State of the Region

Review 2022

West Yorkshire Combined Authority

Tracy Brabin Mayor of West Yorkshire

Executive Summary

Background and Context

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

Due to the limited 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.

Key Messages

- 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 pre-pandemic levels.
- Indicators relating to the capacity and performance of West Yorkshire's policing show a positive picture. For example, police officer numbers continue to increase.

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.

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. Coronavirus negatively impacted on this progress, also widening the gap with the national average against these measures. More recently there has been a degree of recovery against this indicator.

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 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 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 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.

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.

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.

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.

Digital skills 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 but 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 healthy 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.

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.

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.

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

Almost 9-out-of-10 premises have mobile 4G coverage, which is again above the national average.

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 well represented in Leeds. Culture, sport and creative activities were exposed to the coronavirus restrictions, resulting in a fall in employment 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.

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 CO_2 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%.

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 CO_2 emissions (kt) per £m 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.

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 G 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, a 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 4% 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.

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.

West Yorkshire has an ambition to reduce **reliance on private car journeys** and substantially grow the number of trips made using sustainable transport. Almost two-thirds of trips in West Yorkshire are made by car. The bus plays a vital role for those who lack access to a car, but its share of trips is also falling over time, a trend intensified by the pandemic; although bus plays a more important part in the transport mix in West Yorkshire than nationally.

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. However, 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 consolidate the changes in travel choices seen under lockdown and 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.

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.

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

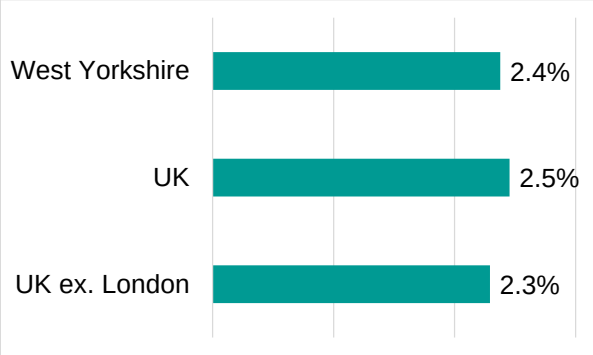
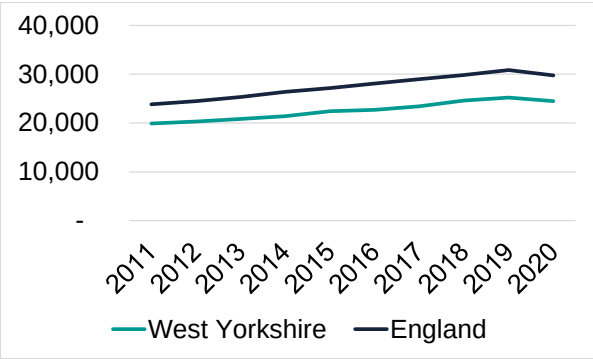
The number of positive outcomes in respect of rape and serious sexual offences increased in 2021/22, although the outcome rate was marginally down on the previous year.

