





## Menu

Background and context

Key messages

- **1.** Driving economic growth and innovation to enable good jobs
- **2.** Enabling a diverse, skilled workforce and accessible learning for all
- **3.** Empowering our communities, towns and cities to thrive
- **4.** Championing culture, sport and creativity
- **5.** Building a sustainable, nature-rich and carbon neutral region
- **6.** Creating an accessible, clean and customer-focused transport system
- **7.** Supporting community safety and accountable, proactive policing





#### **Background and context**

State of the Region 2022 is the second annual review of the performance of West Yorkshire against key socioeconomic and environmental indicators. It provides a stocktake using indicators mapped against seven key priorities outlined below.

Due to the timeliness of the official statistics available at West Yorkshire level, much of the picture we present is coloured by the influence of the coronavirus pandemic.

Where possible, supplementary evidence is used to show how the situation has developed since restrictions have been lifted. The global, national and local economies remain in a state of continuing flux due to the ongoing legacy of the pandemic and the emergence of new challenges, including the acute cost of living crisis facing the UK, which is partly attributable to the economic fall-out from the invasion of Ukraine.

Please visit our website to see the full State of the Region report, the accompanying Equality, Diversity and Inclusion report and our State of the Region interactive dashboard.

westyorks-ca.gov.uk/growing-the-economy/stateof-the-region-report-2022/



- West Yorkshire's economic output fell during the pandemic but it is likely that it has largely recovered since then.
- Productivity is on the increase, but there remains a gap between the output per hour worked in West Yorkshire and nationally.
- Employment in West Yorkshire is on the rise, and the diversity of people in work is improving. The employment rate gaps for ethnicity and disability are narrowing.
- The labour force is becoming better qualified over time in West Yorkshire, although there is still ground to make up with the national average.
- West Yorkshire's **digital infrastructure** is a key strength. The area outperforms the national average on key measures relating to gigabit-capable and mobile 4G coverage.

- The exceptional circumstances of 2020 saw a pronounced fall in greenhouse gas emissions in West Yorkshire, driven to a large extent by a fall in transport emissions, but this is not expected to be sustained.
- Shifts in mode share towards active
   travel and away from car use appear to
   have been accelerated by the pandemic.
   However overall West Yorkshire has
   strong reliance on the car, and the
   ability of the public transport system
   to connect disadvantaged communities
   to opportunity has reduced.
- The coronavirus has had a significant impact on key **policing** indicators in West Yorkshire. Neighbourhood crime, knife crime and the number of persons reported as missing remain below prepandemic levels.
- Indicators relating to the capacity and performance of West Yorkshire's policing show a positive picture.
   For example, police officer numbers continue on an upward trend.



# Driving economic growth and innovation to enable good jobs

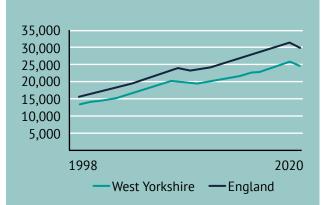
A common feature of the analysis of indicators sitting under this priority is the impact of the coronavirus pandemic. In a number of cases the latest available data for West Yorkshire relates to the main pandemic period. National data shows that the UK economy rebounded during 2021 and early 2022 and it is clear that many other aspects have changed since the pandemic, although they are not all captured by the data available at local level.

West Yorkshire's economic growth rate, in terms of gross value added (GVA) has been slightly below the national average in recent years, even taking into account the slightly less severe impact of the pandemic on West Yorkshire's economic output levels in 2020 relative to the national benchmark. Performance on GVA per head reflects the above pattern.

#### Economic output (GVA) per head

GVA per head (balanced) at current basic prices

Source: ONS, Sub-regional GVA data



Output per head of population fell both locally and nationally in 2020 (the latest data available) as a result of the pandemic. The latest West Yorkshire figure is 18% lower than the national average, a gap that has remained fairly constant since 2013.



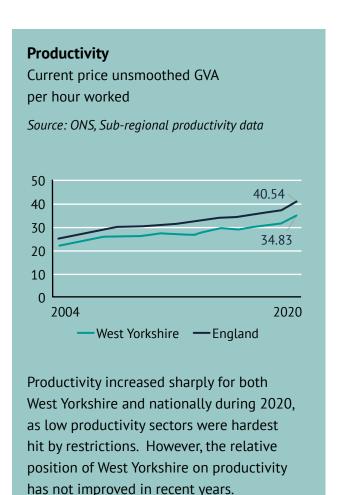


West Yorkshire was performing fairly strongly on employment before the pandemic, in terms of employment levels and the proportion of the working age population in employment. However, coronavirus has served to reverse this progress, also widening the gap with the national average against these measures.

