

Leeds Growth Strategy

Getting Leeds working





Vision

Leeds' vision is to become the best city in the UK by 2030. It will be fair, open and welcoming with an economy that is both prosperous and sustainable and all our communities will be successful.

A successful economy is central to the delivery of this vision. With the recent government announcement of the local retention of business rates, a growing economy will become the generator of income to invest in infrastructure and help pay to strengthen and sustain local services.

This strategy is therefore a statement of intent about the opportunities and priorities the city will pursue to deliver growth and get Leeds working to its fullest capacity. We are also just as concerned with making sure that growth translates into real benefits for people, improving their quality of life whatever their age and background. So the strategy also reflects some of the social and cultural aspects of growth and recognises the substantial contribution to be made by the third sector to the health and vitality of the economy.

We want growth and the jobs that are associated with a successful economy for the benefit of our residents. However the growth cannot come at any cost, we will still minimise the impact on our greenbelt land and ensure that growth is for the benefit of people and not to their detriment. Therefore, the strategy includes traditional economic development action that will attract jobs and investment but also focuses on new activity around social enterprise that will help reduce inequality.

Leeds has had a long and proud history as a successful city. In recent years it has quickened its pace in delivering beneficial change for many of its residents. The economy's diversity across sectors

remains strong and this continues to serve the city well. This becomes even more apparent at times of economic stress. Yet Leeds also has immense growth opportunities in key sectors where the city's assets and advantages shine through. The strategy combines this strength in depth with timely opportunities for the city to further develop new areas of leadership and excellence in its key sectors. In shorthand, it is a recipe of resilience plus brilliance.

Whilst in many ways Leeds is a big diverse city, like other core cities across Britain, it also has its unique selling points.

- It is one of the most cost effective office locations in the whole of Europe
- It has the one of the fastest rates of population growth of any major UK city
- It is home to one of the UK's fastest growing airports
- It is developing Europe's first, purpose built, super theatre arena
- It is within an hour's drive of three national parks which contribute to a superb quality of life

These advantages are critical to protecting and strengthening the city's competitive edge. It also has a unique appeal to those already here. With its active third and cultural sectors, communities are being empowered to help themselves and solve their own problems.

Leeds has transformed itself in the last 20 years. It is the second biggest local authority area in England, home to 800,000 people and has a

I. Health, medical and the ageing population

A world Leader

What

Health is already a major contributor to the city's economy but it has potential to make a much larger impact. The city is home to the largest teaching hospital in Europe. Our universities have leading healthcare expertise. And the city is host to the Department of Health's northern base, a spread of related health agencies and future home of the new NHS National Commissioning Board. The city's health services offer is complemented by its business base. Over 100 businesses employ close to 3,500 staff, including companies such as DePuy International and Brandon Medical. Innovation and R&D is high level and prominent, with Medipex just one example of a successful innovation hub. The potential to connect expertise and R&D to the manufacture of health products and delivery of health services is immense.

This concentration of expertise and jobs in health translate into wealth and well being. Putting the currently disparate pieces of this jigsaw together will reveal a picture of a literal 'healthy economy' that the city can exploit to power future growth and enhance quality of life. The health and medical sector in the city will be one of the fastest growing globally, a lynchpin of the city's economy, and central to its quality of life.

Why

- It supports a **multitude of jobs** – some 32,500, many of them highly skilled.
- Healthcare is **one of the world's fastest growing sectors**. An ageing population and heightening expectations mean that growth is set to continue.
- Leeds has **internationally significant assets** and distinctive strengths that few can rival.
- There are multiple pressures on **health and care services**, with large differences in life expectancy across the city and strained finances set against increasing demands. Innovation and efficiency is needed to meet those challenges and

to enhance the health and well being of residents and their productivity as employees.

Moving Forward

Leeds will:

- Create a health hub partnership and network where businesses, universities, the NHS and the council collaborate to create and implement the Health Hub vision
- Create an advanced medical park, providing space for inward investors and expanding health and medical companies, and connecting them to health expertise and R&D
- Devise and deliver innovation support services that assist medical technology companies to invest in and expand R&D and new product development
- Expand Leeds' role and reputation as a home for health organisations and top class health services, expanding employment and improving cost effective service delivery which significantly improves the overall health of the city's residents

2. Financial and Business Services

The leader in the North

What

The financial and business services sector is both a regional and national centre and is intimately linked to the city's prosperity. It is central to Leeds' domestic business profile and its global reputation.

