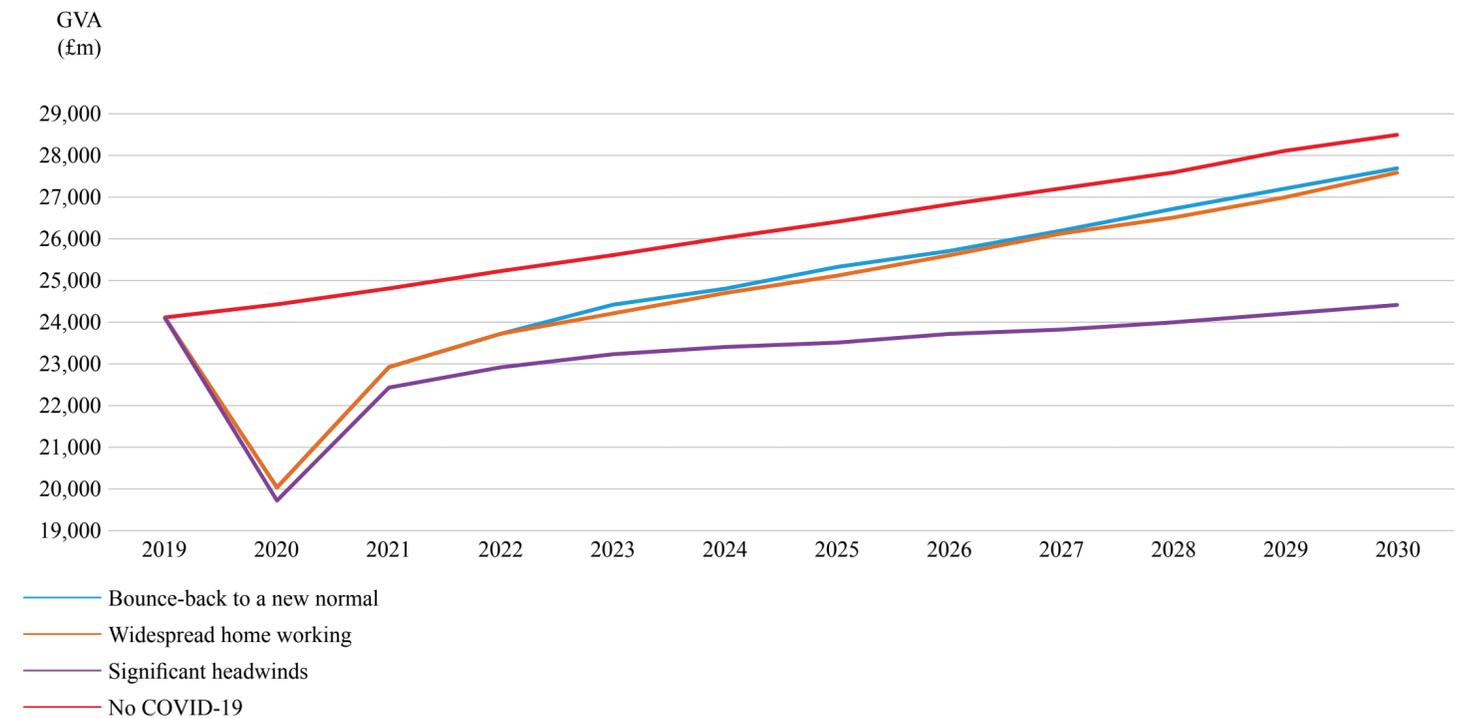


Figure 8 explained

The ‘bounce-back to a new normal’ scenario shows a slightly higher level of GVA in Leeds to 2030 than in the ‘widespread homeworking’ scenario. This is driven by an assumption that workers’ levels of productivity are higher within the city centre (10% uplift applied). As more people spend more time in the city-centre in the ‘bounce-back scenario’, this is reflected in the overall impact on GVA within Leeds. It is important to note that this is a pure assumption and is intended to reflect the concentration of skilled professionals in Knowledge Intensive Business Services (KIBS) within Leeds, and that these professionals benefit from face to face interaction and knowledge spillovers. The graph illustrates GVA across all sectors, not just service sectors.

Impact on the City Centre

All scenarios show a lower level of locally produced GVA in the City Centre compared to ‘No Covid baseline’ as all scenarios show an increase in homeworking. The highest level of GVA is produced under the ‘Bounce-back to new normal scenario’ (see Figure 9).

Figure 9: Locally Produced Gross Value Added (GVA) Within Extended City Centre Boundary

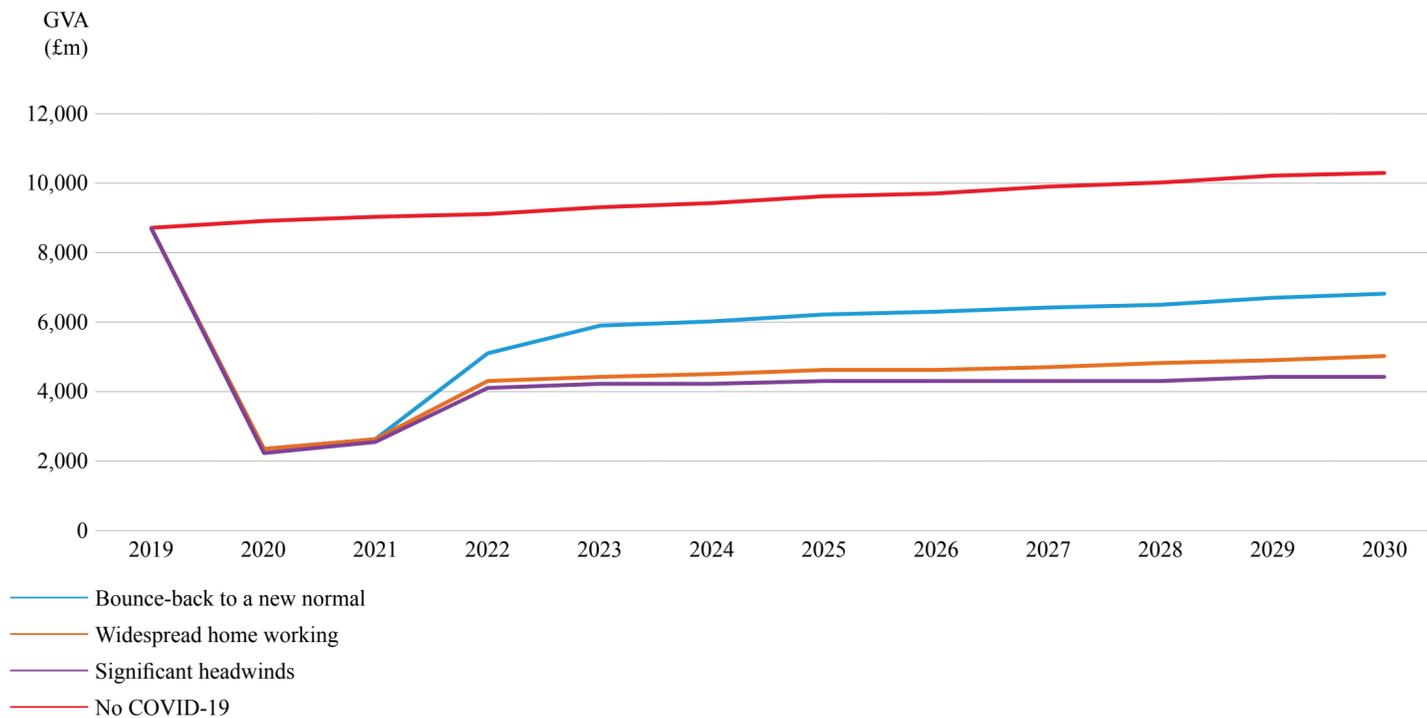


Figure 9 explained

The ‘bounce-back to a new normal’ scenario shows the most positive impact on GVA in the city centre as this is the scenario under which workers spend the most time within the city centre, with increased footfall generating additional spend.

Impact Within the Local Centres

In the local centres, GVA is highest in the ‘Widespread Homeworking’ scenario. GVA is projected to be higher than even in the No Covid baseline scenario, with the local centres benefiting from additional footfall and spend generated by office workers spending more time in the local centres (see Figure 10). For example, workers choosing to buy a coffee from a local coffee shop in their closest local centre.

Figure 10: Locally Produced Gross Value Added (GVA) in Local Centres

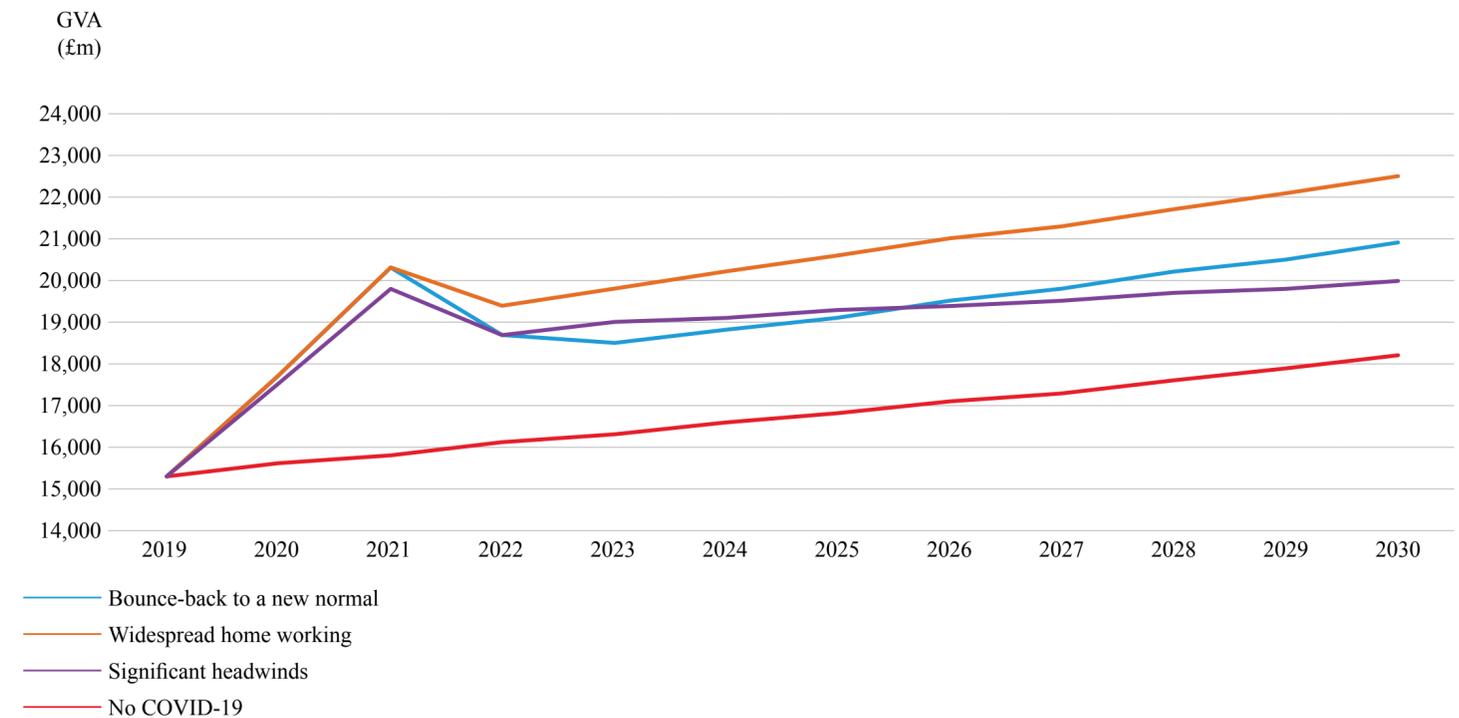


Figure 10 explained

In the medium-term, the ‘Bounce-back to a new normal’ scenario shows lower levels of GVA in the local centres compared to ‘Significant headwinds’ scenario as more people go into the city centre (three days vs two days) instead of working from home. However, looking out to 2030, ‘Bounceback to a new normal’ eventually results in higher levels of locally produced GVA due to the stagnation in Leeds’ population under the ‘Significant headwinds’ scenario.

Discussion

We have developed high level economic scenarios to provide a hypothetical illustration of possible futures that may occur within the economic environment. All scenarios have illustrated that increased homeworking presents challenges for the city centre, as fewer office workers will inevitably impact demand within ‘face to face’ sectors. With a clear need to attract people back into the city centre, there is an opportunity to drive growth, create resilience, and have a vibrant city centre through capitalising on the benefits associated with its concentration of people and businesses.

For example, there are opportunities to be realised in the creative and cultural sectors through encouraging people to engage in events and activities which cannot take place in local centres, at least not on a similar scale, such as live football. The city centre also enables people to access world class experiences such as Light Night Leeds and the Digital Festival. From a business perspective, the city centre enables face to face collaboration on a larger scale than in local centres, with greater knowledge spillovers and opportunities for innovation. Furthermore, Leeds city centre is well-connected to other major UK cities, enabling greater levels of regional and national collaboration.

The scenarios also illustrate that there is an opportunity to be realised in the local centres from increased homeworking, with the potential for some of the spending lost from city centre office workers to be recoupable in the local centres and other

parts of West Yorkshire. Whilst our model assumes a greater propensity to save when home working compared to working in a city centre office, over time there may be an opportunity to capture more spend locally from those working at home or elsewhere in the local centres. This could be encouraged through a high-quality mixed-use local offer and encouraging the 15-minute city concept whereby residents can walk or cycle to access most of the local services they need within 15 minutes.

The scenarios are not sufficiently nuanced to take into account the potential employment impacts of ‘North-shoring’ whereby companies choose to relocate to Northern cities such as Leeds. In alignment with the levelling-up agenda and the UK Government’s commitment to move 22,000 civil service jobs out of London by the end of 2030, the Bank of England and Department for Transport have both announced plans to locate new hubs in Leeds. The HQ of the UK’s first infrastructure bank (UKIB) will also be located in Leeds. Whilst these relocations will create additional jobs and future opportunities in the city centre, it will also be important to consider the evolution of the labour market, such as the growth in digital, and what this means for the city centre, local centres and West Yorkshire.

These scenarios are high level and illustrative and so there are other limitations. For example, we have assumed a higher level of productivity in the city centre (10% uplift in GVA per worker). Whilst this seeks to illustrate the potential productivity benefits that professionals may gain from working ‘face-to-face’

with their colleagues in a city centre office and/or those who would benefit from being in a purpose made office environment, this assumption is merely illustrative. It is recognised that not everyone can do the tasks that their jobs require from home, and there is debate and nuance around the relationship between homeworking and productivity. Variables such as the type of business, sector, stage of career and the existence of a comfortable space to work at home will all likely have an impact.

As illustrated in the ‘Widespread homeworking’^v scenario, it is plausible there could be migration from London towards regional cities such as Leeds due to increased homeworking. However, whether this migration actually increases office working in the city centre is highly uncertain. These individuals could simply undertake longer but less frequent commutes into other major cities but choose to live in Leeds for lifestyle reasons. Furthermore, the scenarios do not factor the age of the population. The city centre could see those with families migrating towards the local centres leaving a younger demographic profile (and possible elderly profile in addition) living in the city centre.

In summary, the city centre and local centre both have roles to play in Leeds future. The challenge and opportunity will be in encouraging people to visit, spend, and engage in leisure activities in the city centre whilst also bolstering the success of the local centres and the communities within them. This will be dependent on the actions taken now which the next sections will explore.

^vOverall population in Leeds is assumed to be c.851,000 which is approximately 16,000 persons higher than the ONS published ‘high migration’ projection.

Conclusions

Conclusions

Increasingly place matters. Local centres and the city centre have a major role in supporting the Leeds economy, in enabling people to access services, and as focal points to the city and its communities. Local centres and the city centre are a bellwether for the Leeds economy; their success and vibrancy has a major impact on people's pride of place and in investor confidence. This section of the report sets out some emerging conclusions relating to the main questions set out in the project brief, recognising that there remains significant uncertainty about the future.

Our centres are facing increasingly rapid change, creating significant challenges as well as opportunities. The review of trends and drivers for change for this project sets out how many of these trends and changes were occurring before covid, and have been accelerated during the pandemic, while others, such as the rapid rise in remote work, could potentially break and change previous structural trends in terms of how the economy works. From the stakeholder views gathered for this project it is clear that investors, developers, businesses, communities,

cultural organisations, and providers of public services are actively considering what these changes mean for them, how and where they operate and invest. There are differing views about what the future will hold. From the economic scenarios developed – and it is important to reiterate these are only indicative scenarios; they are not forecasts or predictions – it is clear that different futures for centres in Leeds could have significant impacts on the city's future economic and population growth.



Responding to new ways of working

Questions posed in the study brief:

- How to maximise the benefits of agglomeration as modes of working changes?
- High knowledge intensity jobs have been driven by interaction with other similar, how can we continue to facilitate this interrelationship now?
- How we can facilitate the development of a larger footprint in the city for the innovation, health and education sectors in the city?
- Is there a big opportunity in the Culture and Leisure area? Can we maximise this now and as we go towards 2023?
- Will the changes we're seeing in the city cause real issues for communities and community cohesion?
- How important will the night time economy be for Leeds? Is there potential for growth?
- Public transport – how can we build confidence?

1. Changing working patterns pose a risk to the trend of agglomeration in city centres, which has been a major factor in the economic success of Leeds in recent years.

In the modern economy knowledge spillovers, collaboration, trust and relationships are so important, and these happen most effectively when high-densities of people and organisations interact face-to-face. Leeds City Centre has supported these collaborative networks and job densities, with its role as the hub of the local and regional transport network enabling employers to access a skilled workforce across a wide catchment. This is why the city centre is the most productive and successful economic location in Leeds. People have predicted the death of geography, and the end of city centres previously, for example when the internet was invented when some commentators suggested firms would move to widespread remote working. In fact, the opposite occurred, as the economy became more knowledge-based, high densities of face-to-face interaction in centres and other employment locations became more important. This has created a positive impact on retail and leisure footfall and spending, and a boost to the city centre residential market as some people want to live near where they work. With less face-to-face interaction in the city centre there is a risk of reduced innovation and productivity, and there is likely to be negative impacts on retail and leisure spending. It will be important for policy makers and investors to respond to the risks posed to this economic model from changes in working practices.

2. With hybrid working the challenge and opportunity for Leeds is to achieve the best of both worlds: retaining the benefits of agglomeration alongside those of more flexible working.

Many employers are adopting or are likely to adopt more flexible working practices, including hybrid working whereby staff split their time between working in the office and working at home. The opportunity for Leeds is to help the city centre to adapt to continue to support face-to-face interaction between people and organisations needed to enable businesses to operate effectively and to support innovation and entrepreneurship, alongside more flexible working, enabling employers in Leeds to attract and retain workers across a wider geographical footprint. There is an opportunity for Leeds to build on its aim around “strong economy, compassionate city” to bring employers together to support better employee mental health and well-being, that could stem from hybrid working (recognising some people prefer working from home, some from the office, and some are seeking a combination).

