



State of the Region 2023/24
Executive Summary



West
Yorkshire
Combined
Authority

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West Yorkshire



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Background and context

State of the Region 2023/24 is the third annual review of the performance of West Yorkshire against key socio-economic, transport and environmental themes. It provides a stocktake using indicators mapped against the West Yorkshire Plan's five Missions.

Due to the time lag affecting the official statistics available at West Yorkshire level, much of the picture we present continues to be coloured by the influence of the coronavirus pandemic and its aftermath. Where possible, supplementary evidence is used to show how the situation has developed since the latest official figures were published.

Key messages

West Yorkshire's economic output

recovered strongly in 2021 (latest data available) as pandemic restrictions were lifted. Over the most recent 5-year period its economy has grown faster than the national average, both in overall terms but also per head of population.

Productivity fell in West Yorkshire and nationally between 2020 and 2021 due to one-off compositional effects linked to the re-opening of the economy. It is likely that these effects have now worked through but this still leaves West Yorkshire with a sizeable, long-term productivity deficit.

The main employment indicator used in State of the Region suggests that the overall level and rate of employment in West Yorkshire remains below its pre-pandemic position, reflecting the national picture. However, more timely experimental statistics indicate that the count of employees in the region is well above the level recorded immediately before the health crisis.

The employment rates of key groups, including women, disabled people and people from ethnic minorities are all on a long-term upward trend, whilst the ethnicity employment rate gap is falling.

West Yorkshire's digital infrastructure is a key strength. Coverage of gigabit-capable fixed internet and mobile 4G services continues to improve and the region outperforms the national average on these indicators.

Average ratings of personal well-being improved in 2021/22 among West Yorkshire residents. This follows a fall in the rating during the pandemic. West Yorkshire's ratings are similar to the national average across all of the measures of well-being.

An estimated 30% of West Yorkshire households are in fuel poverty (defined as households living on a low income in a home which cannot be kept warm at reasonable cost). This is well above the national average but a slight reduction on the peak of 33% seen in April 2023, reflecting a stabilisation of the energy market.

The latest available figures show that, as expected, West Yorkshire's greenhouse gas emissions increased year-on-year in 2021 as the economy re-opened following the pandemic. This was in line with the national trend. Based on more timely national figures we expect that the publication of data for 2022 will show a resumption of the pre-pandemic downward trajectory in emissions, but the rate of decline will need to be accelerated considerably to reach Net Zero by 2038.

Walking and bus services account for a larger share of trips undertaken by West Yorkshire residents than nationally and trips by private car a slightly smaller share. Public transport usage remains below pre-pandemic levels but increased between 2022 and 2023. Satisfaction with West Yorkshire's public transport system fell in 2022.

Mission 1

A prosperous West Yorkshire – an inclusive economy with well paid jobs

Raising the prosperity and real term living standards of all parts of West Yorkshire can only be achieved sustainably by increasing productivity. To do this we will create the conditions to boost the economy so we can see highly skilled, healthy people working in well-paid jobs growing the presence of high productivity businesses and sectors. We will support an environment where entrepreneurial activity is nurtured and can flourish, where it is easy for businesses to start-up, grow, innovate, trade, and invest.



Gross disposable household income in West Yorkshire is only 80% of the national average.

West Yorkshire's economy recovered

at a faster rate than the national average in output (gross value added) terms between 2020 and 2021. Its growth was also faster during the most recent five-year period of 2016 to 2021 and this strong performance was shared across most parts of the region. Output (GVA) per head of population also bounced back more strongly in West Yorkshire in 2021 although the region still faces a deficit with the national average in respect of this key measure.

The main employment indicator used in State of the Region suggests that the overall level and rate of employment in West Yorkshire remains below pre-pandemic values, reflecting the national position. West Yorkshire's employment rate is also somewhat below the national average. However, more timely experimental statistics indicate that the count of employees in the region is above the level recorded immediately before the health crisis.

Progress needs to be made on the inclusivity of employment in West Yorkshire, with key groups, including women, people from ethnic minorities and disabled people still facing employment rate gaps. These groups have seen improvements in their employment rates in recent years and the figures suggest that the ethnicity employment rate gap has narrowed over time in West Yorkshire.

Productivity fell both in West Yorkshire and nationally in 2021 due to one-off effects as the economy re-opened and lower productivity sectors saw restrictions on their activity lifted. The weak

relative position of West Yorkshire on productivity remains unchanged due to structural factors in the local economy, reflecting the wider position across much of the country outside the south and east of England.

The most prosperous areas of the country have a strong business base. West Yorkshire has fewer private sector businesses per head of population than the national average, but its business base has grown faster than the national average in recent years (2017–2022), driven by expansion in sectors including Transport and storage and Business administration and support services.

The region's underperformance on productivity can be traced to a number of underlying factors. The proportion of local businesses engaged in innovative activities has fallen slightly over time, whilst the value of exports forms a relatively small part of West Yorkshire's economy.

On a positive note, the value of West Yorkshire's exports of both goods and services recovered strongly between 2020 and 2021, growing faster than the national average, following a steep decline during the pandemic, although they both have yet to regain their respective 2019 levels.

A key objective of levelling-up is to reduce disparities in household income. Gross disposable household income in West Yorkshire is only 80% of the national average, partly reflecting the region's underperformance on productivity. Over the longer-term this gap has been widening but it narrowed

slightly during the pandemic due to what are likely to be one-off factors related to property income and social benefits.

West Yorkshire is making some progress on low pay. The proportion of jobs paying below the Real Living Wage fell in four out of five local authorities between 2021 and 2022. However, the 2022 figures do not take full account of the recent surge in inflation and it is expected that there will be an increase in the proportion of jobs falling below the threshold in the 2023 data when it is published.

The prevalence of child poverty is a key measure of progress towards an inclusive economy. There are almost 150,000 children living in low-income families in West Yorkshire, according to official statistics. Children in low-income households account for more than a quarter of children aged under 16 in West Yorkshire compared with one fifth across the UK. There is some evidence that the West Yorkshire proportion has seen a reduction compared with the previous year.

Turning to the quality of jobs available, most jobs in West Yorkshire offer satisfactory hours and the worker's desired contractual status. However, large majorities of West Yorkshire employees say that their job does not offer opportunities for career progression and does not offer good employee engagement.

Improving the skills of the workforce is central to driving productivity growth. Over the last two decades West Yorkshire's working age population has steadily become better qualified. It is difficult to discern whether this has continued on the basis of the latest data for 2022 due to a break in the timeseries to take account of the shift to the Regulated Qualification Framework. A substantial gap remains with the national average with regard to the proportion of people with higher qualifications (Level 4 and above). Performance against this indicator is highly variable at local authority level, with Wakefield lagging well below the West Yorkshire average. Meanwhile, 15% of West Yorkshire's working age population either lack any qualifications or are qualified below Level 2, above the national average of 12%.