During the last decade employment in the sector grew by 25,000, and it drove growth and jobs in the city. Over the next decade, and despite the recession, it is forecast to account for 27% of employment growth. Across the Leeds city region, nearly a quarter of a million people are employed in the sector with output valued at £13bn per year.

The sector is broad and includes accountancy and legal services, banking, insurance, stock broking and venture capital as well as many other services to business. It has new opportunities in areas including low carbon finance. We want to ensure talented people can build careers in the sector in Leeds right from their first job to a top job. That does not require extensive direct public sector support but it does mean working together with the financial and business services sector and providing an environment to support it.

Why

- The city has distinctive strengths and assets to build on. It is **the second biggest centre for the sector nationally** outside London and is home to the Bank of England's only base outside the capital.
- After the trauma and shake up of the recession, the sector is **well placed to grow strongly**, and more sustainably, creating jobs and wealth.
- It **services other key sectors and businesses** in Leeds and the wider city region, helping them to access support on the doorstep.
- It is **internationally recognised** and connected and enhances the profile of the city.

Moving Forward

In partnership, Leeds will:

- Promote and raise the profile of the sector and its strengths in Leeds to a national and global audience
- Further enhance the City and its centre as a great location for the sector, including its housing, environmental, lifestyle and skills offers
- Improve transport links within Leeds and the city region, to Manchester and to London, with continued work to ensure plans for high speed rail in Leeds are implemented
- Build a specialism within low carbon finance and environmental investment, linked to supporting functions or outposts of the new Green Investment Bank

3. Low Carbon Manufacturing

The supplier to the 21st century energy industry

What

Leeds has a large and diverse manufacturing sector that employs over 30,000 people. It is a city that makes things as well as one that does deals and provides services. It is imperative that the city retains this combination. No one manufacturing employer dominates and the sector encompasses a very broad range of mostly small and medium sized businesses. These include everything from advanced engineering, electrical equipment and electronics to food and drink, print and publishing. Support to manufacturing will remain vital to our strategy for growth

One thing manufacturers have in common is exposure to the rising costs of energy, water and natural resources. Driving down those costs will enhance competitiveness and reduce the city's carbon footprint. Environmental technologies present major opportunities too. Already leading businesses in the city such as Kelda are pioneering low carbon products and capturing new markets. And Leeds is at the centre of a region where low carbon opportunities are being exploited in every direction, in carbon capture and storage, renewable energy and many other fields. The task is to further define, communicate and exploit the city's USP in this area.

Why

- A **diverse manufacturing base adds to the economy's resilience** but the sector is vulnerable to changes in international markets and commodity prices. Building its strength, efficiency and exports will boost GVA and help to arrest the trend of declining employment.
- **Manufacturing and low carbon are closely linked.** The resource efficiency measures that help to combat long term price rises in energy and resources also reduce carbon footprints. Furthermore there are great opportunities to make the products required in a low carbon economy or to supply the companies which do.
- Leeds needs to nurture a 'centrepiece' low carbon manufacturer or specialism. Whilst it is

at the geographic heart of low carbon activity

in the North and the Midlands, the city also has the potential to be at the epicentre of one of the biggest growth industries over coming decades. The recent award of Enterprise Zone status to the Aire Valley Leeds will support this work.

Moving Forward

Leeds will:

- Encourage the growth of the manufacturing sector by better linking it into available support, for instance on innovation, investment, exports and skills development.
- Support manufacturers to reduce waste, energy, water and transport costs through resource efficiency and, specifically, through support to the 'waste to energy' initiative.
- Build low carbon and environmental attributes into key opportunities – notably in the health and medical sector; housing, construction and the Aire Valley development.
- Put Leeds at the heart of low carbon manufacturing by becoming a centre that links and serves low carbon industry and attracts major investments within it as a priority.

4. Creative, Cultural and Digital Industries

Creating a (city centre) buzz

What

Creative and digital industries (CDI) is a broad sector that includes fields as diverse as media, music, visual and performing arts, publishing, architecture, advertising, and computer games and software. Together they employ over 12,750 people and contribute £270 million to GVA.

