

ECONOMIC CHANGE IN A LOCAL ECONOMY: II THE LEEDS CASE

G.P. Clarke, L.J. Crewe and C.M. Leigh

School of Geography
University of Leeds
Leeds LS2 9JT

WORKING PAPER 525

February 1989

WORKING PAPER 525

ECONOMIC CHANGE IN A LOCAL ECONOMY :
II THE LEEDS CASE

G.P. CLARKE, L.J. CREWE AND C.M. LEIGH

School of Geography
University of Leeds
Leeds LS2 9JT

February 1989

1. Introduction

This paper is the second in a set of three papers outlining the changing economic fortunes of the labour market of West Yorkshire. The first paper (Clarke, Crewe and Leigh 1989a) identified changes since 1971 within and between the nine travel-to-work areas (TTWAs) that make up the county of West Yorkshire. The aim of this second paper is to narrow the focus of interest to the Leeds TTWA within West Yorkshire, focusing both on changes since 1971 and on the situation of the mid 1980s. Part of the analysis will involve a preliminary discussion of major firms within the city, and this paves the way for a more detailed study of key enterprises in West Yorkshire (Clarke, Crewe and Leigh 1989b).

The principal source of information on the local economy remains the Census of Employment, now computerised and available to the academic community through the National On-line Manpower Information System (NOMIS) for years 1971, 1981 and 1984. For 1971 and 1981 the smallest areal unit is the Amalgamated Office Area (AOA), where 'office' in this case refers to local employment offices. Nine AOAs make up the Leeds TTWA. However, for 1984, data are now available for Enumeration Wards (33 in Leeds TTWA) and postal districts, although there are greater confidentiality restrictions for such fine-scale information. Data at the ward level is also available from the 10% sample surveys of the Census of Population (1981 only). These two main sources of information on the local economy can be supplemented by the creation of an establishment data-bank. This has been implemented for Leeds using sources such as 'Dun and Bradstreet', 'Industrial

Market Location Directories', 'Factory Inspectorate Records', and miscellaneous directories such as 'Kompass' and the 'Yorkshire and Humberside Company Guide'. Each of these sources contain only a sample of firms within a local economy, but together they help to provide a useful inventory not otherwise available. The pros and cons of each of these data sets are explored in full elsewhere (Healey (ed) 1983, Aubrey et al 1989).

The sources of information used in this paper are thus drawn from a wide range of public and private sector data sets. Hence, apart from the analysis of the Leeds economy per se, the paper should stand as a pragmatic test of the use of such a mixture of data sets in one study! In principle, all of these data sets are available for other regions and cities (with local commercial libraries being the best starting point). Hence, the study could be replicated elsewhere.

The rest of the paper is organised as follows. In section 2 we explore the changing pattern of employment distributions, focusing first on Leeds as a whole and then on the smaller areal units (AOAs/wards) that make up the Leeds TTWA. In section 3 we focus attention upon journey to work patterns in the city and the idea of job shortfalls within areas: the difference between the jobs available and the number of residents. It is here that we briefly introduce the results of local labour market modelling work in Leeds. The emphasis shifts in section 4 towards the analysis of major firms in the city, their location, size and corporate status. This very much acts as a first step towards the more detailed appraisal of large company corporate restructuring

in West Yorkshire (Clarke, Crewe and Leigh 1989b).

2. Sectoral and Spatial Employment Change in Leeds

2.1 Leeds in Context

Before discussing sectoral and spatial variations within the Leeds TTWA it is useful to set the city within its national and regional context. Table 2.1 lists some key variables for a variety of towns and cities across the Country.

Table 2.1 Indicators of Regional Economic Performance

LLMA	1	2	3	4	5	6	7	8
Norwich	401.8	9.4	16.1	-14.8	26.8	11.0	2.6	17.1
Southampton	440.2	4.9	13.6	-4.5	20.2	10.6	2.9	19.0
Cardiff	441.3	-0.8	6.9	-36.8	4.4	14.9	5.7	15.2
Coventry	496.8	-3.2	5.2	-39.0	20.3	15.0	8.3	14.3
Stoke	531.0	0.2	7.9	-24.3	8.3	12.1	5.4	15.0
Nottingham	672.0	-1.1	6.0	-25.5	23.4	13.2	4.4	12.7
Bristol	740.2	0.7	8.2	-21.9	13.3	11.1	3.6	19.1
Leeds	743.6	-3.6	2.8	-32.8	10.9	12.6	4.7	12.4
Liverpool	944.5	-12.4	-2.9	-38.3	-10.1	19.0	8.8	9.3
Newcastle	944.7	-0.9	7.1	-25.1	7.9	16.5	5.9	8.4

where the indicators are as follows:

- 1) Population 1981 (000s)
- 2) Population change 1971-1981 (%)
- 3) Change in number of households 1971-1981 (%)
- 4) Change in manufacturing employment 1971-1981 (%)
- 5) Change in service employment 1971-1981 (%)
- 6) Unemployment 1981 (%)
- 7) Change in unemployment 1971-1981 (%)
- 8) Households with 2 or more cars 1981 (%)

Source: Champion et al (1987)

Table 2.1 appears to show all the evidence of the North/South divide so widely discussed in the literature (i.e Martin 1988, Armstrong 1987, Lewis and Townsend 1989). Compare, for example, the fortunes of Southampton, Norwich and Bristol with the larger northern cities of Liverpool and Newcastle. Leeds clearly fares better when compared to other northern cities, yet does not

compare too badly even with places like Bristol, often labelled the 'sunbelt city' (Boddy et al 1986). In some cases the differences are relatively marginal and much of the economic restructuring has been of the same type and order. However, local circumstances (such as the importance of Central Government defence expenditure) and a better image clearly put Bristol ahead of Leeds on various demographic and lifestyle indicators.

Table 2.1 clearly emphasises that some medium-sized towns have done relatively well in the period of restructuring. This is also reflected in comparable figures for West Yorkshire, where Leeds can be set in its regional context (Table 2.2). (We have added Harrogate to give a flavour of the change occurring to the north of Leeds).

Table 2.2 Indicators of Economic Performance in West Yorks.

LLMA	1	2	3	4	5	6	7	8
Castleford	109.3	-1.4	6.7	2.6	21.5	13.6	4.6	9.9
Keighley	111.9	7.3	10.5	-23.6	32.3	11.5	3.2	14.4
Harrogate	128.4	8.9	13.4	-1.5	25.5	9.2	1.9	19.7
Dewsbury	162.2	1.2	5.0	-21.7	19.3	15.3	6.4	12.3
Halifax	191.1	-2.1	1.1	-24.4	18.1	12.2	5.9	11.8
Huddersfield	209.8	0.4	4.9	-40.8	11.9	12.0	6.6	12.6
Wakefield	212.1	6.3	15.1	-9.5	22.7	13.1	2.8	12.1
Bradford	358.2	-4.1	-0.8	-38.8	14.7	15.3	6.8	9.8
Leeds	743.6	-3.6	2.8	-32.8	10.9	12.6	4.7	12.4

where the indicators are as before:

- 1) Population 1981 (000s)
- 2) Population Change 1971-1981 (%)
- 3) Change in the number of households (%)
- 4) Change in manufacturing employment (%)
- 5) Change in service employment (%)
- 6) Unemployment 1981 (%)
- 7) Unemployment change 1971-1981 (%)
- 8) Households with 2 or more cars (%)

Source: Champion et al (1987)

From Table 2.2 we can see the growth and general success of the more rural towns such as Harrogate and Keighley, whilst the older and larger urban areas have fared less well. Once again, Leeds does comparatively better than its close neighbours, Bradford and Huddersfield. For more details on the fortunes of different areas in West Yorkshire, see Clarke, Crewe and Leigh (1989a), and for the general growth and success of smaller towns, see Herrington (1984), Champion and Green (1985) and, specifically in North Yorkshire, Leigh (1989).

2.2 Leeds: Aggregate Change

In Table 2.3 we show some broad indicators of employment change for Leeds as a whole.

Table 2.3 Employment Change in Leeds 1971-1984

	1971	1981	1984	71-81	81-84	71-84
Male Full-Time	187537	164322	156576	-12%	-5%	-17%
Female Full-Time	82164	72666	72764	-11%	0%	-11%
Male Part-Time	8873	9219	1091	4%	18%	22%
Female Part-Time	45256	54651	56750	21%	4%	25%

Source: Department of Employment: Census of Employment

Clearly these figures reflect the general trend seen elsewhere in the U.K of a decline in male and female full-time employment since 1971, and a rise in both male and female part-time employment. Whilst the numbers in male part-time employment are still relatively small (typically located in service activities in the city centre), they have been accelerating since 1981. Similarly, the rise in female part-time employment has been particularly marked. By 1984, 44% of all jobs for females were in the part-time category. This has important ramifications for the

local labour market, since part-time work is not simply a numerical reduction in hours vis-a-vis full-time work, but involves a different set of terms and conditions (see Hakim 1987, Crewe 1989).

Table 2.4 breaks down employment change in Leeds by different industrial categories. There have been some modifications to sector definitions since 1971, but the seventeen selected categories in Table 2.4 are generally compatible.

Table 2.4 Leeds TTWA: Sectoral Change 1971-1984

Male Employment

Category	1971	1981	1984	1971-81	1981-84	1971-84
Agriculture/ Forest/Fish	1101	1046	995	-5%	-5%	-10%
Public Utils.	7455	5525	4914	-26%	-11%	-34%
Metal Manuf. & Metal Goods	16847	10059	8129	-40%	-10%	-52%
Mech. Eng.	16527	14482	9619	-12%	-34%	-42%
Elec. Eng.	2996	3178	2668	+6%	-16%	-11%
Motor vehs.	6040	1309	2200	-78%	+68%	-64%
Food/drink/ & tobacco	4635	3847	3217	-17%	-16%	-31%
Textiles	7459	3407	2498	-54%	-27%	-67%
Leather/foot wear/clothing	9103	3657	2363	-60%	-35%	-74%
Paper/print.	6943	6568	7221	-5%	+10%	+4%
Construction	15715	13854	13710	-12%	-1%	-13%
Wholesale & distribution	12432	11471	11780	-8%	+3%	-5%
Retailing	9381	10866	11505	+16%	+6%	+23%
Transport	17820	9965	8992	-44%	-10%	-50%
Insurance & banking etc	7368	14788	16218	+101%	+10%	+120%
Public Admin (inc education)	17881	22281	20788	+25%	-7%	+16%
Health	4347	3446	4594	-20%	+33%	+6%
TOTAL	164050	139749	131411	-15%	-6%	-20%
TOTAL (All categories)	187537	173547	167490	-8%	-4%	-11%

Female Employment

Table 2.4 (cont)

