



Understanding Bradford District

Summary report

September 2013

Introduction

The 'Understand Bradford District' (UBD) report provides a comprehensive analysis of Bradford District. It has been designed to inform future work on prioritisation as well as share accurate and reliable analysis of the District with Bradford's stakeholders –citizens, partners and businesses – to help build a collective understanding of the District.

This report brings together a range of evidence and intelligence from a variety of sources into one document that highlights key issues and opportunities for the District. It is structured to a format that aligns with the current Community Strategy and Bradford Council Corporate Plan, and will help inform subsequent work to refine both these documents.

Understanding Bradford District can be used as a front door into a wider suite of more detailed analysis. For example ward assessments provide a greater focus on more local issues, and the Joint Strategic Needs Assessment drills down into a broader set of health related issues.

This summary brings together the executive summary from the full report and a summary of the content of each of the thematic chapters. The full report can be found here: <http://westyorkshireobservatory.org/resource/view?resourceId=3590>

Key issues

This section focuses on the issues raised throughout the analysis that have an impact across more than one thematic area. In particular it aims to highlight the key drivers that are shaping the current position of the District and its future opportunities and challenges. These drivers include some which reflect enduring trends and others which are products of more recent changes.

Understanding Bradford's Population

Growing population

Bradford has a large and rapidly growing population. Over the last decade the District's population growth has been much faster than the national average, growing at a rate of 11.1% compared to 7.1% nationally.

While the latest population estimates are slightly lower than previously projected, current forecasts predict that the District's population will grow at 8.5% over the next ten years, faster than the national average.

Bradford is the youngest English city outside London. Nearly a quarter of the population is aged under 16 (23.5%). Over the last decade there has been an increase of over 20% in 0-4 year olds. Over the next ten years the number of under 16 year olds is predicted to increase by 13,200 – an increase of 10.7%. This level of growth has had, and will continue to have, a significant impact on demands for education provision. Compared to ten years ago, this growth has created the need for 320 additional class groups across the primary school sector. As the higher number of children currently aged 2 to 11 moves into the secondary sector, the District will require around 200 additional secondary class groups.

The working age (16 – 64) population makes up over 60% of the District population. Over the last decade it has increased by over 10%, a faster rate than the regional and national average. Over the next ten years the working age population of the District is projected to increase by 2,000 people a year. This growth is driving a need for jobs growth. To maintain Bradford's current employment rate of 64.9%, an additional 10,000 people will have to find employment by 2021. To improve the employment rate to the national average 31,000 additional people would need to find work. The latest economic forecasts predict that the number of full-time equivalent jobs in Bradford is expected to grow by 14,000 to 2021.

At 13.7%, Bradford's proportion of older people (65 and over) is the lowest in West Yorkshire and below the average for England. As part of a national trend, the very elderly (85 and over) population which currently totals just under 10,000 in the District is predicted to increase by nearly 30% over the next ten years. Growth in the numbers of very elderly people will drive a demand for care. The total number of carers who are themselves over 85 is also predicted to increase substantially.

Diversity

Bradford has a diverse population. The White British population remains the largest group at 64%. Over 80% of the District population was born in the UK, and it is births over deaths rather than migration that have been driving the District's population growth. Over the last decade there has been a 6% increase in the percentage of people of Pakistani origin and the same in total for a number of other smaller ethnic groups. At 20%, Bradford has the largest percentage of people of Pakistani origin in England. Over 60% of people with a Pakistani origin were born in the UK.

English is the main language in 83% of Bradford households. 95.1% of individuals either have English as their main language or speak it well or very well. Only 0.9% do not speak English at all.

In the past Bradford has had relatively high levels of international migration. In the last year this has reduced significantly, as part of a national trend, although international migration movements do still add 1,500 people to the District's population each year. Population

movements in and out of Bradford but within the UK reduce the District's population by around 4,000 a year – a relatively high rate nationally. These two factors combined mean that migration is currently reducing the District's population, dampening the increase created by the relatively high birth rate.

Current and historic trends in migration and population growth serve to link the District internationally, by country of origin, language and faith, making Bradford an international district. While this can create challenges in terms of service delivery and community relations, it is also a great asset for the District in terms of trading links and cultural richness.

Community capacity

The Localism Act of 2011 signalled a change in the Government's approach to the role of communities and individuals. Local communities are encouraged to take action, manage services, develop decision making powers over planning and hold decision makers to account. This shift towards greater community and individual responsibility is further emphasised by the reduction in public sector resources. It raises the importance of local capacity to participate and engage with this agenda.

In keeping with its traditions of mutual co-operation and social reform, Bradford remains a District where people are active in their communities and in civic life. There are high levels of volunteering when compared to the national average, including in regular volunteering and civic participation in the local area.

For every four people who already have an active citizen role there are another three who would like to get more involved, particularly in activities within their street or neighbourhood. This represents an important asset for the District.

