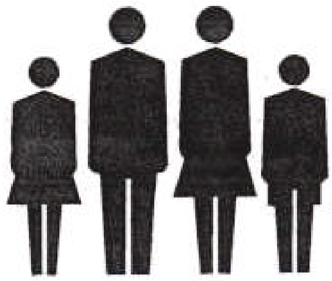
ECONOMIC MONITOR

September 1998



Town Planning Department
Cork Corporation

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1. National Trends

The economy is to expand further in 1998, following on the strong performance of the past five years. The ESRI estimate that Gross National Product (GNP) increased by 8.0% in 1997, and will grow by a further 6.75% in 1998. The Medium Term Review 1997-2003 prepared by the ESRI in 1997 forecast GNP at an average of 5.5% for the rest of the 1990's. Actual performance is ahead of the forecast.

This growth is having a welcome impact on employment. In the year to April 1998 it is estimated that the total number at work increased by 63,000 (4.7%) with a drop of 22,000 (12.3%) in persons unemployed, giving an unemployment rate of 9.4%. The average unemployment rate for 1998 is estimated to come out at 9.2%.

Estimated employment gains for 1998 are 55,000 net new jobs (4%), with a decline of 3,000 (-2.3%) in Agriculture, an increase of 26,000 (6.4%) in Industry and an increased of 39,000 (4%) jobs in Services.

Throughout the year inflation has been giving cause for concern as it could reduce competitiveness of Irish products and lead to increased wage demands. At this stage the ESRI explains the rise in the inflation rate as primarily the result of movement in the exchange rate rather than from domestic sources. A rate of 2.8% is forecast for the whole of 1998. A recent forecast by Davy Stockbrokers concurs with this estimate. Both expect the inflation rate to reach at least 3.5 - 3.7% next year before declining. The year on year rate for August is 3.2%.

Exports appear not to have been affected by the problems in Asian Economics or from increased Asian competition in other markets as a result of these economies increased competitiveness following devaluation. The electronics sector continues to grow and the chemical/pharmaceutical sector is also expanding its export base. The ESRI forecast that exports will rise by 22% in value (18.5% in volume) in 1998 on the basis of a strong US economy, a recovering European economy and the U.K. slowdown counteracted by the continued uncompetitiveness of sterling compared to the punt.

Visible imports also appear to be rising rapidly, with the largest increases in the chemical and electronics sectors, which are also the sectors driving exports; imports growth is forecast at 22.5% in value (19% in volume) for 1998.

The surplus on trade in goods and services in 1998 of exports over imports is likely to be 13% according to the ESRI.

Activity in the construction sector is currently strong in residential, private non-residential and public projects suggesting that investment in building and construction is likely to increase by 22% in value terms during 1998 (15% volume); this difference reflects an acceleration in prices in this sector. The investment in machinery and equipment is forecast to rise by 13% in value (10% in volume) terms. This again is a reflection of a strongly expanding economy. These figures coupled with the an estimated 7.4% increase in personal consumption in 1998 and a 7.8% rise in the Retail Sales index point to growth continuing in the domestic economy also.

As the date for introduction of the Euro in January 1999 approaches it is expected that interest rates will drop.

The economy continues to be strong. There are grounds for believing that the positive trends of the past five years will continue.

<u>Sources:</u>

The Economic and Social Research Institute	***Quarterly Economic Monitor*** *July 1998*
Davy Stockbrokers	***Irish Economic Report*** *August 1998*

2. Local Trends

(i) Unemployment

Table 2.1 shows the numbers on the Live Register for the Greater Cork Area (GCA) in the period 1992-98. The number on the register fell by 17.6% between in the year to August 1998. The decrease at national level in the same period was 10.8%. This decline occurred in an expanding labour force being augmented by young people joining, an increase in female participation and net immigration.

Table 2.1 ***Live Registered 1992-1998 Greater Cork Area.***

December	1992	20,895
December	1993	21,101
December	1994	21,357
March	1995	21,374
June	1995	21,509
September	1995	21,172
December	1995	21,631
March	1996	21,909
June	1996	22,187
September	1996	22,257
December	1996	21,294
March	1997	20,635
June	1997	19,540
September	1997	19,518
December	1997	18,526
March	1998	17,715
June	1998	16,776
August	1998	16,442

In the period from June 1996, when the Live Register was at its peak, to August 1998 there has been a drop of 25.8%.