The CDI sector has distinctive qualities and needs. It is dynamic, entrepreneurial and innovative and includes very many small businesses and freelancers. It values flexibility, a 24 hour culture, proximity to the city centre, ICT infrastructure, the ability to interact and an outward mindset. Areas such as Holbeck Urban Village on the city centre fringe have become creative hubs, with flagship bases such as the Round Foundry. There is much to build on: the task is to help the sector do this without suppressing the creative and independent philosophy that helps it thrive. There is a greater need to recognise the cultural offer and its importance to economy. The city has a great cultural offer with world leading sports teams a regional theatre of good standing and its own ballet and opera companies. The visitor economy is of great value to the city and opportunities for growth are available.

Why

- The Leeds CDI sector is one of the largest in the UK. It is **highly skilled and productive**, with GVA per worker three times regional average. Its growth can be fast and valuable.
- The sector supports the city and its economy more widely through **raising its profile, nurturing creativity and enterprise** and providing specialist services to businesses.

- There is scope to capitalise on current strengths and **assets including the software and gaming sector** and developments such as the Round Foundry and Holbeck Urban Village.
- **Culture** has a major role to play in attracting inward investment to the city; creativity is also a driver of growth across all sectors.

Moving Forward

Leeds will:

- Use a detailed assessment of the sector to clarify its nature, niches, needs and opportunities, how it complements and competes and how firms can grow.
- Establish a design institute similar to Barcelona and Stockholm and based around our existing areas of Holbeck Urban Village.
- Build on existing and ongoing developments to offer a network of infrastructure that enables CDI businesses to start up, operate, interact and reach their customers
- Work with the sector and ICT providers to enhance asymmetric broadband provision, so that upload speeds, which are crucial to many businesses, match business needs.
- Promote and expand the city's strengths in computer gaming and software.
- Continue to enhance the profile of Leeds and its quality of life, and to recognise its cultural and creative strengths more prominently in promotion of the city.

5. Retail

Leeds loves shopping

What

Leeds is big business for retail. The city centre has nearly 1,000 outlets and the 7th highest retail spend in the UK. There are many more stores and jobs in the sector across Leeds too. Whilst retail is an asset, the city centre's ranking slipped two places in 2010. We are determined and on course to correct that. The landmark Trinity Leeds development will open its doors in 2013, with the mixed use Eastgate Quarters scheme scheduled to follow in 2016. These large, high quality schemes will move Leeds to near the top of the retail rankings. Along with hospitality and catering it is a major draw for tourism and leisure trips which also reflects on inward investment decisions to the city.

There are plans for other parts of Leeds' retail offer too and we will facilitate further growth in retail output and employment. Further opportunities to enhance our offer include improvements to Kirkgate market and using attractive design, cultural attractions and green space, such as the planned South Bank city park, to pull shoppers in. Our goal is to avoid switching shopping from one area to another and, instead, to grow retail across the city centre and our neighbourhoods by enhancing the attraction of shopping in Leeds faster than our competitors.

Why

- It's **a big slice of our economy** – it accounts for nearly 12% of output. We are the headquarters location for big names like Asda. And crucially, over 1 in 5 businesses and more than 1 in 7 jobs in Leeds are in the wholesale and retail sector, so its fortunes affect many people.

- It complements other parts of the economy and **offers jobs at all skills levels**, from entry level to managerial. It's also an area where budding entrepreneurs can make their mark.
- It is part and parcel of making the city a great place to live and helps to attract investors, entrepreneurs and visitors. **Great cities have great centres, great shops and great bars, restaurants and accommodation.** Together with the new arena and city park, new retail will breathe life into the city.

Moving Forward

Leeds will:

- See the Trinity Leeds and Eastgate Quarters developments through to completion.
- Work with the big firms – developers and large retailers to understand their needs, help them grow, attract new outlets to the city such as the John Lewis Partnership and enhance the city centre environment.
- Through Employment Leeds and the Retail Academy, bring together retailers, training providers and communities to build a skilled workforce that can access retail jobs.
- Create a distinctive retail offer, with opportunities for independent and small traders to open shops and succeed. Building on the existence of the country's largest indoor market, we will marry the need for independent shops to our natural entrepreneurial flair.

6. Housing and Construction

Levering public sector assets for jobs

What

Housing and construction are all about development, all about places and their opportunities. Leeds is bristling with just such opportunities. The Aire Valley Leeds is a prime example, and there are plenty of others including in East and South Leeds, Holbeck and the city centre fringe.