3. The economic importance of supporting the city centre to adapt.

Whilst some firms may move to mass working from home most of the time, many will want to retain a reasonable quantity of the right type of office and workspace in the city centre, in the right locations. They may need less office space, and its role may change to be more focused on collaboration. Many people want work to be a social, learning and creative experience, all of which is supported by co-location in offices and other workspaces, and in the spaces and other amenities in the city centre. There will still be demand for office space, and indeed there is likely to be a flight to quality with

some firms seeking more modern, better located space that is configured to support collaboration within and between buildings. Occupiers are likely to want more flexible office products and leases, potentially with a combination of core requirements and the ability to expand and use co-working space and communal space when needed. Some older office space may be converted to residential. This means that it is important that there is a good pipeline of future supply of new office space in Leeds City Centre, and there is a real need to address current shortages in supply. There are also opportunities for a wider mix of workspaces in the City Centre, particularly for science, innovation, and creative businesses, as well as education, healthcare and culture, fulfilling the potential created by innovation districts. This can contribute to a more diverse, productive, dynamic and innovative city centre economy. Leeds has huge potential here with schemes such as the Leeds Hospitals of the Future project, and the British Library North, along with its role as the location for three universities and a major further education college offering the prospects to anchor innovation districts and a city centre wide innovation economy. The work of Leeds City Council on Smart Cities, which is genuinely innovative and progressive, can also support innovation. This will require intervention to create the right networks to support innovation and entrepreneurship, as well as in creating the right types of commercial and collaborative space.

4. There are opportunities for employers to maximise the potential benefits of remote work.

Some people prefer working at home, and find the flexibility it offers a real benefit. It can lead to positive culture change to managers trusting staff more, and a move away from presenteeism. Less regular commuting can mean more leisure and family time, a greater contribution to caring responsibilities, stronger connections to their local community (including opportunities for volunteering) and can enable people to live further away from their employers' workplace. Some local centres have benefited from increased spend and footfall from homeworkers. Remote work can make collaborating on projects with colleagues in other locations more feasible.

5. Changing working practices could lead to an acceleration of northshoring.

Roles that required people to previously spend most of the working week in London could now potentially be done from Leeds. This could lead to people and job roles moving out of London, creating an opportunity for places such as Leeds. As has been demonstrated recently, Leeds City Centre provides an attractive location for employers seeking to relocate jobs from London, combining a strong and vibrant city centre economy and amenity offer, great places to live in its wider catchment, and good rail connectivity to London and other cities.

6. There are opportunities but also risks associated with residential development in centres.

There is real momentum with city centre residential development in Leeds City Centre. This will hopefully build investor and developer confidence in the face of the uncertainty about the implications for the city centre of changing working practices. Good quality amenities, green space and public realm are likely to become even more important for people and in unlocking development opportunities. Some older, less well-located office stock, and retail space will be suitable for residential conversion in the city centre and in local centres. However there is a risk of poor quality conversions, particularly under permitted development rights, creating a poor quality residential offer, depressing values. This alongside potentially more student accommodation could impact on the wider amenity quality of some parts of the city centre and some local centres. It will be important for Leeds City Council to continue to be proactive, as they have been through policy the Leeds Living initiative (securing significant investment through the West Yorkshire Brownfield Fund), to support the development of the right quality and mix of housing in the city centre and local centres. This can include a range of housing types and tenures, as well as connecting existing nearby neighbourhoods with the city centre.

7. There is a significant opportunity for culture and leisure as part of the future role of centres.

Cultural production and the creative industries are already a major part of the Leeds economy with positive knowledge and innovation spillovers into other sectors, and can be an important part of the future role of centres. Surplus office or retail space could be repurposed as creative workspace, for which there is evidence of unmet demand in Leeds - particularly “messy” maker space. For example the Future Fashion Factory Project at the University of Leeds has identified the need for a textiles and fashion incubator. Culture can act as major draw in its own right for people to access city centres and local centres, providing a shared experience that is not replicable on-line. For the same reasons, leisure is likely to play a greater role in the city centre and local centres once the pandemic and social distancing ends. As well as its direct benefits around community cohesion, creativity, learning and place brand culture can boost visitor footfall and spending. The run-up to Leeds 2023 provides an opportunity to use culture to help reinvigorate the economy of the city centre, as well as local centres in Leeds.

8. The night-time economy has an important role to play in the success and vibrancy of centres.

The hospitality and entertainment sector has been hit hard by Covid, and it will be necessary to support it during the recovery phase. Creating an evening offer that appeals to a wide range of people, including families, will help increase the attractiveness of and dwell times and spending in centres. There is scope to make permanent some of the changes that have been introduced in the pandemic to enable more outdoor seating for restaurants and bars. Events and culture can also play a role in encouraging people into centres in the evening. Good quality urban lighting also has an important role to play.

9. Changing working and spending patterns could have three major impacts on community cohesion and the labour market.

There are likely to be significant continued job losses in retail as part of the shift to online retail, alongside a growth in in-work poverty. Second, there is likely to be increasing polarisation between local centres; with those centres with relatively affluent catchments of people who can work from home continuing to benefit from increased footfall and spending; while centres with less affluent catchments of people who cannot work from home struggling as a result of the shift to online retail. In general, local centres focused on convenience retail are likely to fare better than those focused on comparison retail. Third, there are opportunities for the city centre and local centres to become more inclusive places, better connected to the neighbourhoods they serve, and providing a wider range of public and community services.

“Events and culture can also play a role in encouraging people into centres in the evening. Good quality urban lighting also has an important role to play.”

10. A high quality transport network is essential to support the city centre to adapt.

Good public transport is important to encourage and support people back into local centres and the city centre, and to enable the mode shift to free-up roads space for people walking and public realm, as well as for cycling, to support collaboration, social interactions, and improved amenity quality. There is significant current investment in public realm in the city centre underway and committed (including Aire Park), and a genuine ambition to build on this set out in the draft Leeds Transport Strategy and the Our Spaces Strategy. Better walking routes can help reconnect some of the surrounding neighbourhoods with the city centre and local centres. Leeds Station is a principal gateway to the city centre, and the proposals to improve the station are important to prove the future capacity and point of arrival the city needs. For some people car travel will continue to be, or be perceived to be the most viable or attractive way of accessing the city centres and local centres (particularly as confidence in and capacity of public transport recovers after the pandemic); the challenge will be to plan road networks and parking so as not to undermine public transport or the quality of public realm. Park and ride schemes, and well-located off-street parking around the periphery of centres (for example as recommended in the South Bank framework) have a role to play.

11. There will be a continued need to support retail workers to find good alternative jobs, and to develop their skills to access opportunities in others sectors.

There is also a risk of increased in-work poverty as workers undertaking insecure jobs see their hours cut, and potentially more people have to take up low-paid, insecure work. A continued focus on creating good jobs, and supporting in-work progression will be important.

Responding to new ways of spending

Questions posed in the study brief:

- What does the impact of Covid and long term trends such the impact of Digital on retail mean for the future of the city centre, towns and local centre?
- How can we minimise the impact of city centre jobs losses in retail and hospitality?
- Retail– do we have the right amount of retail? How can this be a serious draw to get people in safely?
- How can we maximise the wider opportunities within retail, e.g. some of the newest digital tech?

1. The role of centres will need to be less about retail consumption, and more about production, innovation, social interaction, living, education, culture and public services.

With the shift from bricks to clicks in retail, Leeds will require less retail space, and this has significant implications for centres. It is not yet possible to quantify this; an update to the evidence base for planning policy and development management on retail spend and supply will be needed. The trend of reduced demand for retail space means that some shops will need to be repurposed or redeveloped to other uses, such as residential, workspace, education, or leisure. A proactive approach to planning for this is needed which strikes the right balance between protecting some retail frontages, while also being flexible in encouraging good quality conversions, recognising the rapidly changing trends and market demands. A more diverse mix of uses in centres, and a wider role as service and social hubs, will benefit retail by driving up footfall and linked trips.

2. The challenge for centres and retail businesses will be to offer an attractive experience that is positively differentiated from online retail.

Centres and retailers need to find ways to attract shoppers to spend time and money. This means providing an offer and set of experiences that is appealing, authentic, and based on social interaction and leisure experiences (such as food and drink, events and culture) that are not available online. Good quality public space can encourage people to visit and spend time in centres. Supporting retail businesses to innovate, as well as new retail entrepreneurs has a role to play. This could include initiatives to use empty shops, or market trading pitches to allow people to test new retail concepts, or initiatives such as the Leeds Independent Food and Drink Academy.

3. Centres and retailers need to adapt to the omni-channel future, combining in-person and online experiences and services.

This will mean supporting traditional retailers to develop an online presence and e-commerce platforms. There may be potential for independent retailers to work together within centres to create e-commerce platforms and delivery systems (for example the Cargodale e-bike delivery system in Hebden Bridge in Calderdale). For Leeds City Centre there are opportunities to create click and collect/return hubs which can drive footfall and secondary spend, and if combined with deliveries consolidation systems (as Leeds based logistics firm Clipper propose) this could also reduce the number of delivery vehicle movements.



Shaping and Engaging

Questions posed in the study brief:

- Is the 15 minute city a good concept to explore?
- What are our opportunities to shape and change the city to better meet the inclusive growth, health and wellbeing and climate ambitions?
- How might we build a vision for our centres? How can we bring communities together to support it?
- How can we support our independent businesses so they thrive in Leeds?

1. The 15-minute city concept has many benefits but also some limitations, with aspects of the 15-minute city more relevant to local centres than city centres.

Applying the 15 minute city concept will enable more people to access centres in a way that is easy and attractive to them. This will increase the catchment and attractiveness of centres as well as providing a boost to the environment, health and well being and quality of place. As well as being highly relevant to local centres, the 15 minute city concept is also applicable to parts of the city centre and surrounding neighbourhoods. Some of these places, such as Richmond Hill, Hunslet, Holbeck, Wortley, Kirkstall, Hyde Park, Little London, and Lincoln Green are geographically close to parts of the city centre, but disconnected from it partly as a result of severance from large roads and other infrastructure such as railways and waterways. An example is the links between Beeston (including Elland Road) and the Receptions in Holbeck to the City Centre, where the M621, a railway and the canal all create barriers. The limitations of the 15 minute city concept are that in order to retain critical mass and the density of jobs and footfall, many centres and particularly the city centre need to attract people from a catchment far beyond 15 minutes travel time. The fundamental economic function of the city centre in supporting agglomeration with all its positive economic impacts, arguably its *raison d'être*, depends on people accessing it from a wide catchment.

2. Successful centres are important to enabling Leeds to respond to the challenges of climate change.

Centres provide densities and the public transport accessibility that make them sustainable places (although it should be stressed that some out-of-centre retail and employment locations also provide good densities and public transport connections). Improving public transport, walking and cycling routes and facilities, creating more green spaces, and realising opportunities for renewable energy (such as the Leeds Pipes District heating) scheme all have a role to play.

3. Centres should be at the heart of the city's approach to promoting inclusive growth.

The Leeds Inclusive Growth Strategy identified the importance of a successful city centre and strong local centres providing a variety of roles. The success of centres matters to the Leeds economy; they are major employment locations, and the city centre has been the principal driver of economic growth in Leeds in recent years. Because centres are undergoing such significant changes there is a risk that some places and people get left behind. Supporting centres to adapt to new roles, and supporting people that work/have worked in declining sectors to develop new skills and find new or better jobs will be essential. There are also opportunities through a wider range of uses in centres, better public space, more proactive animation of places, child-centres and age-friendly design and urban management, and through the 15 minute city concept for centres to become more inclusive places, where people feel comfortable spending time even if they are not spending money or working in nearby workplaces.



4. There is an opportunity to work with communities to create a new vision for centres, and build broad-based coalitions for positive change.

For centres to be successful they will need to provide what people want, for both the users and the people they need to attract. Engaging with communities, occupiers, workers and businesses can provide valuable intelligence, and it can also mobilise the people and organisations that need to work together to make a difference. Councillors, as the representatives of their communities, have an important role to play. There is only so much the Council can do, particularly with limited resources. Ultimately the success of centres will depend on the quality of development, businesses and services, and the contribution people and organisations make to them. The evidence from work on the future of the high street, such as the Portas and Grimsey reviews, or from successful BIDs, and more recently the Stronger Towns programme points to the value of building strong partnerships and good business and community leadership in creating attractive places and retail and business locations.

“Ultimately the success of centres will depend on the quality of development, businesses and services, and the contribution people and organisations make to them.”

Role of the Council

Questions posed in the study brief:

- How do the Council and partners help transition our local centres to a new reality?
- Where/how can we use our assets effectively to maximise opportunities and mitigate threats?
- Public Space – how could we use our public space more effectively to draw people in, enable outside engagement?

1. The Council has an important role in in urban management in centres.

While there are limits to what the Council can achieve; it also has critically important roles that affect the attractiveness of centres, including cleaning; highways management and maintenance; working with community safety partners to tackle safety concerns and anti-social behaviour; its markets service (most relevant to the city centre, Otley, Yeadon and Pudsey), and planning functions.

2. The Council could consider the impacts on and opportunities in centres as it reconfigures its assets.

The Council is under huge financial pressure requiring it to rationalise, modernise and consolidate its assets. It could consider the implications on and opportunities for centres as it reconfigures its assets. Centralisation of services and functions may or may not be beneficial to particular centres. Initiatives such as creating community hubs, investing in income generating assets, or community asset transfers could have positive roles to play. Centres could provide opportunities for intervention and investment to support Council priorities such as building new homes, schools or assisted living accommodation. There could be opportunities under the One Public Estate initiative to work with other public service providers to bring services together in centres.

3. Creating, managing and maintaining good quality public space – through tactical as well as more substantial interventions – can help centres adapt to a new future.

Public space (including green space) and streets that are attractive, walkable, liveable, welcoming and safe should be at the heart of the future vision for centres. Ultimately successful centres will be attractive, vibrant and sociable places. Interventions could include low cost tactical projects to create pop-up parks, temporary pedestrianisation, or new outdoor dining areas. They could also encompass more significant projects to repurpose derelict or underused spaces and buildings, helping centres reconfigure commercial floorspace, and providing a catalyst and a focal point for new development (as Sovereign Square has done in the city centre).



4. The Council also has an important leadership and enabling role: it should seek to maximise its impact, by working in a coordinated way with and through others.

The Council can work with partners to create a vision for centres, to set an appropriate policy framework recognising the forces of change affecting centres, to build partnerships, and to mobilise business and community leaders to make a difference. The Council could also consider how best it can coordinate its existing resources, expertise, and knowledge and intelligence of its workforce in specific centres to provide a joined-up response to the complex and wide ranging challenges and opportunities faced by local centres and the city centre. In response to previous economic changes the Council played a central role in enabling the local centres and the city centre to respond.

5. The Council can create and champion transformational projects in centres, and make them happen.

The pedestrianisation of the city centre core in the 1990s helped transform Leeds into a modern European city. The proactive approach to supporting the building of the First Direct arena, Trinity Leeds, Victoria Leeds, Sovereign Square, and Wellington Place helped the city bounce back from the 2007–8 recession. The creation of Leeds Bid, the Leeds 2023 initiative, the improvements to New Briggate, the regeneration of Quarry Hill, the South Bank framework, the Leeds Flood Alleviation Scheme, the Leeds Integrated Station masterplan, the Leeds Living interventions to support residential growth, the proposals for the British Library North and the Temple district, the Leeds Innovation District, Aire

Park, City Square and other major public realm projects are positively shaping the future of Leeds City Centre. In local centres, schemes such as Holt Park Active, the redevelopment of Hunslet Town Centre, the Armley Townscape Heritage Scheme and the support for Otley bid are examples of how the Council has helped transform local centres. The Council can achieve a huge amount by sustaining delivery of this ambitious programme, as well as identifying the next generation of projects that can support local centres and the city centre to adapt and change.

“In local centres, schemes such as Holt Park Active, the redevelopment of Hunslet Town Centre, the Armley Townscape Heritage Scheme and the support for Otley bid are examples of how the Council has helped transform local centres.”

Potential Areas for Action

Potential Areas for Action

Drawing on the trends and horizon scanning analysis, the main points raised by stakeholders, the economic and population scenarios, and the conclusions, a series of potential areas for action have been identified.

The potential areas for action set out below are not intended to be prescriptive; more to provide a long-list from which specific initiatives can be developed further. The purpose of this project is not to make detailed recommendations, or to set out a blueprint of very specific, costed, prioritised or timebound actions; it is to identify the main areas for Leeds City Council and partners to potentially work together.

Leeds City Council working with other partners are already progressing work under many of these headings, although in some cases there may be scope to do more or bring existing work together to have greater impact, while for other areas for action there is potential to develop new initiatives. The resource and time constraints for the Council are substantial. To maximise their positive impact the Council will need to work with and through others, mobilising partners across the private sector, community sector, other public service providers and people to make a difference. The focus can be on leveraging the power of the council to bring people together to shape place.

The issues facing centres are complex and multi-faceted, and will require a coherent, cross-cutting policy and investment response with different Council teams working closely together. This can be through better coordination of existing resources, and leveraging internal intelligence (ranging from data,

expertise, and local knowledge) within the Council. Engaging in ongoing conversation with people (and ward members as their representatives) will be important to understand what they want for their spaces, tapping into their imaginations, letting them solve problems. This should include the growing residential population in the city centre, along with people in surrounding neighbourhoods close to the city centre.

The potential areas for action aim to address the challenges and opportunities identified in the horizon scanning, literature review and stakeholder workshops. These consider both the critical certainties (e.g. the more certain high impact trends) and the critical uncertainties (e.g. the less certain high impact trends) which will require a more flexible approach. The suggested areas for action seek to respond to the rapid changes that are affecting centres, and the jobs they support; the opportunities for centres to develop roles focused more on production, creativity, innovation, and bringing people together, as well as their traditional roles around consumption; and the need for centres to be attractive, inclusive, vibrant places where people want to spend time, to positively differentiate centres from online retail and remote work.

This section ends with some suggestions on next steps on what Leeds City Council could do over the next few months.

Leeds Vision Statements

Long term potential areas for action that respond to the changes being observed in Leeds City Centre and Local Centres.



1. Supporting people and business to respond and adapt to changes to the economy and jobs.



2. Maximising health and well-being learning and community support by focusing facilities and services in centres.



3. Creating child and age-friendly city and local centres.



4. Capitalising on culture and the creative industry assets to bring people together, shape place identity, and support communities.



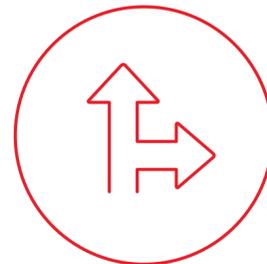
5. Safeguarding and enhancing the role of Leeds as a hub of the knowledge economy, backing innovators and entrepreneurs.



6. Curating a diverse mix of uses to attract people back into Leeds city centre to live, work, learn, create, shop, and play.