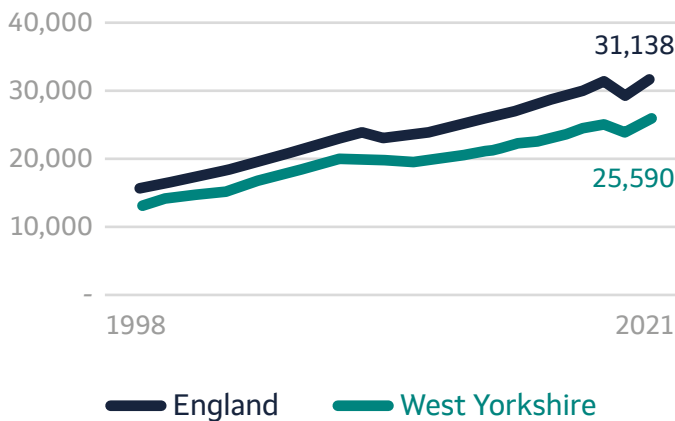
Apprenticeships provide an important pathway into sustainable careers whilst enabling employers to address their core skill needs. They also promote social mobility. West Yorkshire has strong take-up of apprenticeships relative to its population base. Take-up increased in 2021/22 but still remains below its position prior to the pandemic in 2018/19.

Young people not in education, employment or training (NEET) face an increased likelihood of unemployment, low wages, or low-quality work later on in life. The proportion of young people who are NEET in West Yorkshire increased between 2021/22 and 2022/23 and is above the national average, with significant variations at local authority level.



Improving the skills of the workforce is central to driving productivity growth.

Economic output (GVA) per head

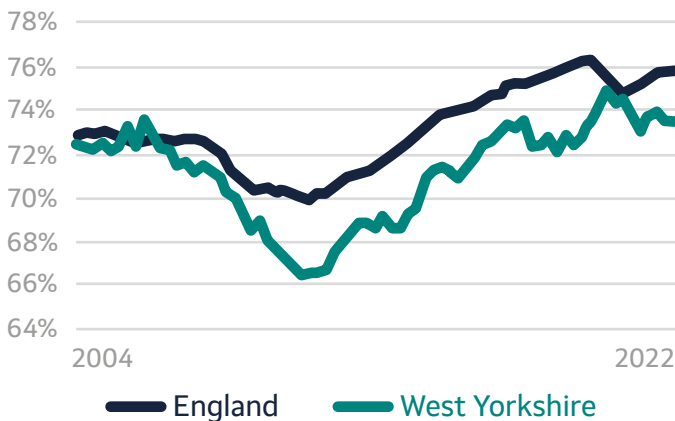


Gross value added per head (balanced) at current basic prices (£)

Output per head fell in 2020, reflecting the pandemic-related lockdown in the economy. However, between 2020 and 2021, the West Yorkshire economy bounced back stronger than the England average. West Yorkshire still faces a significant deficit against the national average regarding its level of output per head.

Source: ONS, Sub-regional GVA data

Employment rate

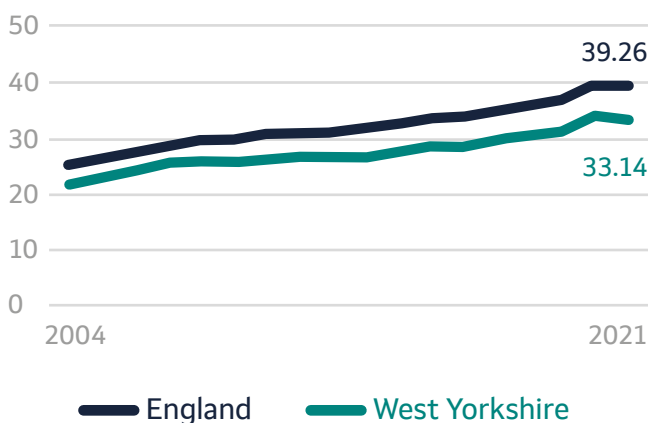


Employment rate for all aged 16–64

West Yorkshire's employment rate fell during the pandemic, widening the gap with the national average. The latest figures from Annual Population Survey (APS) indicate there is still ground to recover on previous peak employment levels. Experimental monthly estimates from HMRC suggest that the count of payrolled employees has recovered more strongly than the APS figures suggest.

Source: ONS APS

Productivity

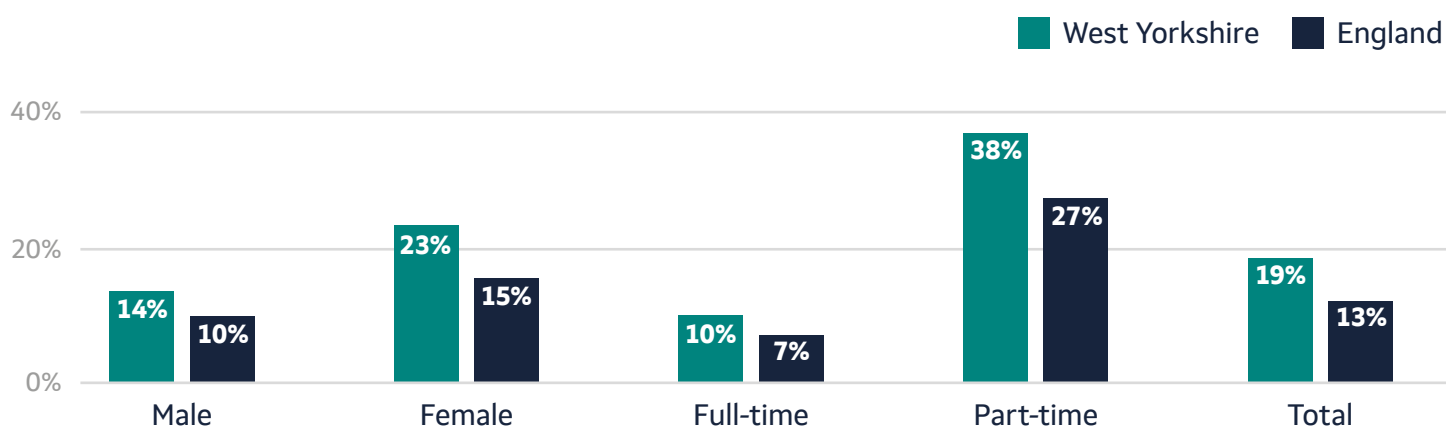


Current price unsmoothed GVA per hour worked (£)

Productivity fell in 2021 as the economy re-opened and lower productivity sectors saw restrictions on their activity lifted. The relative position of West Yorkshire on productivity has not improved in recent years.

Source: ONS, Sub-regional productivity data

Jobs paying below Real Living Wage



Jobs paying below Real Living Wage by gender and status

The proportion of jobs paying below the Real Living Wage is six points above the national average. Women and part-time workers are more likely to be paid below the Real Living Wage.