Category	1971	1981	1984	1971-81	1981-84	1971-84
Agriculture/ Forest/Fish	363	364	364	0%	0%	0%
Public Utils.	1565	1785	1658	+14%	-7%	+6%
Metal Manuf. & Metal Goods	3153	1442	1147	-54%	-21%	-64%
Mech. Eng.	2442	2267	1491	-7%	-34%	-39%
Elec. Eng.	1100	993	927	-10%	-7%	-16%
Motor vehs.	809	338	318	-58%	-6%	-61%
Food/drink/ & tobacco	1638	1571	1685	-4%	+7%	+3%
Textiles	5750	2364	1832	-59%	-23%	-68%
Leather/foot wear/clothing	18323	6842	4978	-63%	-27%	-73%
Paper/print.	3808	3599	3399	-6%	-6%	-11%
Construction	1741	1657	1626	-5%	-2%	-7%
Wholesale & distribution	4987	5737	5897	+15%	+3%	+18%
Retailing	16094	17100	17271	+6%	+1%	+7%
Transport	3731	1889	2285	-49%	+21%	-39%
Insurance & banking etc	6880	12791	13633	+86%	+7%	+98%
Public Admin (inc education)	19120	25527	22801	+34%	-11%	+19%
Health	11538	11826	14460	+3%	+22%	+25%
TOTAL	103042	98092	95772	-5%	-2%	-7%
TOTAL (All categories)	127420	127318	129514	0%	+2%	+2%

Source: DOE:Census of Employment 1971,81,84

Table 2.4 shows that for the major employment sectors of the Leeds economy there have been some massive losses, particularly in the traditional industries of the city: textiles, mechanical engineering, metal manufacture, vehicles, footwear, leather and clothing. Whilst there has been some recovery in vehicles, the other categories have suffered accelerating decline. These losses in manufacturing sectors (as in many other urban economies) have

been partly offset by increases in service sector employment (particularly in financial services) although the people involved are likely to be quite different. For males, twenty percent of jobs in the city were lost between 1971 and 1984. Although women fared much better in this period, much of the increase has been in part-time employment (Table 2.3). We shall look at these changes in more detail for individual areas below.

Table 2.5 Employment Change Across Leeds 1971-1984

AOA	1971	1981	1984	1971-81	1981-84	1971-84
Male full-time employment						
Bramley	12508	9542	9518	-24%	0%	-24%
Horsforth	5668	6696	6325	+18%	-6%	+12%
Leeds/Hunslet	125754	106674	100021	-15%	-6%	-21%
Morley	8924	8943	9941	0%	+11%	+11%
Otley	6631	6419	6575	-3%	+2%	-1%
Rothwell	10076	3912	2940	-61%	-24%	-71%
Wetherby	3840	4634	5751	+20%	+24%	+21%
Yeadon	6998	6924	6087	-1%	-12%	-13%
Seacroft & Crossgates	7252	10584	9406	+46%	-11%	+30%
Female full-time employment						
Bramley	4373	3674	3531	-16%	-4%	-19%
Horsforth	2424	2573	2512	+6%	-2%	+4%
Leeds/Hunslet	60140	50265	49485	-16%	-2%	-18%
Morley	3235	3147	3369	-3%	+7%	+4%
Otley	2752	3233	3282	+18%	+2%	+19%
Rothwell	2113	1280	1187	-39%	-7%	-44%
Wetherby	1572	2244	2676	+43%	+19%	+70%
Yeadon	2184	2059	2311	-6%	+12%	+6%
Seacroft & Crossgates	2987	4191	4391	+40%	+5%	+47%
Female part-time employment						
Bramley	2570	3018	3154	+17%	+5%	+23%
Horsforth	1489	2677	2867	+80%	+7%	+93%
Leeds/Hunslet	31096	33728	34387	+8%	+2%	+11%
Morley	1908	2588	2508	+36%	-3%	+32%
Otley	2444	3745	3419	+53%	-9%	+40%
Rothwell	1229	1342	1581	+9%	+18%	+29%
Wetherby	1003	1527	1713	+52%	+12%	+71%
Yeadon	1425	1614	2063	+13%	+28%	+45%
Seacroft & Crossgates	1943	4413	5081	+127%	+15%	+162%

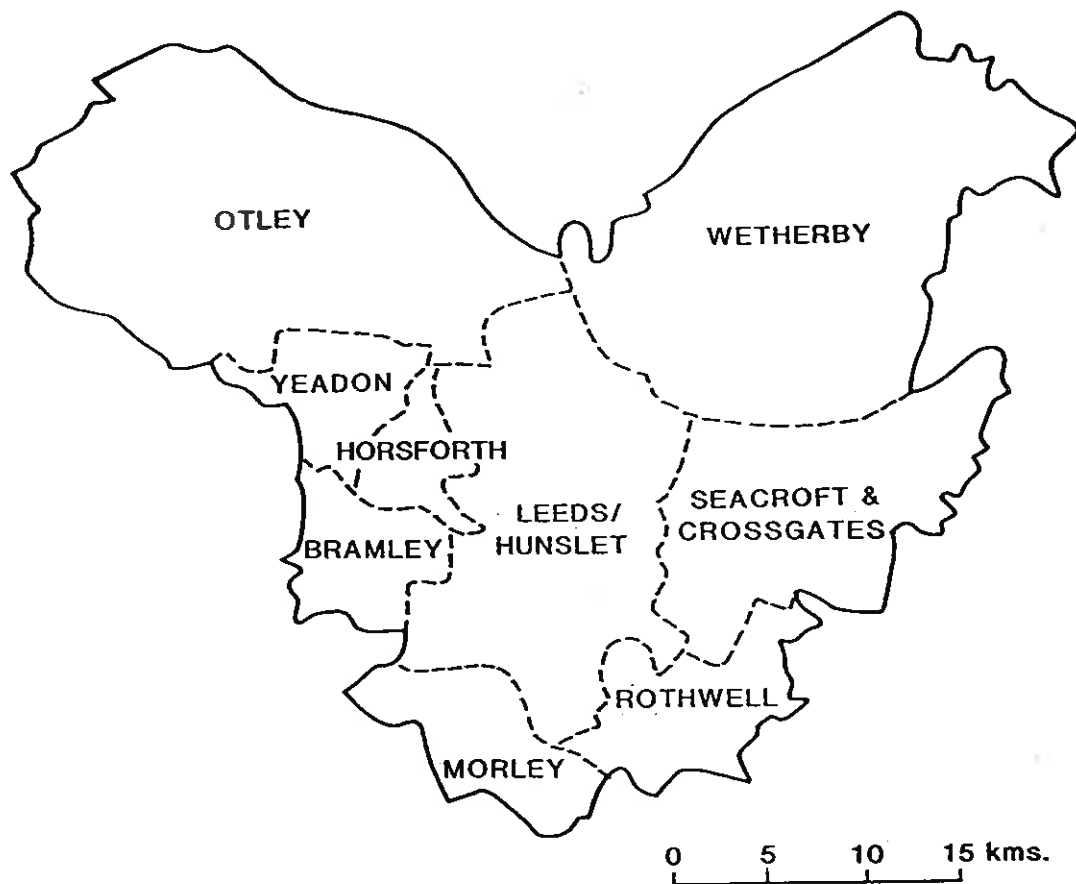


Figure 2.1 Amalgamated office areas in Leeds TTWA

Table 2.5 shows the changing spatial patterns of employment across the nine AOAs of the city. There are a number of striking features. Not surprisingly, the central area of Leeds/Hunslet remains the most important area in terms of job provision. This large spatial unit (see Fig 2.1) contains not only the city centre but also the important manufacturing areas of Holbeck, Hunslet and Richmond Hill to the south, and the Infirmary and University service sector to the north (see also section 2.3). Secondly, as we saw in Table 2.3, there has been an overall decline in male and female full-time employment, whilst female part-time employment has grown across all areas. We shall return to the spatial variations in this pattern shortly.

The figures in Table 2.5 also reveal some very dramatic changes in employment totals since 1971. Rothwell for example,

has suffered a 70% loss in its male full-time employment total, mainly due to the decimation of its manufacturing base. There have been heavy losses in metal production, mechanical engineering and mining. Conversely, some areas have enjoyed considerable gains during this period. Seacroft & Crossgates for example, experienced large increases in mechanical engineering employment during the 1970s, particularly with the new industry attracted to Seacroft Industrial Estate. Since that time, however, the local economy has been in a state of flux with job losses in mechanical engineering as some firms have struggled to establish themselves in the area. The Vickers armaments factory at Halton has partly offset these losses however.

The spatial variations across the city very much mirror the figures seen at the regional level for West Yorkshire: the growth of employment in the northern suburbs of Wetherby, Horsforth and Otley and the loss of full-time jobs in the older inner industrial areas of Leeds/Hunslet and Bramley. This is clearly a reflection of both local industrial structure (see sections 2.3-2.5) and local prosperity and wealth: jobs to some extent following people to the suburbs. In Figs 2.2-2.4 we highlight the relationship between suburban expansion and the formation of new economic activity, at a finer level of disaggregation. Fig 2.2 identifies the wards of the city. Fig 2.3 shows the number of new house constructions in the 33 wards since 1981: the suburban expansion is clearly marked. Fig 2.4 shows the percentage of present day firms in each ward which had begun operating in the area after 1970. Although this does not give the total number of