Barriers to engaging and achieving

Health and wellbeing and long term unemployment have an adverse effect on people's ability to engage and achieve. Mortality rates show health inequalities between deprived and more affluent communities. Such mortality rates have been improving in the district since 2003 – 2005 and the gap in mortality rates between the most deprived 20% of the District and the District average has remained broadly the same. However, the gap in mortality rates between Bradford and the England average has increased.

In the 2011 Census, around 38,000 men and 48,000 women aged over 16 in Bradford reported a long term illness or disability which limited their day to day activities. Of these only 20% were in employment. The largest group (23,430 people) of claimants of out of work benefits are those claiming Employment and Support Allowance or Incapacity benefits. While this number is declining as more people move from incapacity benefits to Jobseeker's Allowance, the number of people living in the District with work-limiting illnesses or disabilities is of concern.

People claiming Employment and Support Allowance (ESA) in the District will also be impacted by welfare reform changes. Claimants of ESA as well as other benefits based on illness and disability will have a Work Capability Assessment to assess their capability for work. The impact of the Work Capability Assessment is likely to be highest for people with mental health problems who may not comply with the reassessment process or whose conditions are difficult to assess by generalists.

Being out of work for over a year can increase an individual's risk of poverty, social exclusion and becoming dependent on benefits. It can have a significant impact on people's confidence

and employability. Unemployment can cause, as well as be caused by, ill health. The number of people claiming Jobseeker's Allowance for more than 12 months has increased more than fivefold since the start of the recession to 6,370 in June 2013. Long term claimants now account for a third of the total.

According to the 2011 Census, 32,398, or 8.8% of Bradford's residents aged 16-74 have been classified as 'never worked'. This is more than twice the national average. More than three quarters of those who are classified as 'never worked' are female.

Understanding Bradford's Economy

A District of scale

Bradford is a city and district of significant scale. In population terms it is the fourth largest district in England, after Birmingham, Leeds and Sheffield. It is in the top ten cities in England in terms of the size of its economy (as measured by GVA – Gross Value Added – the value of goods and services produced in the local area).

Bradford District also ranks among the top ten across a range of other economic indicators including total employee jobs, number of businesses and business births, for which it ranks fifth in England.

Skills and attainment levels

Educational attainment in Bradford is improving year on year. Far more children are taught in schools that OFSTED has judged to be good or outstanding. There has been a recent acceleration in the rate of improvement of the percentage of Bradford's students achieving the Government's benchmark measure of five or more good GCSEs at grades A*-C including GCSEs in English and maths. The Bradford average for 5+ A*-C GCSEs in any subject is now only half a percent below the national average.

Qualification levels among Bradford's working age population are lower than the regional and national averages. The proportion of working age people educated to degree level is considerably below the national average as is the number of working age people qualified to Level 2 - considered to be entry level by most employers. Furthermore, employers report having employees that do not have the full set of skills required for their jobs. Nearly 52,000 people have no qualifications at all.

Employment rates increase as qualification levels increase, and the gap between Bradford's employment rate and the national rate is widest for those without qualifications. Before the recession, Bradford actually had a slightly higher employment rate for those with higher qualification levels. Since the recession, employment rates have dropped for all residents, but more drastically so for those without qualifications.

Combined with the occupational structure of the District economy, the low skills levels of the District contribute to a 'low skill low wage' economy. Educational and skills improvements are essential to increase employment opportunities and choice for the current and future adult and working population, ultimately increasing the prosperity of the District.

Productive capacity

The Comprehensive Spending Review and Capital Investment Plan were released by Government in June 2013 and reinforced a strong political emphasis on creating jobs and driving growth, and the role of Local Enterprise Partnerships in the Single Local Growth Fund and new European structural funds programme. Putting Local Enterprise Partnerships at the

heart of this growth agenda serves to reinforce the importance of Bradford's active participation within the Leeds City Region.

Bradford's economy is £8.3 billion, constituting a fifth of West Yorkshire's economic output and businesses. Between 2008 and 2011, Bradford GVA growth of 5.7% was more than twice the regional average at 2.6% and much higher than UK growth of 3.8%.

The impact of the recession is still being felt on the District's economy. Bradford's total number of businesses in 2012 was just 96% of its 2008 total. Business density levels (the number of businesses per capita), remain relatively low in Bradford. However the number of business births has increased over the last year and the number of business deaths has fallen. The rate of employment growth in Bradford is forecast to outstrip both the Yorkshire and Humber regional and national growth rates over both the medium and long term.

The Producer city and district provides a distinctive economic identity for Bradford based on real strengths in key industries and businesses across the District economy. These relate to not only the manufacture of physical goods but also to the creation and sharing of knowledge to produce new and improved goods and services that can be successfully marketed and traded in an increasingly competitive global economy.

Understanding Bradford's Assets and Infrastructure

Property assets

One of the biggest challenges facing the district is how to accommodate a rapidly growing population and support economic growth in sustainable locations that make best use of previously developed land and minimise the need to travel by car. The availability of good, well located sites, that are unconstrained, market ready and with good access arrangements is essential to generate development and provide new jobs. Of a total 114.6ha of committed employment land, 93.6ha is available for development, constituting a reasonable portfolio of sites available relative to current demand.