Source: Annual Survey of Hours and Earnings, 2022

Employment inequality



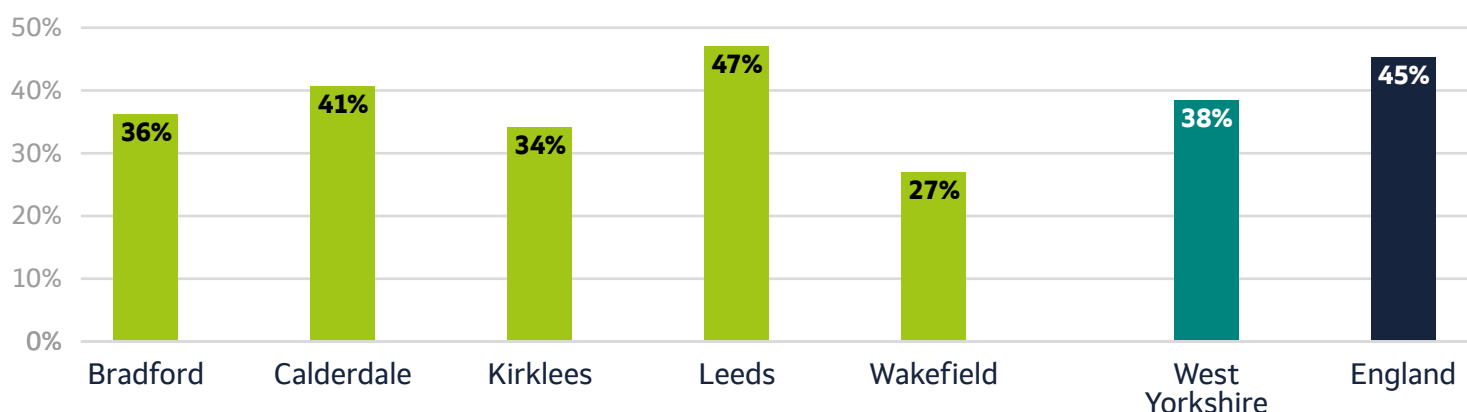
Employment rate for all aged 16-64, January to December 2022

Some groups, including disabled people and people from ethnic minorities, have relatively low employment rates. There has been a general improvement in employment rates for these groups in West Yorkshire in recent years and a narrowing of the ethnicity employment rate gap.

Source: ONS APS

Over the last two decades West Yorkshire's working age population has steadily become better qualified but there is a continuing attainment gap with the national average.

People qualified at Level 4 and above



% of people aged 16-64 whose highest qualification is at RQF Level 4 or above, 2022

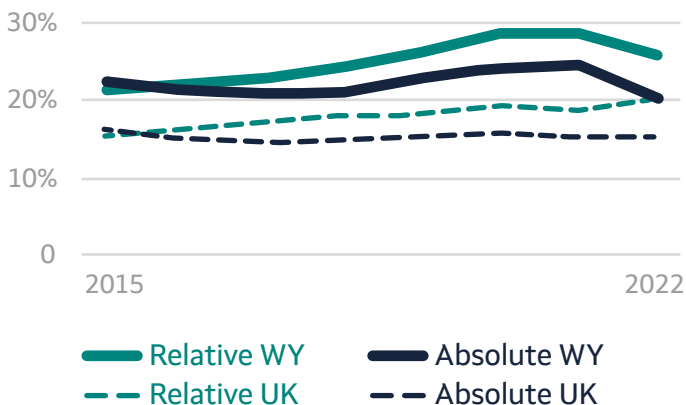
The latest figures show a continuing deficit with the national average for West Yorkshire in respect of the proportion of people with higher level qualifications. At local authority level Leeds outperforms the England average.

Source: ONS APS

The prevalence of child poverty is a key measure of progress towards an inclusive economy.



Child poverty



Proportion of children aged under 16 in Relative and Absolute low-income families

The proportion of children in low income families in West Yorkshire fell against both relative and absolute measures between 2021 and 2022 but remain higher than the respective UK averages in both cases.

Source: DWP – Children in Low Income Families, local authority by age

Mission 2

A happy West Yorkshire – great places and healthy communities

We want our region to be a happy place to live with truly affordable homes, putting the wellbeing of our people at the forefront of our agenda. We will ensure that where you live helps promote good health, active lives, and wellbeing, and that life expectancy aligns with the national average.



Housing in West Yorkshire is relatively affordable in comparison with the national average.

Average ratings of personal well-being

improved in West Yorkshire during the year ending March 2022, following a decline in the previous year linked to the pandemic. West Yorkshire has similar average ratings to national figures across the four measures of well-being.

Healthy life expectancy (at birth) for both women and men in West Yorkshire is significantly lower than the England average. Inequality in overall life expectancy (the difference in life expectancy between the most and least deprived areas) in Leeds is significantly worse than the England average.

Just under two-thirds of adults in West Yorkshire are physically active in terms of activities such as walking, cycling, dance, fitness and sport; this is a similar proportion to the national average. This percentage has remained broadly stable since 2015/16.

Almost nine out of 10 West Yorkshire people engaged with the arts in 2022/23, while more than two-thirds visited a heritage site and more than a fifth watched a live sports event. The proportion of people visiting a museum / gallery saw a year-on-year increase.

Providing local people with access to nature is vital to health and quality of life. Currently, a fifth of West Yorkshire's population have easy access to local natural greenspace.

Housing supply improved somewhat as net additional dwellings increased from 5,983 in 2020/21 to 7,207 in 2021/22 but this is still lower than the pre-pandemic peak in housing supply seen in 2018/19.

Housing in West Yorkshire is relatively affordable in comparison with the national average; although affordability worsened in 2021 as prices grew much more quickly than earnings, this trend was reversed in 2022. It should be noted that the affordability ratio takes no account of the quality of housing stock.

Rented housing costs in West Yorkshire are lower than nationally, except in Leeds. National data (time series data are not available at local level) indicates that rental prices are continuing to increase quickly.

Improving the energy efficiency of properties is an important lever for reducing emissions but is also crucial for helping households to manage their energy costs. West Yorkshire dwellings with an Energy Performance Certificate are less likely to have an energy efficiency rating of C or above compared to the national average (38% versus 47%). There are also wide variations against this measure at local authority level, with Bradford (30%) and Calderdale (32%) having the lowest ratings.

Energy efficiency of buildings has an important bearing on fuel poverty (defined as households living on a low income in a home which cannot be

kept warm at reasonable cost). The latest official statistics indicate that 17% of households in West Yorkshire were in fuel poverty in 2021. Estimates produced by the Combined Authority suggest that this increased to 33% by spring 2023 as energy prices surged from late-2021 onwards before falling to 30% in July 2023.