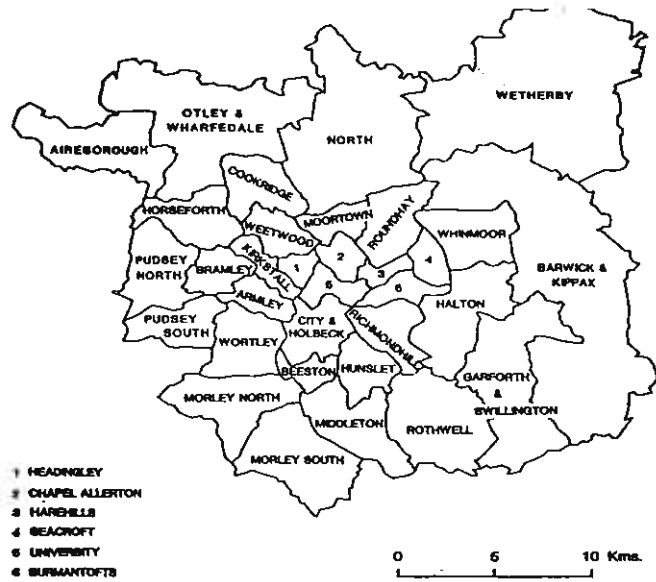


Figure 2.2 Leeds wards, 1981

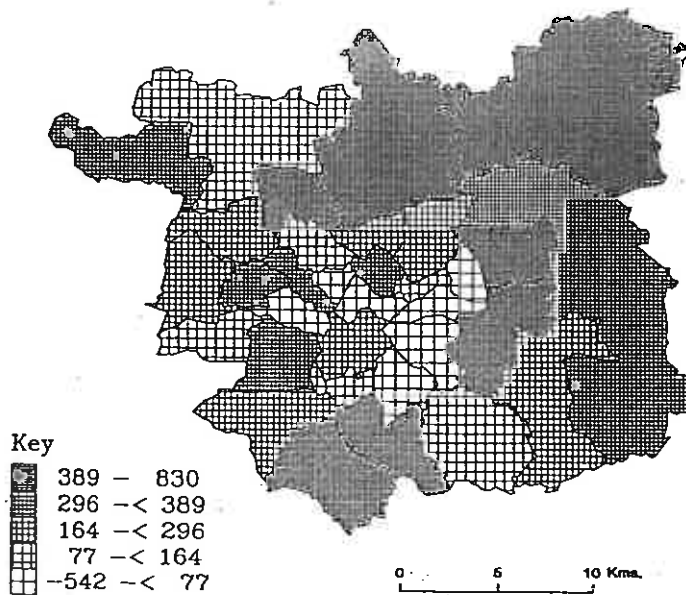


Figure 2.3 New house construction since 1981

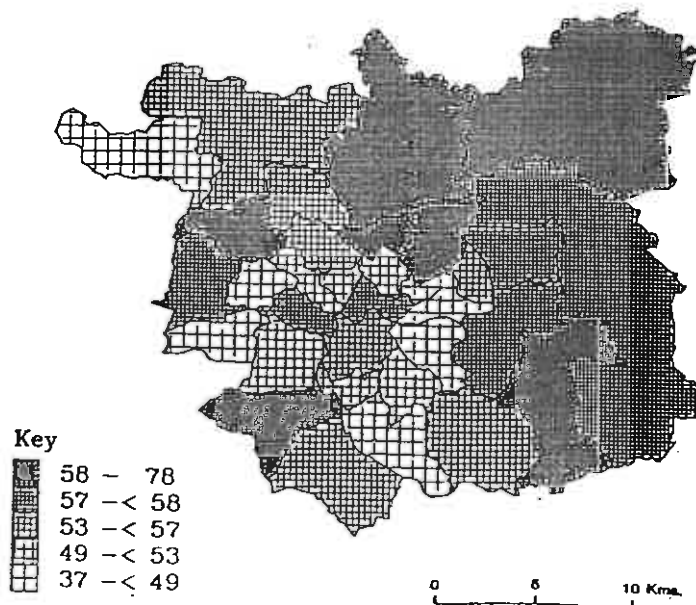


Figure 2.4 Percentage of new firms established since 1970

jobs created in each ward, it does show how much employment in suburban areas is associated with relatively new firms. Most of these new firms are service-based (see Table 2.6), although this varies according to location.

Table 2.6 New firms after 1970

Leeds (All wards)		
	32.35%	Retail, Distribution & Supply
	18.75%	Professional and financial services
	15.08%	Construction
	6.45%	Miscellaneous services
	5.35%	Transport & haulage
	5.23%	Paper and printing
	3.16%	Metal goods
Harehills		
	45.45%	Retail, distribution and supply
	27.25%	Construction
Hunslet		
	25.00%	Retail, distribution and supply
	17.85%	Engineering and metal goods
	14.28%	Professional and financial services
Wetherby		
	48.96%	Retail, distribution and supply
	22.44%	Professional and financial services
	8.16%	'Manufacturing activities'

We now take a closer look at changes that have been occurring within three selected AOAs by identifying for each, the most important employment category for each group of employee and tracing their changing impact on the local labour market.

2.3 Employment Change in Leeds and Hunslet

Leeds/Hunslet is the traditional economic base of the city incorporating both the manufacturing heartland of Hunslet and the service centre of the Central Business District and University area to the north. The four main employment sectors have been identified for the three principal groups, male full-time, female

full-time and female part-time (Table 2.7).

Table 2.7 Leeds/Hunslet AOA : Sectoral Change 1971-1984

Category	1971	1981	1984	1971-81	1981-84	1971-84
Male full-time						
Mechanical eng.	10415	7311	4714	-30%	-36%	-55%
Leather/foot/cloth	7568	3163	1897	-58%	-40%	-75%
Construction	9426	8185	7421	-13%	-9%	-21%
Insurance/banking	8522	11081	11444	+30%	+3%	+34%
TOTAL	35931	29740	25476	-17%	-14%	-29%
(% of all employees)	(29)	(28)	(26)			
TOTAL (All Categ)	125367	106674	100021	-15%	-6%	-20%
Female Full-time						
Leather/foot/cloth	12732	4981	3597	-61%	-28%	-72%
Retailing	6799	5927	4888	-13%	-18%	-28%
Insurance/Banking	5817	7691	8136	+32%	+6%	+34%
Health services	4780	3708	5680	-22%	+53%	+19%
TOTAL	30128	22307	22301	-26%	0%	-26%
(% of all employees)	(50)	(44)	(45)			
TOTAL	60140	50265	49485	-16%	-2%	-18%
Female part-time						
Category	1971	1981	1984	1971-81	1981-84	1971-84
Leather/foot/cloth	3904	1025	408	-74%	-60%	-90%
Retailing	5354	5613	5853	+5%	+4%	+9%
Insurance/banking	1544	2678	2376	+73%	-11%	+54%
Health services	2334	3205	3483	+37%	+9%	+49%
TOTAL	13136	12521	12120	-5%	-3%	-8%
(% of all employees)	(42)	(37)	(35)			
TOTAL(All cats.)	31096	33795	34387	+9%	+2%	+10%

Source: Census of Employment

For male full-time employment the accelerating decline in manufacturing is clearly illustrated by the mechanical engineering sector, which has lost nearly 6000 jobs since 1971. Although not shown in Table 2.7, there have been similar percentage declines in metal manufacturing and electrical engineering. The greatest job losses overall however, have been

in the leather, footwear and clothing sector, where three quarters of male jobs have disappeared ,a particularly alarming fact given the traditional importance of this sector to the city as a whole.

The clothing industry came to dominance in the Leeds/Hunslet area for a variety of reasons. These included the proximity of the woollen industry, the availability of large amounts of female labour, local Jewish skills, the proximity of local engineering firms (for machinery) and what Connell and Ward (1980) refer to as 'a fortuitious concentration of enterprising industries with a willingness to innovate'. Although there were job losses up to 1971 the decline is clearly more visible during the 1970s. Between 1971 and 1981 some 15000 jobs were lost, followed by 3250 jobs between 1981 and 1984. Most of this loss has occurred within the traditional tailoring industries and especially the manufacture of raincoats (Connell and Ward 1980). Many of the local firms seem to have been unable to change production rapidly in the face of consumer preference changes. The long-established Leeds firm Burtons, for example, have responded by simply turning away from manufacturing and concentrating on retailing, a strategy which has had a marked impact upon the employment fortunes of the local economy: formerly employing 10000 production workers in Leeds, the group now employs none. Part of the consequence of this change has been a loss to Leeds in corporate terms, as Burton's headquarters have shifted from Leeds to London.

The loss of manufacturing jobs has been partially compensated

for, at least in terms of job numbers, by the growth of service employment, although this generalisation masks important differences between services themselves. For example, Table 2.7 shows three important categories of services for female employment. The picture is clearly not one of uniform growth, with fluctuations apparent in health and retailing. Professional and financial services on the other hand, have enjoyed a period of sustained growth for both males and females. Marshall (1983) has reported how property, advertising and finance have been rapidly growing sectors nationwide, yet also notes that Leeds has had one of the fastest rates of office growth in the country, especially in computer studies, management consultants and advertising agents. It is clear from local property reports that this growth has continued since 1984. As prime office space has dried up over the last few years, so office rents have doubled with the increasing demand from many national and international firms.

"Over the past few years Leeds has changed
from just another northern city to a
regional and professional centre."
(Sunday Times 1988)

There is no more striking evidence of this than the recent River Aire embankment office development which includes the new headquarters of ASDA.

2.4 Employment Change in Bramley

Bramley, to the west of the City (Fig 2.1), consistently one of the worst areas for job loss in the city, has also been a traditional manufacturing region which has experienced rapid

employment change since the 1970s (Table 2.8).

Table 2.8 Bramley AOA : Sectoral Change 1971-1984

Category	1971	1981	1984	1971-81	1981-84	1971-84
Male full-time						
Mech. Eng.	2632	1424	1970	-46%	+38%	-25%
Textiles	2127	971	620	-54%	-36%	-71%
Construction	1270	1203	1117	-5%	-7%	-12%
TOTAL	6029	3598	3707	-40%	+3%	-39%
(% of all employees)(48)		(38)	(39)			
TOTAL(All cats.)	12549	9542	9518	-24%	0%	-24%
Female full-time employment						
Mech.Eng	315	151	217	-52%	+44%	-31%
Textiles	1509	591	420	-61%	-29%	-72%
Retailing	272	261	244	-4%	-7%	-12%
TOTAL	2096	1003	881	-52%	-12%	-58%
(% of all employees)(48)		(27)	(25)			
TOTAL(All cats.)	4373	3674	3531	-16%	-4%	-19%
Category	1971	1981	1984	1971-81	1981-84	1971-84
Female part-time employment						
Textiles	415	247	165	-41%	-33%	-60%
Retailing	346	485	520	+40%	+7%	+50%
Hotels & Catering	298	651	775	+119%	+19%	+160%
TOTAL	1059	1383	1460	+31%	+6%	+38%
(% of all employees)(41)		(46)	(46)			
TOTAL(All cats.)	2570	3018	3154	+18%	+5%	+23%

Source:DOE Census of Employment

The AOA of Bramley contains many of the old textile and engineering establishments of Leeds, especially along the banks of the River Aire. In engineering, this part of the city has specialised in the production of transport and vehicle equipment and machinery for the textile industry. This is partly a legacy of Northern Engineering Industries who set up in Rodley in the nineteenth century and who, along with smaller companies in Stanningley and Bramley itself, made this area the leading U.K

location of heavy crane manufacture. As with much of the Leeds/Hunslet region, these core industries have been subjected to heavy employment losses since 1971. Much of this loss in engineering has been associated with another of the largest vehicle component manufacturing plants in Leeds, GKN at Kirkstall Forge. They shed over 1200 jobs during the late 1970s as the company looked away from traditional products and markets. Full details of this particular case-study appear in Clarke, Crewe and Leigh (1989b). On a brighter note, there has been some recent resurgence in the fortunes of engineering in the area, reflected in the figures shown in Table 2.8.

Textiles in Bramley has also suffered heavy job losses since 1971. The move away from traditional products, towards man-made fibres and higher technology products, has a spatial repercussion which does not favour West Yorkshire, with its traditional focus upon woollen and worsted spun yarns. The recent closure of Courtauld's spinning plant at Bramley is a perfect example of this, with 220 people losing their jobs.

2.5 Employment Change in Wetherby

The final case-study in this section is Wetherby, one of the most consistently bouyant of the Leeds AOAs, located in the far north-east of the Leeds Metropolitan District (Fig 2.1).