Table 2.2 gives a more detailed breakdown of the overall figures by age and sex and compares them to the national average in percentage terms.

The GCA had a higher percentage fall in all categories than the national average. The under 25 groups both male and female had the highest percentage falls in those signing on. The female over 25 group had the smallest decline at 12.1% which probably reflects the increasing number of older women wishing to re-enter the labour force. This compares with a 2.7% decline nationally.

Table 2.2 ***Breakdown by age and sex of live register 1997-1998***

	August 1997	August 1998	% change GCA	% change State
Males				
under 25	2,587	1,832	-29.1%	-20.3%
over 25	9,034	7,564	-16.1%	-11.5%
Females				
under 25	2,229	1,685	-24.4%	-18.6%
over 25	6,100	5,361	-12.1%	-2.7%
Total	19,990	16,442	-17.6%	-10.8%

(ii) Housing Construction

Local Authority Construction

28 Local Authority houses were constructed in Cork City up to the end of August while a further 53 are due for completion before the end of the year. The projects consist of small infill schemes in existing local authority housing estates in Knocknaheeney, Mayfield, The Glen and Glenamoy Lawn.

Work has started on further schemes totalling 33 units at Lotamore, Ringmahon Road and St. Peter's Avenue (all due for completion in 1999).

Table 2.3 ***Local Authority House Construction Cork City.***

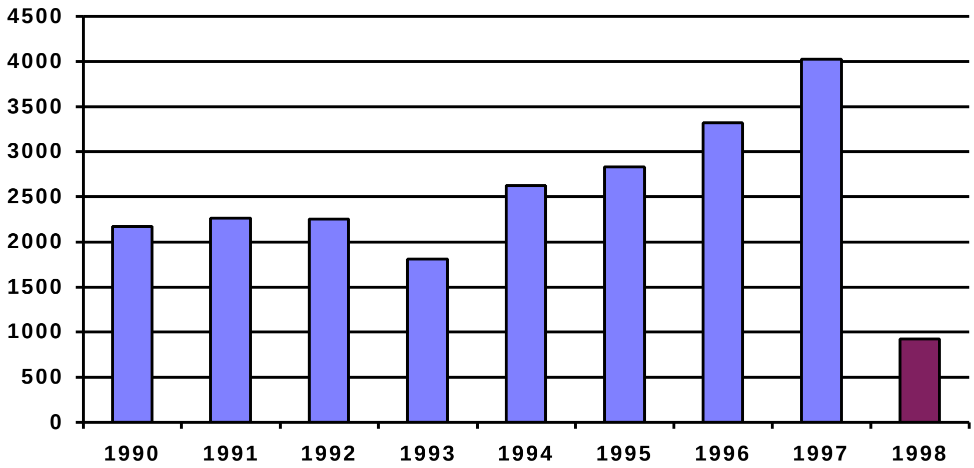
Year	**1990**	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**	**1998***
Units	14	50	36	39	118	79	106	82	81

***Projected Figure**

Private House Completions - Cork City and County

Private house construction grew rapidly in 1997 when a total of 4025 houses were constructed in Cork City and County, 1078 of which were in the greater city area. This was up significantly on the 1996 figure of 2992. In the first three months of 1998 924 houses have been completed, (229 in the greater city area), which if continued over the remainder of the year would match last years level.

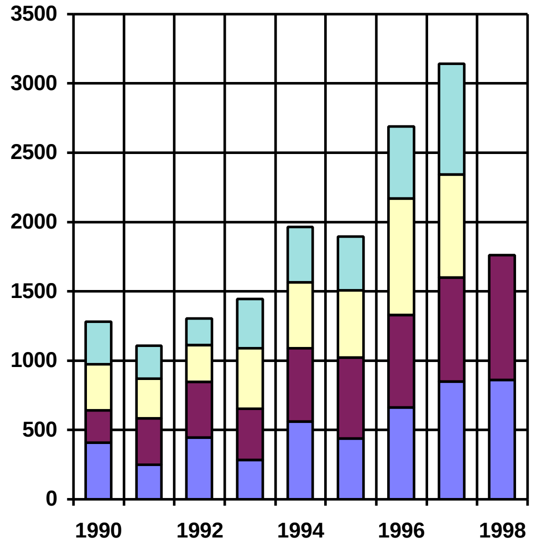
Figure 2.1 **<u>Private House Completions - Cork City and County</u>**



Housing starts under the Home Bond Scheme in Cork City and County look like being even higher in 1998 than the 3,037 recorded in 1997. Work had commenced on 1832 houses by the end of June 1998 (see Fig. 2.2).