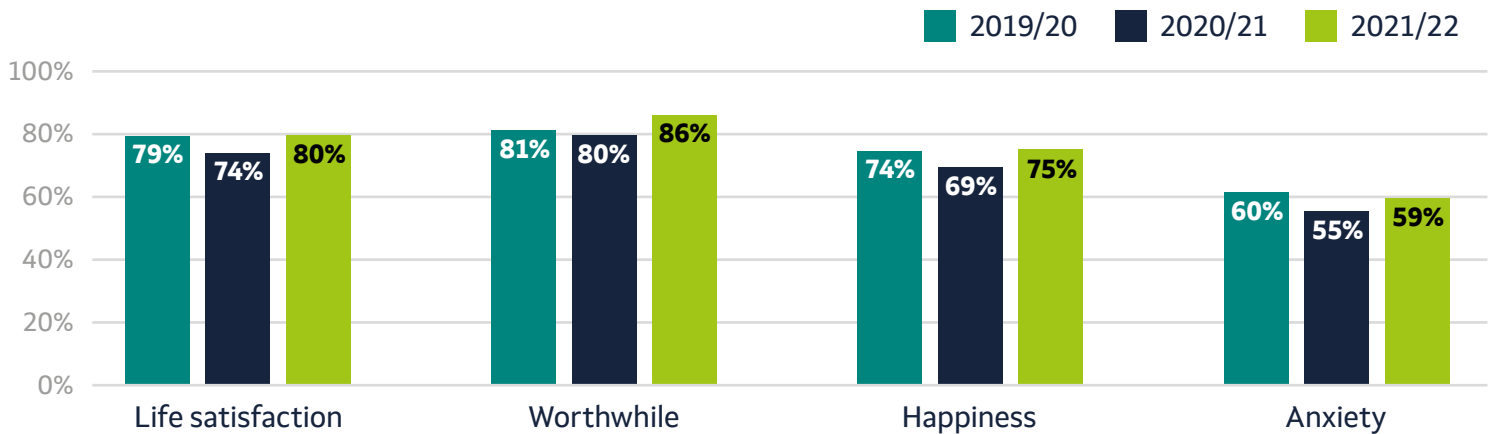
West Yorkshire continues to perform strongly in respect of its digital infrastructure, which is key to its future competitiveness as a region. 85% of

properties in West Yorkshire have gigabit-capable internet coverage, 7 percentage points higher than the national average and 5 points higher than a year ago. This includes 63% of West Yorkshire properties that have full-fibre coverage. 4G mobile coverage is growing in West Yorkshire and exceeds the national average, with 90% of premises covered by all providers compared with 85% nationally.



Providing local people with access to nature is vital to health and quality of life.

Well-being

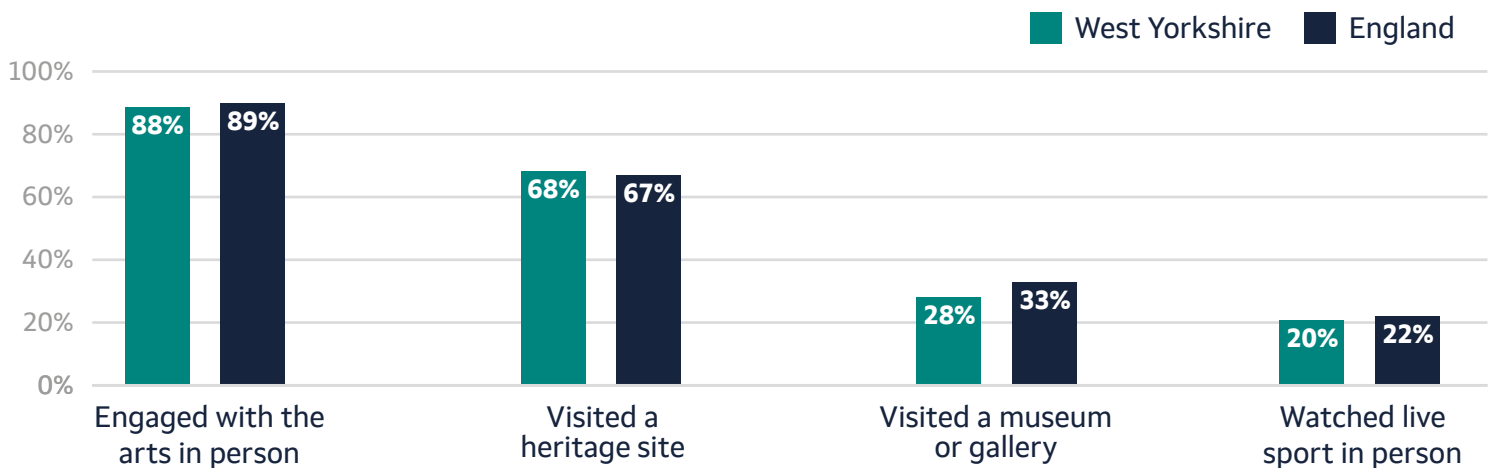


Estimates of life satisfaction, feeling that the things done in life are worthwhile, happiness and anxiety – % of respondents giving a very good or good rating, West Yorkshire

Personal well-being improved in West Yorkshire in the year ending March 2022, following a decline during year ending March 2021 linked to the pandemic. This is based on a positive movement across all four indicators of well-being.

Source: Office for National Statistics – Annual Population Survey

Participation in culture and heritage activities



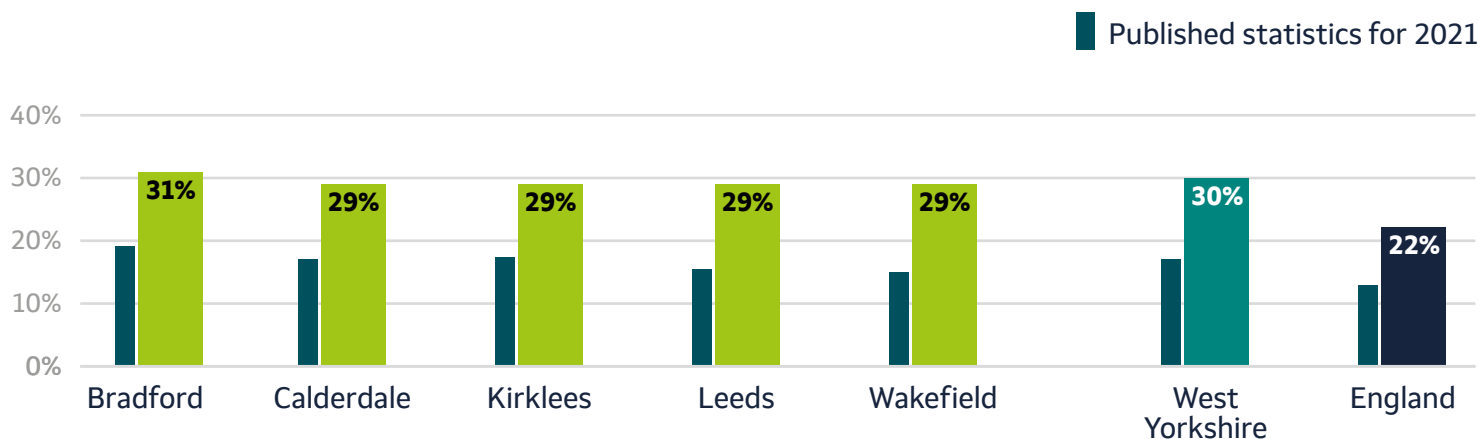
Proportion of adults aged 16 and over who engaged with culture, heritage and sport activities

A large majority (88%) of West Yorkshire adults engaged with the arts in the previous year, whilst a smaller majority visited a heritage site (68%);

28% visited a museum / gallery; and around a fifth watched live sport. These proportions are in line with the national average. There was a statistically significant increase in the proportion of West Yorkshire adults who visited a museum or gallery during 2022/23.