#### **Employment rate** Employment rate for all aged 16-64 Source: ONS, APS 80% 75% 76% 72% 73% 68% 64% 2021 2024 - West Yorkshire - England West Yorkshire's employment rate fell during the pandemic, widening the gap with the national average.

#### Productivity increased in 2020

Productivity increased in 2020, according to the latest available figures, but this represents a short-term compositional effect arising out of the disproportionate impact of the pandemic on low productivity sectors within the economy. The relative position of West Yorkshire on productivity remains unchanged due to structural factors in the local economy, reflecting the wider situation 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 slightly faster than the national average in recent years (2015-2021), driven by expansion in sectors like transport and storage and accommodation and food 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.

Trade, in particular, has been hard hit by the pandemic with the region's exports of both goods and services sharply down in 2020. The region's continuing skills deficit (considered below) is a further contributing factor.

#### A key objective of levellingup is to reduce disparities in household income

A key objective of levelling-up is to reduce disparities in household income. Gross disposable household income in West Yorkshire is 79% of the national average and the gap is steadily widening over time. This demonstrates the need to increase productivity in the region.

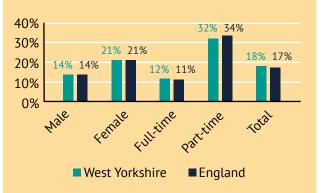
More positively, West Yorkshire is making progress on low pay. The proportion of jobs paying below the Real Living Wage in West Yorkshire fell between 2020 and 2021 and is close to the national average. This partly reflects changes to the government's National Minimum Wage and National Living Wage.

However, when hours worked and contractual status are taken into account, as well as pay, the quality of work available is below the national average across much of West Yorkshire.

#### Jobs paying below Real Living Wage

Jobs paying below Real Living Wage by gender and status

Source: Annual Survey of Hours and Earnings, 2020



The proportion of jobs paying below the Real Living Wage has fallen in West Yorkshire and is now on a par with the national average. Women and part-time workers are more likely to be paid below the Real Living Wage.



# Enabling a diverse, skilled workforce and accessible learning for all

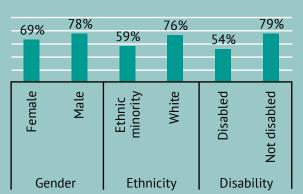
West Yorkshire's workforce is becoming more diverse. The employment rate gaps for people from ethnic minorities and for disabled people are narrowing over time, although the ethnic minority employment rate gap remains wider than nationally.



## **Employment rate gap for equalities groups**

Employment rate for all aged 16-64

Source: ONS, APS



Members of some groups are much less likely to be in employment. There are signs that the employment rate gap is narrowing for disabled people and people from ethnic minorities.

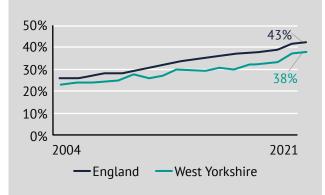


West Yorkshire's workforce is also becoming more skilled. The share of people in the working age population who are highly qualified is on an upward trend, although progress was very modest in 2021 and a substantial gap remains with the national average. Performance against this indicator is highly variable at local authority level, with Wakefield lagging well below the West Yorkshire average.

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People qualified at Level 4 and above

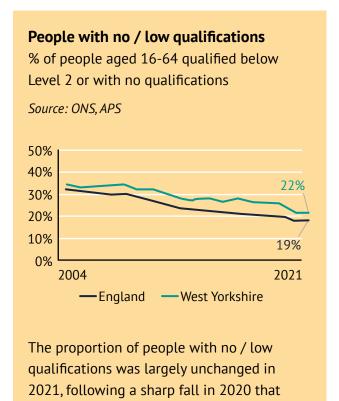
% of people aged 16-64 qualified at Level 4 or above Source: ONS, APS



The proportion of people qualified at this level remained unchanged in 2021 but the underlying trend is an improving one. A significant gap with the national average remains.

Apprenticeships are a relatively strong element of education and training in West Yorkshire

Conversely, there is an underlying downward trend in the proportion of people who have no qualifications or are limited to low level qualifications, although there was again little progress in 2021 against this measure and there is a continuing gap with the national average.



Apprenticeships are a relatively strong element of education and training in West Yorkshire, with a high ratio of apprenticeship starts to employment. However, figures for the latest full academic year of 2020/21 show that starts are almost a quarter below pre-pandemic levels. There are also issues around equality and diversity. For example, although females account for a majority of apprentices, they are narrowly concentrated in particular subject areas, most notably health, public services and care.

narrowed the gap with the national average.

## Digital skills are a key requirement for employment

Digital skills are a key requirement for employment and are increasingly necessary for individuals to operate effectively within society. The latest figures show that a quarter of adults in Yorkshire and the Humber lack essential digital skills for life while two-fifths of people in employment do not have essential digital skills for work.