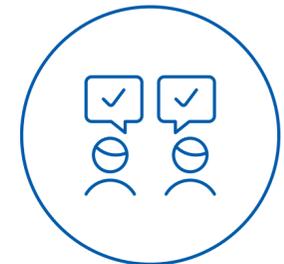
7. Adapting local centres to new forms of working, living, and spending.



8. 15-minute city, 90-minute region. Connecting neighbourhoods with centres, and expanding the economic reach of the city centre.



9. From grey to green. Bringing nature, and new and improved green spaces, into centres.



10. Leading and convening, creating partnerships, and mobilising the people that can make a difference.

Key Moves



1. Supporting people and business to respond and adapt to changes to the economy and jobs.

- 1.1 Providing support for people to adapt to the changing employment landscape, including retraining people in sectors most affected economically by Covid-19, to encourage recovery in the most sustainable sectors, and in improving digital skills across the workforce.
- 1.2 Stepping up – developing programmes to support in-work progression for people working in retail and hospitality.
- 1.3 Backing independents – supporting retail, food and drink and social entrepreneurs to start-up and grow successful businesses.
- 1.4 Connecting city centre businesses with schools and communities in nearby neighbourhoods to increase awareness of career opportunities, building on the learning from the Leeds Inclusive Anchors Programme.



2. Maximising health and well-being learning and community support by focusing facilities and services in centres.

- 2.1 Identifying and realising opportunities for facilities and initiatives in centres to improve health and well-being in centres, including preventative and public health.
- 2.2 Adopting a health-led approach to town and city centre design, to support physical activity and well-being.
- 2.3 Supporting community-led initiatives to provide services in centres, including through community shops and where appropriate Community Asset Transfers.
- 2.4 Making centres sociable and inclusive places, where people can meet and connect with each other, tackling isolation, and building social cohesion.



3. Creating child and age-friendly city and local centres.

- 3.1 Designing for children and older people – undertaking audits of parts of the city centre and local centres (involving people) of how well they meet the needs of young and older people, identifying opportunities.
- 3.2 Playful centres – initiatives to improve play facilities and to promote play in the city centre and town centres.
- 3.3 Making centres places for teenagers – identifying opportunities in centres for creating spaces and initiatives for teenagers to come together, to socialise, and to gain skills, support and confidence.
- 3.4 Placing centres at the heart of tackling loneliness, and in providing support for older people, creating spaces and initiatives to bring people together, and building on the neighbourhood networks.



4. Capitalising on culture and the creative industry assets to bring people together, shape place identity, and support communities.

- 4.1 Supporting grass roots bottom up cultural activities in local centres in a holistic and coordinated manner
- 4.2 Securing investment in continued improvements to landmark cultural facilities and destinations to attract tourism and provide hubs for learning and skills development for young people.
- 4.3 Protecting and bringing forward space for creatives and designers and use public sector assets as anchors for creative and cultural activities in local centres.



5. Safeguarding and enhancing the role of Leeds as a hub of the knowledge economy, backing innovators and entrepreneurs.

- 5.1 Supporting development of the right type of workspace, and wider quality of place to meet demand, addressing current shortages, and enabling creativity, collaboration, and innovation.
- 5.2 Backing innovators and entrepreneurs, enhancing networks of entrepreneurs, universities, corporates, the public sector and investors to build the ecosystem for innovation, and knowledge spillovers, developing workspaces and accelerators for start-ups and scale-ups.
- 5.3 Maintaining diversity of the city centre economy, and growth and inward investment in knowledge sectors, including financial and professional services, digital, creative, health innovation, screen industries, and built environment.

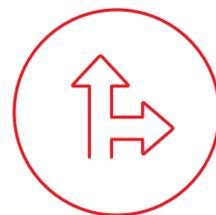
Key Moves



- 6. Curating a diverse mix of uses to attract people back into Leeds city centre to live, work, learn, create, shop, and play.**
- 6.1 Encouraging a diverse mix of uses in the city centre to create reasons to live, learn, visit, create, and work for all different profiles of users.
- 6.2 Improving the liveability of the city centre through a wide range of quality homes, quality of place, and the wider mix of uses. Adopting a proactive approach to repurposing retail and office buildings to residential, where appropriate, with an aim of supporting quality schemes (and responding to the risk of poor-quality conversions).
- 6.3 Supporting businesses in retail and hospitality to survive and adapt, as well as start-ups, including independents.
- 6.4 Adapting the city centre for omni-channel retail, including click-and-collect/return hubs to drive footfall.
- 6.5 Promoting Leeds as a data driven smart city 2.0, using data driven insight to adapt to rapidly changing economic context



- 7. Adapting local centres to new forms of working, living, and spending.**
- 7.1 Identifying the roles and functions that some centres play in the context of the local economy and viability of uses.
- 7.2 Widening the diversity of uses, encouraging suitable high-quality residential development, creating new workspaces and start up spaces, education, health & public & community services, comfortable and welcoming public spaces and seating, whilst protecting and enhancing an appropriate and viable scale of retail.
- 7.3 Supporting retail, food and drink and social entrepreneurs in centres to start-up and grow businesses and social enterprises, through advice and opportunities for test-trading through markets and pop-up units.
- 7.4 Prioritising investment and action for local centres that are struggling the most.



- 8. 15-minute city, 90-minute region. Connecting neighbourhoods with centres, and expanding the economic reach of the city centre.**
- 8.1 Connecting neighbourhoods to the city centre and local centres – the 15-minute city – through creating high quality walking routes, as well as cycle routes, to reduce severance.
- 8.2 Continuing to invest in public transport, and appropriate parking solutions (with EV charging), to enable people to access centres, to free up roadspace for people, and manage traffic better.
- 8.3 Place-shaping – building on recent schemes, future plans and the ambition set out in the Leeds Transport Strategy to enhance quality of place and public realm from well-designed transport and infrastructure investments. Consider design reviews/more design competitions.
- 8.4 Continuing to make the case for strategic connectivity to the city centre, including improving the station and rail links, which alongside hybrid working could attract a workforce across a wider area, placing Leeds at the centre of a “90 minute region”.



- 9. From grey to green. Bringing nature, and new and improved green spaces, into centres.**
- 9.1 Bringing places closer to nature, increasing environmental net gain through initiatives such as urban greening, pocket parks, green corridors, trees, and sustainable urban drainage. Establishing an ambitious plan on how to deliver environmental net gain across Leeds city and local centres.
- 9.2 Maximising the opportunity of the green economy, particularly clean tech, in terms of skills and jobs to drive our net zero ambitions and support economic growth.
- 9.3 Improving the Aire waterfront, building on recent waterfront improvement schemes, to develop an ambitious long-term plan to make the most of this huge opportunity for the city.
- 9.4 Identifying opportunities in centres for renewable energy generation and food production.



- 10. Leading and convening, creating partnerships, and mobilising the people that can make a difference.**
- 10.1 Creating local partnerships within local centres, that are flexible and fluid, bringing together council officers, local members, local businesses, community leaders and local people to develop shared visions and broad-based coalitions for change in centres.
- 10.2 Developing coherent investment plans for local centres, and parts of the city centre, identifying future funding opportunities. This may require some upfront investment, coordinating what the council are already doing.
- 10.3 Working with businesses and communities in the city centre to develop local partnerships for improving parts of the city centre not covered by the BID.
- 10.4 Bringing together cross-cutting teams from different Council services, and other public sector partners to provide an integrated approach to centres through coordination of existing resources.
- 10.5 Prioritising or phasing action on a few centres at a time, to focus resources.

Case Study: Bromley by Bow Centre Community Centre

The Bromley by Bow Centre is a pioneering and vibrant community charity in East London which is renowned for its radical approach to health and wellbeing. This community hub, GPs and innovative research project combines extensive neighbourhood community services with a medical practice, providing a variety of integrated services based on individual needs. It was founded 36 years ago and sits in a three-acre community park. At its heart is a partnership between a diverse community, a locally-rooted charitable organisation, a research team and one of the most progressive primary care health teams in the UK. The charity supports families, young people and adults of all ages to learn new skills, improve their health and wellbeing, find employment and develop the confidence needed to achieve positive outcomes they may not have dreamt of. The centre works with the most vulnerable people in the community, those who are isolated, facing physical or mental ill health or who are lacking confidence, skills or qualifications.

Case Study: Neighbourhood Catalyst Film Studio Regeneration

Manchester's 1970s Fujitsu production factories have been renovated into The Space Project, a 360,000 sq ft TV studio complex and extension of Space Studios. The Space Project contains production stages, workshops, catering facilities, office space for small creative businesses, and flexible space that can be appropriated for makeup and dressing rooms, as well as rehearsal space.

The project cost £27 million and was intended to catalyse improvement in the surrounding deprived neighbourhood, offering opportunities and inspiration to locals. The space provides apprenticeships and free masterclasses in film sector-relevant trades, including building, joinery, lighting, rigging, special effects, and make-up, and in 2018 The Space Project won the Royal Institute of Chartered Surveyors (RICS) award in the category of Regeneration as a result of its social impact.

Implications

- Provides opportunities to locals.
- Demonstrates the positive social impact open, mixed-use spaces can have on local communities.
- Reused existing structures, reducing waste and cost by using exposed structure to achieve a 'raw' aesthetic.

Case Study: Roboat – using urban canals to test use cases for autonomous vessels⁴

This real-world testbed is part of a five-year research programme on autonomous floating systems ('Roboats') in Amsterdam, designing the world's first fleet (potentially) able to move people and goods, function as portable, temporary infrastructure, and gather data. Through testing the vessel in the canals of Amsterdam, the innovators were first able to verify that the technology – which had previously been tested in closed-off pools – functioned in the unpredictable environment of a lively city canal. They were also able to investigate how urban waterways in combination with the vessel can be used to improve city functions and quality of life.

The real-world testbed showcased and improved control systems for autonomous navigation in urban environments and showed that new technology can revitalise 17th century infrastructure. The technology was first tested in Amsterdam before moving on to other similar canal and waterways cities such as Cambridge, UK, sharing the initial learning across the different urban environments.



Case Study: Net-Zero Housing Scheme

The city of York has partnered with London based-architecture firm Mikhail Riches, submitting plans to build a 600 unit housing development with a net zero carbon emission. 60% of the units are planned for market sale and 40% as affordable housing, and the council has designed the development to address both the international climate emergency as well as societal issues such as loneliness, isolation, and poverty.

The firm plans to build the structures with materials suited to net-zero goals such as timber frames and roughcast render, prioritising the embodied energy of the structure. The development will be mostly car-free and encourage cycling through a community bike fleet and personal bike sheds. Green ‘ginnels’ will provide excess green space for occupants to garden and socialise, and the units themselves will create renewable energy as well as utilise energy-efficient heating and cooling methods to lower running costs for residents. If successful, the development could inspire councils across the UK to use similar methods to address unique housing crises and high carbon emissions.

Implications

- Could set standards for private developers in the city and encourage them to build carbon neutral homes.
- Demonstrates a project addressing joint issues – providing needed housing as well as meeting environmental requirements.
- The average York family with one full-time earner and one part-time earner cannot afford typical housing prices and would not qualify for the market-rate units.

Case Study: Barcelona Superblocks⁵

Barcelona is piloting a radical new strategy which will restrict traffic to main roads around consolidated 400m-by-400m city blocks. This will turn internal streets into “citizen spaces” with increased safe green space for culture, leisure and community activities. The city’s Department of Mobility advocates a series of measures to give pedestrians and cyclists priority, to support an efficient mobility network and to reduce the environmental impact of vehicles. Superblocks are being piloted as an easily applicable and adaptable model that can improve quality of life for children, families and seniors. Assessment of health impacts has shaped the project, which is expected to help to reduce pollution, promote active travel, improve safety and encourage activity and social cohesion without compromising the mobility network.



City of York net zero housing scheme

Case Study: Hudson River Park

The 550-acre, five-mile long Hudson River Park project regenerates the historic waterfront on the west side of Manhattan and provides public access to the Hudson River. Design features include a waterfront esplanade, bike way and landscaping along the full length of the park.

Little Island, a new, free public park pier within the larger Hudson River Park, opened to the public on May 21, 2021, providing residents and visitors with a unique green space. Innovative design has been integrated throughout the park including a 687 seat amphitheatre and impressive landscaping.

The park runs a series of events and volunteer projects from restoring New York City waterfront to horticultural groups to a community compost programme.

Implications

- Demonstrates how city parks can be successful, bring communities together, and develop innovative sustainable design solutions.
- Provides opportunities for locals while generating visitor footfall.

Potential Next Steps

The potential areas for action together comprise an extensive long-term agenda for policy and investment. So where should the Council start, and what are some actions that could be taken now and over the next few months as the Council moves from the response to the recovery phases of its Economic Recovery Plan.

1. Sustaining delivery on existing projects that will improve and build long term confidence in centres.

This includes a wide range of projects to support local centres, including capital investments. In the City Centre this includes the substantial investment and plans to improve public realm, such as Aire Park, City Square, and the Corn Exchange schemes, the Leeds Living initiative to accelerate good quality residential development, the initiative to improve the station in-line with the Leeds Integrated Station Masterplan, the roll-out of the district heating network, as well as the ongoing work of the City Centre Management and Regeneration teams. It will be important for the Council to support significant private-sector led regeneration schemes

2. Piloting the creation of local centre boards, and cross-cutting council teams focused on specific centres.

It is not realistic to do this for all local centres, so it will be necessary to prioritise and draw on a range of partnership models such as BIDs, neighbourhood forums, and Town Council's.

3. Creating a framework for gathering intelligence on trends and issues in centres.

In a context of rapid change and uncertainty there will be a need to keep up to date with trends. This framework could encompass existing evidence gathering and monitoring (for example the work that is already undertaken in planning policy around housing completions, employment space, retail development, and town centre health checks), available data, as well as softer intelligence from Council staff who work in or live near centres. The focus could be on identifying high-level trends and issues, as opposed to creating overly detailed dashboards.

4. Continuing to support businesses in local centres and the city centre through the economic recovery, and continuing to support people affected by job or income losses to develop new skills and access new jobs.

This could be through the Council's and WYCA's business support and skills offer, as well as supporting stronger business-to-business links.

5. Developing a partnership and campaign to promote the strategic economic role, importance and future of the city centre, with a focus on occupiers, workers and investors.

This could complement the Rediscover Leeds campaign and the work of Leeds BID. It could bring together city centre businesses (large and small) in the office, science and creative sectors to work with universities, colleges, culture organisations, health care providers, and public sector organisations. This partnership could bring together evidence, and develop and help fund campaigns to build confidence in the city centre. The Council and other stakeholders could work with WYCA, the new West Yorkshire Mayor, and central Government to make the case for investment in Leeds City Centre based on its economic significance and potential.

6. Accelerating progress with innovation districts and for promoting innovation-led entrepreneurship in the city centre.

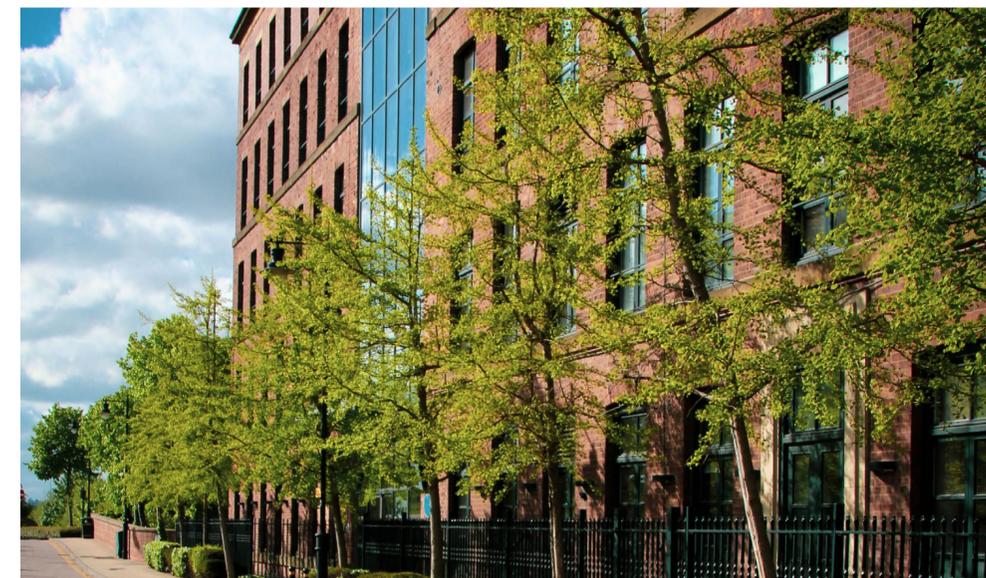
The Leeds City region Ide@ initiative is gathering pace. With the Leeds Hospitals of the Future scheme moving forward there is an opportunity to accelerate progress with the innovation district, recognising competing cities are not standing still with their innovation district proposals. There is also the potential to develop a second innovation district, focused on creative and digital industries based around the proposed British Library North scheme at Temple Works.

7. Set a clear vision for centres as part of refresh of inclusive growth strategy.

The existing inclusive growth strategy has priorities around strengthening the roles of the city centre and local centres, and there is an opportunity to build on this through the proposed refresh of the strategy.

8. Start a conversation about the next generation of transformational projects for centres.

Previous city centre vision processes helped generate the ideas that led to the Capitalisation of First Direct Arena, Leeds Flood Alleviation Scheme, and Aire Park. The private sector have also brought forward major schemes that have transformed parts of the city centre such as Trinity Leeds, Victoria Leeds, and Wellington Place, and well developed plans are in place and work on-site has commenced on projects such as Temple in Holbeck, the former Tetley Brewery site, and Quarry Hill. What will be the next generation of transformational projects, for local centres and the city centre? Are there opportunities to achieve investment in new facilities for Leeds, such as a high profile visitor attraction focused on children, a conference and exhibition centre, more world class green spaces (for example along the river Aire, or in local centres)? This conversation can start now.



Covid 19 may not have changed many trends affecting centres, but it has accelerated them rapidly. These trends, and in particular the rise of remote work, and the accelerated shift to online retail posed real threats to the traditional economic role of the city centre and local centres. There are also opportunities to reimagine centres as more collaborative, social, playful, liveable, inclusive, creative, and sustainable places. Intervention, partnership, investment and leadership will be needed to help our centres, and their businesses and workers, to adapt. Leeds City Centre has to date been a huge source of economic growth not just for Leeds and West Yorkshire, but of national significance. Local centres support many businesses and jobs. The health of our local centres and city centres matter to people. Leeds has a diverse economy which, combined with farsighted civic and business leadership, have enabled it to respond to economic shocks and changes in the past, and can provide the basis for the future resilience and success of our local centres and city centres.