The City Centre is the heart of the District and the primary location for office based firms in the financial, professional and public sector services, as well as small and medium sized home grown enterprises in the creative and knowledge industries. Vacant Grade A office accommodation is in short supply in the City Centre and deals for the development of further space remain challenging due to a perceived lack of returns for developers. One recent development commanded headline office rental values in the region of £17 per sq ft, based on a pre let for the entirety of the 113,000 sq ft accommodation.

The Airedale Corridor has the potential to become a creative, connected, lifestyle corridor with high quality rural landscapes and economic activity centred around the three inter-connected town centres of Keighley, Bingley and Shipley.. Critical to its role in the economic transformation of the District will be Airedale's commercial and industrial premises, where the property market is currently quite strong.

The area of South Bradford in the vicinity of the M606 motorway will continue to be the focus for employment growth in large scale general industry, storage and distribution, utilising the area's excellent transport connections.

Existing land planning permissions could yield a total of 9,754 homes. An assessment of potential housing land in Bradford District shows that in the short term (2011 – 2016) there

are sites which could practically deliver 8,554 homes. This represents approximately 46% of what is needed to meet current need over the 5 years.

Connectivity

To meet the demands of a growing workforce, links with neighbouring districts will be important to connect people with employment and housing. While Bradford district has a relatively competitive position in terms of its connectivity to wider destinations, and a high level of bus use throughout the urban area, there are also some key services, employment and housing areas in Bradford that are poorly served by public transport networks and cycling and walking infrastructure.

Bradford was the only UK city in a 2011 ranking of 100 global cities' broadband speeds. However, alongside Leeds, Bradford *city centre* will remain one of the lowest speed broadband areas in West Yorkshire for the foreseeable future. It is estimated 35% of household's in Bradford do not have access to broadband, although provision is available and increasing through PCs in libraries and other public buildings, and smart phones provide an alternative access route. Bradford will be one of the first 13 cities in the UK that receive 4G mobile connectivity in 2013.

Environmental resilience

Natural environmental systems and the network of rivers, moors and woodlands have the capacity to absorb CO₂, buffer severe weather and mitigate pollution. The balance between these regulating aspects, and the harm posed by pollution, climate change and inappropriate development will be key to the wellbeing of communities in years to come.

The District's natural open space provides an important asset in terms of the desirability of the area for living and working, along with the provision of space for sport and recreation uses. Greenspace helps improve mental wellbeing, increase levels of physical and communal activity and improve air quality and reduce noise pollution.

The extent of Bradford's natural floodplains is well understood. The main flood risk areas lie along the course of river Wharfe, River Aire and Silsden beck in Ilkely, Burley, Stockbridge, Shipley, Bingley, Apperley Bridge and Silsden. Developments in those floodplains are strictly controlled by planning policies and through consultation with partners including the Environment Agency.

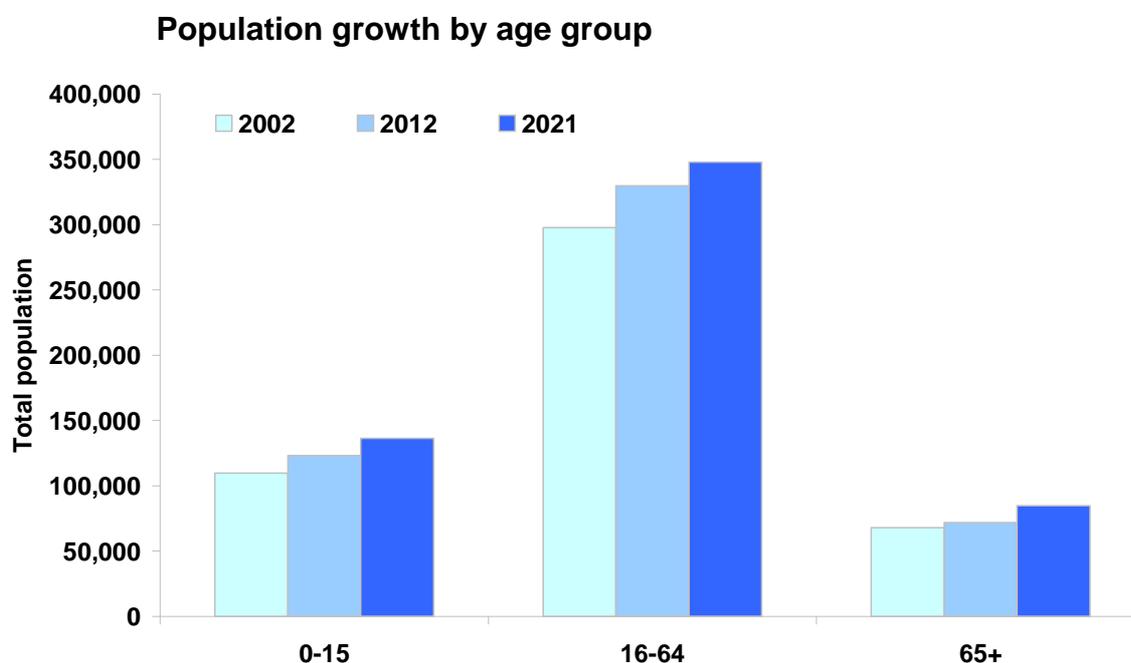
Analysis of Bradford's renewable energy resource shows the high potential for decentralising energy, particularly from commercial wind and solar photovoltaic panels. Hydro electric potential in the District is significantly better than many Yorkshire local authority areas.