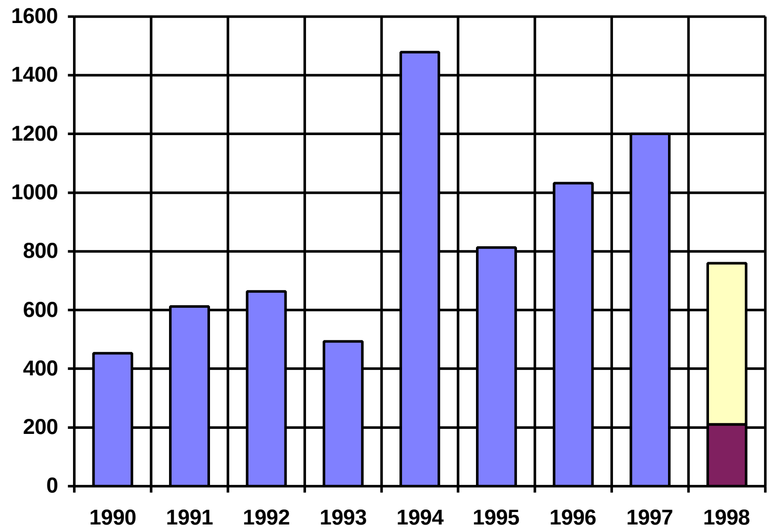
Figure 2.2 **Registered House Starts in Cork City and County under Home Bond Scheme**

By Quarter



Planning applications for housing in Cork City in the first half of 1998 total 763 units, a slight increase on those for the first six months of 1997. The total for 1997 was 1,210 units.

Figure 2.3 **Planning Applications for Housing in Cork City (no. of dwelling units)**



(iii) ***<u>Infrastructure</u>***

<u>Roads</u>

(a) South Ring Road and River Lee Tunnel

The Bloomfield Interchange Bridge has been completed. Construction of the Douglas Estuary Bridge is ongoing with a completion date of the end of 1998. Work on the Lee Tunnel is also ongoing with a completion date of early 1999.

(b) ***Blackpool Bypass***

Work has commenced on Phase 1 of this scheme from Fitzs Boreen to Redforge Road via the Pole field and is now well advanced.

<u>Water Schemes</u>

A project to investigate structural and hydraulic models of the water network and to introduce leakage control and district metering commenced in September 1997 and will continue for 18 months.

European Union Cohesion and DoELG funding has been awarded to lay a 600mm watermain along Sarsfield Road to augment the city water supply from the Cork Harbour and City Water Scheme at Chetwynd.

An updating of the 1993 Preliminary Report on the Lee Road Waterworks improvement scheme is in preparation.

The DOE have approved the preparation of a preliminary report on the provision of a firemain to serve the Industrial Estate at Tivoli. Consulting Engineers have been appointed to prepare same.

A number of schemes have been submitted to the DoELG as part of an EU Cohesion Fund application:

> a scheme to construct a storage reservoir at Rochestown, laying of a feed main from the Cork Harbour and City trunk main and a distribution main from this reservoir to feed into the Blackrock and Mahon area;
>
> provision of a 600mm main from the Lough to the Mardyke;
>
> provision of a stand-by generator to the Lee Road Waterworks.

Drainage Schemes.

Contract documents are being completed on the following elements of the Cork Main Drainage Scheme:

- Interceptor Sewer No. 1
- Collector Sewers for Blackrock, Mahon, Boreenmanna Road
- Pumping Station at Atlantic Pond
- City Centre sewers and City Centre culvert replacement - Contract No. 1

It is expected that these contracts will be advertised shortly and is expected to commence late in 1998.

Design work is underway to produce contract documents on the following elements of the Cork Main Drainage Scheme:

- the twin rising mains from the pumphouse at Atlantic Pond to the Header Chamber at Mahon;
- the Header Chamber, the twin pressure pipes across Mahon and the trans-marine pipes across Lough Mahon to the Treatment Plant site at Carrigrennan;
- City Centre Drainage - Contract No. 2

Work on these elements of the Cork Main Drainage Scheme is scheduled to commence in 1999.