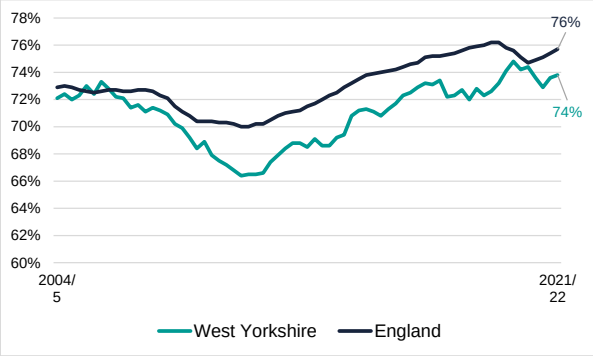
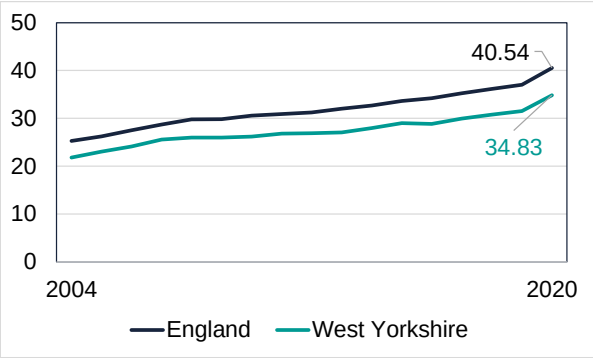
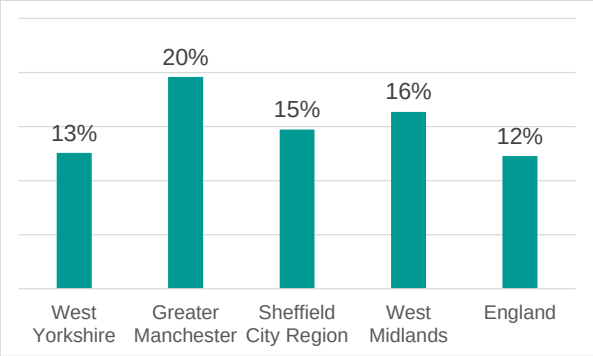
West Yorkshire's Liaison and Diversion Service (L&D) supports people who come into contact with the criminal justice system and have mental health, learning disability, substance misuse or other vulnerabilities. During 2021/22 there were 5,272 adult referrals and 2,290 referrals of young people into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

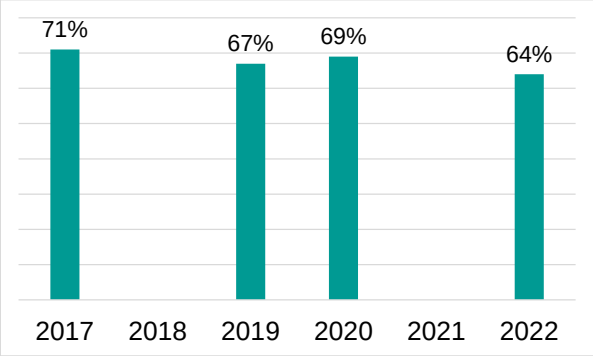
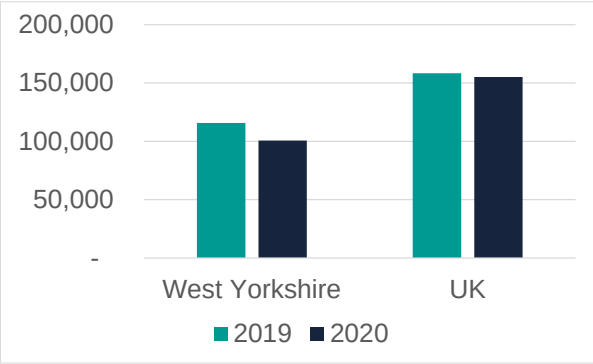
Police officer numbers continue on an upward trend. The most recent figures for March 2022 show an increase of 1,179 officers since March 2016, bringing the total in West Yorkshire to 5,680, a net increase of 26% for that period.