Source: DCMS Participation Survey 2022/23, Department for Digital, Culture, Media and Sport

Fuel poverty

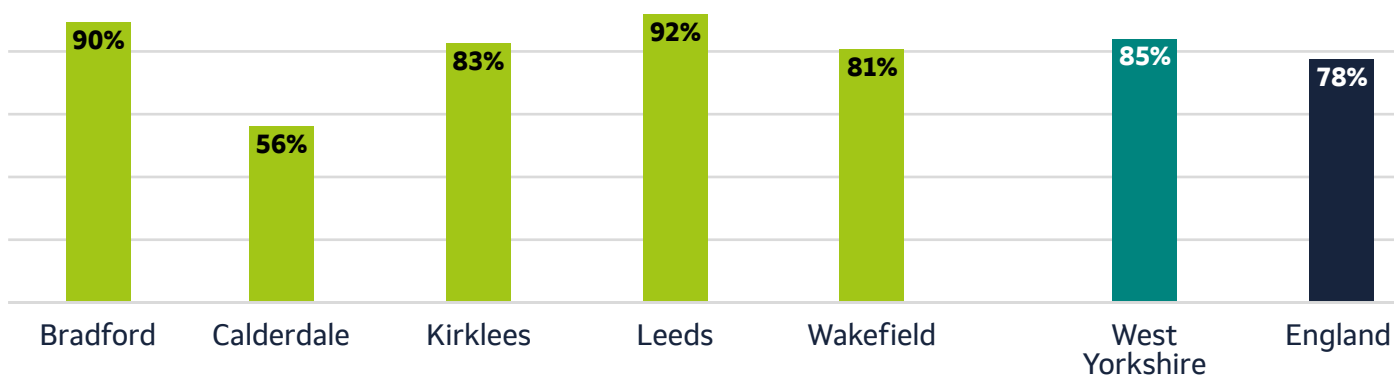


Proportion of households in fuel poverty, estimates for July 2023

The latest official statistics indicate that 17% of households in West Yorkshire were in fuel poverty in 2021. Estimates by the Combined Authority suggest that this increased to 30% by July 2023 as energy prices surged from late-2021 onwards.

Source: Sub-regional fuel poverty data, Department for Energy Security & Net Zero plus Combined Authority estimates

Gigabit-capable internet coverage



% of properties with gigabit-capable internet coverage, July 2023

85% of properties in West Yorkshire have gigabit-capable internet coverage, 7 percentage points higher than the national average and 5 points higher than a year ago. This includes 63% of West Yorkshire properties that have full-fibre coverage.

Source: ThinkBroadband

Mission 3

A well-connected West Yorkshire – a strong transport system

We will develop a sustainable, accessible transport system with reliable and affordable buses, trains, and mass transit; a region with healthy people where active travel is the easiest choice for short journeys, car usage is reduced, and the first choice for travel is public transport.



An effective transport system connects people from all communities to employment opportunities.

West Yorkshire has an ambition to reduce reliance on private car journeys and substantially grow the number of trips made using sustainable transport. The latest available figures show that walking and the bus account for a larger share of trips undertaken by West Yorkshire residents than nationally and trips by private car a slightly smaller share. Public transport usage remains below pre-pandemic levels but increased between 2022 and 2023.

A key purpose of an effective transport system is to connect people from all communities to employment opportunities. Inequality of access to employment from the most deprived areas in West Yorkshire worsened in 2021/22. Bus access decreased while car access improved. This is reflective of a reduction in provision and frequency of bus services alongside reduced congestion for car trips in the region.

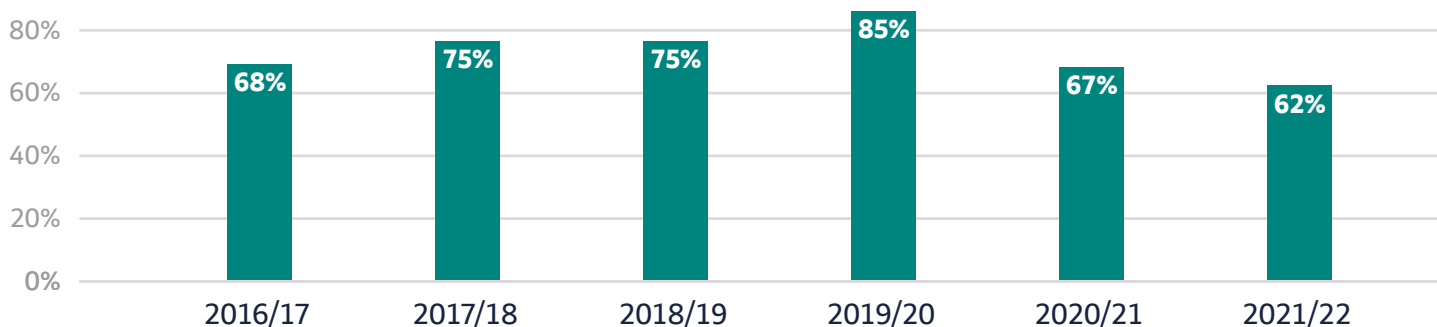
The transport system must play its part in creating clean, safe, healthy places for communities and businesses. Ensuring the safety of all users of our streets and highway network is essential to this as well as enabling people to feel confident to walk or cycle more. The number of killed or seriously injured casualties arising from traffic collisions was on a downward trend in West Yorkshire prior to the pandemic, before falling by more than a fifth between 2019 and 2020. However, the lifting of lockdown in 2021 was accompanied by a substantial increase in casualties.

Better planning and management of West Yorkshire's transport networks is essential and smart ticketing products like Metro's MCard contribute to this. 2022 has seen the number of trips made on MCard products increase substantially to above pre-pandemic levels. Changes to the ticketing offer in West Yorkshire through the Young Person's Fare Deal and Mayor's Fares have resulted in significant channel shift from operator tickets to MCard products, with a total of 18m trips recorded. The shift to digital channels for the purchase of MCard trips has accelerated, with 84% of travel tickets bought through the MCard mobile app rather than traditional outlets during 2022, up from 70% in 2021.

Satisfaction with transport infrastructure is a key measure of performance and of public perceptions. Satisfaction with highway infrastructure remains somewhat low, at 5.8 (out of 10), the same score as in 2020/21 and in 2021/22. This is a composite indicator and satisfaction with individual elements that comprise has changed, most notably a small increase in satisfaction with cycle routes and facilities.

Satisfaction with public transport (bus and rail services) has a similar rating to satisfaction with highway infrastructure for the 2022/23 period but this represents a decline on the previous year for both services and the lowest rating for bus services since data was first collected in 2015/16.