Table 2.9 Wetherby AOA : Sectoral Change 1971-1984

Category	1971	1981	1984	1971-81	1981-84	1971-84
Male full-time employment						
Mech. Eng	128	370	426	+189%	+15%	+233%
Distribution	243	272	464	+12%	+71%	+91%
Insurance,finance	191	484	706	+153%	+46%	+270%
Public services	457	629	708	+38%	+13%	+55%
TOTAL	1019	1755	2304	+72%	+31%	+126%
(% of all employees)(27)	(38)	(40)				
TOTAL	3840	4634	5751	+21%	+24%	+50%
Female full-time employment						
Distribution	71	86	304	+21%	+253%	+328%
Insurance,finance	84	220	378	+161%	+73%	+350%
Public services	198	333	370	+68%	+11%	+87%
Retailing	107	170	224	+59%	+32%	+109%
TOTAL	460	809	1276	+76%	+58%	+177%
(% of all employees)(29)	(36)	(48)				
TOTAL(all cats.)	1572	2244	2676	+43%	+19%	+70%
Female part-time employment						
Insurance,finance	56	123	154	+119%	+25%	+175%
Retailing	110	241	348	+119%	+44%	+216%
Hotels/Catering	105	254	391	+142%	+54%	+272%
TOTAL	271	618	893	+128%	+45%	+229%
(% of all employees)(27)	(41)	(52)				
TOTAL(All cats.)	1003	1527	1713	+52%	+12%	+71%

source: DOE Census of Employment

Here, as Table 2.9 clearly shows, the emphasis is on job growth, with all employment groups enjoying large percentage increases, although from a much smaller base than in inner Leeds. As with the rest of North Leeds this area has witnessed both a house building boom and a house price boom as the commuter belt has extended northwards. (It is useful here to refer back to Fig 2.3). Without an historical manufacturing base the majority of jobs have been in services, again professional and financial services in particular, yet we should note the growth in male

full-time employment in mechanical engineering and instrument engineering. The proximity of the A1 and M1 roads have also favoured Wetherby as a distribution point, although the total numbers involved are still relatively small.

3 Patterns of Employment - jobs and residents

3.1 Introduction

We saw in section 2.3 the dominance of the central area of Leeds/Hunslet in providing jobs within the Leeds TTWA. This can be highlighted by plotting both the total number of jobs (Fig 3.1) and the number of jobs as a percentage of the number of residents for the 33 wards of the city (Fig 3.2). All the central wards emerge as principal providers of jobs, whilst there are also high percentage figures in the older townships of Morley, Otley and (to a lesser and more recent extent) Wetherby. In contrast, some inner city areas such as Chapel Allerton and Harehills, some suburban housing estates such as Middleton, Whinmoor and Seacroft (sometimes labelled 'problem estates') and the more affluent northern suburbs of Cookridge and North, have very few jobs available locally. We can break down this aggregate pattern by looking at particular social groups in particular areas. Fig 3.3 shows, for the 3 wards of North, Richmond Hill and Harehills, the number of jobs available and number of residents present plotted on the y-axis and 6 main social groups on the x-axis (data comes from the 10% Census of Population sample for 1981). The affluence of the resident population is apparent in North ward, along with the relatively small number of jobs

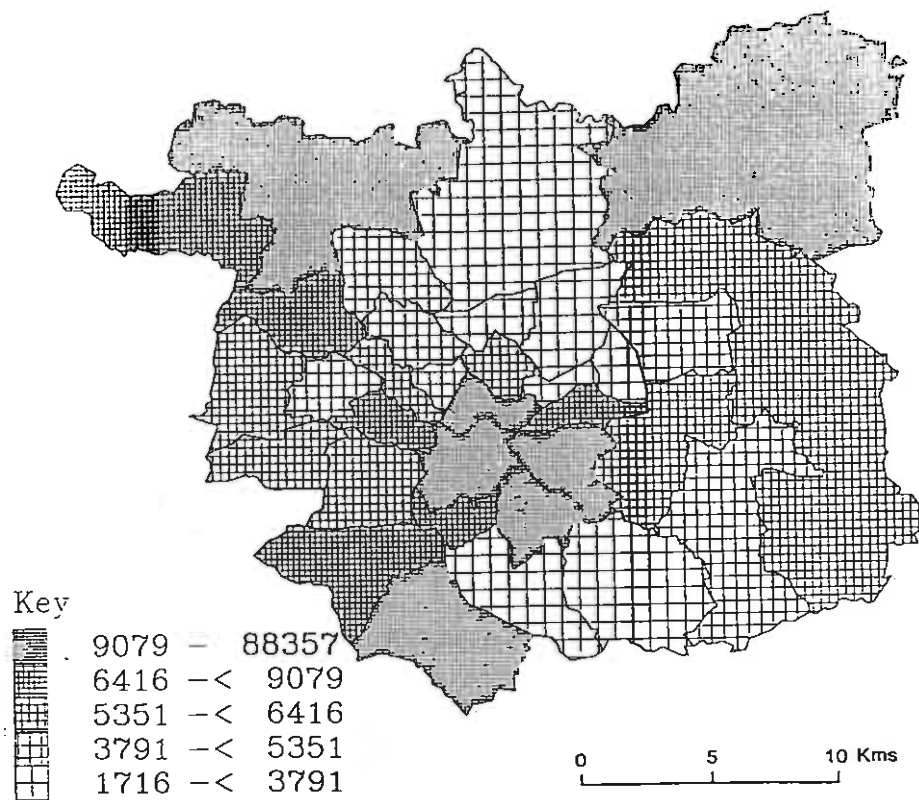


Figure 3.1 Total number of jobs, Leeds wards, 1984

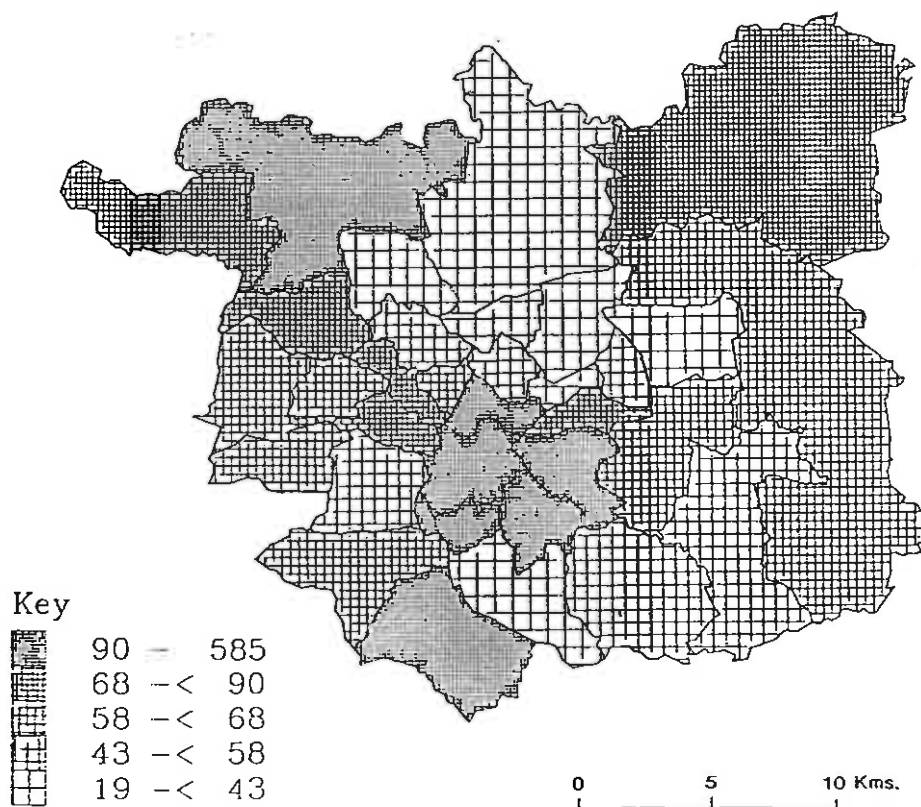


Figure 3.2 Number of jobs as a percentage of residents, Leeds wards, 1981

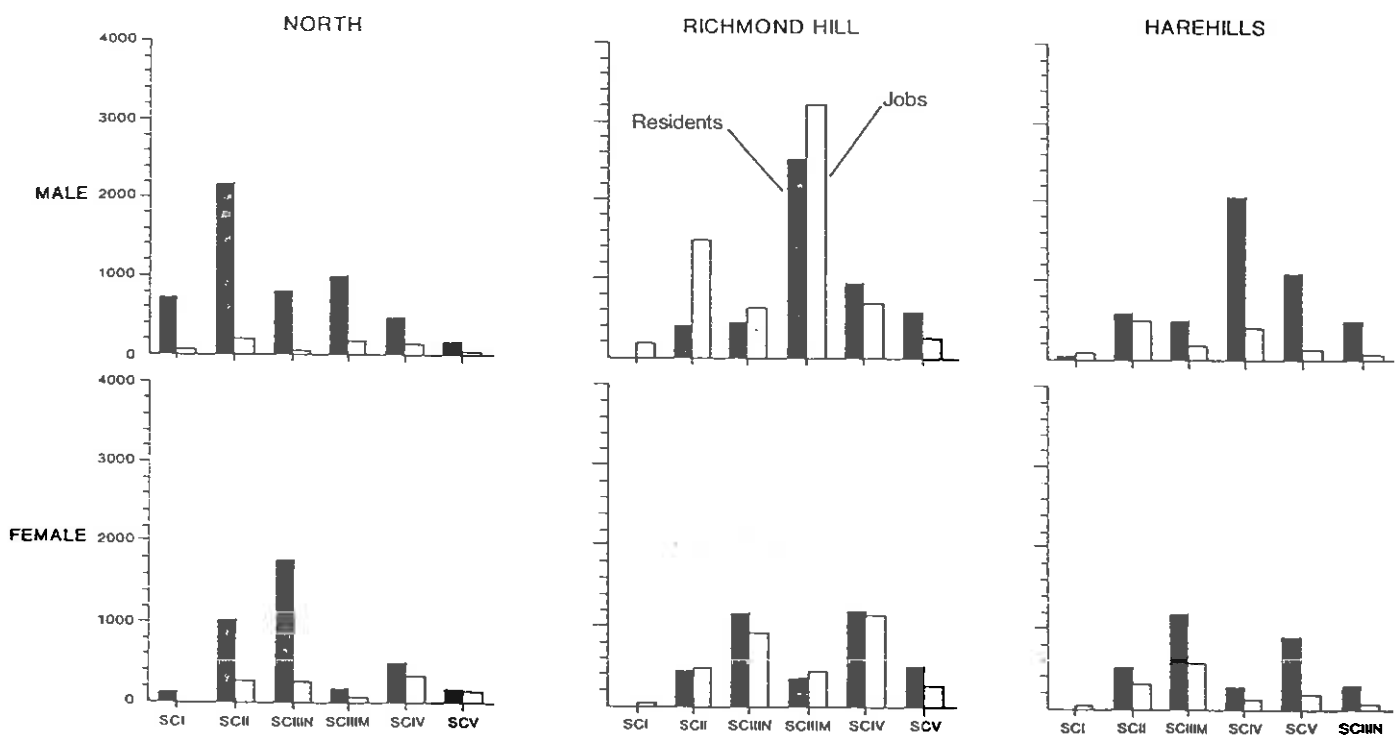


Figure 3.3 Employed residents and number of jobs by social groups

available locally (people generally trading accessibility to work for open space and better housing). In Richmond Hill, in contrast, the number of jobs available exceeds local resident totals and this area is likely to receive many commuters from outside the locality. Harehills, however, has many more residents than jobs, as well as a population concentrated in the middle and lower social groups (the semi-skilled and unskilled categories). Hence, many people are forced to commute out of the area for work, and this is one of the crucial problems facing a population which is generally not affluent. The problem is deepened when jobs are increasingly found not in central areas, where accessibility is generally good, but in suburban or fringe locations which are not as well served by public transport. The other consequence of fewer local jobs available for the unskilled workforce is, of course, much higher unemployment (see the high figures for Harehills in Fig. 3.4).