A Client's Representative Consultant has been appointed to advise the Corporation on the construction of the Treatment Plant at Carrigrennan. Advertisements will be placed within the next month to invite pre-qualification submissions from suitable consortia to design, build and operate the Treatment Plant. The most suitable consortium will be selected in 1999 and it is expected that work will commence on site in the Autumn of 1999 with a completion date of mid-2002.

Progress on other drainage schemes is as follows:-

- Work is in progress on Phases III & IV of the River Glen Bride and Kiln Scheme - the scheme will be completed in 1999;
- Culvert at Lower Glanmire Road - work is substantially completed;
- Flood relief schemes at Ballyvolane, Parkcourt and Phase 2 of the Turners Cross scheme are all substantially completed;
- Mayfield flood relief scheme - work is substantially completed.

Amenity Schemes.

The Community Employment scheme employs approximately 150 people and carries out environmental improvement works throughout the city. The principal projects being undertaken during 1998 are:

- landscaping and regrading in Mayfield to the rear of Glencree and Shannon Lawn in conjunction with the house refurbishment programme;
- continuing development of Colmcille Park, Gurranabraher;
- ongoing development of Lady's Well Park, Richmond Hill;
- development of Clashduv Park, Togher;
- St. Anne's churchyard, Shandon.

The education of selected community groups and schools in the care of the environment is ongoing under the guidance of the Environmental Officer of the Cork City Partnership.

Three tonnes of bulbs will be planted in various locations this Autumn. In addition a scheme of tree planting in the individual gardens of dwellings is being undertaken in various targeted areas, particularly Mahon and Knockaheeny.

Work is ongoing on the local park being developed by the Parks Department at Ballinsheen Quarry in Mahon and should be completed by the end of the year.

(iv) Forfas Survey of Manufacturing and International Services Employment

Table 2.3 shows the results of the Forfas survey of total manufacturing employment in the GCA for the period 1993-1997.

Table 2.3 ***Manufacturing Employment 1990-97 - Cork (000's)***

	1990	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**
Cork City	8.5	8.7	8.6	9.1	9.0	9.3	9.8	10.0
Suburbs	2.6	2.6	2.6	2.7	2.7	3.0	3.3	3.2
City & Suburbs	11.1	11.3	11.2	11.8	11.7	12.4	13.1	13.2
Rest of G.C.A.	4.4	4.1	4.1	4.3	4.1	4.2	4.3	4.7
Total G.C.A.	15.5	15.4	15.3	16.1	15.8	16.6	17.4	17.9

Total employment continues to show an increase despite the slight blip in the trend in 1994. While the increases in terms of total numbers are relatively small, any increase in overall manufacturing industry employment is positive given the trends in other Western economies where manufacturing employment is decreasing or static. The increase of 508 jobs (3%) for the GCA compares with an increase of 8.6% nationally in the same period.

This trend is likely to improve into 1998 and 1999 with recent announcements of new projects totalling over 3,000 jobs.

(v) Survey of Vacant Office Space - Cork City Centre.

For the past ten years a survey of vacant office space in selected area of the City has been carried out as well as a survey of vacant ground floor retail space on St. Patrick's Street. The findings of this year's survey, together with those of previous surveys are given below. Vacant ground floor retail space on Oliver Plunkett Street is included for the first time.

Table 2.4 ***Vacant Office and Retail Space - Selected Streets***

	Vacant Office Space				**Vacant Retail Space**	
Year	**South Mall**	**Grand Parade**	**South Tce.**	**George's Quay**	**St. Patrick's Street**	**Oliver Plunkett Street**
1988	45,600			15,200		
1992	39,186		8,400	15,679		
1994	55,460	14,070	15,125			
1995	47,094	14,405	4,800	12,800	6,444	
1996	45,407	13,999	2,545	0	18,632	
1997	8,800	0	1,000	4,300	5,487	
1998	23,023	680	800	4,500	2,285	3,876

Overall however, the level of vacancy remains low compared to previous years with the exception being South Mall up to 23,023 sq. ft. in 1998. This may be a blip are part of a trend. There are a number of properties in the 5,000 sq. ft. range included in this total. The survey also shows very little retail space available in either Patrick Street or Oliver Plunkett Street.