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 fell between 2020/21 and 2021/22 but remains slightly above the national average, at just over 1-in-20 of the cohort, with significant variations at local authority level.





# Empowering our communities, towns and cities to thrive

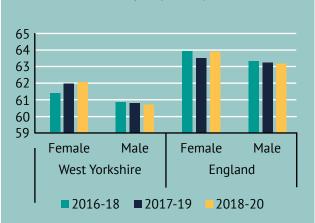
Healthy life expectancy (an important measure of socio-economic as well as health inequality) in West Yorkshire is below the national average for both males and females. According to the latest data overall life expectancy for males fell during the 2018-20 period as a result of the pandemic. There is also inequality of overall life expectancy within West Yorkshire, between the most deprived and least deprived areas.



#### Healthy life expectancy

Healthy life expectancy (HLE) at birth. Estimates in years

Source: Health state life expectancy, ONS



Healthy life expectancy in West Yorkshire is below the national average for both males and females. Healthy life expectancy for males fell during the 2018-20 period as a result of the pandemic. In addition, inequality in overall life expectancy between the most deprived and least deprived neighbourhoods within the five West Yorkshire local authorities ranges from 8 to 10 years for females and 9 to 11 years for males.

The pandemic had a substantial effect on housing in West Yorkshire, with continuing ramifications for housing supply, affordability and rental prices.

The number of net additional dwellings fell substantially in West Yorkshire during the pandemic. According to the latest data for 2020/21 housing supply is a third lower than in 2018/19.

# Fuel poverty is more widespread in West Yorkshire than nationally

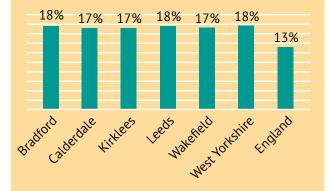
Housing affordability worsened in 2021 as prices grew more quickly than earnings. The impact on West Yorkshire was less marked than nationally and housing remains relatively affordable locally, although the affordability ratio takes no account of the quality of housing stock. There are signs that the housing market is now cooling.

Rented housing costs in West Yorkshire are lower than nationally, except in Leeds. However, more timely national data point to a sharp increase in these costs during 2022. The latest available data for 2020 show that round 176,000 households in West Yorkshire (18% of all households) are in fuel poverty, a prevalence that is above the national average (13%). This shows that West Yorkshire is poorly positioned to cope with the current energy price crisis. There is clear evidence that the proportion of households in fuel poverty is growing rapidly.

#### **Fuel poverty**

Proportion of households in fuel poverty, 2020

Source: Fuel poverty detailed tables, Department for Business, Energy and Industrial Strategy, 2022



Around 176,000 households in West Yorkshire (18% of all households) are in fuel poverty - above the national average (13%). This shows that West Yorkshire is relatively poorly positioned to cope with the current energy price crisis. Forecasts suggest that 30% of households could be in fuel poverty this winter despite the government's price freeze plan.





## Championing culture, sport and creativity

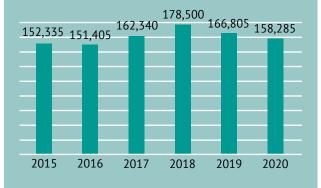
Employment in the culture, sport and creative sector in West Yorkshire is a substantial part of the West Yorkshire economy, accounting for 15% of all employment. It is smaller than nationally in proportionate terms, although it is strongly represented in Leeds. Culture, sport and creative activities were exposed to the coronavirus restrictions, resulting in a fall in employment in 2020. There was also a decline in employment for these activities at national level in 2020.

Additional indicators are currently being consulted on as part of the Culture, Heritage and Sport Framework and will be incorporated into future iterations of State of the Region.

## Employment in cultural, sport and creativity activities

Trend in employment in cultural, sport and creative activities, West Yorkshire

Source: Business Register and Employment Survey



Cultural, sport and creative activities represent a substantial part of the West Yorkshire economy but employment in this area fell over the two consecutive years of 2019 and 2020.





# Building a sustainable, nature-rich and carbon neutral region

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 10.6 Mt CO2 equivalent. This equates to 4.5 tonnes per capita, below the national average of 5.1 tonnes.

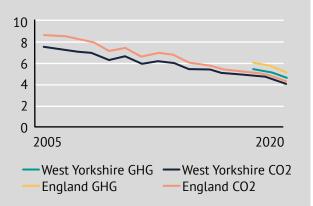
The pandemic resulted in a sharp fall in emissions in 2020 (the latest data available). There was a reduction of 12% in West Yorkshire and a 10% fall nationally. To put this into context the annual average fall in the previous decade in West Yorkshire was only 3%.