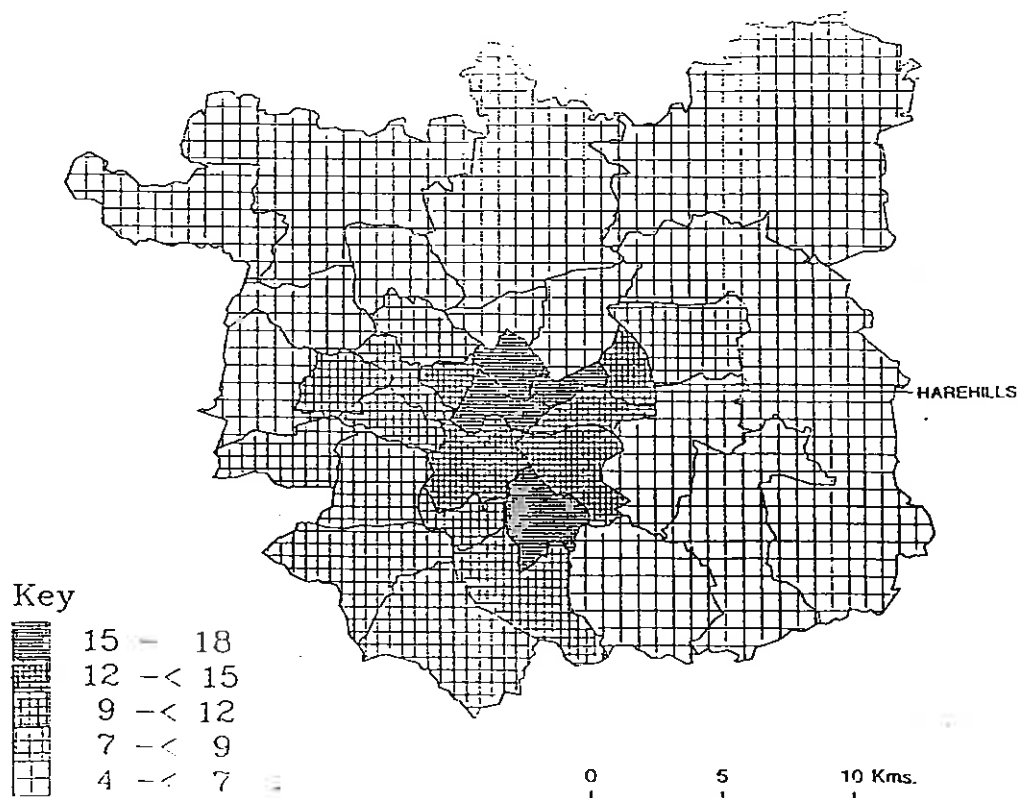


Figure 3.4 Unemployment, Leeds wards, 1981

This type of analysis identifies areas of aggregate job surplus or job shortfall but not the type of jobs involved: we pursue this below.

In Table 3.1 we categorize each ward in the city by the economic activity which provides the greatest number of jobs in that ward. In Barwick, for example, there are more jobs in the primary sector than any other activity (in this case 70% of jobs are in mining). Where an activity dominates a ward by only a narrow margin then its nearest competitor is listed in brackets elsewhere in the table. Before commenting upon this figure in detail it is worth remembering that this does not mean a particular ward is the largest provider of jobs in that sector across the city as a whole. For example, although 21.9% of male full-time employment in Harehills is in retailing, the actual number of jobs is nowhere near that of City/Holbeck ward. However, the exercise is still useful in that it gives an indication of the type of jobs available locally to residents in particular parts of the city. This is particularly important when considering those areas which are not affluent and hence unable to afford the greater commuting costs borne by residents in the outer suburban areas. We shall look at commuting itself in section 3.3.

There are a number of interesting issues in the figures shown

	PRIMARY	LIGHT MANUFACT.	HEAVY MANUFACT.	WHOLESALE & RETAIL	PROF. SERVICES	EDUCATION	HEALTH	TRANSPORT	CONSTRUCTION	RETAIL	MISCELL. SERVICES	HOTELS CATERING
1 AIREBORO		○					●					○
2 ARMLEY				○							○	
3 BARWICK	○ ●											○
4 BEESTON		○ ●									○	
5 BRAMLEY		● ○									○	
6 BURTOFTS							○ ●				○	○
7 CHAPEL ALL.							○	○			○	
8 CITY					○ ●					○		
9 COOKRIDGE							○		○		●	
10 GARFORTH	○					●						○
11 HALTON			○							● ○		
12 HAREHILLS										○ ●		○
13 HEADINGLEY		●			○				○		○	
14 HORSFORTH					○ ●				○		○	
15 HUNSLET		● ○										○
16 KIRKSTALL		○								●		○
17 MIDDLETON		●										○
18 MOORTOWN							○ ●			○ ○		
19 MORLEY N.				○ ●								○
20 MORLEY S.										○ ● ○		
21 NORTH						●					○	○
22 OTLEY		○					●					○
23 PUDSEY N.		● ○										
24 PUDSEY S.		●		○						○		
25 RICH.HILL		●		○							○	
26 ROTHWELL				●				○				○
27 ROUNDHAY						●			○			○
28 SEACROFT						●				○ ○		
29 UNIVERSITY						○ ○	●					
30 WEETWOOD		○				●						○
31 WETHERBY									○		●	○
32 WHINMOOR		○ ●										○
33 WORTLEY				○ ●								○

Table 3.1 Dominant economic activity by ward

○	Male full-time
●	Female full-time
◐	Female part-time

in Table 3.1. These are best described by taking each of the three main employment groups in turn. Male full-time employment is still very important over a range of categories in both the manufacturing and service sectors. Given the arguments of section 2, it is not surprising to see the dominance of heavy manufacturing in Bramley, Hunslet, Kirkstall and Pudsey North (all in either Leeds/Hunslet or Bramley AOAs). The high figures for motor vehicles in Halton is due to the Vicker's tank and armaments factory. [Recent government decisions have ensured the short-term security of the plant but customers are increasingly looking towards the U.S.A. Clearly a loss of some 1000 jobs in manufacturing here would have considerable impacts on the residents of East Leeds].

The figures in Table 3.1 also reveal the importance of a second batch of manufacturing activities, light manufacturing (paper and printing, leather/footwear/clothing, electrical and instrumental engineering), located further from the core of the city. Away from manufacturing there are similar geographical clusters. The dominance of wholesale and distribution in the cluster of wards to the south-east and south-west of the city centre (see Fig 2.2) are closely associated with the M62, M621 and M1 corridors. Similarly, construction is particularly important in north-west Leeds as well as Wetherby and Roundhay. The city centre is not surprisingly dominated by service sector employment, but interestingly more jobs are now provided in professional and financial services than retailing. Local Authority services are more important for female than male

employment. Finally, retailing remains a major employer where large local shopping centres are present (Harehills, Seacroft and Morley South).

The patterns for female employment are equally revealing. In manufacturing, the dominance of the lighter industries is immediately apparent, particularly the traditional employer of female labour, the leather, footwear and clothing sector (even though numbers of jobs have dropped significantly since the early 1970s). What is also clear is the importance of local public services for female full-time employment today, especially in health and education. Murgatroyd and Urry (1983) report similar findings in their study of the Lancaster economy.

For female part-time employment the dominance of hotels and catering, retailing and miscellaneous services (cleaning etc) are again clear, helping to re-assert the idea that although part-time jobs have increased during a period of heavy full-time job losses, the type of jobs are very different, being concentrated in manual, low skill and low pay categories. This adds local evidence to the arguments of an increasing polarisation of the workforce within the British economy.

3.3 Commuting patterns

It has been clear from the above sections that journey to work patterns are likely to be complex, with many residential zones feeding employment zones in the inner core. However, there are clearly two different types of flow patterns. Fig 3.5 shows the distribution of unskilled workers in Leeds, typically located in inner city areas, whilst Fig 3.6 maps the distribution of the

professional workers, typically located in the more affluent suburban fringes. For the unskilled workers manufacturing jobs in Hunslet, City/Holbeck, Beeston and Richmond Hill are crucially important. Fig 3.7 plots the journey to work totals for Hunslet ward. Clearly, the catchment area for the ward comprises of much of south and east Leeds, areas which contain a large part of the semi-skilled and unskilled labour force. This is also apparent in Fig 3.8 which plots the journey to work totals for the City/Holbeck ward. However, in the latter case, we also pick up the the large inflows of workers from the suburban edges of the city, reflecting the number of professional, service-orientated jobs also available in the city centre.