Few sectors were hit harder than construction during the recession yet the sector still employs nearly 25,000 people. £4.3bn of major schemes were completed in Leeds in the last decade. Another 6.5bn are proposed, on hold or underway. Housing and construction affect people like few others – providing jobs, incomes and homes, and shaping the communities we live in. It is estimated that a further 60,000 houses will be needed over the next 15 years.

Housing and construction growth will come from focusing on key areas such as the city centre, Aire Valley Leeds with its urban eco-settlement and East Leeds. These are significant areas of opportunity for the city and sector and, by taking advantage of them, we will be able to provide growth in construction jobs and also ensure the city has a housing offer suitable to attract investment and act as a driver for growth.

Why

- The **construction sector is substantial** and employment in it is expected to grow by 16% in the next decade – a figure few other sectors can match and five times UK average.
- Growth in construction and housing **creates jobs, boosts the economy and can improve and regenerate the city** – in turn attracting skilled people, entrepreneurs and investment.

- **The Aire Valley Leeds is a prime example of opportunities** to expand the city in a sustainable way that attracts businesses, improves lives and leads on low carbon.

Leeds will:

- Produce a Leeds City Prospectus and clear plans for housing growth to set out our offer and approach and to catalyse development through the judicious use of the city's land holdings where it is profitable, needed and can most enhance the city.
- Support the continuation of major development schemes such as the Leeds Arena, attract new ones, and seek to unlock those that are currently blocked.
- Utilise Construction Leeds to link construction activity to local employment, training and business opportunities.
- Catalyse key development in targeted areas across the city, including realising its ambitions for transformational development in the Aire Valley Leeds and making this a priority in proposals to attract business and investment.
- We will retrofit old social housing and support businesses to do the same, which will both help meet our low carbon targets but also stimulate demand for products and services in the economy, creating new jobs in a growth sector.
- Produce a Planning Core Strategy for the city that will assist in providing certainty and confidence to investors wishing to bring forward developments supporting sustainable growth.

7. Social Enterprise and the Third Sector

What

The voluntary and community or 'third sector' is smaller, more disparate and more easily neglected than the private and public sectors. But is part of the lifeblood of the city's economy. There are over 3,000 community projects and charities in Leeds that reach places and people that others cannot.

The third sector is about far more than charity. It includes a host of social enterprises that are dynamic businesses in their own right, not just ones that reinvest their profits to provide community benefits. Stretched public finances and reduced grant support – just at the time their services are most required – means times are challenging for the voluntary and third sectors. The challenge is to help the sector not only survive but grow, and in doing so, help to diversify the economy and bring its benefits to citizens.

Why

- Growing the sector would multiply the thousands of jobs within it and help many more people, often in deprived communities, to **build their skills, confidence and well being and to access jobs and incomes**. This will in turn widen and strengthen the workforce.
- Flourishing **social enterprises add to economic vitality**, creativity and entrepreneurial spark at the same time as creating jobs and improving lives. They provide a route into enterprise that may attract those who are less tempted to start a conventional business.
- Specific initiatives such as Employment Leeds and Construction Leeds are demonstrating the importance of **establishing strong links between employers and deprived local communities**.

Moving Forward

Working with bodies promoting social enterprise in the city, Leeds will:

- Assess its scale and role, and ensure that it is properly represented and monitored as a fundamental part of the economy.
- Help people make full use of support that can assist them to set up a social enterprise.
- Look at how procurement and service provision within public sector agencies, led by Leeds City Council, can fully take advantage of all that the sector provides.
- Tap into the sector as a source of distinctiveness and innovative ideas and use it to test and potentially roll out new approaches.
- Ensure the sector's voice is heard and influences how the city and its economy develop.

Delivery

The tools of economic development are changing: a previous reliance on grant funding is no longer available and delivery structures have changed from a regional perspective to a more local and city regional approach. With the future **localisation** of business rates and the current approach of **enterprise zones**, a new approach is needed to ensure that economic growth can drive forward the delivery of other services. Growth must also sit within the confines of the planning framework; the **Core Strategy** is at the centre of this and will help frame our approach.