3. Urban Renewal

(i) Designated Area Scheme

The 1994 Urban Renewal Scheme, due to finish in July 1997, was extend to the 31st July, 1998 for projects which has expended 15% of total project cost by the end of July 1997. No final figure is yet available for expenditure/investment under this scheme, but should be available for the next Economic Monitor.

New Scheme

The Department of the Environment and Local government has announced the introduction of a new Urban Renewal Incentive Scheme which required the Local Authority to submit Integrated Area Plans (IAPS) to the Department for assessment. These plans were to identify key sites and areas which might benefit from financial incentives. The key to this scheme is incentives targeted to the sites and areas most in need.

Two plans (IAP's) have bee prepared for Shandon/Blackpool and the City Docks. These involved extensive public consultation and have been submitted to the Department of the Environment and Local Government in March 1998. The decision of the Minister is currently awaited before the scheme can begin.

(ii) Cork Urban Pilot Project

All sub-projects funded by the European Union under the Cork Urban Pilot Project have been completed and the final report has been published. These projects included a Partnership to implement the Historic Centre Action Plan, the Vision Centre in St. Peters Church, Managed Workspace on Wandesford Quay, demonstration projects for "Living over the Shop", the Saturday Market at Cornmarket Street and the restoration of 18th Century houses at Fenn's Quay, Sheares Street. The Partnership is due to be expanded to City Centre Management Forum in the near future with the appointment of a City Centre Co-ordinator.

(iii) Major Initiative:Cork City

The Major Initiative:Cork City seeks to build on the Cork Urban Pilot Project and is seen as Phase II Implementation of the Historic Centre Action Plan. The programme is being financially assisted by the European Union and the Department of the Environment to the extent of £3.5 million with a further £3.5 million being raised locally. The main elements of the Major Initiative are:

Historic Spine Route
A large amount of the environmental improvements have been carried out in this project with work completed in South Main Street and Adelaide Street in recent times. North Main Street is largely complete with the exception of the northern end which will be completed in conjunction with the Cork Main Drainage project.

Grattan Street/Lavitts Quay Route
This proposal involves environmental improvements, including roadway, footpath, the planting, riverside walk, traffic calming initiatives as well as upgrading open spaces.

Conservation Study and Strategy
Work is well advanced on this part of the project which seeks to preserve the built historic record of the city, to develop tourist potential, to develop public awareness of the rich historic fabric that the city contains and to provide employment and further specialist training.

East West Visitor Spine
Work has commenced on the extension of Paul Street pedestrianised scheme to provide a tourism development link from Emmet Place to Mardyke walk. Work on Daunt Square is complete and consultations are underway on major improvements for Emmet Place.

Elizabeth Fort
This project includes a Fort Heritage Feasibility Study to investigate possible future uses for the fort which would be appropriate for its status as one of the major historic building in the city. Other proposals involve environmental improvements, new paving, access improvements, lighting, street furniture and planting. A pilot floodlighting scheme has been in place for some months. The Feasibility Study is currently underway.

Traffic Assessment Framework
It is proposed to have a traffic assessment framework in place for evaluation of transportation proposals. Some work was carried out on the development of a traffic model under LUTS and the LUTS Review. This project will further develop the model to the refinement of scheme proposals and optimisation of network capacity. Development of this model is underway.

Cork Centre for the Unemployed
No. 13 North Main Street has been refurbished and is currently open as a centre for the unemployed providing a wide range of services including education classes, social welfare, counselling, computer and language training, creche facilities, and a canteen.

(iv) <u>Cork URBAN Initiative</u>

Approximately £5m is being spent in the northside of the city under the EU funded URBAN Initiative. Projects include the extension and upgrading of Farranree Community Centre, which is almost complete; the construction of an Enterprise Centre in Ballyvolane and a Community Resource Centre in the Glen, both of which are well underway. A package of measures to tackle education disadvantage is also in progress, under the direction of Cork City Partnership. A second round of projects, mainly dealing with training, education and community development, has commenced.

4. Overall Prospects

At present indications are that the Irish economy will continue to grow, but at a slightly reduced pace. The major obstacles to this continued progress would be inflation, capacity constraints or major international shocks.