Appendix

Appendix A: Main Trends

Key Trends – Living and Working

Changing working patterns

Increasing remote and flexible working patterns

The rise of remote, flexible working has accelerated due to Covid-19. Early findings from an Arup survey suggest a 20% decrease in the number of days staff will spend in the office post-pandemic. The barriers between home and workspaces have blended raising questions on the future of the office⁶. While it has been shown we can adapt to home working and use digital advances to connect remotely, the future of the office is likely not dead. Extensive evidence shows the benefits of collaboration and face-to-face interaction on driving innovation, productivity and enabling knowledge spill overs. Office spaces will likely need to rationalise, downsize and reconfigure⁷ to support more diverse working styles, provide flexible spaces and collaboration zones, while also to save on costs. Leeds has a diverse economy with skilled jobs across a range of sectors which benefit from the knowledge spill overs, the ecosystems, and the trust and relationships that face-to-face contact brings. There is an important role these sectors and the city centre play in attracting people back into our workplaces. Changes in working patterns also raises questions on the need for citizens to be as centred around city centres to access employment and could result in a gradual shift to suburban centres⁸. There is an opportunity for Leeds local centres to become local hubs offering a mix of uses from retail to leisure with small flexible and co-working spaces to allow a flexible lifestyle and to adapt to the changing working patterns.

Knowledge economy and innovation

The growing importance of the knowledge economy and innovation locals in cities

The knowledge economy and innovation is key to driving growth in cities. The rise of innovation locals⁹ have enabled cities to drive productivity growth, bringing together innovators, entrepreneurs, researchers, creatives, knowledge workers and investors to work together, to collaborate, compare and compete, creating the conditions for business growth. This enabling of the “knowledge economy” is worth of over £95 billion¹⁰ annually to the UK economy, with over 2.5 million businesses in the UK knowledge economy. Leeds is a destination for entrepreneurs and innovators¹¹, a world leader in health innovation and home to nearly 3500 digital companies with a digital GVA of £1.3bn¹². Its diverse broad base economy provides a concentration of skilled jobs in Knowledge Intensive Business Services (KIBS), the creative and digital sector, universities, healthcare and health innovation, and the public sector. This is evidenced by plans recently submitted by CEG, the global diagnostics and drug development company, to redevelop Drapers Yard in Leeds’ South Bank into a new Labcorp medical facility, which would create up to 3000 healthcare jobs¹³.

Future skills

Increasing skills shortages alongside a changing demand for the types of skills needed

Official statistics show a quarter of UK job vacancies are hard to fill because of a lack of suitable candidates¹⁴. This in part is due to cuts in education spending in real terms over

the last decade. School spending per pupil in England fell by 9% in real terms between 2009/10 and 2019/20 and funding per student in further education and sixth-form colleges fell by 12% in real terms between 2010/11 and 2019/20¹⁵. At the same time the CBI estimates nine out of 10 workers will need to learn new skills for their own jobs by 2030, at a cost of £13bn annually. The need for retraining is likely to be accelerated further in sectors most affected economically by Covid-19. Covid-19 has also highlighted the growing importance of digital skills. Yet a recent report by the Learning and Work Institute warns the UK is heading towards a ‘catastrophic’ digital skills shortage ‘disaster’¹⁶. Leeds’ digital sector is growing faster than anywhere in the UK and now employs 30,000 people, an increase of 67% since 2015 and has been particularly resilient. This is recognised by the West Yorkshire Local Digital Skills Partnership which influences the digital skills landscape across the region, including a range of digital skills training programmes to boost business productivity.

15-minute neighbourhoods

The increasing desire for distributed hubs of mixed uses within a 15-minute walk or cycle

Covid-19 has highlighted the importance of the quality of the immediate neighbourhood. The idea of a “15-minute city”, first mooted by the academic Carlos Moreno and popularised by Paris mayor Anne Hidalgo, looks at the provision of more localised access to essential goods and services. Distributed hubs of mixed-use ‘15-minute neighbourhoods’ can provide access to essential goods and services on our doorstep. They

provide the ability to find all things necessary for a human lifestyle within a 15-minute walk or bike ride. They offer a sense of community due to repeat encounters with a few anchor ‘familiar strangers’ such as your shop-keeper, barista, religious leader or gym buddies. Leeds has a legacy of large roads and highways, and many communities who live in surrounding neighbourhoods are not connected well to the opportunities it provides as a result of poor physical connectivity. In addition, surrounding neighbourhoods lack the critical 15-minute infrastructure and the amenity required, be that a GP’s surgery, shopping parade or a park. However, encouraging the concept of the 15-minute neighbourhood offerings could support inclusive growth amongst these neighbourhoods.

City Living

The growth in recent decades of city centre residential populations; people who value living near work and city centre amenities.

Key Trends – Leisure, Culture, and Consumption

Shift to online retail

Struggling high streets and retail locations due to growing online retail

Our high streets and retail locations were suffering long before Covid-19 with the rise of online shopping, and consumer demand for speed and convenience. However, since Covid-19 retail locations have been hit further by a double whammy of reduced footfall from office workers, and the acceleration to

online retail. Retail developers may need to review their assets and consider redevelopment to maintain profitability, this could be alternative retail but may also be change of use to leisure, offices, culture, logistics/distribution or residential. Changes in planning policy and regeneration strategies for the retail core of Leeds City Centre are already being seen, with developers already rethinking plans for future schemes (i.e. Victoria Gate phase 2). Demand for housing in England has intensified as the population and the number of households have grown, providing opportunities for residential development. According to projections released in 2018, the number of households in England is projected to rise from 22.9 million in 2016 to 26.9 million in 2041¹⁷.

Placemaking

Creating appealing places with mixed use offerings, quality public realm and green space

Placemaking creates appealing, high quality mixed-use places that draw people in to both live and visit. There is an increasing number of developments in cities mixing uses such as retail, leisure, co-working, offices, dining, cultural activities and importantly residential. Flexible spaces and meanwhile uses can further inject life into a place through pop up stores and temporary micro-enterprise spaces. Covid-19 has highlighted the value of good quality public green and blue space, and streets and routes that are safe and attractive for walking and cycling. This can reconnect residential neighbourhoods with high levels of deprivation to nearby city centres, tackling the

severance caused by major roads and infrastructure. Improving public realm and creating quality spaces should be a key priority for Leeds City Centre. There are already plans for a £1.1 million investment from MEPC to bring fitness classes, market stalls, and street food to Wellington Place which will enhance the area and create a flexible public realm space¹⁸. In addition, Leeds waterfront, River Aire and the Leeds-Liverpool Canal, is an underutilised asset which should be celebrated and maximised providing a distinctive asset in the city centre for activity and placemaking¹⁹.

Cultural life

Increasing recognition of the role of creative industries and culture in cities

Creative and cultural industries in cities are vital, accounting for 5.2% of the UK economy. Cities have a unique role to play in supporting culture, serving large diverse populations and creating hubs for the next generation of artists and creatives. Culture brings together and defines community. Cities need to enable culture to happen through creating spaces to be shared and connected, embedding culture into our streets, shopping centres, parks, and urban spaces. Leeds has a strong arts and culture offering²⁰ with the creative and cultural industry accounting for 1 in 18 jobs in Leeds in 2017. Leeds has four major theatres, a diverse population, and over 16 museums and galleries. This is a key strength for the city and in 2023 Leeds²¹ will be the year of culture, celebrating the city and providing new connections, experiences and reasons to visit for all. Leeds local centres are defined by diverse communities and cultures. There is an opportunity to develop new connections and collaborations across these communities and enable an everyday culture encouraging small acts of community and creativity and sharing experiences amongst people.

“However, since Covid-19 retail locations have been hit further by a double whammy of reduced footfall from office workers, and the acceleration to online retail.”

Consumer expectations

Consumers are expecting more convenient, sustainable omnichannel retail experiences

Consumers are increasingly looking for convenience, seamlessness and consistency across a growing number of touch points, blurring the boundaries of online and offline experiences. New technologies such as Augmented Reality are supporting this omni-channel experience. Another aspect to consider is the cultural shift towards sustainable and ethical retail products. A survey across 60 countries found that 55% of online consumers consider a company's environmental and social commitment when deciding where to shop and will accept higher prices for sustainable products²². Covid-19 has further highlighted ethical considerations and issues of transparency, exposing appalling factory conditions in Leicester's garment factories²³. Leeds will need to respond to the changing consumer expectations around shopping, retail experiences, and sustainable choices and how the role of the high street and wider city centre can accommodate these expectations and shifts, for example click and collect hubs to drive footfall. For local centres distinctiveness, local production and creating personalised experiences will be important. Local centres may also help to provide local delivery hubs that support consumers omnichannel expectations.

Key Trends – Social Value and Inclusive Growth

Young people

The long-term impact of school closures on educational progress and mental health of young people

Covid-19 has had a huge impact on children and young people and this negative impact could extend well beyond the immediate recovery. School closures and a lack of meaningful education has impacted children's educational progress

and 64% of pupils say closures have negatively impacted their mental health²⁴. Covid-19 has further highlighted and increased the disadvantages between different communities, an example being 40% of students do not have access to reliable broadband²⁵. In addition, young workers entering employment have been set back, struggling to access employment and high skilled jobs. Putting children and young people at the heart of the recovery is crucial in the short term and long term. Designing for urban childhoods incorporates playful behaviours and freedom to as part of everyday life, throughout the city. The network of social infrastructure, spaces, streets, nature and interventions should be designed and reframed from a child's point of view. Leeds has a higher proportion of young people than the national average and is working to become a child friendly city. There is an opportunity for Leeds to respond positively to these challenges addressing issues with access to employment and skills growth and influencing the inclusive design of our places.

Health and wellbeing

The increasing importance of health and wellbeing and reducing health inequalities

Covid-19 has highlighted the importance of health and wellbeing and exposed health inequalities, with existing poor health putting people at risk of more severe outcomes if they contract the virus. Health inequalities in England are significant, boys born in the most deprived areas should expect 18.6 fewer years of good health than those born in the least deprived areas²⁶. Other health challenges include obesity and an ageing population who will require more complex care. In Leeds the number of people aged over 65 is estimated to rise by almost a third to over 150,000 by 2030²⁷. Mental ill-health is also on the rise, costing the UK more than £94bn every year. It is

estimated that by 2030 there will be approximately two million more adults in the UK with mental health problems than there were in 2013²⁸. Looking ahead it is likely that a more joined up approach to health and social care, a broader view of health, adopting new technologies and more preventative approaches will be required to improve health outcomes. There is also a role for the health sector as an inclusive anchor, driving wider opportunities across city centres and local centres.

Digital exclusion

The increasing use of digital technologies is highlighting issues of digital exclusion

Digital skills, technology and connectivity are becoming ever more critical for individuals to access jobs, services and education, and benefit from the growing digital economy. Covid-19 and the associated increased use of digital technologies has provided opportunities for organisations to optimise productivity, collaboration and employee experience²⁹, and for children to access learning. However it has also highlighted issues of digital exclusion. In the UK 3.8m people are almost completely offline, 1.9m households do not have access to the internet³⁰ and 11.9m people are lacking the essential digital skills they need³¹. An increasing proportion of internet non-users are also over the age of 65 years³². Greater investment in infrastructure expansion and digital skills education and training are amongst the solutions required to reduce digital exclusion.

Child and age friendly cities

Cities that are child friendly and where people can age well

Playful behaviours and freedom to explore should be part of everyday life for children. However urban children face challenges such as increased traffic, pollution, crime,

deprivation and social mobility. The network of social infrastructure, spaces, streets, nature and interventions are key features to be a child-friendly city. Cities also need to be intergenerational and somewhere people can age well. Solutions include streets and spaces near homes, reducing car dominance and connected green infrastructure networks. The benefits are vast, including improved health and wellbeing, safety and stronger communities. Leeds have committed to being child friendly and somewhere people can age well, all of which will have implications for the design of urban realm.

Poverty

Poverty and income inequality is increasing

Poverty and income inequality were already a significant issue in the UK pre-pandemic. However Covid-19 has now pushed the total number of people in the UK living in poverty to more than 15 million, 23% of the population, according to the Legatum institute³³. Those hardest hit are young workers, those working in sectors such as hospitality and retail, and those in relatively low-paid jobs. Prior to the pandemic over 80,000 jobs in Leeds (many of them part-time and insecure) paid less than the Living Wage, as recommended by the Living Wage Foundation³⁴. Furthermore over 170,000 people in Leeds live in neighbourhoods that are ranked in the 10% most deprived neighbourhoods in England. This highlights the risk of increasing poverty in Leeds due to the impacts of Covid-19. Deprivation is concentrated in particular neighbourhoods, where poor housing stock and conditions, financial exclusion, physical and mental health problems and poor-quality local services can be issues. Those facing multiple forms of social and economic exclusion are also at heightened risk of poverty – women, girls, migrants, people with disabilities, older people, youth, and groups facing ethnic, racial or religious discrimination.

Key Trends – Mobility

Green transport

The transport system is electrifying with the ban on sales of petrol and diesel vehicles coming into force in 2030

The government's policy of ending the sale of all new conventional petrol and diesel cars and vans by 2030 has created a major mindset shift towards green transport. This is evidenced by an increase between 2018 and 2019 in licensed ultra-low emission cars in the UK of over 30%³⁵. The lack of public charging points is a challenge for this major shift. In 2018 there was approximately one public charge point for every eight EVs in the UK³⁶. Other challenges include the upfront costs of shifting businesses and those fulfilling last-mile deliveries to zero-emissions fleets. Transport is a major contributor to carbon emissions. According to the Mini-Stern Review for the City of Leeds, the transport sector accounts for the largest share of carbon emissions at 36%³⁷. Encouraging green transport is therefore a priority for Leeds. The Leeds Core Strategy enforces new residential developments to have every residential space having an electric charging point (or at least the infrastructure for it). Furthermore, in partnership with Highways England, the Council has launched a new electric vehicle scheme giving businesses, organisations and charities the change to trial electric vans free of charge for up to two months³⁸.

Active travel

An increasing focus on active travel to help combat challenges such as obesity and air pollution

Active travel can help to combat major UK challenges such as obesity, mental health, air pollution and congestion. In 2017, 24.9% of British adults were classified as obese, and at current rates, by 2030, 11 million more adults will be obese³⁹. The UK Government has pledged to increase walking activity to 300 stages per person per year and double cycling by 2025⁴⁰. With this pledge, local governments can repurpose roads as bikeways and dynamic road management that reconfigure lane and pavement widths to suit demand and priority users can quickly adapt existing infrastructure to new modes and use⁴¹. The location of work also impacts forms of travel, with 63% of people who work in city centres using public transport or travelling by bicycle or foot to work, compared to 23% who do not work in city centres⁴². In response to Covid-19 Leeds City Council implemented emergency walking and cycling routes across the city centre⁴³. The Connecting Leeds draft strategy⁴⁴ aims to promote low carbon travel choices and implement active travel infrastructure across Leeds, moving away from private car use and choosing healthier and more sustainable travel choices. In 2020, Leeds City Council also introduced active travel neighbourhoods in two residential areas (Hyde Park and Chapeltown) with the aim to make these residential areas more child, pedestrian and cycle friendly and restrict through traffic⁴⁵.

“The Leeds Core Strategy enforces new residential developments to have every residential space having an electric charging point (or at least the infrastructure for it).”

Regional connectivity

Changing working patterns may increase the importance of regional connectivity

Post-Covid-19 we are unlikely to see a return to old working patterns, with a proportion of those able to work from home doing so for at least part of the week. If workers spend more time remote working, commuting patterns may change and workers may be able to live further geographically from their workplace. The connectivity to locations around cities and to the wider region may become even more important to drive economic growth and provide greater access to jobs. Leeds is the main economic hub for Yorkshire, with the busiest transport hub in the north⁴⁶. Its regional role within the Northern Powerhouse means it is well placed. This will be further strengthened through HS2. The future aspirations and plans⁴⁷ for Leeds train station will create a world class gateway for Leeds City Region and drive the economic growth of the region. It will also be an opportunity to integrate and encourage sustainable travel options across the city, as well as transit orientated development and land value capture.

Key Trends – Environment and Net Zero Carbon

Net zero carbon

The UK and Leeds has committed to achieving net zero carbon by 2050 and 2030 respectively

In 2019, the UK became the first major economy in the world to commit to a legally binding target to bring all UK greenhouse gas emissions to net zero by 2050. However, the CCC report that current policies and plans are insufficient to meet the fourth or fifth carbon budgets to be on track to meet this target. At the same time, some industries, companies and local authorities, have committed to even more challenging targets of net zero carbon emissions – Leeds plans to be net zero carbon by 2030.

According to the Mini-Stern Review for the City of Leeds, both production- and consumption-based emissions have declined by more than 25% between 2001 and 2017. However, the rate of decline is expected to decelerate in the future barring additional measures, and Leeds is expected to miss its carbon reduction targets as a result⁴⁸.

Climate adaptation

Climate change impacts, such as flooding, are becoming more prevalent and extreme

There is rising awareness around the impacts of climate change, with an increasing proportion of the population developing more environmentally sustainable attitudes. However extreme weather events, such as the ‘beast from the east’ in 2018, have severe costs to people’s livelihoods and homes and the UK economy. It is crucial that climate adaptation becomes a main focus in the UK to enable cities to be resilient to the ever-changing climate. Leeds suffers from extreme flooding and the Leeds Flood Alleviation Scheme provides Natural Flood Management techniques to slow the flow of the River Aire and reduce the risk of flooding. However more needs to be done to protect communities and build self-reliance and resilience amongst communities in order to prepare for, respond to, and recover from extreme weather events.

Energy system transformation

Our energy system is decarbonising and becoming more decentralised and efficient

UK Government policy is increasingly driving towards a decarbonised energy system. The Government’s 10-point plan for a ‘green industrial revolution includes producing enough offshore wind to power every home in the UK, quadrupling how much it produces to 40 gigawatts by 2030⁴⁹. As well as decarbonising our energy system we need to be more efficient with the energy we

use. Buildings make up a significant proportion of our energy use and the Energy Efficiency Directive identified existing building stock as “the single biggest potential sector for energy savings”⁵⁰. Leeds have received £18m from the Getting Building Fund and £2m of this will be used to improve older terraced homes in the Holbeck area to improve the energy efficiency of properties and help to reduce fuel bills. Furthermore, the energy system is also becoming more decentralised offering greater local system resilience and efficiency, reduced greenhouse gas emissions and lower cost extension of grids to unconnected locations. Leeds is developing a Local Heating Network to provide sustainable heat and hot water to homes, businesses and civic buildings using heat generated from household waste at the city’s Recycling and Energy Recovery Facility.

Environmental net gain

The built environment is moving towards practices that deliver environmental net gains

The built environment is moving away from practices and designs that take from the planet (e.g. degenerate) towards net positive (e.g. net gain) practices that return more than they take. Solutions include integrating green and blue infrastructure and urban greening⁵¹. This often not only delivers environmental benefits such as carbon sequestration, biodiversity and combatting extreme weather events, but other social and economic co-benefits. It is estimated in 2017, the removal of pollution by vegetation in the UK equated to a saving of £1.3 billion in health costs⁵² and the cooling shade of trees and water saved £248 million by maintaining productivity and lowering air conditioning costs⁵³. Leeds City Council already have plans in place to deliver environmental gains. An additional 1,250 hectares of woodland will be created over 25 years, doubling the amount of woodland in Leeds and transforming the way parks and green spaces are managed.