# et Yorkshire was only 3%.

#### Greenhouse gas emissions

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

Source: UK local authority carbon dioxide emissions estimates 2020, Department for Business, Energy and Industrial Strategy, 2022



Per capita emissions of carbon dioxide and of wider greenhouse gases in West Yorkshire are below the national average and are on a downward trend, which was accelerated by the pandemic in 2020. The rate of reduction needs to be accelerated to achieve net zero by 2038.

The main contributor to the fall in West Yorkshire's emissions in 2020 was a substantial reduction in transport emissions – this sector accounted for 54% of the total decrease in emissions with a year-on-year decline of 17%. This was primarily due to a fall in road transport. The industry, commercial and public sectors also saw double-digit falls, whilst the domestic sector fell by only 4%.

Such were the unique circumstances that prevailed in 2020 when emissions fell that it is possible that emissions will see a net increase in the data for 2021 when it is published.

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 emissions (kt) per £ million of GVA, is slightly above the national average and is higher than most of the comparator areas. The region's emissions intensity continues to fall, however, with a bigger decrease in 2020 than that seen nationally.

## The transport sector was the main source of emissions reductions in 2020

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 underperforms in terms of the proportion of its dwellings with an energy efficiency rating of C or above on their Energy Performance Certificate (ratings run from A to C with A being the most energy efficient, G being the least efficient). Thirty-four per cent of

dwellings in West Yorkshire meet the threshold compared with a national average of 40%.

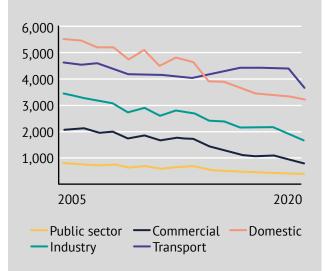
Providing local people with access to nature is vital to health and quality of life. Currently, around two-fifths of West Yorkshire's population have easy access to local natural greenspace.

Flooding is likely to become a more frequent occurrence 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.

#### Greenhouse gas emissions by sector

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

Source: UK local authority carbon dioxide emissions estimates 2020, Department for Business, Energy and Industrial Strategy, 2022



The transport sector was the main source of emissions reductions in 2020, linked to the impact of the pandemic.



# Creating an accessible, clean and customer-focused transport system

A key purpose of an effective transport system is to connect people from all communities to employment opportunities. The pandemic has presented a major challenge to this aim. West Yorkshire's access inequality ratio worsened substantially during 2020, as the number of jobs accessible by the bus network from deprived neighbourhoods fell relative to those accessible by private car. This is attributable to a reduction in services as a result of the coronavirus pandemic, when only essential travel was supported; but it also illustrates the barriers to travel faced by certain groups.