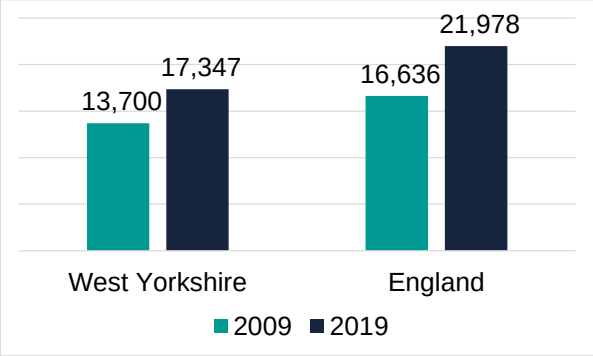
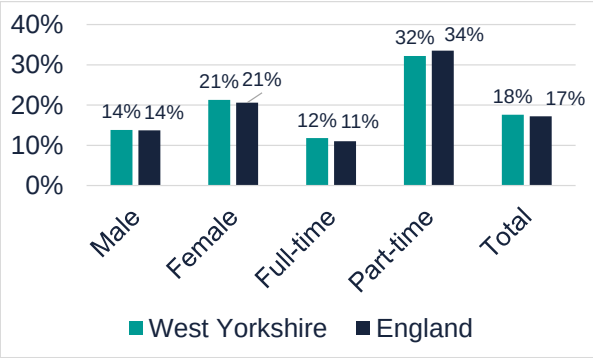
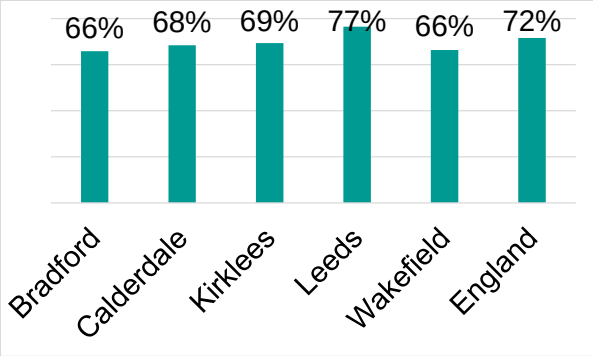
West Yorkshire Police's call handling performance (time taken to answer 999 calls to the police) has been consistently high since monitoring was introduced last year.

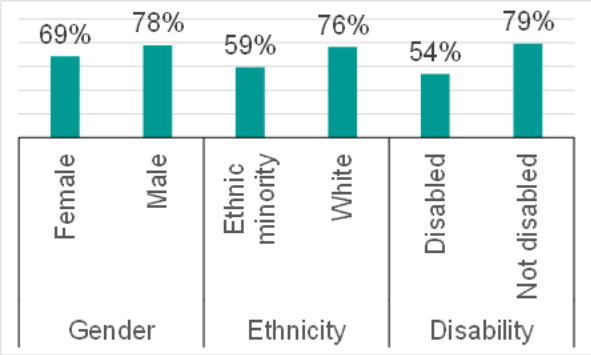
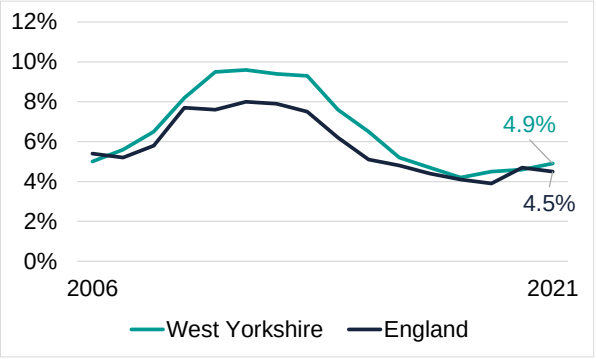
Summary of performance against the indicators