Appendix A: Main Trends

Key Trends – Living and Working

Changing working patterns

Increasing remote and flexible working patterns

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Knowledge economy and innovation

The growing importance of the knowledge economy and innovation locals in cities

The knowledge economy and innovation is key to driving growth in cities. The rise of innovation locals⁹ have enabled cities to drive productivity growth, bringing together innovators, entrepreneurs, researchers, creatives, knowledge workers and investors to work together, to collaborate, compare and compete, creating the conditions for business growth. This enabling of the “knowledge economy” is worth of over £95 billion¹⁰ annually to the UK economy, with over 2.5 million businesses in the UK knowledge economy. Leeds is a destination for entrepreneurs and innovators¹¹, a world leader in health innovation and home to nearly 3500 digital companies with a digital GVA of £1.3bn¹². Its diverse broad base economy provides a concentration of skilled jobs in Knowledge Intensive Business Services (KIBS), the creative and digital sector, universities, healthcare and health innovation, and the public sector. This is evidenced by plans recently submitted by CEG, the global diagnostics and drug development company, to redevelop Drapers Yard in Leeds’ South Bank into a new Labcorp medical facility, which would create up to 3000 healthcare jobs¹³.

Future skills

Increasing skills shortages alongside a changing demand for the types of skills needed

Official statistics show a quarter of UK job vacancies are hard to fill because of a lack of suitable candidates¹⁴. This in part is due to cuts in education spending in real terms over

the last decade. School spending per pupil in England fell by 9% in real terms between 2009/10 and 2019/20 and funding per student in further education and sixth-form colleges fell by 12% in real terms between 2010/11 and 2019/20¹⁵. At the same time the CBI estimates nine out of 10 workers will need to learn new skills for their own jobs by 2030, at a cost of £13bn annually. The need for retraining is likely to be accelerated further in sectors most affected economically by Covid-19. Covid-19 has also highlighted the growing importance of digital skills. Yet a recent report by the Learning and Work Institute warns the UK is heading towards a ‘catastrophic’ digital skills shortage ‘disaster’¹⁶. Leeds’ digital sector is growing faster than anywhere in the UK and now employs 30,000 people, an increase of 67% since 2015 and has been particularly resilient. This is recognised by the West Yorkshire Local Digital Skills Partnership which influences the digital skills landscape across the region, including a range of digital skills training programmes to boost business productivity.

15-minute neighbourhoods

The increasing desire for distributed hubs of mixed uses within a 15-minute walk or cycle

Covid-19 has highlighted the importance of the quality of the immediate neighbourhood. The idea of a “15-minute city”, first mooted by the academic Carlos Moreno and popularised by Paris mayor Anne Hidalgo, looks at the provision of more localised access to essential goods and services. Distributed hubs of mixed-use ‘15-minute neighbourhoods’ can provide access to essential goods and services on our doorstep. They

provide the ability to find all things necessary for a human lifestyle within a 15-minute walk or bike ride. They offer a sense of community due to repeat encounters with a few anchor ‘familiar strangers’ such as your shop-keeper, barista, religious leader or gym buddies. Leeds has a legacy of large roads and highways, and many communities who live in surrounding neighbourhoods are not connected well to the opportunities it provides as a result of poor physical connectivity. In addition, surrounding neighbourhoods lack the critical 15-minute infrastructure and the amenity required, be that a GP’s surgery, shopping parade or a park. However, encouraging the concept of the 15-minute neighbourhood offerings could support inclusive growth amongst these neighbourhoods.

City Living

The growth in recent decades of city centre residential populations; people who value living near work and city centre amenities.

Key Trends – Leisure, Culture, and Consumption

Shift to online retail

Struggling high streets and retail locations due to growing online retail

Our high streets and retail locations were suffering long before Covid-19 with the rise of online shopping, and consumer demand for speed and convenience. However, since Covid-19 retail locations have been hit further by a double whammy of reduced footfall from office workers, and the acceleration to

online retail. Retail developers may need to review their assets and consider redevelopment to maintain profitability, this could be alternative retail but may also be change of use to leisure, offices, culture, logistics/distribution or residential. Changes in planning policy and regeneration strategies for the retail core of Leeds City Centre are already being seen, with developers already rethinking plans for future schemes (i.e. Victoria Gate phase 2). Demand for housing in England has intensified as the population and the number of households have grown, providing opportunities for residential development. According to projections released in 2018, the number of households in England is projected to rise from 22.9 million in 2016 to 26.9 million in 2041¹⁷.

Placemaking

Creating appealing places with mixed use offerings, quality public realm and green space

Placemaking creates appealing, high quality mixed-use places that draw people in to both live and visit. There is an increasing number of developments in cities mixing uses such as retail, leisure, co-working, offices, dining, cultural activities and importantly residential. Flexible spaces and meanwhile uses can further inject life into a place through pop up stores and temporary micro-enterprise spaces. Covid-19 has highlighted the value of good quality public green and blue space, and streets and routes that are safe and attractive for walking and cycling. This can reconnect residential neighbourhoods with high levels of deprivation to nearby city centres, tackling the

severance caused by major roads and infrastructure. Improving public realm and creating quality spaces should be a key priority for Leeds City Centre. There are already plans for a £1.1 million investment from MEPC to bring fitness classes, market stalls, and street food to Wellington Place which will enhance the area and create a flexible public realm space¹⁸. In addition, Leeds waterfront, River Aire and the Leeds-Liverpool Canal, is an underutilised asset which should be celebrated and maximised providing a distinctive asset in the city centre for activity and placemaking¹⁹.

Cultural life

Increasing recognition of the role of creative industries and culture in cities

Creative and cultural industries in cities are vital, accounting for 5.2% of the UK economy. Cities have a unique role to play in supporting culture, serving large diverse populations and creating hubs for the next generation of artists and creatives. Culture brings together and defines community. Cities need to enable culture to happen through creating spaces to be shared and connected, embedding culture into our streets, shopping centres, parks, and urban spaces. Leeds has a strong arts and culture offering²⁰ with the creative and cultural industry accounting for 1 in 18 jobs in Leeds in 2017. Leeds has four major theatres, a diverse population, and over 16 museums and galleries. This is a key strength for the city and in 2023 Leeds²¹ will be the year of culture, celebrating the city and providing new connections, experiences and reasons to visit for all. Leeds local centres are defined by diverse communities and cultures. There is an opportunity to develop new connections and collaborations across these communities and enable an everyday culture encouraging small acts of community and creativity and sharing experiences amongst people.

“However, since Covid-19 retail locations have been hit further by a double whammy of reduced footfall from office workers, and the acceleration to online retail.”

Consumer expectations

Consumers are expecting more convenient, sustainable omnichannel retail experiences

Consumers are increasingly looking for convenience, seamlessness and consistency across a growing number of touch points, blurring the boundaries of online and offline experiences. New technologies such as Augmented Reality are supporting this omni-channel experience. Another aspect to consider is the cultural shift towards sustainable and ethical retail products. A survey across 60 countries found that 55% of online consumers consider a company's environmental and social commitment when deciding where to shop and will accept higher prices for sustainable products²². Covid-19 has further highlighted ethical considerations and issues of transparency, exposing appalling factory conditions in Leicester's garment factories²³. Leeds will need to respond to the changing consumer expectations around shopping, retail experiences, and sustainable choices and how the role of the high street and wider city centre can accommodate these expectations and shifts, for example click and collect hubs to drive footfall. For local centres distinctiveness, local production and creating personalised experiences will be important. Local centres may also help to provide local delivery hubs that support consumers omnichannel expectations.

Key Trends – Social Value and Inclusive Growth

Young people

The long-term impact of school closures on educational progress and mental health of young people

Covid-19 has had a huge impact on children and young people and this negative impact could extend well beyond the immediate recovery. School closures and a lack of meaningful education has impacted children's educational progress

and 64% of pupils say closures have negatively impacted their mental health²⁴. Covid-19 has further highlighted and increased the disadvantages between different communities, an example being 40% of students do not have access to reliable broadband²⁵. In addition, young workers entering employment have been set back, struggling to access employment and high skilled jobs. Putting children and young people at the heart of the recovery is crucial in the short term and long term. Designing for urban childhoods incorporates playful behaviours and freedom to as part of everyday life, throughout the city. The network of social infrastructure, spaces, streets, nature and interventions should be designed and reframed from a child's point of view. Leeds has a higher proportion of young people than the national average and is working to become a child friendly city. There is an opportunity for Leeds to respond positively to these challenges addressing issues with access to employment and skills growth and influencing the inclusive design of our places.

Health and wellbeing

The increasing importance of health and wellbeing and reducing health inequalities

Covid-19 has highlighted the importance of health and wellbeing and exposed health inequalities, with existing poor health putting people at risk of more severe outcomes if they contract the virus. Health inequalities in England are significant, boys born in the most deprived areas should expect 18.6 fewer years of good health than those born in the least deprived areas²⁶. Other health challenges include obesity and an ageing population who will require more complex care. In Leeds the number of people aged over 65 is estimated to rise by almost a third to over 150,000 by 2030²⁷. Mental ill-health is also on the rise, costing the UK more than £94bn every year. It is

estimated that by 2030 there will be approximately two million more adults in the UK with mental health problems than there were in 2013²⁸. Looking ahead it is likely that a more joined up approach to health and social care, a broader view of health, adopting new technologies and more preventative approaches will be required to improve health outcomes. There is also a role for the health sector as an inclusive anchor, driving wider opportunities across city centres and local centres.

Digital exclusion

The increasing use of digital technologies is highlighting issues of digital exclusion

Digital skills, technology and connectivity are becoming ever more critical for individuals to access jobs, services and education, and benefit from the growing digital economy. Covid-19 and the associated increased use of digital technologies has provided opportunities for organisations to optimise productivity, collaboration and employee experience²⁹, and for children to access learning. However it has also highlighted issues of digital exclusion. In the UK 3.8m people are almost completely offline, 1.9m households do not have access to the internet³⁰ and 11.9m people are lacking the essential digital skills they need³¹. An increasing proportion of internet non-users are also over the age of 65 years³². Greater investment in infrastructure expansion and digital skills education and training are amongst the solutions required to reduce digital exclusion.

Child and age friendly cities

Cities that are child friendly and where people can age well

Playful behaviours and freedom to explore should be part of everyday life for children. However urban children face challenges such as increased traffic, pollution, crime,

deprivation and social mobility. The network of social infrastructure, spaces, streets, nature and interventions are key features to be a child-friendly city. Cities also need to be intergenerational and somewhere people can age well. Solutions include streets and spaces near homes, reducing car dominance and connected green infrastructure networks. The benefits are vast, including improved health and wellbeing, safety and stronger communities. Leeds have committed to being child friendly and somewhere people can age well, all of which will have implications for the design of urban realm.

Poverty

Poverty and income inequality is increasing

Poverty and income inequality were already a significant issue in the UK pre-pandemic. However Covid-19 has now pushed the total number of people in the UK living in poverty to more than 15 million, 23% of the population, according to the Legatum institute³³. Those hardest hit are young workers, those working in sectors such as hospitality and retail, and those in relatively low-paid jobs. Prior to the pandemic over 80,000 jobs in Leeds (many of them part-time and insecure) paid less than the Living Wage, as recommended by the Living Wage Foundation³⁴. Furthermore over 170,000 people in Leeds live in neighbourhoods that are ranked in the 10% most deprived neighbourhoods in England. This highlights the risk of increasing poverty in Leeds due to the impacts of Covid-19. Deprivation is concentrated in particular neighbourhoods, where poor housing stock and conditions, financial exclusion, physical and mental health problems and poor-quality local services can be issues. Those facing multiple forms of social and economic exclusion are also at heightened risk of poverty – women, girls, migrants, people with disabilities, older people, youth, and groups facing ethnic, racial or religious discrimination.

Key Trends – Mobility

Green transport

The transport system is electrifying with the ban on sales of petrol and diesel vehicles coming into force in 2030

The government's policy of ending the sale of all new conventional petrol and diesel cars and vans by 2030 has created a major mindset shift towards green transport. This is evidenced by an increase between 2018 and 2019 in licensed ultra-low emission cars in the UK of over 30%³⁵. The lack of public charging points is a challenge for this major shift. In 2018 there was approximately one public charge point for every eight EVs in the UK³⁶. Other challenges include the upfront costs of shifting businesses and those fulfilling last-mile deliveries to zero-emissions fleets. Transport is a major contributor to carbon emissions. According to the Mini-Stern Review for the City of Leeds, the transport sector accounts for the largest share of carbon emissions at 36%³⁷. Encouraging green transport is therefore a priority for Leeds. The Leeds Core Strategy enforces new residential developments to have every residential space having an electric charging point (or at least the infrastructure for it). Furthermore, in partnership with Highways England, the Council has launched a new electric vehicle scheme giving businesses, organisations and charities the change to trial electric vans free of charge for up to two months³⁸.

Active travel

An increasing focus on active travel to help combat challenges such as obesity and air pollution

Active travel can help to combat major UK challenges such as obesity, mental health, air pollution and congestion. In 2017, 24.9% of British adults were classified as obese, and at current rates, by 2030, 11 million more adults will be obese³⁹. The UK Government has pledged to increase walking activity to 300 stages per person per year and double cycling by 2025⁴⁰. With this pledge, local governments can repurpose roads as bikeways and dynamic road management that reconfigure lane and pavement widths to suit demand and priority users can quickly adapt existing infrastructure to new modes and use⁴¹. The location of work also impacts forms of travel, with 63% of people who work in city centres using public transport or travelling by bicycle or foot to work, compared to 23% who do not work in city centres⁴². In response to Covid-19 Leeds City Council implemented emergency walking and cycling routes across the city centre⁴³. The Connecting Leeds draft strategy⁴⁴ aims to promote low carbon travel choices and implement active travel infrastructure across Leeds, moving away from private car use and choosing healthier and more sustainable travel choices. There is an ambition to deliver a 800km cycle network across Leeds, and in 2020 Leeds City Council also introduced active travel neighbourhoods in two residential areas (Hyde Park and Chapeltown) with the aim to make these residential areas more child, pedestrian and cycle friendly and restrict through traffic⁴⁵.

“The Leeds Core Strategy enforces new residential developments to have every residential space having an electric charging point (or at least the infrastructure for it).”

Regional connectivity

Changing working patterns may increase the importance of regional connectivity

Post-Covid-19 we are unlikely to see a return to old working patterns, with a proportion of those able to work from home doing so for at least part of the week. If workers spend more time remote working, commuting patterns may change and workers may be able to live further geographically from their workplace. The connectivity to locations around cities and to the wider region may become even more important to drive economic growth and provide greater access to jobs. Leeds is the main economic hub for Yorkshire, with the busiest transport hub in the north⁴⁶. Its regional role within the Northern Powerhouse means it is well placed. This will be further strengthened through HS2. The future aspirations and plans⁴⁷ for Leeds train station will create a world class gateway for Leeds City Region and drive the economic growth of the region. It will also be an opportunity to integrate and encourage sustainable travel options across the city, as well as transit orientated development and land value capture.

Key Trends – Environment and Net Zero Carbon

Net zero carbon

The UK and Leeds has committed to achieving net zero carbon by 2050 and 2030 respectively

In 2019, the UK became the first major economy in the world to commit to a legally binding target to bring all UK greenhouse gas emissions to net zero by 2050. However, the CCC report that current policies and plans are insufficient to meet the fourth or fifth carbon budgets to be on track to meet this target. At the same time, some industries, companies and local authorities, have committed to even more challenging targets of net zero carbon emissions – Leeds plans to be net zero carbon by 2030.

According to the Mini-Stern Review for the City of Leeds, both production- and consumption-based emissions have declined by more than 25% between 2001 and 2017. However, the rate of decline is expected to decelerate in the future barring additional measures, and Leeds is expected to miss its carbon reduction targets as a result⁴⁸.

Climate adaptation

Climate change impacts, such as flooding, are becoming more prevalent and extreme

There is rising awareness around the impacts of climate change, with an increasing proportion of the population developing more environmentally sustainable attitudes. However extreme weather events, such as the ‘beast from the east’ in 2018, have severe costs to people’s livelihoods and homes and the UK economy. It is crucial that climate adaptation becomes a main focus in the UK to enable cities to be resilient to the ever-changing climate. Leeds suffers from extreme flooding and the Leeds Flood Alleviation Scheme provides Natural Flood Management techniques to slow the flow of the River Aire and reduce the risk of flooding. However more needs to be done to protect communities and build self-reliance and resilience amongst communities in order to prepare for, respond to, and recover from extreme weather events.

Energy system transformation

Our energy system is decarbonising and becoming more decentralised and efficient

UK Government policy is increasingly driving towards a decarbonised energy system. The Government’s 10-point plan for a ‘green industrial revolution includes producing enough offshore wind to power every home in the UK, quadrupling how much it produces to 40 gigawatts by 2030⁴⁹. As well as decarbonising our energy system we need to be more efficient with the energy we

use. Buildings make up a significant proportion of our energy use and the Energy Efficiency Directive identified existing building stock as “the single biggest potential sector for energy savings”⁵⁰. Leeds have received £18m from the Getting Building Fund and £2m of this will be used to improve older terraced homes in the Holbeck area to improve the energy efficiency of properties and help to reduce fuel bills. Furthermore, the energy system is also becoming more decentralised offering greater local system resilience and efficiency, reduced greenhouse gas emissions and lower cost extension of grids to unconnected locations. Leeds is developing a Local Heating Network to provide sustainable heat and hot water to homes, businesses and civic buildings using heat generated from household waste at the city’s Recycling and Energy Recovery Facility.

Environmental net gain

The built environment is moving towards practices that deliver environmental net gains

The built environment is moving away from practices and designs that take from the planet (e.g. degenerate) towards net positive (e.g. net gain) practices that return more than they take. Solutions include integrating green and blue infrastructure and urban greening⁵¹. This often not only delivers environmental benefits such as carbon sequestration, biodiversity and combatting extreme weather events, but other social and economic co-benefits. It is estimated in 2017, the removal of pollution by vegetation in the UK equated to a saving of £1.3 billion in health costs⁵² and the cooling shade of trees and water saved £248 million by maintaining productivity and lowering air conditioning costs⁵³. Leeds City Council already have plans in place to deliver environmental gains. An additional 1,250 hectares of woodland will be created over 25 years, doubling the amount of woodland in Leeds and transforming the way parks and green spaces are managed.