Development of commercial scale renewable energy has been slow during the past five years. There has been rapid uptake in small scale renewable energy installations over the past four years. Domestic energy consumption is steadily falling despite a cold winter in 2010/2011. Resource availability and capacity for energy production is important for the District's long term resilience.

Chapter Summary

This chapter provides an introduction to the subsequent thematic chapters of Understanding Bradford district. It offers an analysis of the district's demographics.

- The District's population is just over half a million (524,600) and is growing.
- This growth is driven by our young population profile producing more births than deaths.
- The District has more children as a proportion of its population than any other city outside London.
- While we have a smaller proportion of older people than the national average, numbers are increasing as part of a national trend.
- The District is ethnically diverse, with over 85 languages spoken.
- 64% of the population are of White British origin and 20% have a Pakistani heritage - the highest in England.



Source: ONS mid-year population estimates 2002-2012 & 2011-based interim population projections

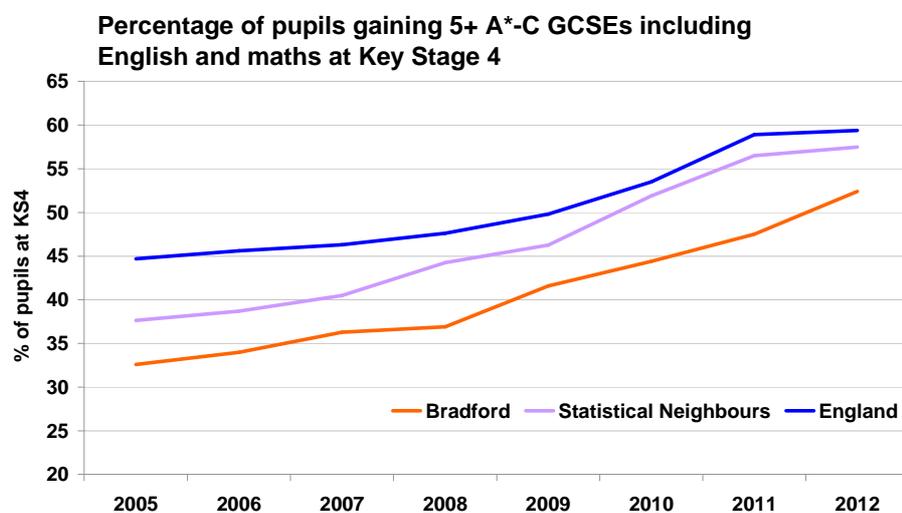
Chapter 1: Education

Chapter summary

This chapter summarises the progress to improve educational outcomes for the children and young people of the District. It considers how well children and young people are doing and where they go to after the end of compulsory education.

The District has a strong trend of improvement from the relatively recent position where educational attainment lagged far behind national attainment. This is being driven by strong improvement in the standard of teaching and of school inspection results – far more of the District's schools are now being judged to be good or better.

- The child population is growing and the school estate is growing and diversifying to meet need and expand choice.
- The Department for Education estimate that 59% of the District's 2 year olds will be eligible for its new early learning programme for deprived 2 year olds, compared to 46% nationally.
- Far more schools are now classed as good or better and far more children are taught in OFSTED classified good or outstanding schools. In the year to June 2013 the proportion of primary pupils taught in good or outstanding schools increased from 65% to 80%. The proportion taught in good or outstanding secondary schools increased from 28% to 47% although this is below the national average.
- 58% of 5 year olds achieved a 'Good Level of development' at the end of the Foundation Stage of education in 2012 compared to 64% in England. This gap with the national average attainment opens up early in children's lives and is very difficult to close as children get older, particularly for those from deprived areas.
- The percentage of Bradford's students achieving the Government's benchmark measure of five or more GCSEs at grades A*-C including English and maths rose significantly in 2012 by a further 4.9% to 52.4%. This represents an acceleration in the rate of improvement.
- The under-achievement of Pakistani pupils and white British boys on Free School Meals (FSM) remains an issue, as is the achievement gap between Looked after Children (LAC) and their peers.