Access inequality ratio



Access inequality ratio (employment)

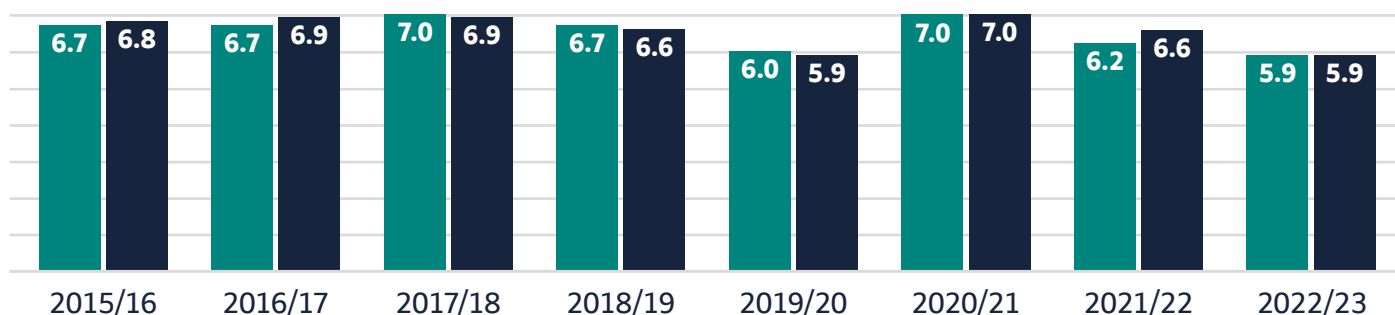
This is the ratio of number of jobs accessible in 30 minutes using frequent bus network from most deprived areas in West Yorkshire, to the number of jobs accessible by car in 30 minutes from same areas, during the morning peak

Inequality of access to employment from the most deprived areas in West Yorkshire worsened in 2021/22. Bus access has decreased while car access has improved. This is reflective of reduction in provision and frequency of bus services alongside reduced congestion for car trips in the region.

Source: Combined Authority analysis

Satisfaction with public transport

Local bus services Local rail services



Satisfaction with bus and rail services in the region (average score on a 10 point scale)

Satisfaction with public transport fell in 2022/23, and has fallen below 2019/20 levels.

Source: Residents' Perceptions of Transport Survey

Mission 4

A sustainable West Yorkshire – making lives greener

We will deliver a fair and just net zero economy where people have the skills and opportunity to access new jobs in the green sector. Where transport is sustainable and energy efficient homes ensure fuel poverty is eradicated. Where businesses and industry operate efficiently, reducing energy consumption and boosting regional productivity.



The region's emissions intensity is nearly 50% lower than in 2005 and continued to fall in 2021.

West Yorkshire has declared a climate emergency and is committed to becoming a net zero carbon economy by 2038 and to making significant progress against this challenge by 2030.

The latest data indicate that greenhouse gas end-user emissions in West Yorkshire stand at around 11.1 Mt CO₂ equivalent. This equates to 4.7 tonnes per capita, below the national average of 5.5 tonnes.

As expected, greenhouse gas emissions increased in West Yorkshire and nationally in 2021, as the economy re-opened following the pandemic. Emissions remain below their 2019 level and West Yorkshire data for 2022 are expected to show a net reduction when published in 2023, based on the national trend in emissions that can be observed in more timely data available at this level.

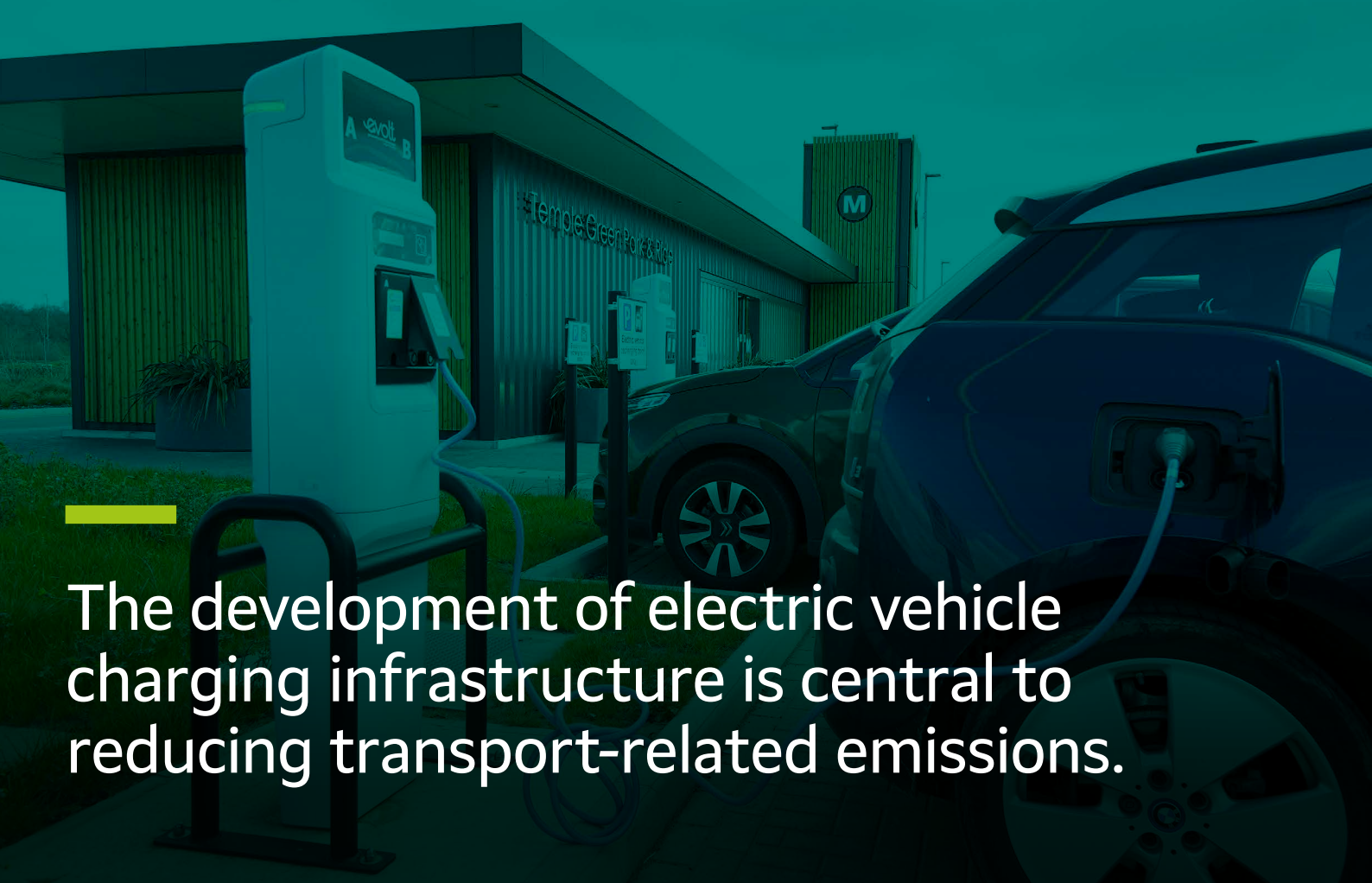
All broad sectors of the West Yorkshire economy, except Waste management, saw increases in emissions in West Yorkshire between 2020 and 2021. The biggest contributors to the overall net increase were the Industry sector, the Commercial sector and the Domestic sector. Transport sector emissions grew only modestly year-on-year, by 3% and remained 14% lower than in 2019.