The 1981 Census of Population gives information on journeys to work by age,sex and mode of travel, but not by industry or occupation. However, combining this with known industry and occupation totals at the workplace end, it is possible to calibrate models which allocate individuals to workplaces on the basis of age, sex, industry type, occupation and residence, and consequently to throw further light on the degree of openness of local labour markets. (Full details appear in Birkin and G Clarke 1987, Birkin and M Clarke 1988). Disaggregating in this manner raises interesting questions concerning the reduction of unemployment by simply locating new jobs in areas of high unemployment, without recourse to the kinds of people who are likely to take up these jobs. Using these models Birkin et al (1988) hypothesised the creation of 100 new professional and 100

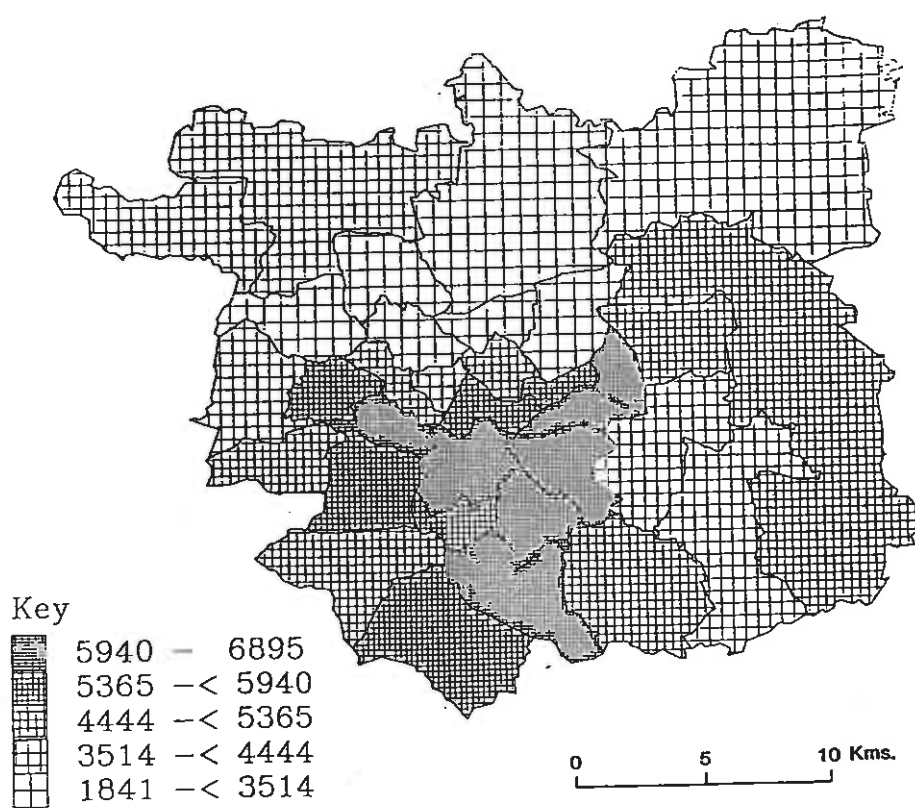


Figure 3.5 Distribution of unskilled workers Leeds wards, 1981

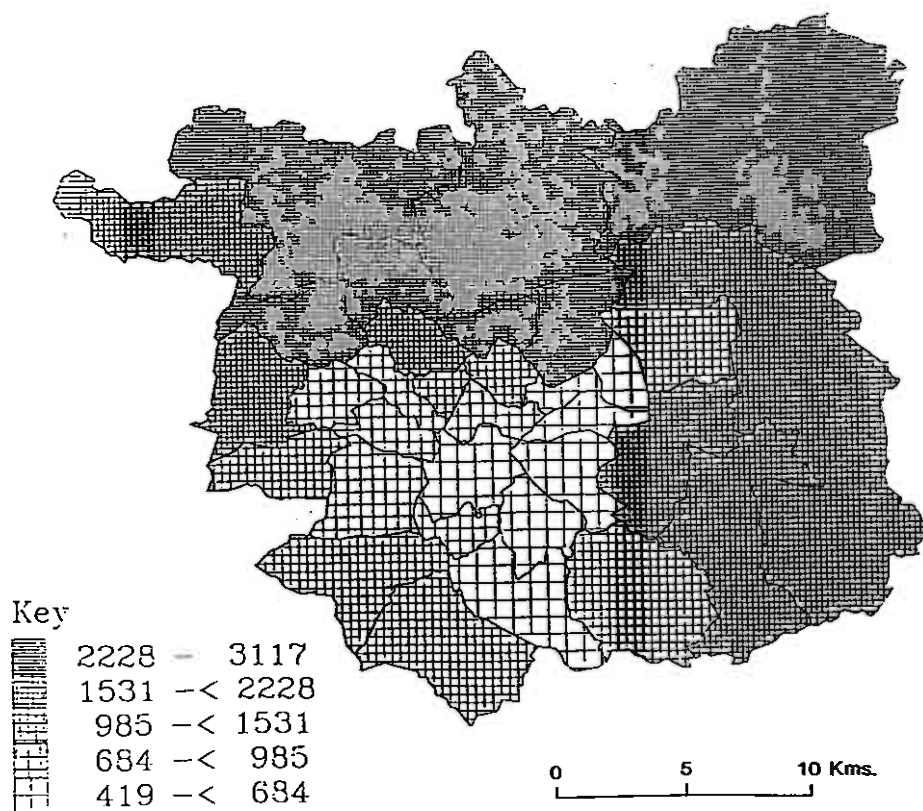


Figure 3.6 Distribution of professional workers, Leeds wards, 1981

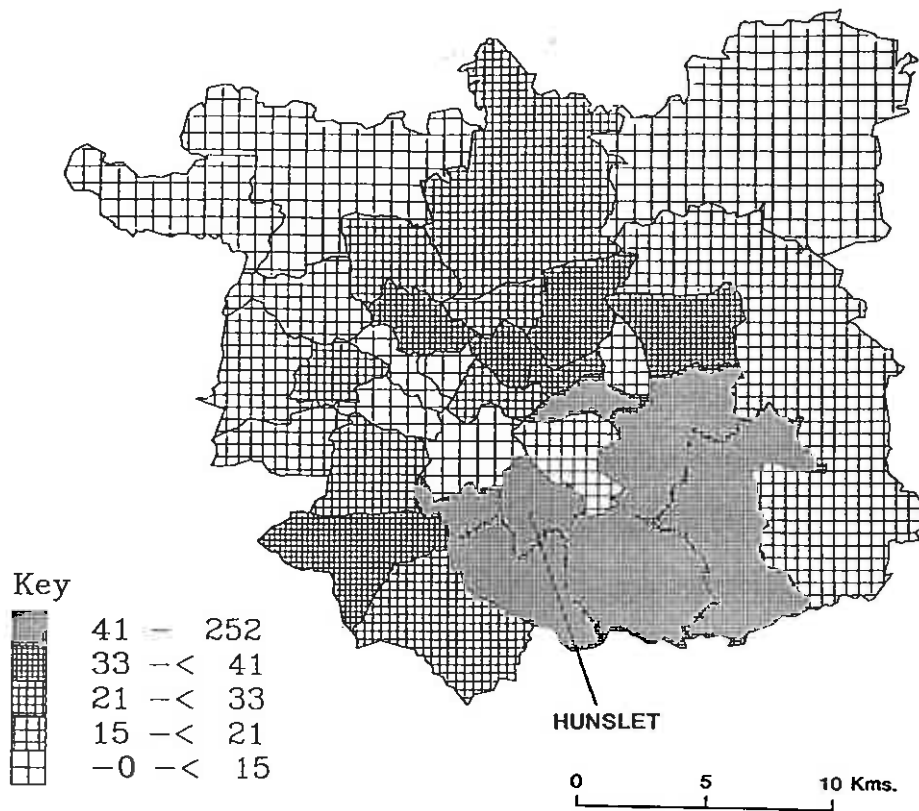


Figure 3.7 Journey to work to Hunslet

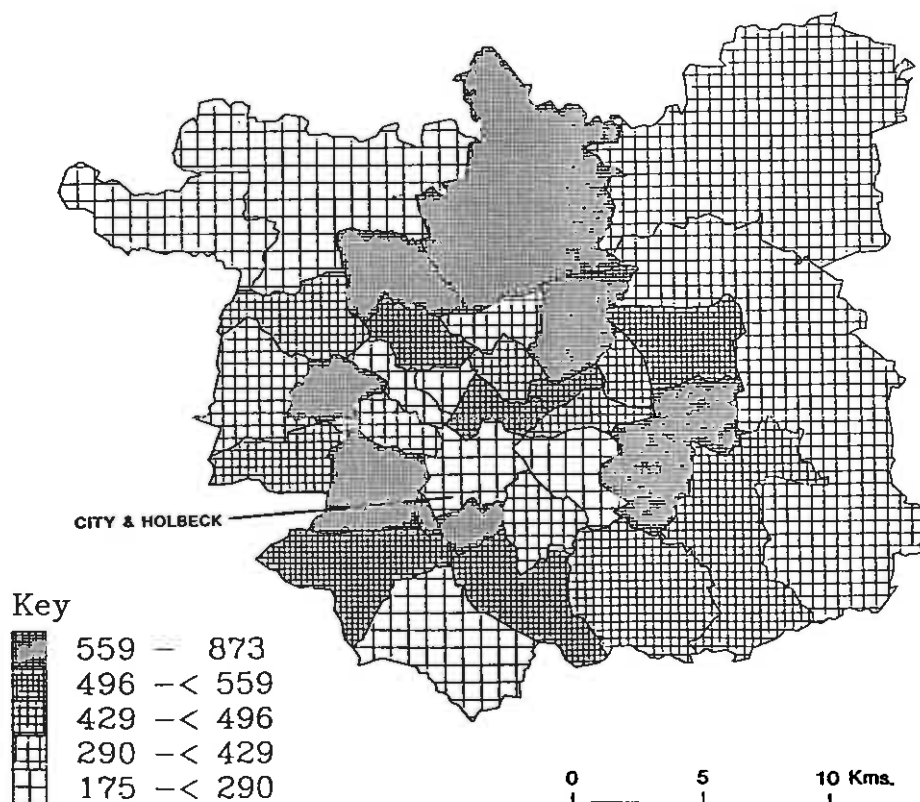


Figure 3.8 Journey to work to Ciy and Holbeck ward

new unskilled jobs in Harehills (an area of currently high unemployment) and predicted the origin of trips to take up these new jobs. As one would expect, the unskilled jobs are taken up locally (Fig 3.9), and especially from neighbouring zones of high unemployment. In contrast, new professional jobs (Fig 3.10) would result in drawing in workers from the more affluent suburbs to the north and north-east. Hence local economic policy must be carefully examined in the light of the types of jobs it would create, rather than simply new jobs per se. (see also Cheshire 1979 , Vickerman 1984 and Gordon and Lamont 1983).

4. Major plants in the City

Any detailed study of the local economy would not be complete without a discussion of the major employment locations of firms which are located in Leeds. Researchers in economic geography have been increasingly interested in such 'enterprise analyses', since it is the major firms in local economies which ultimately shape aggregate sectoral and spatial patterns. The aim in this section is not to examine such corporate studies in detail (this challenge is taken up in Clarke, Crewe and Leigh 1989b) but to simply present some general features of the large plants found in Leeds. The major controlling interests in the city are in part manifest by those establishments which employ a sizeable workforce. We have chosen 150 employees as a useful cut-off point here, giving 230 establishments in all. The data is based on the establishment databank constructed during 1985/1986.