Source: CBMDC

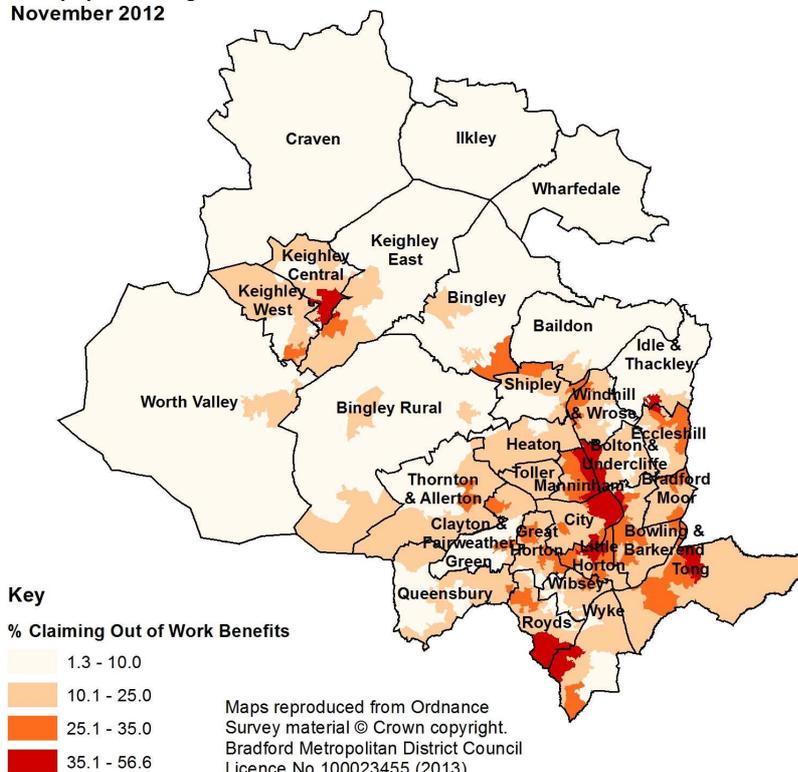
Chapter 2: Employment and Skills

Chapter summary

This chapter looks at the local labour market and provides a summary of how Bradford's working age population fares when it comes to employment, unemployment and skills and what has changed since the recession.

- Bradford's labour market does not perform well against sub-regional and national averages and when compared to our statistical neighbours. We have experienced a bigger decline since the recession than regionally and nationally.
- Unemployment and worklessness are high in Bradford. Youth unemployment continues to be a concern as well as long-term unemployment, which is rising sharply. Large numbers of people in Bradford are out of work due to physical or mental health issues.
- Unemployment is not a major issue in all parts of the District – the highest concentrations of out of work residents can be found within inner urban areas of Bradford and Keighley and some outlying housing estates.
- Bradford's working age population has lower than average qualification levels.
- Bradford has a higher proportion of residents employed in lower-skilled jobs than average, and the competition for these jobs is highest.
- Both the occupational structure and the low skills levels of our residents contribute to a 'low skill low wage' economy.
- Under-employment is also a growing issue with an increase in part-time working. This reflects the slow rate of jobs growth and drop in number of vacancies since before the recession.

Out of work benefit claimant rates
% of population aged 16-64
November 2012

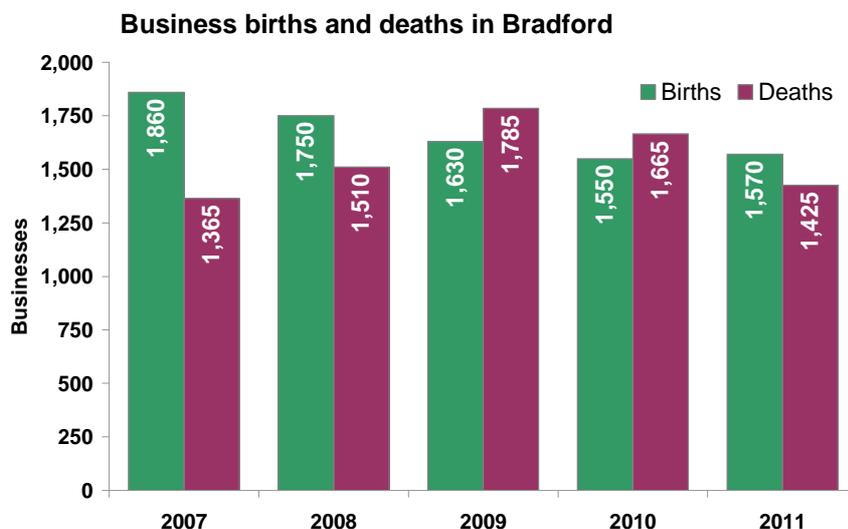


Chapter summary

Following the onset of the recession in 2008, Bradford experienced significant falls in business numbers and employment. Signs of improvement appeared in 2012 and the local economy is now growing but will take a number of years to get back to pre-recession levels.

Between 2011 and 2012, the number of businesses in the District increased by 370 to 15,285. Economic output increased by 1.8% over the year to 2011. This expansion in the local economy has resulted in an increase in the District's employment rate. Today Bradford has the second largest economy of all districts in West Yorkshire with GVA at £8.3 billion and a fifth (20.4%) of all businesses in West Yorkshire.