#### Access inequality ratio

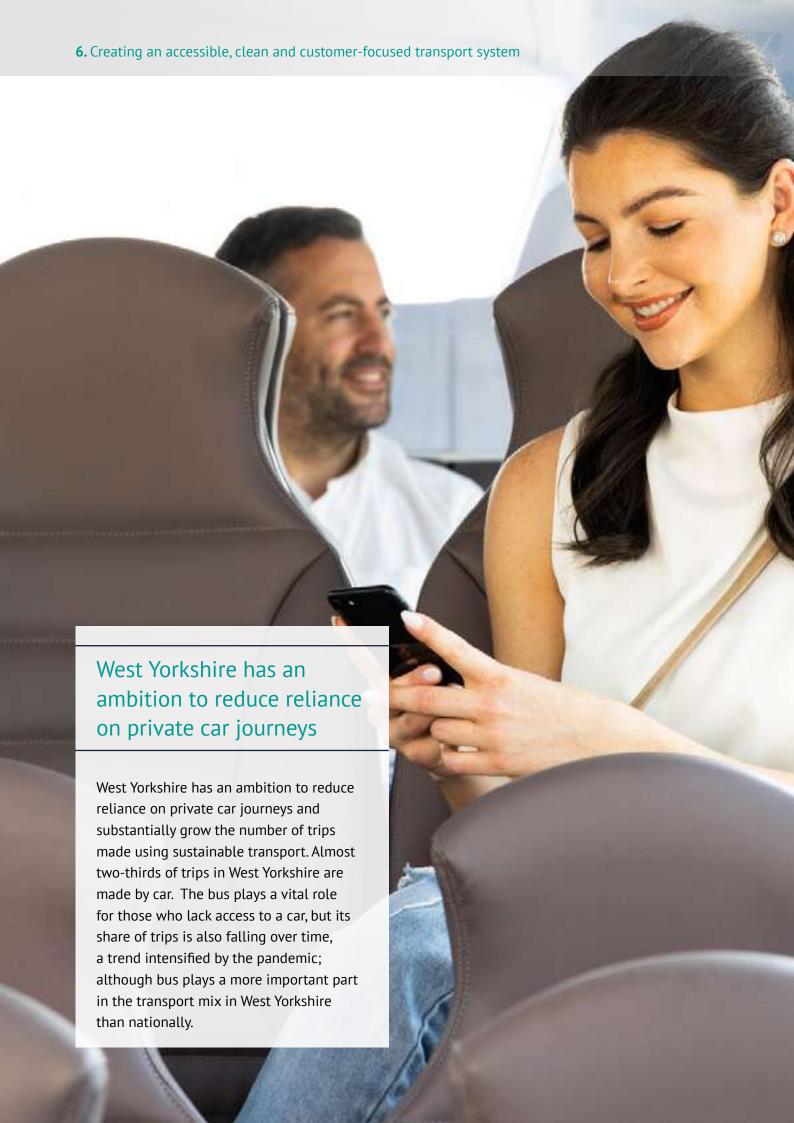
Access inequality ratio (employment)1

Source: Combined Authority analysis



Inequality of access to employment from the most deprived areas in West Yorkshire increased substantially in 2020/21, as a result of the pandemic, when only essential travel was supported. This illustrates the impact of reduced bus services on the disadvantaged.

<sup>1</sup>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.



# Satisfaction with local public transport in West Yorkshire is high

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 accidents is on a downward trend in West Yorkshire and this trend was reinforced by the reduction in road traffic associated with the pandemic, as casualties fell by more than a fifth between 2019 and 2020.

Better planning and management of West Yorkshire's transport networks is essential and smart ticketing products like Metro's MCard contribute to this. Following a sharp reduction during the pandemic there was a modest recovery in trips made using the MCard in 2021, with a total of 10m trips recorded. The pandemic seems to have accelerated a shift to digital channels for the purchase of MCard trips, as 70% of travel tickets were bought through the MCard mobile app rather than traditional outlets during 2021.

Satisfaction with transport infrastructure, is a key measure of performance and of public perceptions. Satisfaction with highway infrastructure remains relatively low, at 5.8 (out of 10), the same score as in 2020/21. Satisfaction with the provision of cycling routes and facilities as well as with most elements of road surface and pavement maintenance has worsened.

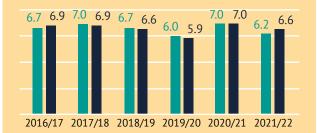
Satisfaction with local public transport in West Yorkshire is high, when compared with other aspects of the transport system. However, the average satisfaction rating for public transport fell in 2021/22 when compared with the previous year, although it remains higher than in 2019/20.

It is uncertain what patterns of travel will emerge over time following the pandemic, particularly around the potential for a sustained shift to home working. Usage of public transport, including bus and rail, remains below pre-crisis levels with no certainty that it will recover. There is an opportunity to support a shift away from carbon-intensive travel to sustainable modes as the economy recovers and grows, to meet the challenge of becoming a net-zero carbon city region by 2038.

#### Satisfaction with public transport

Satisfaction with bus and rail services in the region

Source: Residents' Perceptions of Transport Survey



- Satisfaction with local bus services
- Satisfaction with local train services

Satisfaction with public transport fell in 2021/22, although it remains higher than in 2019/20.

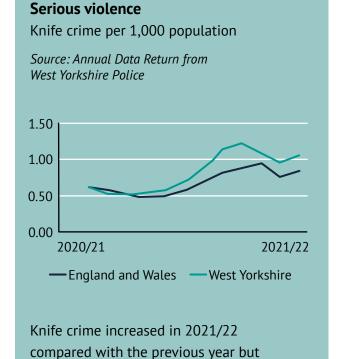


# Supporting community safety and accountable, proactive policing

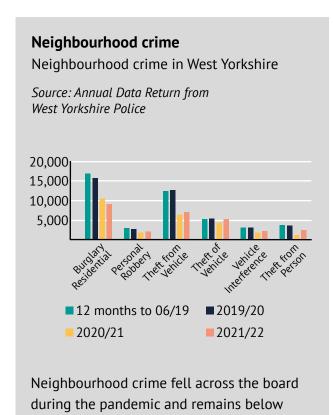
The coronavirus has had a significant impact on key policing indicators in West Yorkshire. Neighbourhood crime, knife crime and the number of persons reported as missing remain below pre-pandemic levels.







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Indicators relating to the capacity and performance of West Yorkshire's policing show a positive picture.

the level recorded in 2019.

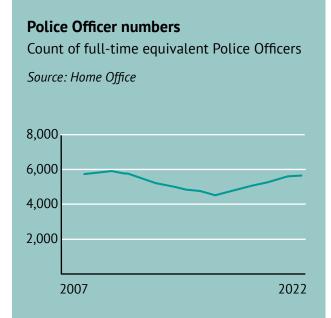
The number of positive outcomes in respect of rape and serious sexual offences increased in 2021/22, although the outcome rate was marginally down on the previous year.