The outlook regarding inflation would appear to be good. Most commentators anticipate that the rate will not increase beyond 3.7% over the next year.

Capacity constraints are generally felt when an economy has grown rapidly over a sustained period and is approaching full employment. They can relate to labour supply and infrastructure. In relation to labour supply Davy Stockbrokers, in a recent report, predicted continued growth in the labour force, fed by continued increases in the female participation rate and immigration. The report suggests that 170-180,000 Irish emigrants aged 15-40 years are living abroad. On this basis the demand for labour within the economy should continue to be met.

In terms of infrastructure the focus of national policy has turned to deal with strategic bottlenecks. In the Greater Cork Area, the major elements of required infrastructure are now being put in place after a twenty year effort. As the capacity of the road network is unlikely to be expanded in the foreseeable future, management of the resource will assume greater importance.

The recent problems in the Asian and Russian economies serve to remind us of Ireland's vulnerability as a small open economy. They also point to the increased interconnectedness of the regional economies with Latin American commodity-based economies now coming under pressure from the lack of demand. Most commentators to date do not see major dangers for the Irish economy. However this would change quickly should the U.S. economy go into recession. Most Irish based companies are not greatly exposed to the problem areas; however their competitiveness could suffer as a result of devaluation in Asia, and reduced demand.

Stock market losses in the Irish Stock Exchange appear not to be based on the actual performance of the companies involved but more on events elsewhere. Some commentators have voiced concern regarding the potential for major institutional investors to move out of the Irish market as monetary union approaches. This could reduce access to funds for Irish companies. In addition losses on the stock exchange by small investors could dampen consumer expenditure and thus the domestic side of the economy.

Much of the recent employment growth in Ireland has been underpinned by foreign multinational investment. Many of these firms are large operators, particularly in the electronics sector. Surrounding communities can become dependant on this employment. The recent example of two microchip plants closing in the north east of the United Kingdom, due to falling, demand demonstrates the danger of the global uncertainty continuing.

5. *Census of Population 1996: Employment, Industry and Transport*

Additional information has become available from the Census of Population 1996. The main trends are set out below.

(i) Labour Force

Between 1991 and 1996 the City's labour force increased by 6.3%. This reversed a decline experienced in the 1986-91 period and was achieved within a static overall population situation. The Greater Cork Area (GCA) labour force increased by 12.5% over the same period, nearly three times the rate of increase experienced between 1986 and 1991 (see Table 5.1).

Table 5.1 ***Labour Force (000s) 1971-96***

	1971	**1981**	**1986**	**1991**	**1996**
GCA	65.6	80.7	85.0	89.0	100.1
Cork City	45.6	50.8	49.8	48.9	52.0

(ii) Unemployment

Between 1991 and 1996 the unemployment rate for Cork City as measure in the Census of Population remained static at 21% (actual change was 21.1% to 20.8%) whilst the GCA rate declined by one percentage point to 16%. The rate for the Northside also remained static at 27% (see Table 5.2). The national rate declined from 16.9% to 14.8%.

Table 5.2 ***Sequence of Unemployment Rate 1971-91***

	1971	**1981**	**1986**	**1991**	**1996**
GCA	5	10	19	17	16
Cork City	5	11	23	21	21
Northside	7	14	28	27	27

The lack of change in the City and Northside rates is disappointing considering the rate of economic expansion experienced in the 1991-96 period. However closer examination of the figures shows that whilst the number at work in the city increased from 38, 624 to 41,169 (+6.6%), the number declaring themselves as unemployed also increased by 9% to 9,481. Of the increase of 800 persons 706 (88%) were female.

One possible explanation is that with the increased employment opportunities and increased female participation rate in the labour force, there is now a higher expectation of employment. Therefore people are now describing themselves as unemployed, whereas before they would have chosen one of the other categories to describe their current status.

It is also worth recalling that the Census was taken in April 1996. The Live Register for the GCA peaked in June 1996 and has declined by 26% since then.

Throughout the City the unemployment rate varied considerably. The lowest rate of any ward was 6.3% in Bishopstown D. The highest recorded rate was in Knocknaheeny at 47.8%; however this had declined from 52.6% in 1991.