In Table 4.1 we list the number of large plants in Leeds by

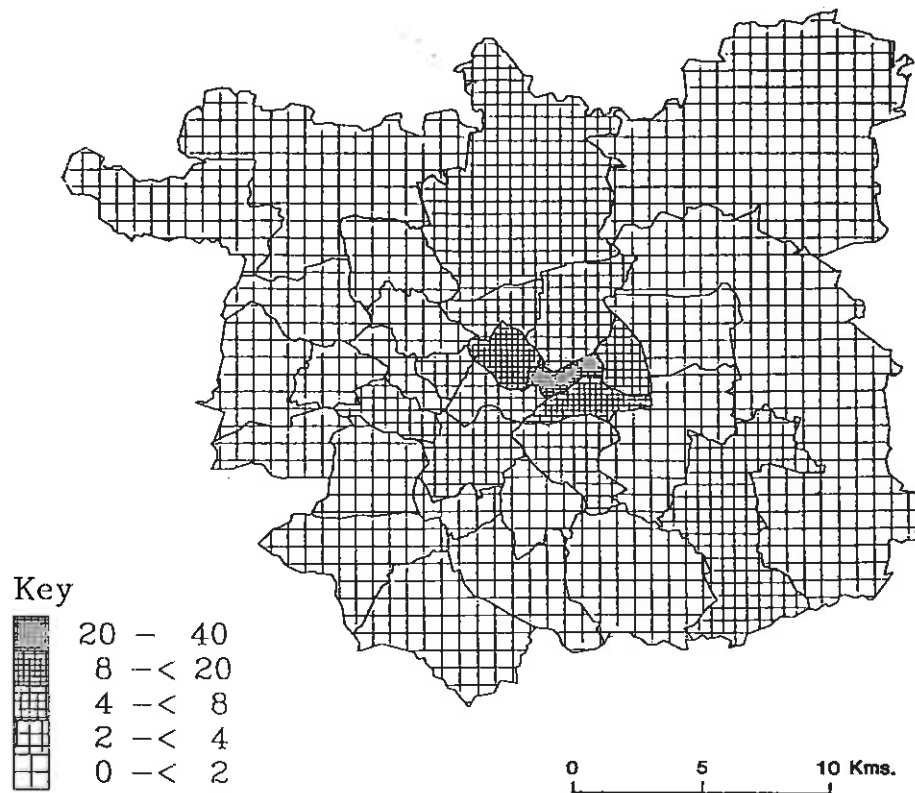


Figure 3.9 100 new unskilled jobs in Harehills

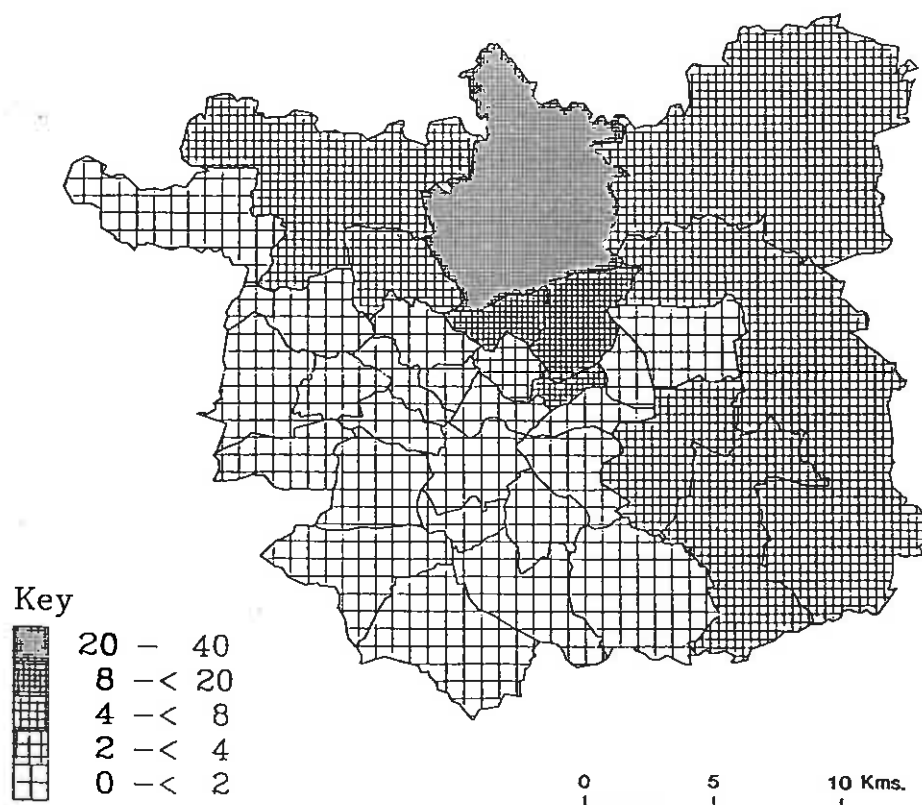


Figure 3.10 100 new professional jobs in Harehills

size category and 'Minimum List Heading' (MLH). It can be seen that the number of large establishments is relatively low, with 70% of firms employing less than 300 people. [The dominance of small and medium sized firms in Leeds has been noted elsewhere. Dobson and Goddard (1986) claim that 94% of Leeds' firms have less than 62 employees, accounting for 40% of employment, whilst Lever (1981) notes that the two largest firms in Leeds account for only 4.6% of total employment in the city (especially significant when compared to say, Scunthorpe, with 73.5%)]. In terms of MLH, the dominance of large firms in key sectors is again apparent: 8.69% in mechanical engineering, 6.52% in paper and printing, and 5.22% in textiles. Similarly, the rise in services and administration offices (especially regional or national headquarters) is increasingly apparent in the distributive trades and professional/financial categories. It is not surprising, therefore, that the distribution of these top 230 establishments is concentrated in the traditional economic heartlands of the city: Hunslet, City/Holbeck, Richmond Hill, Bramley and Pudsey in particular (see Fig 4.1).

The ownership patterns of these key firms are particularly important. There is increasing evidence that many local economies are now principally controlled by externally-owned companies, with headquarters outside the city or region (for example see Murgatroyd and Urry 1983 for Lancaster, Bassett 1984 for Bristol and Lloyd and Shutt 1985 for Manchester). Leeds, unlike many cities, has managed to retain a strong element of local power,

Table 4.1 Firms employing more than 150 people, mid 1980s

MLH	Abbreviated title	Employment size categories				Total	%
		150-300	300-500	500-1000	1000+		
10	Mining	-	1	-	-	1	0.43
21	Food	1	1	1	-	3	1.30
26	Coal Prods.	1	-	-	-	1	0.43
27	Chemicals	1	1	3	-	5	2.17
31	Metal Man.	2	1	-	-	3	1.30
32	Metal Man.	3	-	-	1	4	1.74
33	Mech.Eng.	11	3	4	2	20	8.69
34	Mech.Eng.	1	1	-	-	2	0.87
35	Inst. Eng.	2	1	1	-	4	1.74
36	Elec. Eng.	8	-	1	1	10	4.34
38	Vehicles	3	-	2	2	7	3.04
39	Metal Goods	6	1	-	1	8	3.48
41	Textiles	10	2	-	-	12	5.22
42	Textiles	2	-	-	-	2	0.87
43	Leather etc.	4	-	-	-	4	1.74
44	Clothing	8	1	2	1	12	5.22
46	Bricks etc.	4	1	-	-	5	2.17
47	Timber; Furn.	6	-	2	-	8	3.48
48	Paper; Printing	12	1	1	1	15	6.52
49	Other Manuf.	3	1	2	-	6	2.61
50	Construction	8	-	1	-	9	3.91
70	Transport	8	2	1	-	11	4.78
81/83	Dist. Trades	16	3	1	1	21	9.13
86/87	Prof/Admin.	15	4	5	2	26	11.30
88	Misc. Services	5	1	1	1	8	3.48
Total		140	26	28	13	207	100.00
MLH not found		23	-	-	-	230	-

Source: Establishment databank

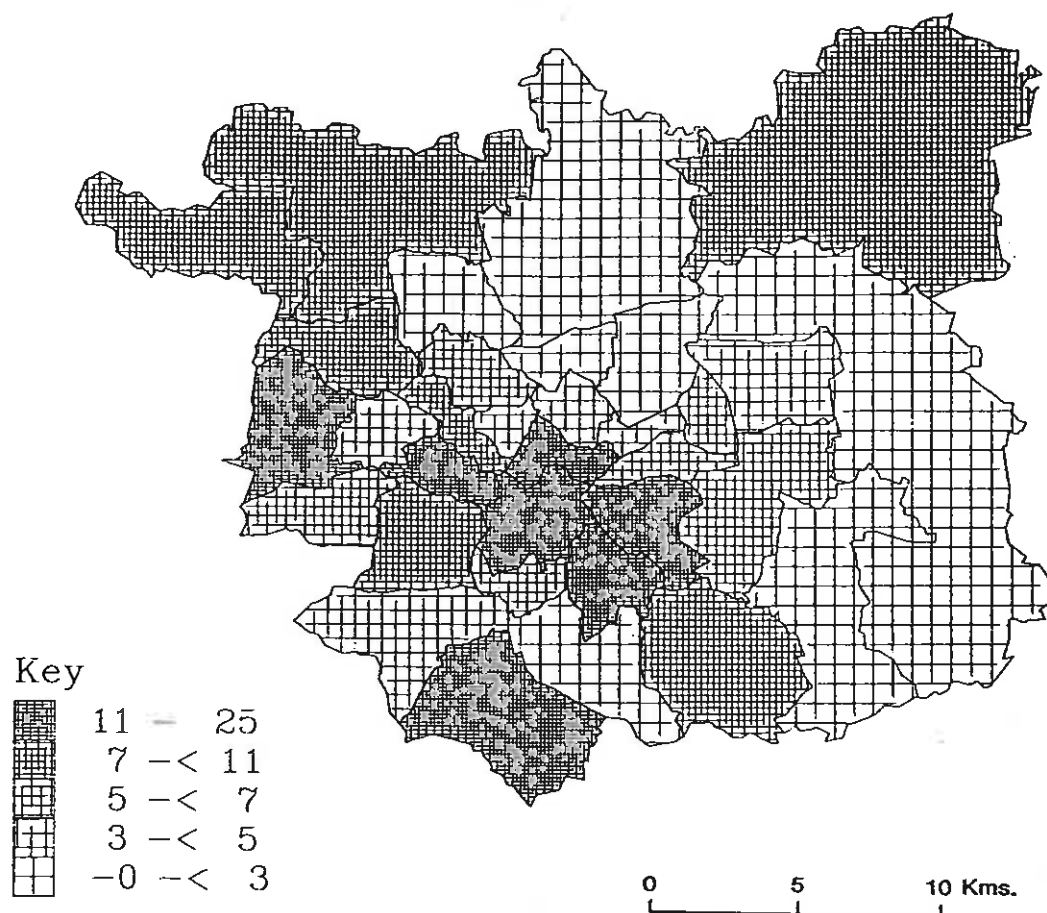


Table 4.1 Firms employing more than 150 people, mid 1980s

with many indigenously controlled firms surviving into the 1980s. This is emphasised by the fact that 106 out of the 230 establishments are owned by local companies, including many with a long tradition in the city: Yorkshire Chemicals, Leeds Group PLC, Jarvis Porter, Hunslet Holdings, Chas Thackeray, Clayton and Sons, Leeds Permanent PLC, Yorkshire Bank etc. (Note that this does not mean these firms do not have substantial interests outside the city: Yorkshire Chemicals has subsidiaries in at least six different countries around the world. It does however, suggest the Leeds economy may escape many of the problems of dependency and external control which afflict other local economies).