West Yorkshire's Liaison and Diversion Service (L&D) supports people who come into contact with the criminal justice system and have mental health, learning disability, substance misuse or other vulnerabilities. During 2021/22 there were 5,272 adult referrals and 2,290 referrals of young people into the service, an increase of 14% in total referrals on the previous year.

## Police officer numbers continue on an upward trend

Police officer numbers continue on an upward trend. The most recent figures for March 2022 show an increase of 1,179 officers since March 2016, bringing the total in West Yorkshire to 5,680, a net increase of 26% for that period.

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.

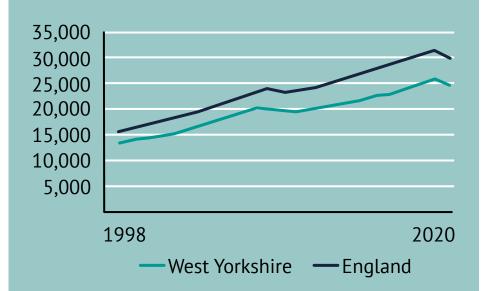


Officer numbers in West Yorkshire are on an upward trend. The most recent figures for March 2022 show an increase of 1,179 officers since March 2016, bringing the total in West Yorkshire to 5,680, a net increase of 26% for that period.

#### Economic output (GVA) per head

GVA per head (balanced) at current basic prices

Source: ONS, Sub-regional GVA data

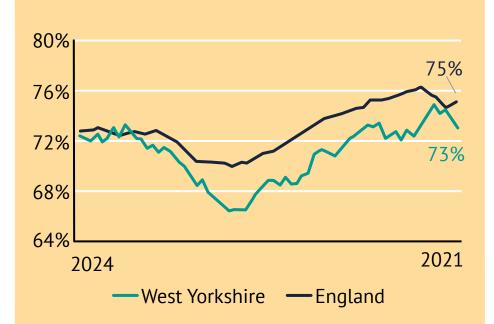


Output per head of population fell both locally and nationally in 2020 (the latest data available) as a result of the pandemic. The latest West Yorkshire figure is 18% lower than the national average, a gap that has remained fairly constant since 2013.

#### **Employment rate**

Employment rate for all aged 16-64

Source: ONS, APS

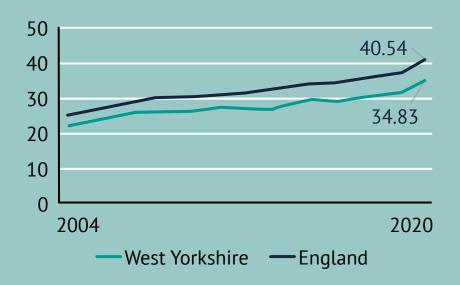


West Yorkshire's employment rate fell during the pandemic, widening the gap with the national average.

#### **Productivity**

Current price unsmoothed GVA per hour worked

Source: ONS, Sub-regional productivity data

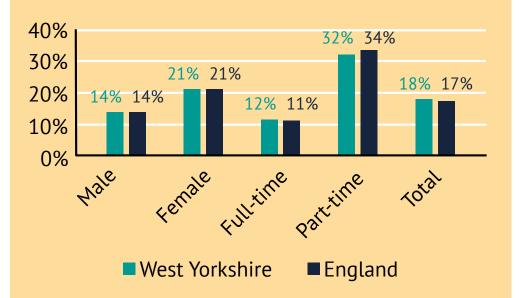


Productivity increased sharply for both West Yorkshire and nationally during 2020, as low productivity sectors were hardest hit by restrictions. However, the relative position of West Yorkshire on productivity has not improved in recent years.

#### Jobs paying below Real Living Wage

Jobs paying below Real Living Wage by gender and status

Source: Annual Survey of Hours and Earnings, 2020

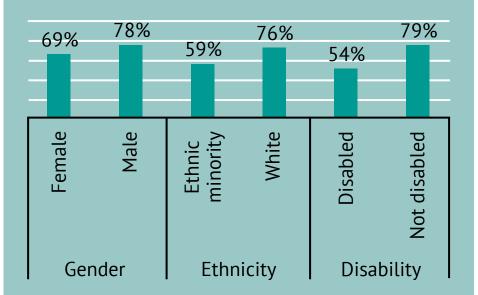


The proportion of jobs paying below the Real Living Wage has fallen in West Yorkshire and is now on a par with the national average. Women and part-time workers are more likely to be paid below the Real Living Wage.