Appendix B: Document List

Document/Resource	Source	Date
Beyond the curve -a visual journey in to our post-pandemic future	Arup	2020
Future of offices in a post-pandemic world	Arup	2020
Future of mobility trends cards	Arup	2019
https://invest-leeds.co.uk/		
InvestLeeds	N/A	
Leeds Growth Strategy	LCC	2018
Leeds Economic Recovery Framework	LCC	2020
Leeds Health and Wellbeing Strategy	LCC	2016
Leeds Our Spaces Strategy	LCC	2019
Leeds Carbon Roadmap	Leeds Climate Commission	2019
Leeds Digital Festival	Leeds Digital	2021
Leeds Talent and Skills Plan	LCC	2017
CEG Report (Leeds Economy)	Arup	2020
https://www.linkedin.com/pulse/2021-what-now-uk-towns-cities-tom-bridges-1f	Arup	2021
https://www.linkedin.com/pulse/high-street-testbed-tom-bridges/	Arup	2020
Future of stations	Arup	2020
Towns Fund resources	Arup	2020

Document/Resource	Source	Date
Arup White Rose Office Park work	Arup	2020
COVID Business Recovery Scenarios	Arup	2020
Landsec Future of Offices and Retail	Arup	2020
Future of healthcare ecosystem	Arup	2020
LaSalle Future of Retail	Arup	2020
Future of retail thought piece	Arup	2021
Neighbourhood Plans	LCC	—
Leeds Culture Strategy	LCC	2017
<u>LEP Documents/Website</u>		
Leeds City Region Enterprise Partnership	N/A	
High streets in Great Britain – Office for National Statistics	ONS	2020
The impact of office workers' absence on central London's economy	Arup	2020
<u>Leeds 2030 – our vision to be the best city in the UK. Vision for Leeds 2011 to 2030</u>	The Leeds Initiative	2011
Assessing the impact COVID-19 on the City of Westminster's economy	Arup	2020
Leeds South Bank masterplan	LCC	2017
<u>https://leeds2023.co.uk/</u>	LCC	—
<u>https://www.leeds.gov.uk/childfriendlyleeds</u>	LCC	—
<u>https://www.leeds.gov.uk/age-friendly-leeds</u>	LCC	—
<u>https://www.ageing-better.org.uk/our-work/leeds-neighbourhood-network#:~:text=The%20Leeds%20Neighbourhood%20Network%20is,social%20connection%20and%20healthy%20agein</u>	Ageing Better	—
<u>Climate change</u>	LCC	—

Document/Resource	Source	Date
Leeds Core Strategy - Policy P1-Town and Local Centre designations. P policies relate to Centres. Page 96 onwards	LCC	
Leeds Site Allocations Plan - Retail Background Paper (2017)	LCC	2017
Leeds Site Allocations Plan - Retail Background Paper Part 2 (2017)	LCC	2017
Leeds City Centre, Town and Local Centres Study, July 2011	LCC	2011
Authority Monitoring Report 2017/18	LCC	2017
Local authorities power a low-carbon future	Raconteur	November 20
Will UK skills crisis be fixed by vocational education plan?	Financial Times	January 21
Workplace disrupted – five themes that will define the future of work	WEF	January 21
Dark Stores	Raconteur	November 20
Four Comms Mapping 360 webinar report	LCC	January 21
Springboard 2020 Annual Review	LCC	2020
The NPD Group - Springboard Annual review presentation	LCC	2020
Future of towns and cities (KPMG)	LCC	January 21
The fates of Arcadia and Debenhams point to retail's huge problem.	Economist	December 20
Making sense of the knowledge economy	Telegraph	2019

Appendix C: Stakeholder Workshop Attendees

Group 1

David Aspin	Munroe K
Rachael Kennedy	Morley Town Centre Manager and Mayoress
Robin Hawkes	Leeds Playhouse/IG Ambassador
Nathan Clark	Brudenell Social Club
David Smith	Nexus
David Hodgson	CEG/Temple Quarter and Kirkstall Forge

Group 2

Andrew Cooper	Leeds BID
Gerald Jennings	Chair of Morley Town Deal Board
Richard Mantle	Opera North
Alison Gillespie	WYCA
Richard Walker	Institute for Transport Studies

Group 3

Mark Goldstone	Chamber of Commerce
Mike Piet	Leeds Civic Trust
Chris Hollins	VAL/IG Ambassador
Adrian Sinclair	Chapel FM
Paul Connell	ODI Leeds

Appendix D: Scenario Methodology, Assumptions and Limitations

Methodology

Model Boundaries

The model has been developed to distinguish between the impact of the different scenarios on the city centre and the local centres. For example, in a situation with wider home working, we can investigate the benefits for local centres, and how this may impact on the City Centre. In order to do this, we have needed to define the boundary areas for the city centre and local centres (defining the local centres as one collective area for simplicity). When we refer to Leeds as a whole this is the city centre area and local centre area combined (as defined below).

The Leeds city centre boundary is defined by 16 LSOA areas (2011 Super Output Areas – Lower Layer). This is an ‘extended’ city centre boundary i.e. includes additional LSOAs to what is traditionally defined as the city centre. This was to capture areas including the University of Leeds, Leeds General Infirmary, the Leeds Dock, Quarry Hill, Rose Wharf area; and more of Holbeck. See Figure 11.

The Leeds local centres are considered on an aggregated basis. The Leeds District area is defined by the ‘Leeds’ District/unitary (as of April 2020) – see Figure 12. When considering the impact on the local centres, the area is the District/Unitary boundary ‘minus’ the Leeds City Centre boundary (as defined above). As such, it is important to note that when considering the impact on the local ‘centres’ this will include all other areas in between including more rural geographies.

Variables

The scenarios explore the following key variables looking out to 2030;

- The economy (e.g. employment, GVA data)
- Office worker behaviour (e.g. number of days working from an office based in the city centre vs home or co-working in a local centre)
- Leeds’ population (e.g. population in total and population in city centre and local centre).

LSOA Area Codes	
075F	111C
075G	111D
063B	111E
063D	112D
063E	112E
055H	82E
111A	82F
111B	85A

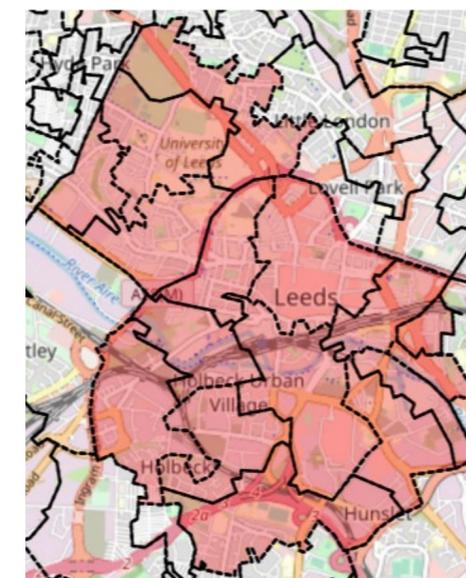


Figure 11
Extended City Centre Boundary and area codes used to define the boundary

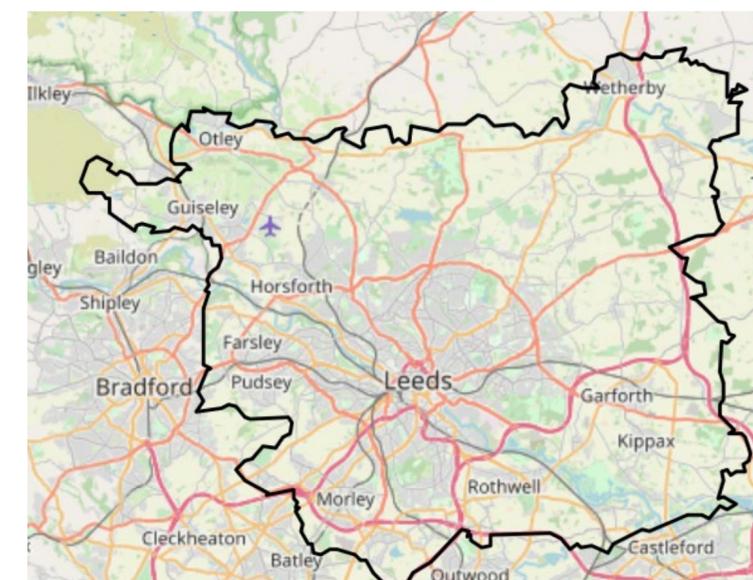


Figure 12
Local Centre Boundary (Map data © OpenStreetMap contributors, CC-BY SA, Nomis)

Prioritised Trends	Key Variables and Projections		
	The Economy	Office Worker Behaviour	Population (total, city, and local centres) ^{vi}
Baseline scenario	<p>Employment grows at the similar rate to pre-covid; 2.6% in the city centre and 1.2% in the defined local centres area^{vii}.</p> <p>It is assumed that GVA will increase at a similar rate to pre-covid (1.5%)^{viii}.</p>	Workers are five days a week in an office (in the city centre)	<p>Population continues to grow at a similar rate to pre-covid^{ix}</p> <p>Leeds: 0.5%</p> <p>City centre: 2.7% in the city centre</p> <p>Local centres: 0.4% in the local centres</p> <p>Population in 2030 (vs 2019): Leeds: 840,740 (793,140) City Centre: 56,790 (42,330) Local Centre: 783,950 (750,810)</p>
Bounce-back to a new normal	<p>Decrease in employment of -1.5%^x in 2020 and 2021 resuming to the pre-covid growth rate by 2022 (2.6% in the City centre and 1.2% in the defined local centres area)^{xi}. Total employment in Leeds returns to pre-covid (2019) levels by 2023.</p> <p>GVA will follow a delayed V-shaped recovery projection^{xii}, and assumes that GVA returns to pre-covid levels by 2022.</p>	Workers return three days a week to a city centre office, two days at home or in a local centre office	<p>Population continues to grow at same rate as pre-covid^{xiii}:</p> <p>Leeds: 0.5%</p> <p>City centre: 27% in the city centre</p> <p>Local centres: 0.4% in the local centres</p> <p>Population in 2030 (vs 2019): Leeds: 840,740 (793,140) City Centre: 57,790 (42,330) Local Centre: 783,950 (750,810)</p>

^{vi} Figures are rounded to the nearest 10 persons

^{vii} Calculated by applying the Compound Annual Growth Rate (CAGR) between 2015 and 2019
The CAGR is the average rate of growth over a certain period of time

^{viii} Calculated using the CAGR between 2015 and 2019. Experian GVA forecast data has been used as the baseline

^{ix} Calculated by applying the CAGR between 2015 and 2019

^x -1.5% change in employment between December 2019 and December 2020
(ONS Labour market statistics time series dataset (LMS))

^{xi} Calculated using the CAGR between 2015 and 2019

^{xii} See data limitations below

^{xiii} Calculated by applying the CAGR between 2016 and 2019

Prioritised Trends	Key Variables and Projections		
	The Economy	Office Worker Behaviour	Population (total, city, and local centres) ^{vi}
Widespread home working	<p>Decrease in employment of -1.5% in 2020 and 2021 resuming to the pre-covid growth rate by 2022 (2.6% in the City centre and 1.2% in the defined local centres area). Total employment in Leeds returns to pre-covid (2019) levels by 2023.</p> <p>GVA will follow a delayed V-shaped recovery projection, and assumes that GVA returns to pre-covid levels by 2022.</p>	Workers spend two days a week in a city centre office and three days at home or in a local centre office	<p>Total population: grows at a higher rate (0.6%) than pre-covid (0.5%) driven by local centre growth</p> <p>City centre: slows to a 1.35% increase (compared to 2.7% pre-covid)</p> <p>Local centre: increases to 0.6% (from 0.4% pre-covid).</p> <p>Population in 2030 (vs 2019): Leeds: 850,930 (793,140) City Centre: 49,060 (42,330) Local Centre: 850,930 (793,140)</p>
Significant headwinds	<p>Decrease in employment of -1.5% then resume to a low growth rate of +0.5 % in 2022. Total employment in Leeds returns to pre-covid (2019) levels by 2028</p> <p>A -1% growth reduction has been applied to the GVA projections for a delayed V-shaped recovery.</p>	Workers are two days a week in a city centre office and three days at home or in a local centre office.	<p>Total: population stagnates at 2019 level (0% growth)</p> <p>City centre: population stagnates at 2019 level (0% growth)</p> <p>Local centre: population stagnates at 2019 level (0% growth)</p> <p>Population in 2030 (same as 2019): Leeds: 793,140 City Centre population: 42,330 Local Centre: 750,810</p>

General Assumptions

Footfalls in 2020 and 2021

It is assumed that there is a 68% decrease in footfall in the city centre in 2020 and 2021. In the absence of any alternative data, this is an Arup assumption based on analysis as part of a previous project. However, as emphasised above, the model is intended to take a longer-term view, as opposed to offering insights about short-term economic recovery.

Tourism

The model does not consider the impact of tourism.

Definition of Office workers

Office workers include emerging office-based jobs; traditional office-based jobs; and Public sector: administration, education, health and social services.

Spending

It is assumed that spending is the same whether working from home or in a local centre office space such as a co-working space.

It is assumed that when working from home, people have a higher propensity to save. Of redistributed spend, it is assumed that 50% of spend would be spent locally but 50% of spend would actually be saved or spent online (i.e. spend is 'lost' to outside of the Leeds area). Due to limited data available on worker spend in the Leeds area, the assumption has used London-based spending assumptions (grounded in more data) with a reduction applied. The reduction has been calculated by comparing the difference in household resident spend between London and Yorkshire and Humber (ONS data) and applying the same ratio. It is therefore assumed that the average worker in the Yorkshire and the Humber region would spend 69% of the average worker in London. The table (right) is in £2020 prices^{xiv}.

Type of worker spend	London assumption	Yorkshire and Humber assumption
Retail and other services	£4.30	£2.96
F&B	£6.40	£4.41
Entertainment	£2.30	£1.58
Total	£13.00	£9.00

^{xiv}Note figures are rounded

GVA Assumptions

GVA data provided by Experian has been used as the base data set for all GVA projections, with different assumptions applied to the historical data. All scenarios assume the same level of GVA between 2015 and 2019 inclusive. From 2020, different assumptions have been applied to the Experian forecast data to illustrate different scenarios.

GVA per worker was projected at a Leeds geographical level with a 10% increase then applied to the city centre geography. This assumption is merely illustrative, as a means to express the potential productivity benefits that professionals may gain from working 'face-to-face' with their colleagues in a city centre office and/or those who would benefit from being in an office environment made for working (recognising not everyone has an optimal working environment at home). It is recognised that not everyone can do the tasks that their jobs require from home, and there is debate and nuance around the relationship between homeworking and productivity. Variables such as the type of business, sector, stage of career and the existence of a comfortable space to work at home will all likely have an impact.

No Covid (baseline)

Under this scenario, it is assumed that GVA increases at the Compound Annual Growth Rate between 2015 and 2019 (based on the Experian data).

Bounce-back to a new normal and widespread homeworking

Under this scenario, the projections made by Experian have been used. The projections assume that GVA in Leeds returns to pre-covid (2019) levels by 2022.

Significant Headwinds

This scenario uses the Experian GVA projections with a -1% growth assumption applied to illustrate a less favourable economic scenario.

Population Assumptions

Baseline and Bounceback to new normal scenarios

The no-Covid (baseline) and Bounce-back to a new normal scenarios have used the Compound Annual Growth Rate between 2016 and 2018 based on historical data published by the ONS. Figure 13 below shows the projected total population for this scenario, both within the city centre (approximately 56,790 in 2030) and across the District excluding the city centre (an

estimated 783,946 in 2030). Figure 14 shows the percentage change in population assumed within this scenario (2.71% growth in the City Centre and 0.4% in the Local centres from 2020 through to 2030). The overall growth rate of the population within Leeds remains similar at the pre-covid rate (0.5%, the same as the CAGR within Leeds between 2016 and 2019). Overall population in Leeds in 2030 is estimated to be c. 840,740.

Figure 13: Maintain pre-covid growth rate (Total population assumed for Baseline and Bounceback to new normal scenarios)

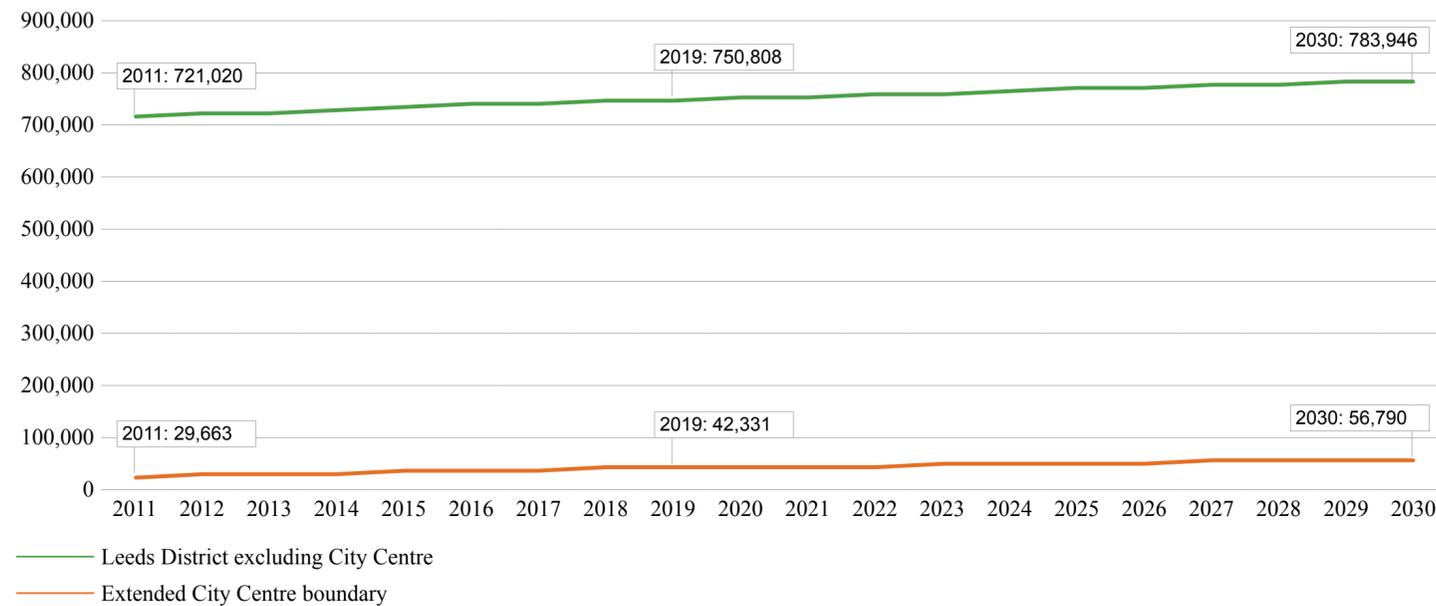
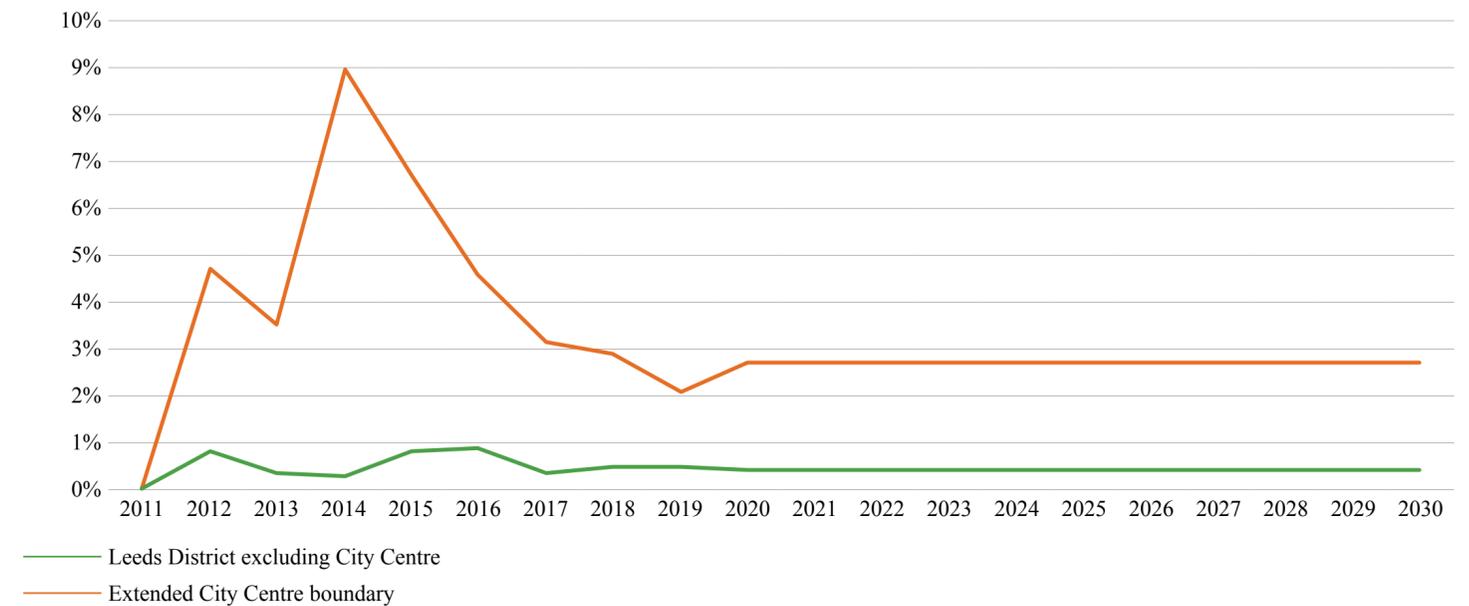