- The recession brought significant falls in employment in the District as businesses folded or contracted.
- Signs of recovery appeared in 2012 with more new businesses forming and growth in the District's economic output (GVA) outstripping the West Yorkshire average.
- Further growth is now required in business activity and employment to keep pace with the forecast growth in Bradford's population.
- Bradford retains a relatively strong manufacturing base. However the biggest industries in terms of business numbers and employment are all in the service sector - retail being the largest with 14% of all Bradford businesses.
- Higher value added or knowledge intensive industries are under-represented in Bradford.
- The Producer City model provides a focus for building on key sector strengths and other key assets to promote investment, business growth and job creation.
- The number of business start ups per annum is increasing and business deaths are decreasing, but business density levels (businesses per capita) remain relatively low.
- It is estimated there are around 1,000 social enterprises in Bradford. The majority are small and involved in education and training, health activities, art and caring.
- It is likely the informal economy is prevalent in Bradford as the industries in which it is most typically found are well represented in the District.

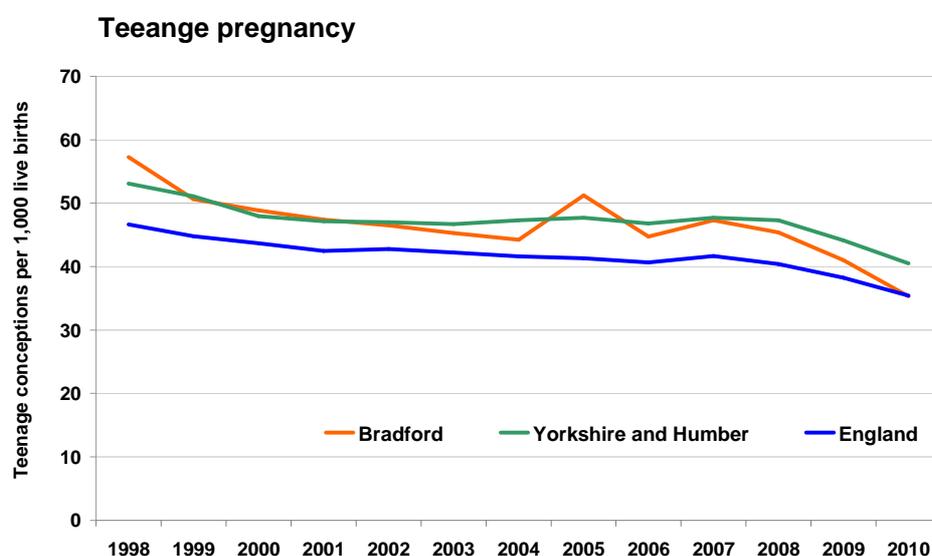


Source: Business Demography 2011, ONS

Chapter summary

There is a difference between people's perception of their general health within Bradford and what their health is actually like. This chapter considers life expectancy, infant mortality and the prevalence in the District of various diseases that affect quality of life, including diabetes and obesity.

- There is a difference between people's perception of their general health within Bradford and what their health is actually like. 80.4% of Bradford residents believe they are in 'very good' or 'good' health. However for key health indicators, Life Expectancy, All Age All Cause Mortality and Infant Mortality, the picture is very different.
- Bradford's infant mortality rate is one of the highest in England and Wales.
- Life expectancy at birth is increasing in both males and females, but is below the England average and all age all-cause mortality rates in Bradford are higher than the England average.
- The prevalence of obese or overweight in Reception and Year 6 aged children is higher than the England average.
- Teenage conceptions have fallen below the England average and are at their lowest since 1998.
- The recorded prevalence of diabetes in Bradford is rising and above the England average.
- Admissions for substance misuse and alcohol related harm are both on the increase and above the England average.