Greenhouse gas emissions intensity measures the level of emissions per unit of gross value added

(GVA) and can be used to examine the relationship between economic growth and emissions. The emissions intensity of the West Yorkshire economy, in terms of CO₂ equivalent emissions (kt) per £m of GVA, is slightly above the national average and above some of the comparator areas. The region's emissions intensity is nearly 50% lower than in 2005 and continued to fall in 2021, reflecting the fact that GVA grew more rapidly than emissions as the economy re-opened following the pandemic.

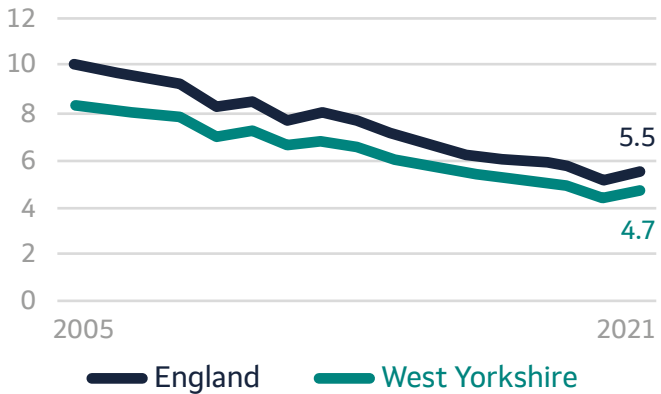
Flooding will become a more frequent occurrence and more severe as a result of climate change. Around 3% of residential properties in West Yorkshire fall within a flood zone, rising to more than 6% in Calderdale. A significant proportion of neighbourhoods in Bradford and Calderdale are acutely vulnerable to the effects of flooding, lacking the resources needed to prepare, respond to and recover from flooding.

The development of electric vehicle charging infrastructure is central to reducing transport-related emissions. The number of publicly available electric vehicle charging points in West Yorkshire is growing rapidly, expanding by 41% in the last year alone and by 140% in the last three years. However, the ratio of charging devices to population is below the national average.



The development of electric vehicle charging infrastructure is central to reducing transport-related emissions.

Greenhouse gas emissions

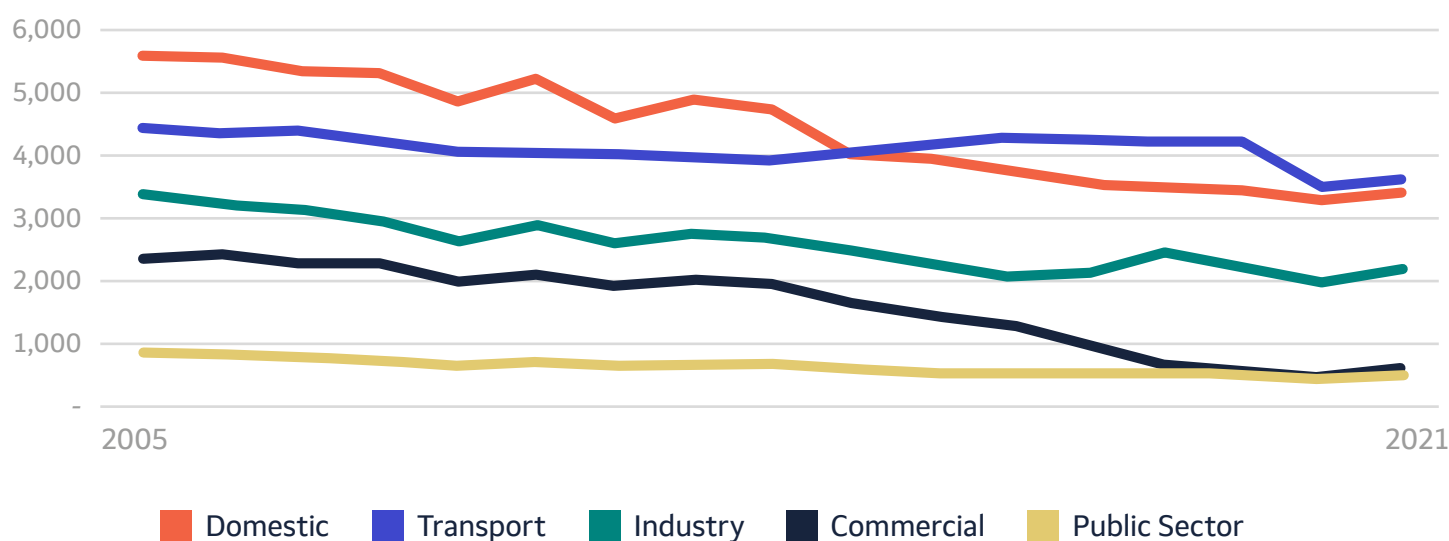


Per capita greenhouse gas emissions (tonnes CO2 equivalent per head)

Per capita emissions of greenhouse gases in West Yorkshire are below the national average and are on a downward trend. There was a net increase in emissions in 2021 as restrictions were lifted following the pandemic but emissions are expected to fall in 2022. Emissions need to be reduced at a faster rate to achieve net zero by 2038.

Source: UK local authority and regional greenhouse gas emissions national statistics, 2005 to 2021, Department for Energy Security and Net Zero, 2023

Greenhouse gas emissions by sector



Greenhouse gas emissions (ktCO₂ equivalent) by selected sector for West Yorkshire

There was an increase in West Yorkshire emissions across all sectors except Waste management between 2020 and 2021. Transport emissions remain substantially below their pre-pandemic level (2019).

Source: UK local authority and regional greenhouse gas emissions national statistics, 2005 to 2021, Department for Energy Security and Net Zero, 2023

West Yorkshire is committed to becoming a net zero economy by 2038.

Mission 5

A safe West Yorkshire – a region where all can flourish

We will build a safe, just, and inclusive region that puts the safety of women and girls at its heart; ensuring all people feel safe, particularly in the night-time economy. We will work tirelessly to ensure that all people who live, work, and visit West Yorkshire are safe and feel safe so our communities can thrive.



Although West Yorkshire has a very low rate for risk of personal crime, the household crime risk is higher.

The pandemic and its aftermath continue

to have a significant impact on key policing indicators in West Yorkshire. Neighbourhood crime, knife crime and the number of persons reported as missing remained below pre-pandemic levels in 2022/23.

West Yorkshire achieves a higher rate of positive outcomes (charges/summons) in respect of rape offences when compared to other Metropolitan Forces and Forces nationally.