Figure 14: Maintain pre-covid growth rate (% change in population assumed for Baseline and Bounceback to new normal scenarios)



Widespread Homeworking

The widespread homeworking scenario assumes that the population within the local centres would grow at a higher rate than historically; 0.6% compared to 0.4% (CAGR 2016–2018). It is also assumed that the population within the City Centre grows at a slower rate than historically; 1.35% compared to 2.7% (CAGR 2016–2019). At a Leeds wide level, growth is higher (0.6% from 2020) compared to the pre-covid growth rate

(0.5%; the CAGR within Leeds between 2016 and 2019). By 2030, overall population across Leeds as a whole is the highest of all scenarios at approximately 850,930. Figure 15 below shows the projected total population for this scenario, both within the city centre and across the District (excluding the city centre). Figure 16 shows the percentage change in population assumed within this scenario.

Figure 15: Higher district growth (Total population assumed for Widespread Homeworking)

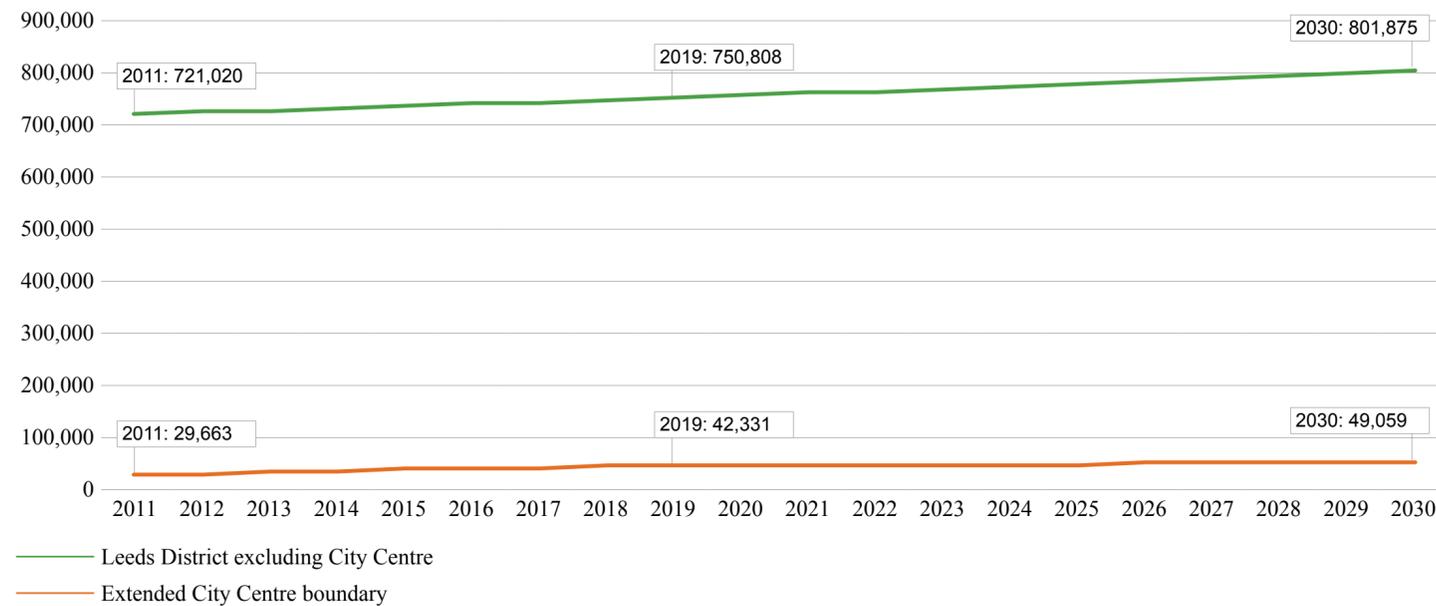
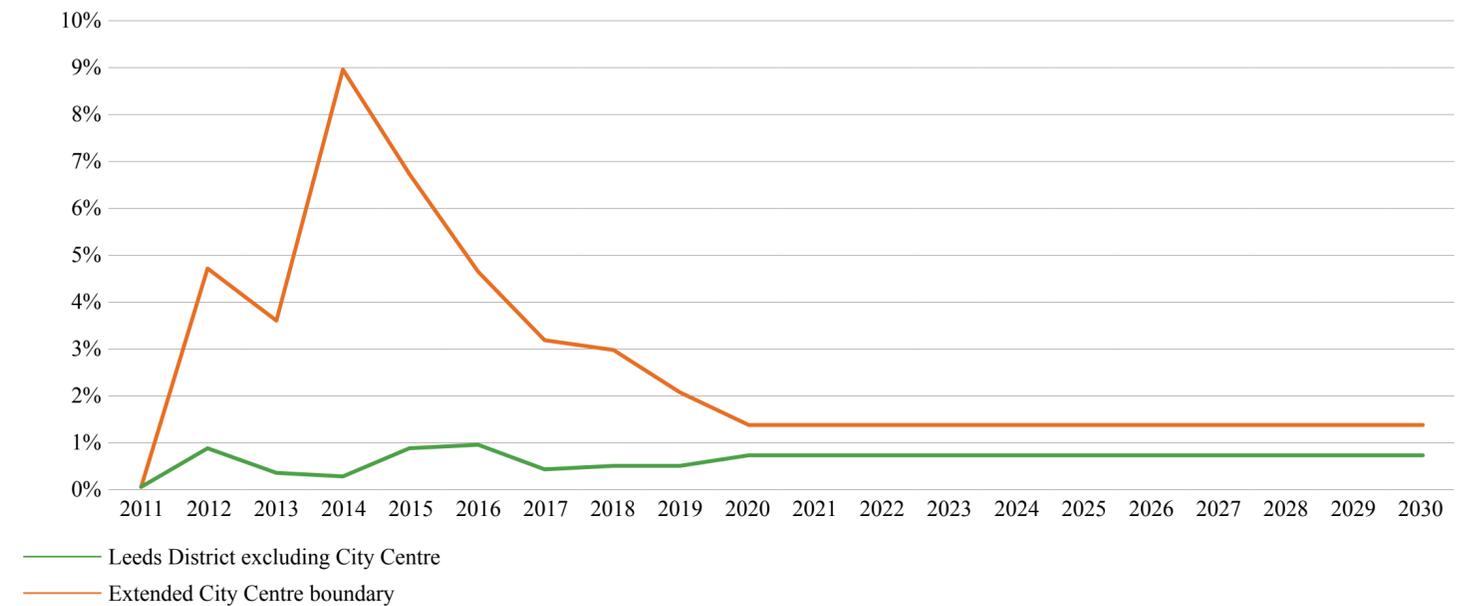


Figure 16: Higher district growth (% change in population assumed for Widespread Homeworking)



Significant Headwinds

The significant headwinds scenario assumes that the population within the city centre and the local centres stagnates at 2019 levels (0% growth). Figure 17 below shows that the projected population in the city centre remains at approximately 42,330, whilst the population of Leeds District excluding the city centre remains approximately 750,810 through to 2030. In 2030, overall population within Leeds is assumed to be 793,140 (the pre-covid 2019 level). Figure 18 shows the historical percentage change in population and the 0% growth assumption after 2019.

Figure 17: Population stagnation (Total population assumed for Significant Headwinds Scenario)

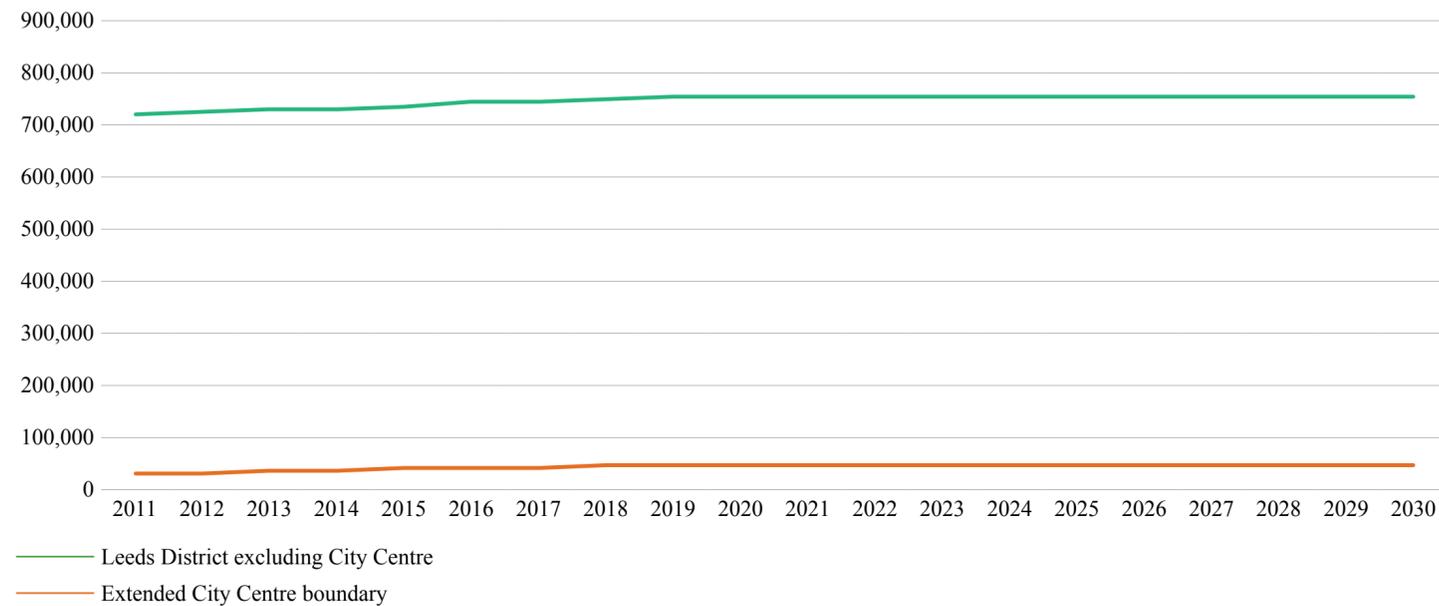
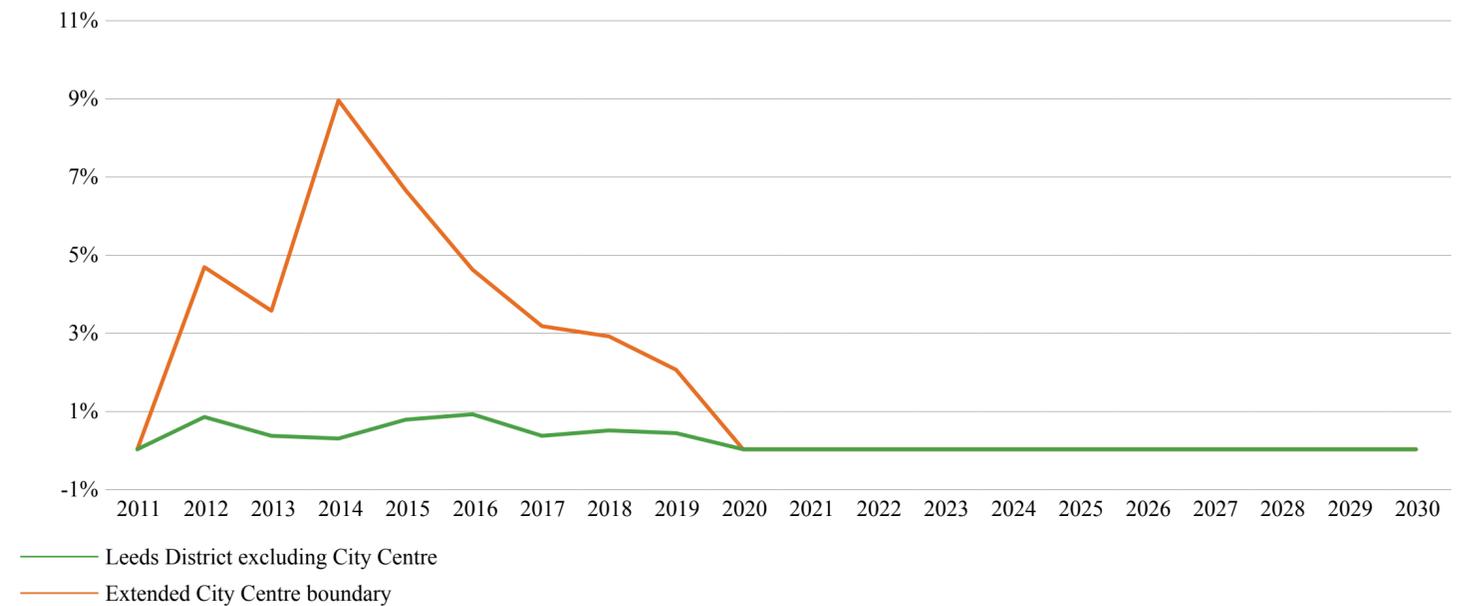


Figure 18: Population stagnation (% change in population assumed for Significant Headwinds Scenario)



Employment Assumptions

No Covid-19 (Baseline) scenario

In the no Covid-19 (baseline) scenario it is assumed that employment grows at a similar rate as pre-covid (2.7% in the city centre and 1.2% in the locals), calculated using the Compound Annual Growth Rate between 2015 and 2019 based on historical data published by the ONS. At an overall Leeds level, this corresponds to growth of 1.7% from 2020. Figure 19 below shows the projected total employment for this scenario,

both within the city centre and across the District (excluding the city centre). The city centre employment is projected to increase from approximately 134,855 in 2015 to 201,559 in 2030. Employment within the locals is assumed to increase from approximately 309,080 in 2015 to 367,911 in 2030. Figure 20 shows the percentage change in employment assumed under this scenario. Total employment^{xv} in Leeds is estimated to be 569,470 in 2030.