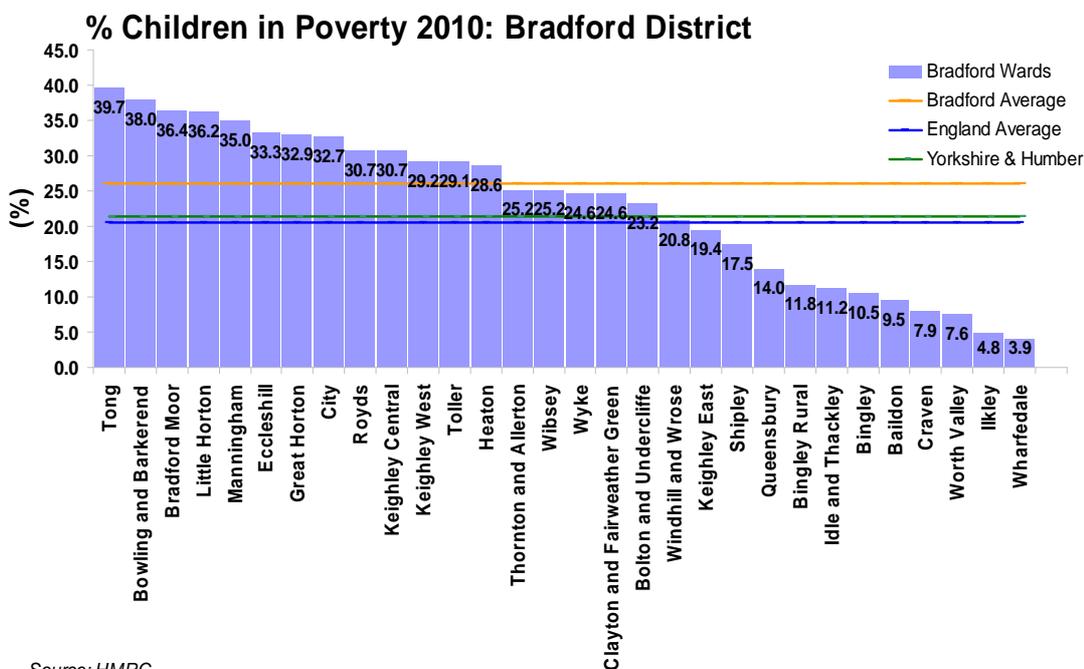
Source: ONS & DfE

Chapter 5: Social Care & Support and Financial Exclusion

Chapter summary

This chapter considers social care issues for children and older people. It also provides analysis of some of the critical aspects of financial exclusion, fuel and child poverty, and the impact of recent welfare reform.

- Referrals to social care services for children have fallen from a peak in 2009.
- In 2011, 51,026 (9.6%) of people in the District provided some form of unpaid care or support, slightly lower than regional or national rates.
- 59,664 households have debt levels of £10,000 or more and 37,666 households have debt levels between £2,000 and £3,999.
- Just over a quarter of the District’s children are classified as living in poverty.
- Living in a couple headed household in Bradford is not the protective factor against child poverty that it is elsewhere.
- Low birth weight and emergency admissions to hospital rates are highest in the most deprived parts of the District.



Chapter 6: Housing

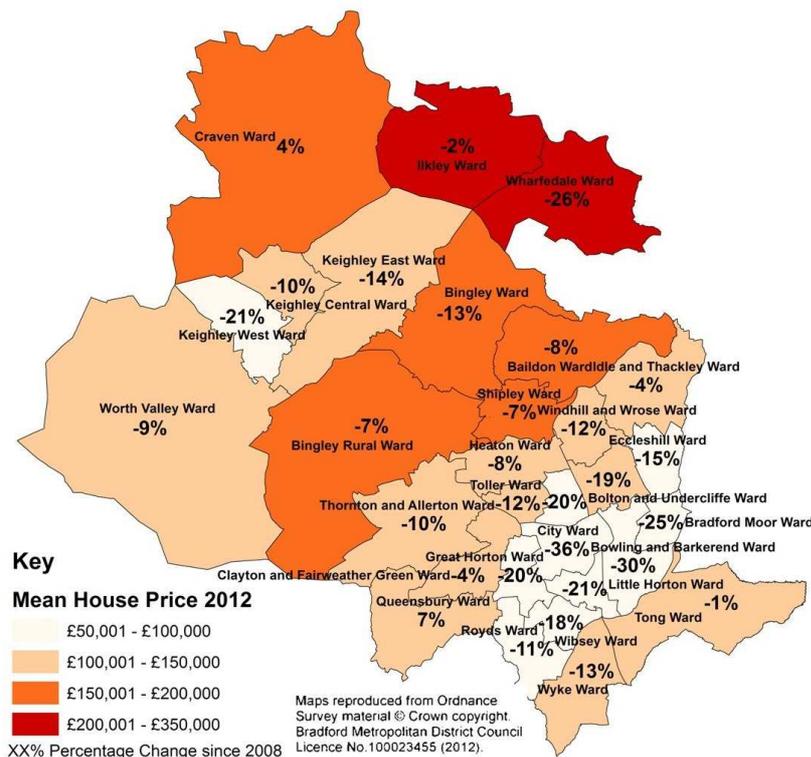
Chapter summary

Bradford has just over 210,000 homes across the District, housing around 200,000 households.

Just over 30,000 homes are owned by a Housing Association to provide affordable social housing. In comparison to regionally or nationally, Bradford has a low proportion of social housing. Over the last ten years the number of households renting from a private landlord has increased significantly.

- A lack of private sector and Government finance is affecting the viability of new build housing in the District. If housing growth does not keep up with population growth then existing trends of increasing overcrowding and homelessness will become entrenched, and impact upon the District's economic growth prospects.
- A reduction in the number of long term empty homes is reducing opportunities for anti-social behaviour and improving neighbourhoods.
- Inaccessible home ownership and housing benefit reform is making housing less affordable for thousands of households. This will impact on household budgets, their ability to spend on other essentials such as keeping warm and eating healthily, and in households being self-sufficient in their old age.
- Bradford District's ageing housing stock increases the risk of excessive cold and trips on steep stairs, but 99.9% of social housing in the District now meets the Decent Homes Standard.
- There has been an increasing trend of households becoming at risk of being made homeless, largely caused by relationship issues and issues associated with the growing private rented sector. The impact of Welfare Reform is likely to increase pressures on the homelessness service.