## **Employment rate gap for equalities groups**

Employment rate for all aged 16-64

Source: ONS, APS

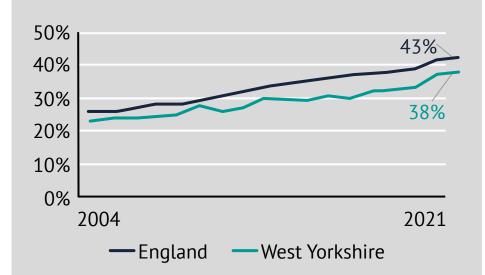


Members of some groups are much less likely to be in employment. There are signs that the employment rate gap is narrowing for disabled people and people from ethnic minorities.

#### People qualified at Level 4 and above

% of people aged 16-64 qualified at Level 4 or above

Source: ONS, APS

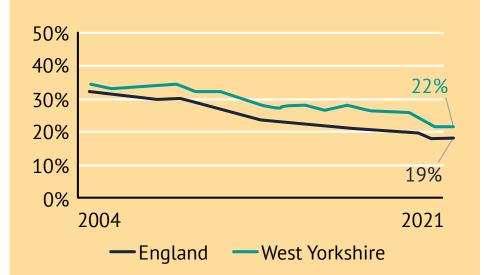


The proportion of people qualified at this level remained unchanged in 2021 but the underlying trend is an improving one. A significant gap with the national average remains.

#### People with no / low qualifications

% of people aged 16-64 qualified below Level 2 or with no qualifications

Source: ONS, APS

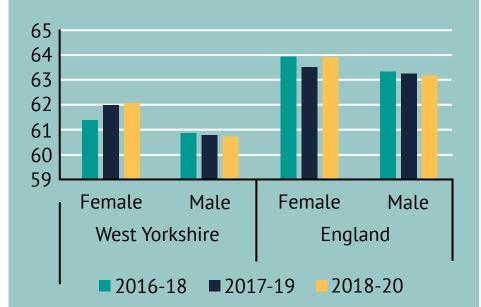


The proportion of people with no / low qualifications was largely unchanged in 2021, following a sharp fall in 2020 that narrowed the gap with the national average.

#### **Healthy life expectancy**

Healthy life expectancy (HLE) at birth. Estimates in years

Source: Health state life expectancy, ONS

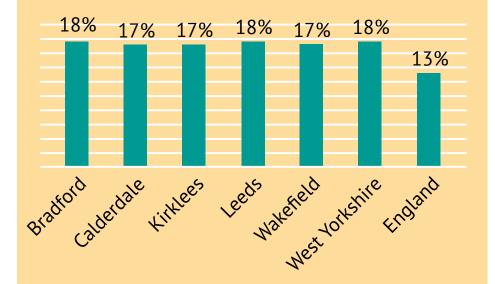


Healthy life expectancy in West Yorkshire is below the national average for both males and females. Healthy life expectancy for males fell during the 2018-20 period as a result of the pandemic. In addition, inequality in overall life expectancy between the most deprived and least deprived neighbourhoods within the five West Yorkshire local authorities ranges from 8 to 10 years for females and 9 to 11 years for males.

#### **Fuel poverty**

Proportion of households in fuel poverty, 2020

Source: Fuel poverty detailed tables, Department for Business, Energy and Industrial Strategy, 2022

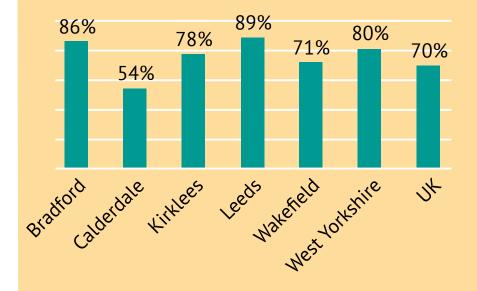


Around 176,000 households in West Yorkshire (18% of all households) are in fuel poverty-above the national average (13%). This shows that West Yorkshire is relatively poorly positioned to cope with the current energy price crisis. Forecasts suggest that 30% of households could be in fuel poverty this winter despite the government's price freeze plan.

#### Gigabit-capable internet coverage

% of properties with gigabit-capable internet coverage

Source: ThinkBroadband

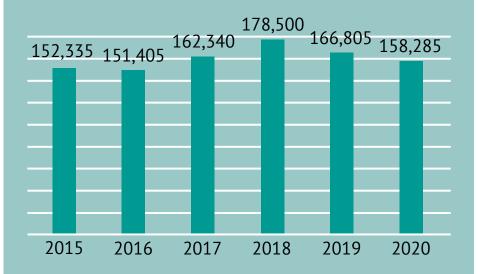


Around 80% of West Yorkshire premises are covered by gigabit-capable internet connections, well ahead of the national average.