Local Enterprise Partnerships must be central to any strategy. The **Leeds City Region** is our functional economic market and we must work with partners to maximise the economic drivers we have across the area. This does not mean that we can forget about local delivery, but we will look beyond Leeds as well as within our boundaries. This will at times mean working bi-laterally with our neighbours when it is in both our interests. Our central role within the Leeds City Region means some tasks and roles are better undertaken at that level and through the recently established Local Enterprise Partnership, including some of the work to support the priorities in this strategy.

Given very limited public sector resources, a partnership-based and prioritised approach is crucial. Where sectors naturally extend beyond the city, we will work with them to reflect their real geography. That will often mean working across Leeds City Region and sometimes with neighbouring city regions or with key centres like London. A first task in moving forward will be to clarify how far, and how, the sectoral and underpinning drivers of the economy (e.g. skills,

enterprise) are advanced in Leeds itself and/or in the Leeds City Region. Subsequent plans will make this clear.

Leeds City Council must provide strong leadership and a clear message that growth is important to the city and our residents. The new **Marketing Leeds** will also have a major role to play. Amalgamating work around inward investment, tourism and marketing will ensure that these key drivers of growth are as effective as they can be in the new economic world. Finally the new local enterprise partnership will provide a key strategic lead and link to the business world and other local authority partners.

Whilst progress and activity extends right across the city, for a good number of key sectors, the **city centre** is a key business base and a crucial asset. It is a melting pot where sectors and businesses can interact, trade and fuse ideas. It is a focus for the city's profile and image providing unparalleled opportunities to showcase Leeds and the Leeds City Region to the world. That is why we must remain ambitious in attracting the very best whether it is John Lewis or the Tour de France, whilst at the same time keeping it relevant for meeting the needs of neighbouring communities.

The **low carbon economy** offers huge potential in the future and is an area where Leeds can play a leading role. Many of the priorities within this strategy connect to this goal and can help to create jobs and business opportunities whilst reducing greenhouse gas emissions. This theme can unite elements of the economy and itself be promoted as an asset.

The **Aire Valley Leeds** is one of the largest regeneration areas in the region and stretches east and south from the city centre fringe to the M1 motorway. It has the potential to create 27,000 jobs, to combine state of the art new housing (through the eco-settlement) and business opportunities (through the enterprise zone), and it is an eco exemplar in the making. This will include retrofitting homes to save energy and tackle fuel poverty, setting stretching environmental standards for new buildings, and using low carbon energy to power fuel them. Proposals for the enterprise zone will raise ambitions for the area still further and attract new industry, jobs and investment.

Innovation comes in many forms relating to the invention and application of new technologies, products, production processes and services, and has been shown to bring about dynamic efficiency gains, positively affecting productivity levels in the long term. Specific, but only partial indicators of increased innovation include the comparative share of jobs in high-tech sectors, levels of investment in R&D and levels of knowledge transfer between firms, industries and spatial areas. Leeds' universities and teaching hospitals are key innovation assets for the city which need to exploit their potential and improve linkages with the private sector:

There is strong evidence that **entrepreneurship** is a key driver of productivity growth. Developing entrepreneurial skills enables businesses to innovate, seek new opportunities and resources and take calculated risks. The more entrepreneurial a locality, the more likely it is to contain people willing to take risks in uncertain economic ventures and ready to grasp commercial opportunities and introduce new products to the market. These activities would result in higher productivity and growth. Although

Leeds has high business stock figures its business birth rate is well below the national average. Addressing this issue alongside improving skill levels will be a key priority.

Skills are a key determinant of economic prosperity. Investment in education and training contributes to a more skilled and productive workforce, with long term benefits for both localities and individual residents. Increasing skill levels can result in a permanent increase in economic growth for localities, as education and training can increase labour productivity. For local residents, education and training have been shown to increase the individual's capacity to innovate and adapt to new technologies and to changed economic conditions. Skills levels amongst the working age population in Leeds have continued to improve, however still lag behind the national average. This needs to be addressed in order to meet future employer demands and increase productivity.

Bringing benefits to the people is as important as growing the economy itself. Another key theme will be to look at how Leeds' people can access opportunities within and support the growth of the priority sectors and the economy more widely. The role of Employment Leeds in helping new or expanding employers to recruit and retain staff will be pivotal. So will a buoyant voluntary and third sector, along with work to enhance education, skills and ambitions. Leeds' ethnic diversity is an asset in itself and one that can be used commercially in developing international links and trade. There is considerable and strong evidence that the most equal societies have the strongest economies. Therefore equality becomes not just something we should achieve from a moral and social justice point of view but also for the benefit of the economy as a

whole. We must make the best use of all our communities and all our residents if we are to compete on a global level.