Bradford District Mean House Prices and House Price Change Since 2008



Chapter summary

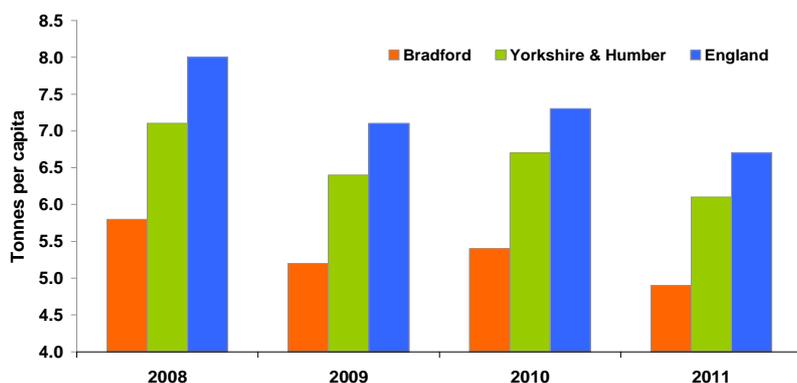
Natural environmental systems and the network of rivers, moors and woodlands have the capacity to absorb CO₂, buffer severe weather and mitigate pollution. The balance between these regulating aspects of the natural environment, and the harm posed by pollution, climate change and inappropriate development will be key to the wellbeing of communities in years to come.

Tougher environmental regulations have led to improved ecological quality of the District's rivers and water courses. Some regulatory functions to improve air quality, such as the emissions standards for new vehicles have not had the desired effect.

The drive toward a low carbon economy has delivered tangible benefits to the District by way of jobs in waste, water and construction. Domestic energy efficiency continues to attract investment while improving the warmth and comfort of people's homes. Nevertheless there remain inequalities between the affordability of fuel and the extent to which communities can benefit from climate change policies.

- The value of natural assets across the District goes beyond aesthetics. The District's rivers, woodlands and moors provide recreation, wellbeing, timber, clean water, resilience to climate and valuable wildlife habitat.
- There are around 10,000 jobs in Bradford's environment sector accounting for a quarter of all primary environmental sector jobs in the Leeds City Region.
- The District has seen an accelerated uptake in renewable energy investment through government incentives (Feed in Tariff), and has potential for large scale renewable energy generation.
- There has been a gradual reduction in CO₂ emissions, with a notable fall in emissions when the recession hit in 2009. 5.3% of all deaths in Bradford can be attributed to poor air quality.
- Improvements over the last two years mean that Bradford's residual household waste i.e. waste that isn't recycled, is now well below both regional and national per household rates and recycling rates are also better than regional averages.
- 16% of the District is formally recognised for nature conservation at local, national and international level. Bradford's citizens have generally good access to greenspace although there are parts of the District in which households fall outside the basic standards for accessible greenspace.

Per-capita CO₂ emissions (Tonnes)



Chapter 8: Safer and Stronger Communities

Chapter summary

This chapter considers crime trends, the communities these most impact on and how Bradford District residents are contributing to the District as active citizens, both as individuals and collectively, tackling issues that affect their neighbourhoods and communities. The chapter also looks at how diverse communities get on together and where this varies across the District.

- Overall crime levels continue to reduce in the District. Although rates of burglary reduced in 2012/13, rates do not compare well to other West Yorkshire districts.
- There is an underreporting of hate crime and domestic abuse.
- Traffic issues and rubbish and litter lying around are the top anti-social behaviour related issues for residents in the District.
- The total number of Killed or Seriously Injured (KSI) casualties has risen after positive reductions in previous years.
- The District has relatively high levels of active citizenship. 13% of people gave voluntary help over 2010/11 although this varied across the District.
- The number of voluntary and community groups has grown in the past five years although there have been reduced turnovers and a significant fall in full time staff.
- Satisfaction with local areas and identity with neighbourhoods is strong. Over 60% of the population agree that people from different backgrounds get on well together and 71% of Bradford District's residents were satisfied with their local area as a place to live in.

Predicted and actual rates of re-offending by Local Authority and Probation Trust				
Local Authority	Cohort size	Predicted rate	Actual rate	% difference from baseline (2007/08)
Kirklees	4,809	10.02%	8.19%	-18.25%
Bradford	7,728	9.92%	8.77%	-11.60%
Calderdale	2,567	10.65%	9.82%	-8.06%
Wakefield	3,906	10.45%	9.98%	-4.44%
Leeds	11,979	10.98%	10.61%	-3.37%
West Yorkshire	31,048	10.48%	9.64%	-8.07%
<i>Source: Ministry of Justice, local reducing reoffending dataset Feb 2013</i>				