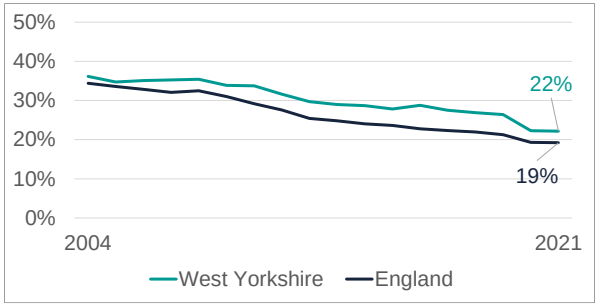
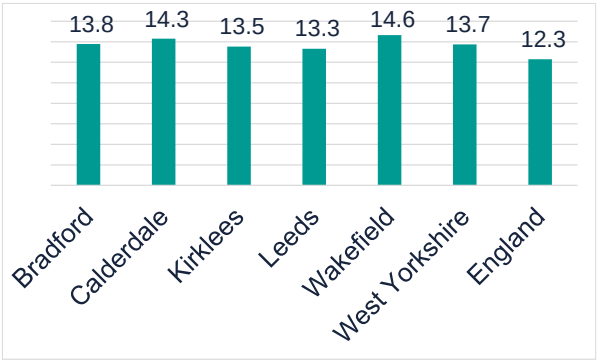
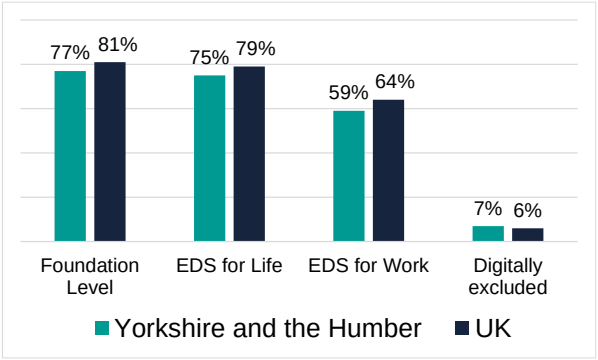
Indicator	Headline chart	Comment
Driving economic growth and innovation to enable good jobs		
Economic output (GVA) *GVA (balanced) at current basic prices - annual growth rate (%), 2015-20* Source: ONS, Sub-regional GVA data		Between 2015 and 2020 West Yorkshire's economy grew at a rate slightly below the UK average but above the UK average excluding London. Average growth rates across the UK were tempered by a sharp fall in 2020 linked to the pandemic.
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.

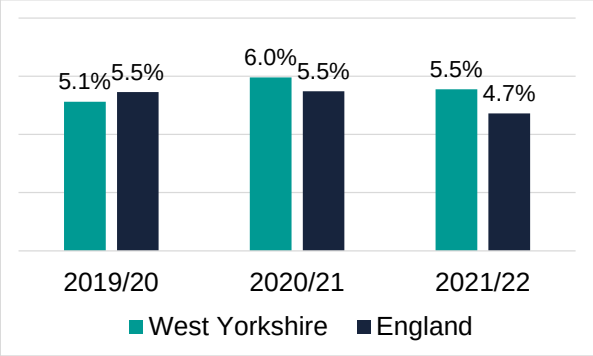
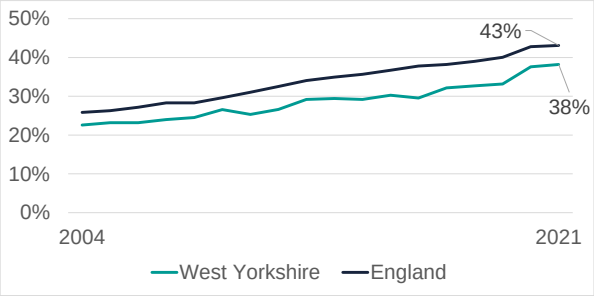
Indicator	Headline chart	Comment
Employment rate *Employment rate for all aged 16-64* Source: ONS APS (July to June periods)		West Yorkshire's employment rate fell during the pandemic, widening the gap with the national average but has seen a degree of recovery more recently.
Productivity *Current price 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.
Private sector businesses *% change in count of private sector businesses, 2015-21* Source: ONS, Business activity, size and location, 2021		The number of private sector businesses in West Yorkshire is growing at a slightly faster rate than the national average but slower than comparator areas. The level of business density is relatively low in West Yorkshire.