## **Employment in cultural, sport and creativity activities**

Trend in employment in cultural, sport and creative activities, West Yorkshire

Source: Business Register and Employment Survey

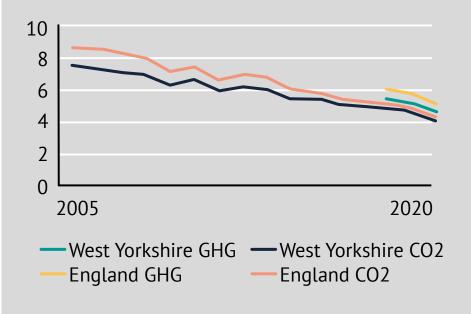


Cultural, sport and creative activities represent a substantial part of the West Yorkshire economy but employment in this area fell over the two consecutive years of 2019 and 2020.

#### **Greenhouse gas emissions**

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

Source: UK local authority carbon dioxide emissions estimates 2020, Department for Business, Energy and Industrial Strategy, 2022

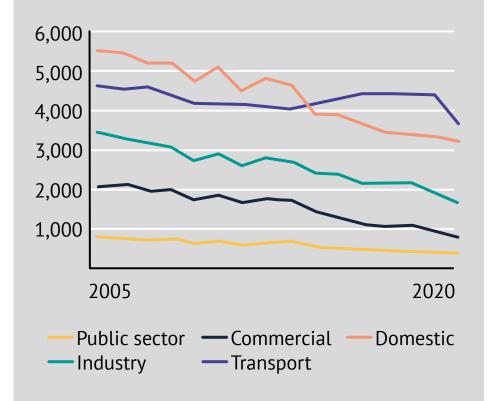


Per capita emissions of carbon dioxide and of wider greenhouse gases in West Yorkshire are below the national average and are on a downward trend, which was accelerated by the pandemic in 2020. The rate of reduction needs to be accelerated to achieve net zero by 2038.

#### Greenhouse gas emissions by sector

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

Source: UK local authority carbon dioxide emissions estimates 2020, Department for Business, Energy and Industrial Strategy, 2022



The transport sector was the main source of emissions reductions in 2020, linked to the impact of the pandemic.

#### **Access inequality ratio**

Access inequality ratio (employment)1

Source: Combined Authority analysis



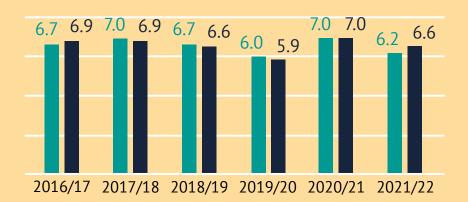
Inequality of access to employment from the most deprived areas in West Yorkshire increased substantially in 2020/21, as a result of the pandemic, when only essential travel was supported. This illustrates the impact of reduced bus services on the disadvantaged.

<sup>1</sup>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.

#### Satisfaction with public transport

Satisfaction with bus and rail services in the region

Source: Residents' Perceptions of Transport Survey



- Satisfaction with local bus services
- Satisfaction with local train services

Satisfaction with public transport fell in 2021/22, although it remains higher than in 2019/20.

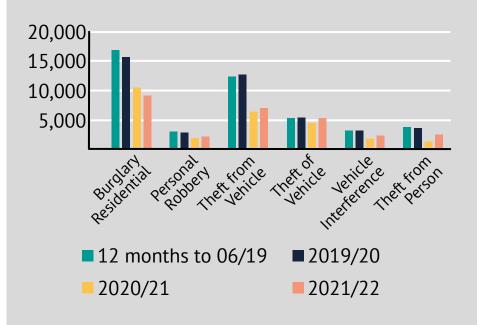
## Serious violence Knife crime per 1,000 population Source: Annual Data Return from West Yorkshire Police 1.50 1.00 0.50 0.00 2020/21 2021/22 England and Wales -West Yorkshire Knife crime increased in 2021/22 compared with the previous year but remains below pre-pandemic levels.

#### **Neighbourhood crime**

Neighbourhood crime in West Yorkshire

Source: Annual Data Return from

West Yorkshire Police

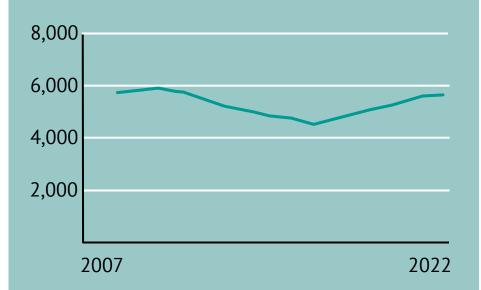


Neighbourhood crime fell across the board during the pandemic and remains below the level recorded in 2019.

#### **Police Officer numbers**

Count of full-time equivalent Police Officers

Source: Home Office



Officer numbers in West Yorkshire are on an upward trend. The most recent figures for March 2022 show an increase of 1,179 officers since March 2016, bringing the total in West Yorkshire to 5,680, a net increase of 26% for that period.