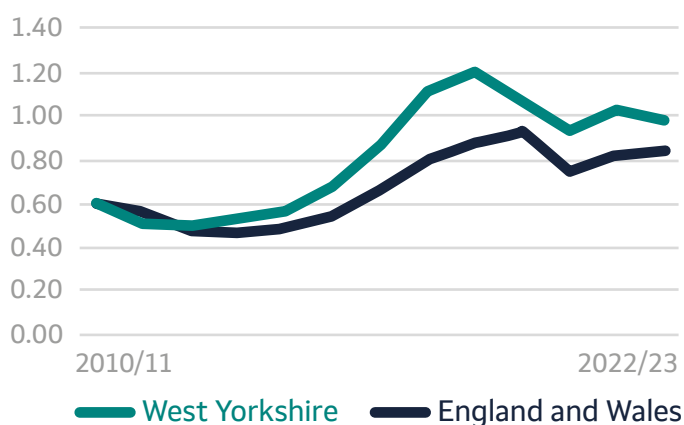
To understand feelings of safety, State of the Region presents indicators relating to perception of crime in the area. For personal crime – West Yorkshire has a positive perception rate, with only 1.1% of those responding to the Crime Survey of England and

Wales feeling that personal crime was a risk. Although West Yorkshire has a very low rate for risk of personal crime, the household crime risk is higher (8.6%), but similar to other areas.

Police officer numbers continue on an upward trend. The most recent figures for March 2023 show an increase of 1,571 officers since March 2016, bringing the total in West Yorkshire to 6,072, a net increase of 35%. This also offsets the loss of officers seen between 2009 and 2016.

West Yorkshire Police's call handling performance (time taken to answer 999 calls to the police) has been consistently high since monitoring was introduced last year.

Serious violence

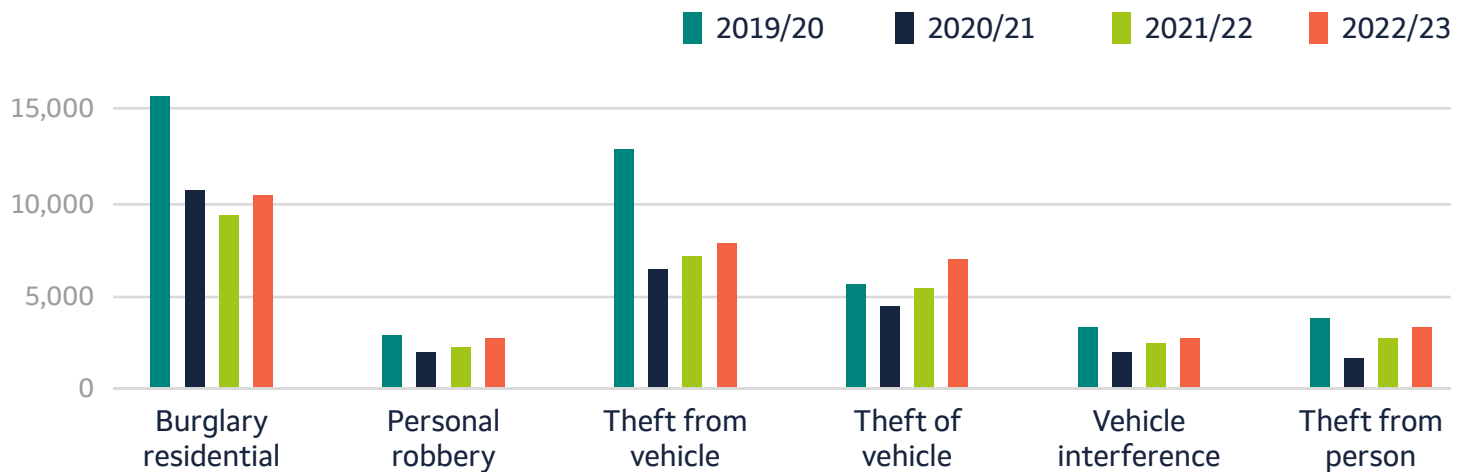


Knife crime per 1,000 population

After a period of increase, West Yorkshire has seen a reduction in the number of offences recorded in 2022/23 when compared to the same period the previous year. The decrease in West Yorkshire amounts to a 4.1% reduction compared to a national increase in knife related crime of 4.7%.

Source: Annual Data Return from West Yorkshire Police

Neighbourhood crime

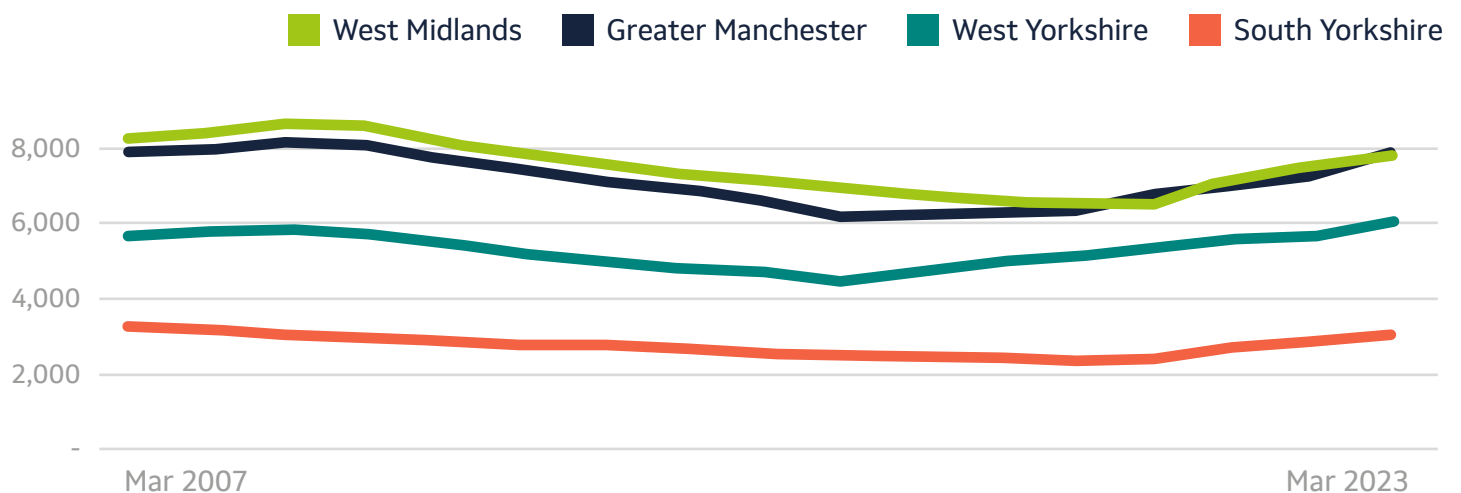


Neighbourhood crime in West Yorkshire

Neighbourhood crime fell during the pandemic and remains below the level recorded in 2019 in all areas apart from Theft of Motor Vehicle, although there have been small increases in 2022/23 for most types of offence.

Source: Police recorded crime Police Force Area Open Data tables, Home Office

Police Officer numbers



Count of full-time equivalent Police Officers

Officer numbers in West Yorkshire continue on an upward trend. The most recent figures for March 2023 show an increase of 1,571 officers since March 2016, bringing the total in West Yorkshire to 6,072, an increase of 25.8% for that period.

Source: Home Office



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