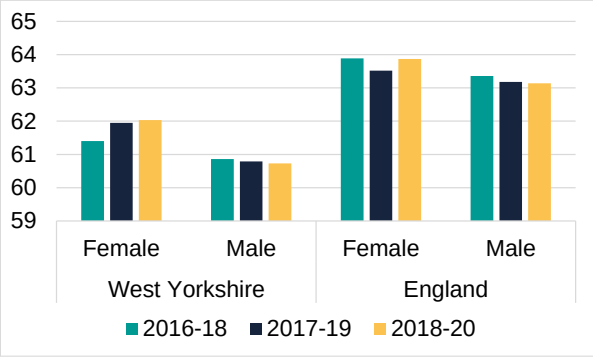
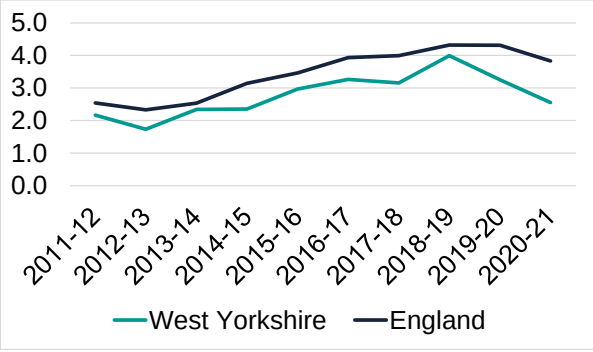
Indicator	Headline chart	Comment
Innovation *Proportion of West Yorkshire businesses engaged in innovation activities* Source: Leeds City Region Business Survey (NB: data not collected in 2018 and 2021)		The proportion of businesses engaging in innovation activity fell in 2022 compared with previous years. This is probably linked to the pandemic, but other evidence suggests a long-standing West Yorkshire deficit in innovation activity.
International trade *Service exports per £m of GVA* Source: ONS, International exports of services from subnational areas of the UK (NB: Goods exports covered in main report)		Exports of goods and services fell sharply in 2020 due to the pandemic. Service exports have overtaken exports of goods in their importance to the West Yorkshire economy.

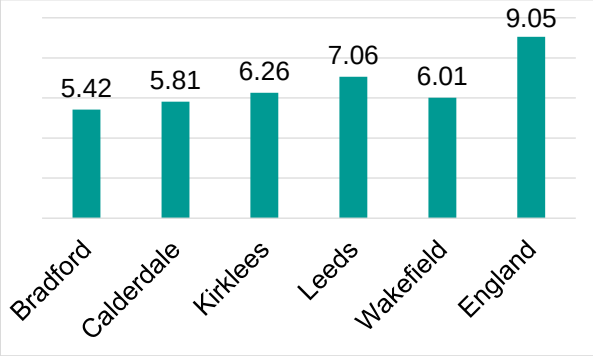
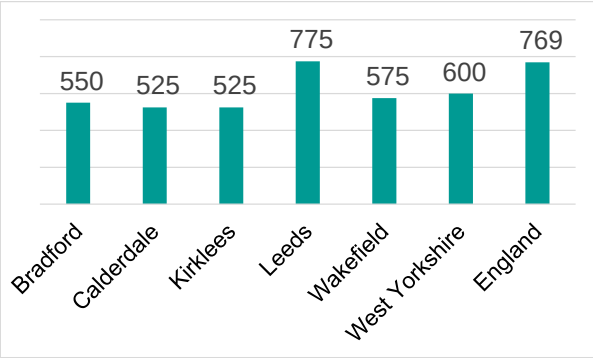
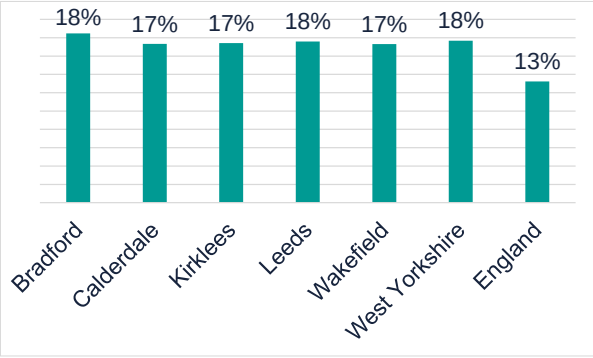
Indicator	Headline chart	Comment
Gross disposable household income (GDHI) *Gross disposable household income per head (£) at current basic prices* Source: Regional Accounts, ONS		West Yorkshire's gap with the national average on household income continued to widen according to the latest data, growing by 2.0% in West Yorkshire between 2018 to 2019 but by 2.5% at national level. Since the publication of the most recent GDHI data, rising inflation driven by increasing energy costs, has impacted on real household incomes.
Jobs paying below Real Living Wage *% of jobs paying below Real Living Wage by gender and status* Source: Annual Survey of Hours and Earnings, 2021		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.
Quality work *Proportion of residents who are employees in quality work* Source: Job quality in the UK, ONS, 2018		All local authorities in West Yorkshire except Leeds have a relatively low proportion of people in jobs that offer quality work, based on a composite measure that takes into account pay, working hours and contractual status.