The unemployment rate fell in 32 wards, remained unchanged in 11 wards and increased in 31 wards. Two wards had a rate of over 40% in 1996, compared to 2 also in 1991 and 4 in 1986. Eleven wards had a rate of less than 10% compared to six in 1991 (see Figure 5.1).

The largest decrease in the employment rate was recorded in Greenmount (-8.9%); this can be mainly attributed to housing development in the area since 1991. The largest increase occurred in Sundays Well B at 10.6%.

The average unemployment rate for the five County Boroughs of Dublin, Cork, Galway, Limerick and Waterford in 1996 was 19.2%, down from 21.9% in 1991. Figure 5.2 shows the wards in Cork City which exceeded this average. 38 wards was exceeded this average in 1996 compared to 35 in 1991 and 33 in 1986.

Table 5.3 indicates the unemployment rate for different age groups from 1981-96

Table 5.3 ***Unemployment Rate by Age Group***

	15-24	**25-34**	**35-44**	**45-54**	**55-64**	**65+**
1981	15.1	11.7	8.9	7.1	6.2	2.9
1986	29.8	20.5	20.7	18.2	16.4	0
1991	26.5	19.3	21.0	18.8	17.0	5.9
1996	29.5	17.9	19.2	19.6	16.0	7.4

There were increases in the 15-24, 45-54 and 65+ age groups and decreases in the 25-34, 35-44 and 55-64 age groups.

(iii) Employment by Industrial Group

Table 5.4 shows employment in the Census Industrial Groups between 1981 and 1996. These figures relate to employment of residents in Cork City and not the number of jobs within the city.

Table 5.4 ***Employment by Industrial Group 1981-96***

Industrial Group	1981	1986	1991	1996	change 1991-96
Agric. Forestry, Fishing	207	186	253	291	+15%
Mining, Quarrying	114	75	60	35	-42%
Manufacturing	11,797	8,947	8,932	8,318	-7%
Elect., Gas, Water	791	595	514	446	-13%
Building & Construction	4,798	3,061	2,743	2,719	-1%
Commerce & Finance	9,982	8,561	8,842	9,051	+2%
Transport	3,536	2,869	2,666	2,711	+2%
Public Admin. & Defence	2,647	2,611	2,411	2,569	+7%
Professional Services	8,216	8,179	8,120	9,086	+12%
Other (incl. Personal Services)	3,182	3,521	4,083	5,943	+46%
Total	45,270	38,605	38,624	41,169	+7%

Over the period 1991-96 there was an overall increase of 2,545 (+7%) persons in the number of employed residents. The major increases in absolute numbers were in professional services - 966 (+7%) - and Other (including Personal Services) - 1,860 (+46%). Smaller increases occurred in Public Administration and Defence - 158 persons (+7%). Manufacturing showed a significant decline of 614 persons (-7%) with a smaller decrease in Electricity, Gas & Water - 68 persons (-13%).

(iv) Means of Transport

Journeys to work and school by persons aged 5 years and over are shown in Table 5.5. Overall journeys grew by 3.1%. The most significant increases were in motor drivers (+21.7% and Car Passengers (+30.4%). There was a steep decline in cyclists (-35%) and motor cyclists (-18.4%).

Table 5.5 ***Means of Travel to Work, School or College, Cork City Residents***

	1991	**1996**	**% Change**
Foot	27,231	26,744	-1.8%
Bicycle	4,751	3,088	-35.0%
Bus	7,306	7,522	+3.0%
Train	142	156	+9.9%
Motor-cycle	795	649	-18.4%
Motordriver	15,155	18,443	+21.7%
Car passenger	8,313	10,839	+30.4%
Not stated	8,002	6,512	-18.6%
Total	71,695	73,935	3.1%

This information can be subdivided into three broad categories giving the percentage modal split as shown in Table 5.6 below. The 'Not stated' category in Table 5.5 is excluded from this calculation.

Table 5.6 ***Journey to Work (Broad Modal Split %), Cork City***

	1991	**1996**
Motor Vehicles	38.1%	44.4%
Public Transport	11.7%	11.4%
Self Propelled (on foot, cycle)	50.2%	44.2%

Self Propelled, the most environmentally friendly form of transport, declined to 44.2% whilst Motor Vehicles are now used for slightly over 50% of journeys. This situation coupled with increases in car ownership since 1996 will have major consequences for the city is the trend continues unchecked.