Figure 19: Total change in employment (No Covid/Baseline)

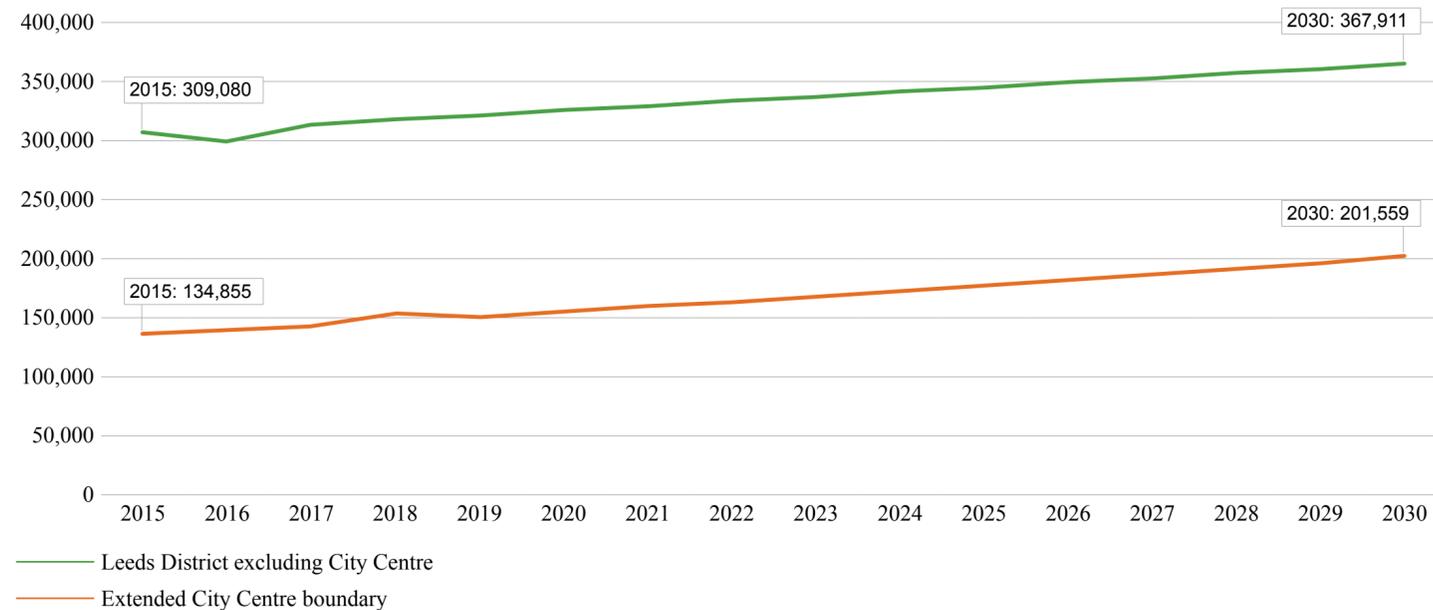
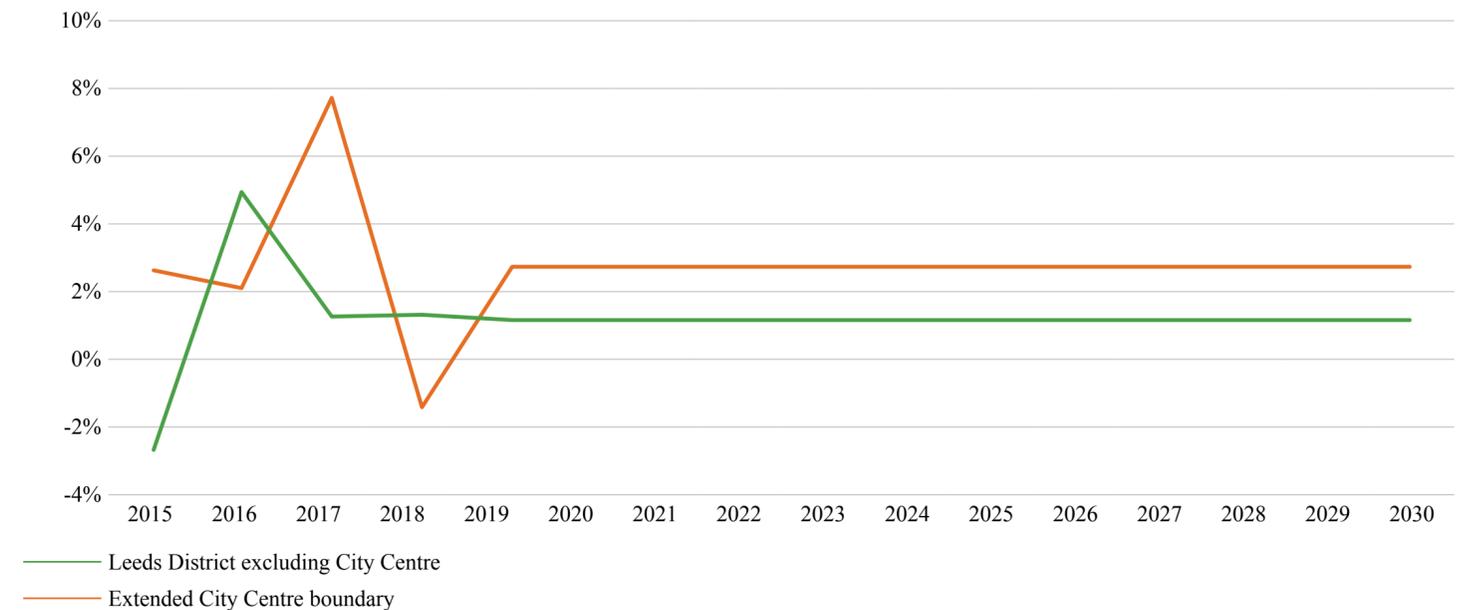


Figure 20: Percentage change in employment (No Covid/Baseline)



^{xv}BRES definition of Employment. "Employment includes employees plus the number of working owners. BRES therefore includes self-employed workers as long as they are registered for VAT or Pay-As-You-Earn (PAYE) schemes. Self-employed people not registered for these, along with HM Forces and Government Supported trainees are excluded."

Bounce back to a new normal and Widespread Home working scenarios

In the bounceback to a new normal and widespread homeworking scenarios it is assumed that employment growth contracts by 1.5% in 2020 and 2021, turning to a similar pre-covid growth rate in 2022 (2.7% in the city centre and 1.2% in the locals), calculated using the Compound Annual Growth Rate between 2015 and 2019 based on historical data published by the ONS. At an overall Leeds level, this corresponds to growth of 1.7% from 2022. Figure 21 below

shows the projected total employment under this scenario, both within the city centre and across the Local (excluding the city centre). City Centre employment is projected to increase from 134,855 in 2015 to approximately 185,354 in 2030. Employment within the locals is assumed to increase from approximately 309,080 in 2015 to 348,759 in 2030. Figure 22 shows the percentage change in employment assumed under this scenario. It is assumed that the total employment in Leeds returns to pre-covid (2019) levels by 2023. In 2030, total employment within Leeds is estimated at 534,113.

Figure 21: Total change in employment (Bounce back to a new normal and Widespread Home working)

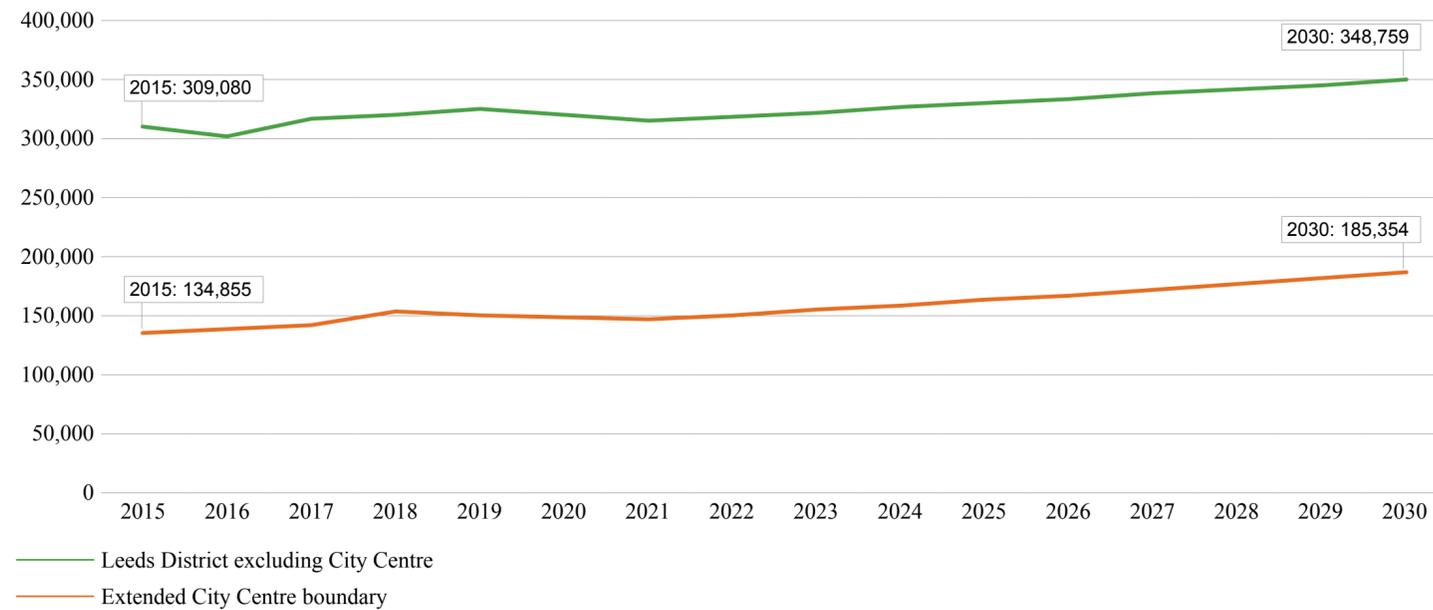
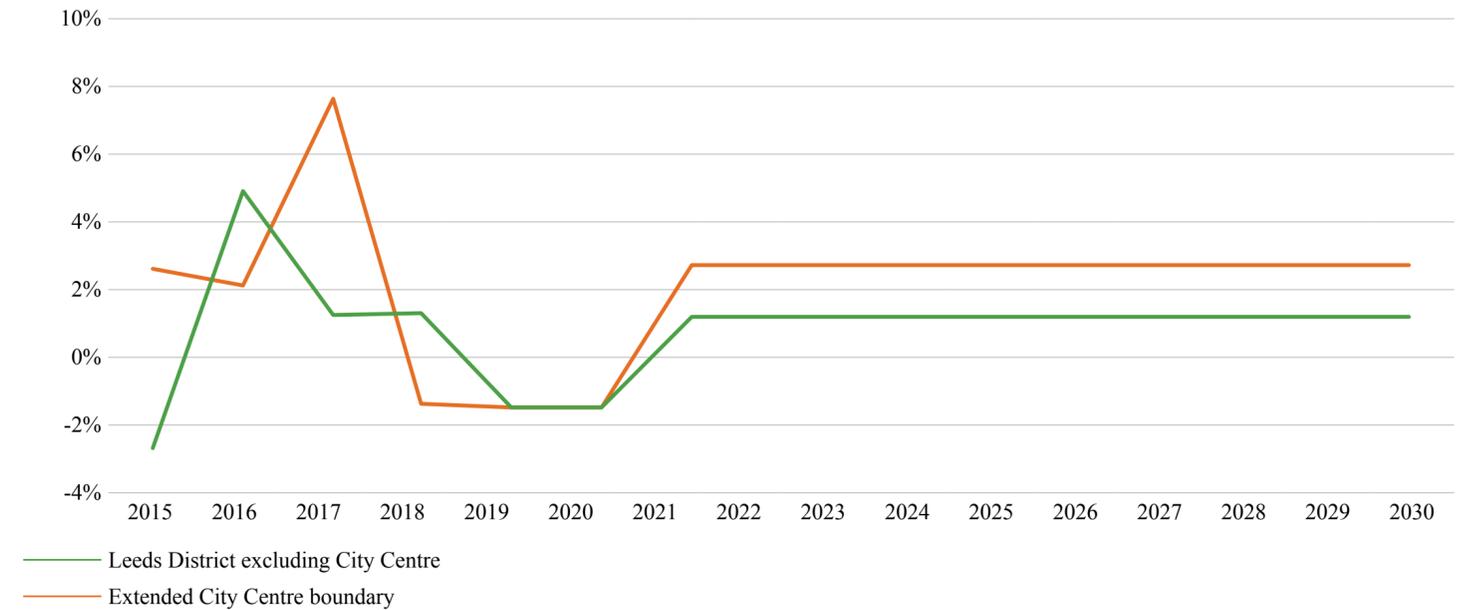


Figure 22: Percentage change in employment (Bounceback to new normal and widespread homeworking scenarios)



Significant headwinds

The significant headwinds scenario assumes employment growth contracts in both the city centre and the local centres by 1.5% in 2020 and 2021, returning to a positive but slow 0.5% growth rate in 2022 within both the city centre and the local centre. Figure 23 below shows employment projections for this scenario, both within the city centre and across the District (excluding the city centre). City Centre employment

is projected to increase from 134,855 in 2015 to approximately 152,327 in 2030. The employment within the local centre area is assumed to increase from 309,080 in 2015 to 328,562 in 2030. Figure 24 shows the percentage change in employment assumed under this scenario. It is assumed that the total employment in Leeds returns to pre-covid (2019) levels by 2028. In 2030, total employment in Leeds is estimated at 480,889 under this scenario.

Figure 23: Total change in employment (Significant Headwinds)

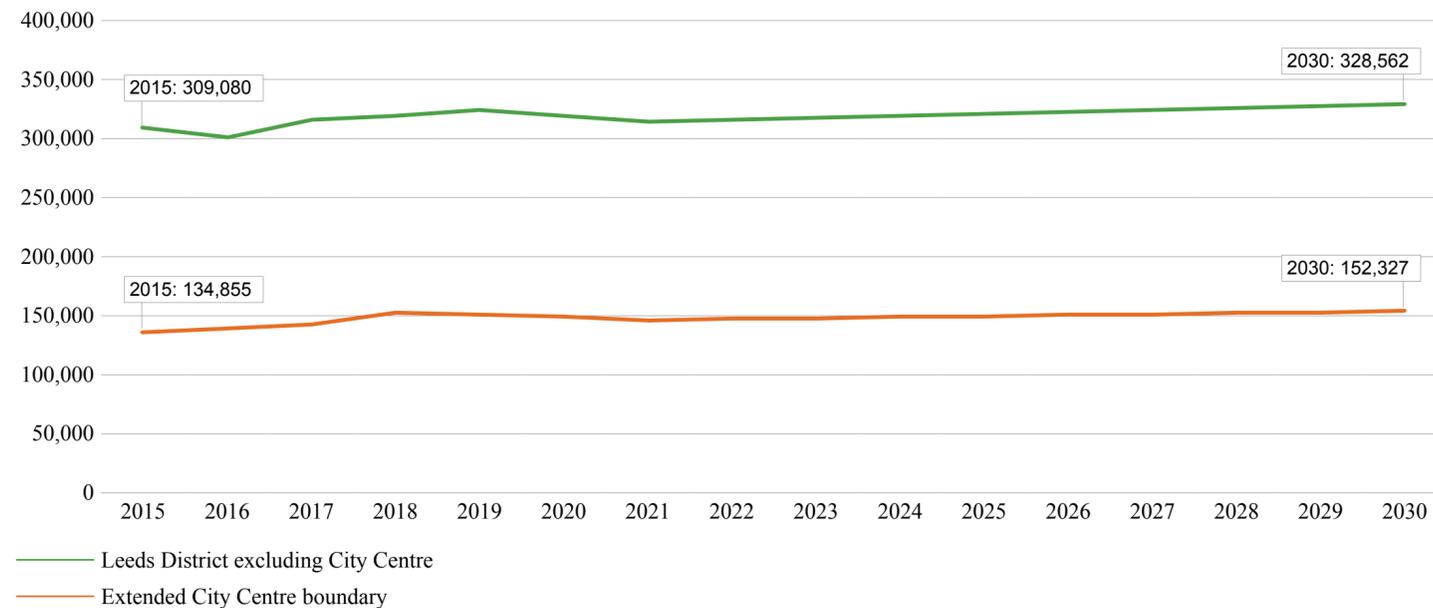
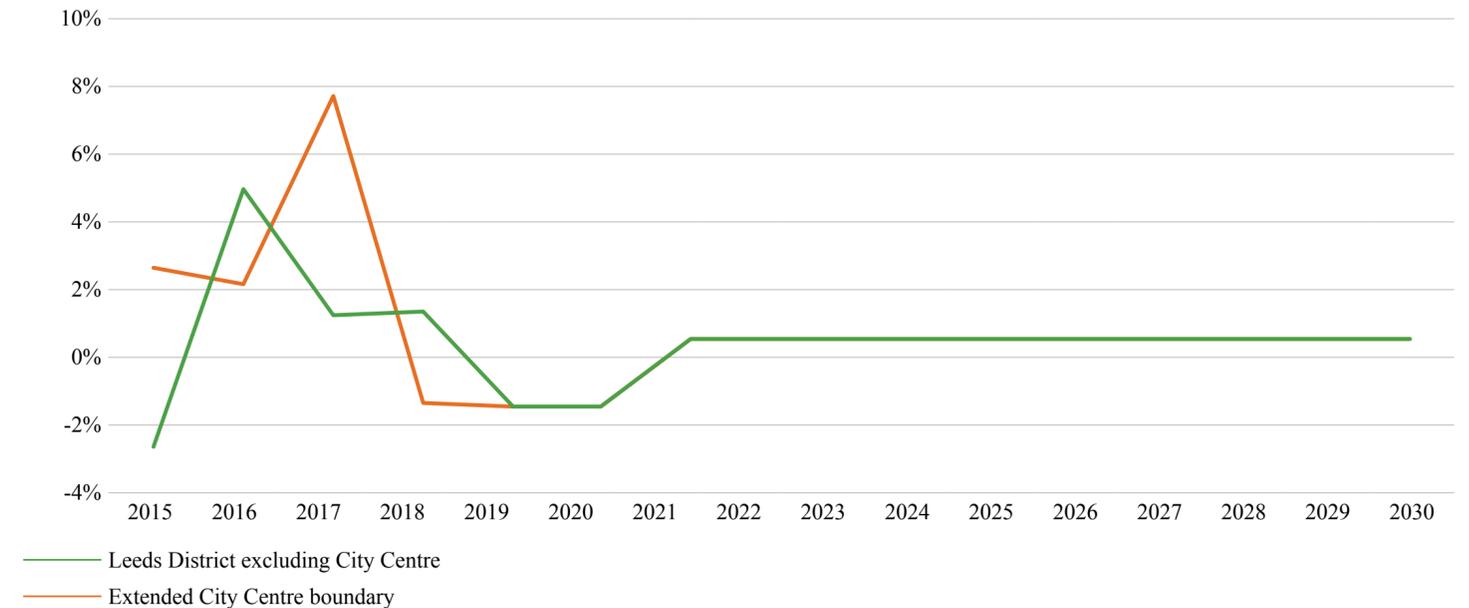


Figure 24: Percentage change in employment (Significant Headwinds scenario)



Data and Model Limitations

Population Projection Data

Whilst the ONS publish population projections, no projections are available at the level of granularity required (LSOA level which has been used to define the city centre boundary).

As such, the compound annual growth rate in population between 2016 and 2019 has been used (based on historical data published by the ONS) for the no-covid and bounceback to new normal scenarios.

When this calculated projection is compared to the principal population projection published by the ONS on a district wide level, there is therefore a discrepancy. In 2019, there is a 0.04% difference (340 persons) rising to 2.6% in 2030 (21,268 persons), although the discrepancy smaller when compared to the high migration scenario published by the ONS^{xvi}.

Similarly, the widespread homeworking scenario assumes a higher population growth rate within the local centres and a lower population growth rate in the city centres than the historical data (assumes higher population overall within Leeds in 2030 than the other scenarios) and will therefore not correspond to ONS published projections. For example, under widespread homeworking, overall population in Leeds is assumed to be c.851,000 which is approximately 16,000 persons higher than the ONS published ‘high migration’ projection.

The significant headwinds scenario assumes the population stagnates based on the historical trend.

It should also be noted that the age of the population has not been considered as a data input.

GVA Forecast Data

As detailed above, GVA forecast data provided by Experian has been used for the ‘Bounce-back to a new normal’ and ‘widespread homeworking’ scenarios. The GVA projection provided was based on a ‘Delayed V-shape recovery’ and is underpinned by various assumptions, some of which could be deemed as outdated. Key assumptions include:

- “The virus is successfully contained in 2020Q2”.
- “The rebound in activity from the unwind of suppression measures is initially gradual, but gathers pace from late 2020Q3 and the resurgence of cases remains controlled”.
- The vaccine begins to be rolled out amongst the at-risk population group in 2021 H1.
- “Enforced lockdown triggers a sharp drop in output in early 2020 Q2; activity recovers slowly in 2020 Q3, gathering momentum in 2020 Q4 with output returning to pre-covid levels by 2022.”
- “Unemployment peaks in 2020Q3 and remains elevated into 2021” (note that this assumption is marginally different to the employment input data which assumes employment reaches its lowest point in 2021).

Study Area

As defined above, the local centres have been simplified as the Leeds district boundary excluding the extended city centre boundary. As such, it is important to note that employment, population and GVA inputs apply to an area wider than the local ‘centres’ and include all other areas in between including more rural geographies.

^{xvi}See figure 5. <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/subnationalpopulationprojectionsforengland/2018based>

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