In Fig 4.2 we plot the headquarters of the 230

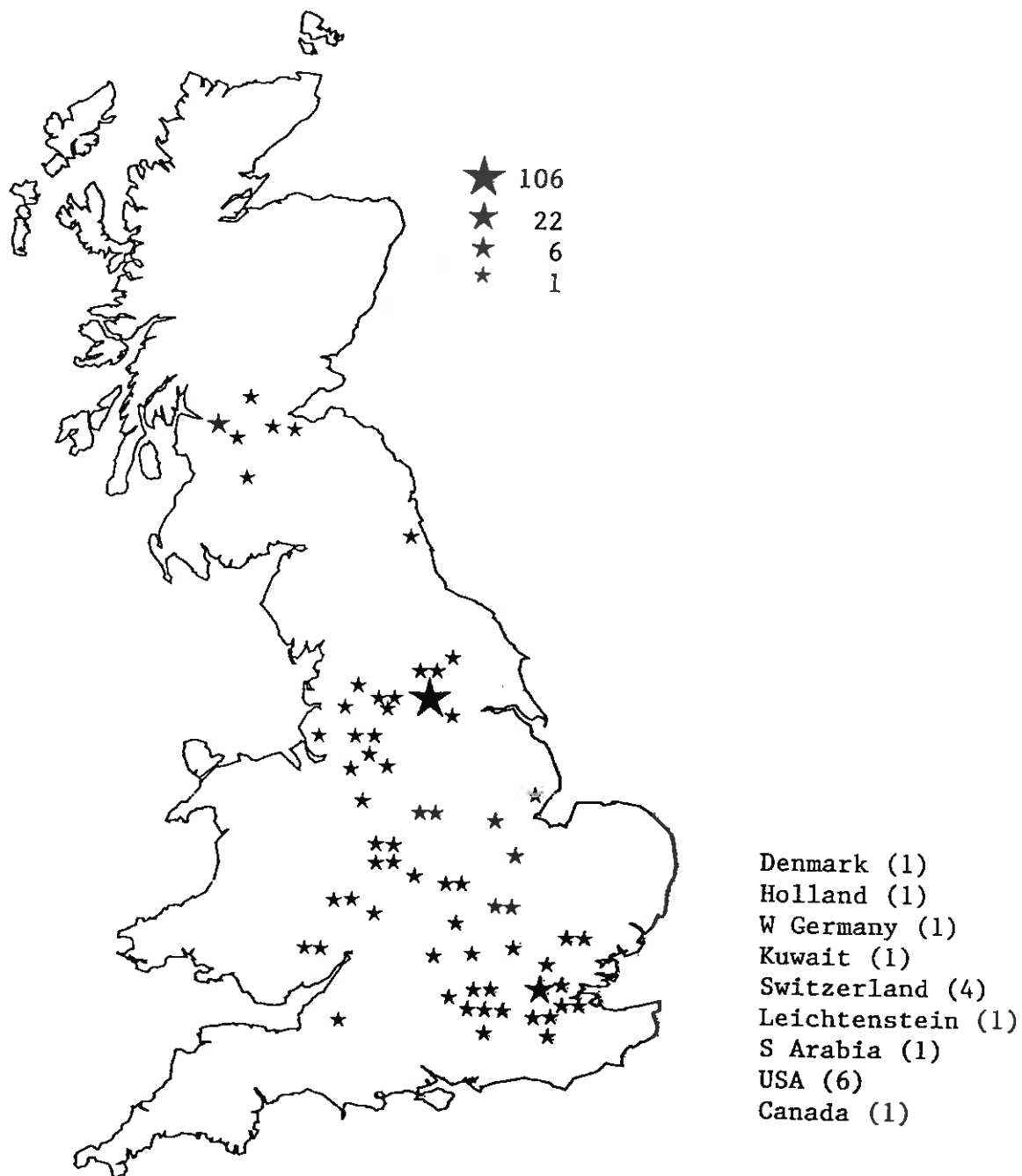


Figure 4.2 Location of HQ of companies with plant in Leeds

establishments, as traced through the publication 'Who Owns Whom'. Bearing in mind the difficulties of defining the final controlling interest in many subsidiaries and branch plants, the map shows an interesting pattern in respect to Leeds. Outside Leeds itself, the South East shows a major concentration of corporate power, with London alone controlling 22 of the major plants in Leeds (Fothergill and Kitson 1985 also show the importance of London as a head office location). Elsewhere, Lancashire and Yorkshire are obviously important, as are Glasgow and the West Midlands. In Glasgow, the Coats Viyella and Weir Groups have a marked presence in Leeds as does GKN from Birmingham. Finally, when combined, the overseas interests are as important as London, with the USA and Switzerland being particularly important.

A much fuller discussion on the importance of internal and external control appears in Clarke, Crewe and Leigh (1989b).

5. Conclusions

In this paper we have sought to breakdown the aggregate picture of employment change in West Yorkshire (described in Clarke, Crewe and Leigh 1989a) by examining the Leeds TTWA in more detail. By adopting a much finer level of spatial resolution we hope that we have demonstrated the wide variations contained within such local economies, patterns which are often not possible to tease out from aggregate studies. In particular, we have shown how the local economy is becoming increasingly polarised between the declining inner core of primarily

manufacturing activities (with subsequent consequences for the local resident unskilled and semi-skilled workforce) and the rising service sector, with its greater number of professional jobs serving a more affluent suburban population. The fact that there are more jobs becoming available in lower skilled service categories (hotels and catering, miscellaneous cleaning/clerical activities) is of some comfort to high unemployment inner city wards: yet these jobs tend to be part-time, predominantly female, and low paid.

All of these changes are shaped not only by national trends in job practises but also by the activities of particular firms within the local economy, themselves tied into national and international labour markets. It is at this level of analysis that we can begin to explain in more detail why these aggregate patterns are emerging and which kind of people are likely to be most affected. We take up this challenge elsewhere (Clarke, Crewe and Leigh 1989b).

References

- Armstrong, H. (1987) The 'North-South' controversy and Britain's regional problem, *Local Economy*, 93-107
- Aubrey, J., Clarke, G.P. and Stillwell, J.C.H. (1989) The use of establishment data to examine employment structure: two studies in West Yorkshire, Working Paper, School of Geography, University of Leeds.
- Bassett, K. (1984) Corporate structure and corporate change in a local economy: the case of Bristol, *Environment and Planning A*, 16, 879-900
- Birkin, M. and Clarke, G.P. (1987) Synthetic data generation and the evaluation of urban performance: a labour market example, Working paper 502, School of Geography, University of Leeds.
- Birkin, M., Clarke, G.P., Clarke, M. and Wilson, A.G. (1988) Leeds 1971-2000, Mimeo, School of Geography, University of Leeds.
- Birkin, M. and Clarke, M. (1988) SYNTHESIS-a synthetic spatial information system for urban and regional analysis: methods and examples, *Environment and Planning A*, 20, 1645-1671
- Boddy, M., Lovering, J. and Bassett, K. (1986) Sunbelt city? A study of economic change in Britain's M4 corridor, Clarendon Press, Oxford.
- Champion, A.G. and Green, A.E. (1985) In search of Britain's booming towns, CURDS Discussion Paper 72, CURDS, Newcastle.
- Champion, A.G., Green, A.E., Owen, D.W., Ellin, D.J. and Coombes, M.G. (1987) Changing places: Britain's demographic, economic and social complexion, Edward Arnold, London.
- Cheshire, P.C. (1979) Inner areas as spatial labour markets: a critique of the Inner Area Studies, *Urban Studies*, 16, 29-43
- Clarke, G.P., Crewe, L. and Leigh, C.M. (1989a) Economic change in a local economy: I the West Yorkshire case, Working Paper, School of Geography, University of Leeds.
- Clarke, G.P., Crewe, L. and Leigh, C.M. (1989b) Economic change in a local economy: III an enterprise study of West Yorkshire, Working paper, School of Geography, University of Leeds.
- Connell, E.J. and Ward, M. (1980) Industrial development 1780-1914, in D.Fraser (ed) *A history of modern Leeds*, Manchester University Press, Manchester.

- Crewe, L. (1989) Economic restructuring in West Yorkshire: some empirical and theoretical developments with reference to the textile-clothing-retail distribution system, Unpublished Ph.Thesis (forthcoming), School of Geography, University of Leeds.
- Dobson, S. and Goddard, J. (1986) Local economic policy in three cities, Leeds University Press, Leeds.
- Fothergill, S. and Kitson M. (1985) An atlas of Britain in the 1980s, Pluto Press, London
- Gordon, I and Lamont, D. (1982) A model of labour market interdependencies in the London region, Environment and Planning A, 14, 237-264
- Hakim, C. (1987) Trends in the flexible workforce, Employment Gazette 95, 549-567
- Healey, M.J. ed (1983) Urban and regional industrial research: the changing UK database, Geo Books, Norwich.
- Herrington, J. (1984) The outer city, Harper and Row, London.
- Lever, W. (1981) The measurement and implications of employment concentration ratios in British local labour markets, Papers of the Regional Science Association, 47, 139-154
- Lewis, J. and Townsend, A.R eds (1989) The north-south divide: regional change in Britain in the 1980s, Paul chapman, London.
- Leigh, C.M (1989) Small towns in North Yorkshire, Working Paper (forthcoming), School of Geography, University of Leeds.
- LLoyd, P. and Shutt, J. (1985) Recession and restructuring in the North-West region, 1975-82: the implications of recent vents, in D.Massey and R.Meegan (eds) Politics and Methods: contrasting studies in industrial geography, Methuen, London, 16-60
- Marshall, J.N (1983) Business service activities in British provincial conurbations, Environment and Planning A, 15, 1343-1359
- Martin, R.L. (1988) The political economy of Britain's north-south divide, Transactions, Institute of British Geographers, 13(4), 389-418
- Murgatroyd, L. and Urry, J. (1983) The restructuring of a local economy: the case of Lancaster, in J.Anderson, S.Duncan and R.Hudson (eds) Redundant spaces in cities and regions?

Studies in industrial decline and social change, Academic Press, London.

Vickerman, R. (1984) Urban and regional change, migration and commuting- the dynamics of workplace, residence and transport choice, Urban Studies, 21, 15-29