A **high quality infrastructure** is a key driver of economic growth. This includes both the traditional infrastructure as well as the newer digital. The case for superfast broadband is no longer one of why but when: it can drive up growth and productivity, facilitate new business models and help make localities more attractive to both businesses and residents.

Transport connectivity is still as important as it has ever been for economic growth. West Yorkshire local authorities have always recognised this and have drawn up a new approach based on a £1bn bid to government. The primary objective is to maximise an increase in employment and productivity growth by the completion of transport schemes across West Yorkshire, irrespective of boundaries. An improvement in people's ability to access jobs, with a particular focus on those living in the most deprived communities, will be an important complementary measure of the programme of schemes.

Increasingly, **Leeds Bradford International Airport** will play an important part in building the Leeds City Region's future economy and the airport's contribution to the regional economy is set to grow as the airport expands. The airport intends to carry out future developments in a sustainable way to minimise the effects on the environment and to ensure that local people are consulted and involved to alleviate as far as possible any concerns over the future development.

There is a greater need to recognise the **cultural** offer and its importance to economy. Culture, tourism and sport play a key role in attracting people and investment in Leeds. The city has a great cultural offer with world class sports facilities, a nationally recognised regional theatre and concert season, the largest film festival outside the capital and the world famous Piano Competition. The visitor economy is of great value to the city and opportunities for growth are available within both leisure and business tourism.

Responsibility for delivery

Finally, this strategy is a start – a statement of intent and an economic manifesto for Leeds covering our priorities for the next four years, providing guidance regarding the adjustment of resources going forward. Future work between Leeds City Council and key partners involved with each priority sector will assess the barriers to and opportunities for its growth and plan the specific action that can be taken. We will learn and innovate as we go, set ourselves SMART objectives and monitor progress.

This carries with it the need for both accountability and responsibility for the delivery of specific activities. This is why we have placed the overall responsibility for delivery of the strategy with the newly created Sustainable Economy and Culture Board as this is the best place to encourage engagement across all sectors. The partnership approach will also help us to maximise our new freedoms gained through the city's enterprise zone and tax incremental finance pilot status.

These advantages can all be combined to bring further momentum to a partnership approach emphasising the importance of 'self-help' as the key to sustainable growth.

Above all we will create a prosperous and sustainable economy in the city and for its people.

Key Economic Stats	Leeds	LCR	Core Cities	GB
Area, sq.km	552	5,716	-	-
Population 2011	799,000	2,982,000	4,375,000	60,463,000
GVA	£15.1bn (2011)	£48.5bn (2011)	£138bn (2008)	£1,266bn (2008)
Residents employed Dec 2010	384,000	1,358,000	1,918,900	28,088,000
Residents unemployed Dec 2010	40,700	132,700	228,300	2,328,900
Employment (all people working the area),	428,000 (2011)	1,398,000 (2011)	2,631,000 (2010)	27,843,000 (2010)
Active enterprises 2009	24,300	95,600	142,300	2,282,000
Business birth rates (rate per 10,000 of working age population 2009)	46	51	48	60
VAT 5-year survival rate (2004 births)	47%	46%	45%	47%
Male residential median earnings £, 2010	477	464	442	500

NB. Due to collection and collation of data some of the figures will be inconsistent as we have used the most up to date available for each unit.

Best cities in terms of value for money of office space – Cushman and Wakefield

City	2010	2009
Leeds	1	1
Lisbon	2	4
Berlin	3	7

Top Cities – Employment in Financial and Business Services

City	2008
Leeds	122,100
Glasgow	113,900
Birmingham	111,500

Top Cities – Employment in Knowledge Based

City	2010
Leeds	122,500
Birmingham	113,850
Glasgow	106,100

Employees in employment: change 1998 - 2008

Top 3 English Cities

LA	Change in number of jobs, '000s
Leeds	51.8
Manchester	38.8
Newcastle	26.7
Leeds City Region	108.6
Y & H	185.9
Core Cities	188.5
GB	2,349.3

Source :ABI

Growth and Specialisation - Leeds