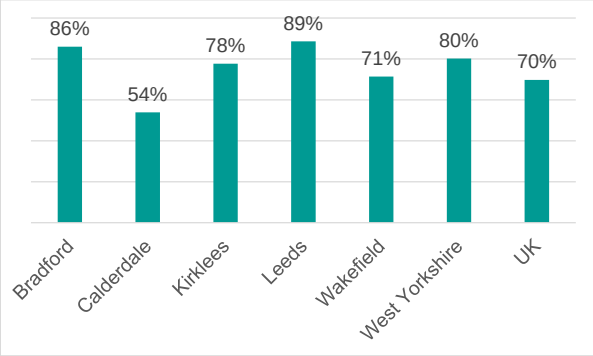
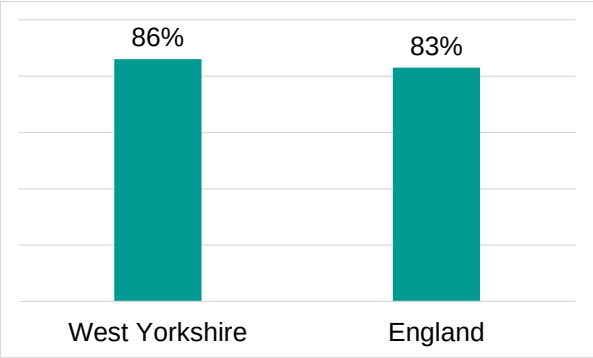
Indicator	Headline chart	Comment
Enabling a diverse, skilled workforce and accessible learning for all		
Employment rate gap for disadvantaged groups *Employment rate for all aged 16-64, West Yorkshire* Source: ONS APS		Members of some groups are much less likely to be in employment. There are signs that the employment rate gap is narrowing for disabled people and people from ethnic minorities.
Unemployment rate *Unemployment rate for all aged 16+* Source: ONS APS model-based estimates of unemployment		West Yorkshire's official unemployment rate is similar to the national average. The impact of the pandemic on this measure was modest.

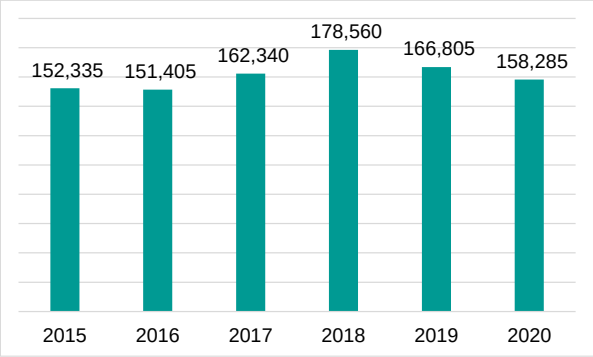
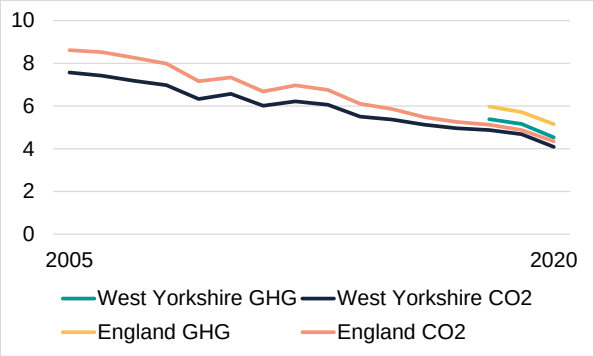
Indicator	Headline chart	Comment
People with no / low qualifications *% of people aged 16-64 qualified below level 2 or with no qualifications* Source: ONS APS		The proportion of people with no / low qualifications was largely unchanged in 2021, following a sharp fall in 2020 that narrowed the gap with the national average.
Apprenticeships *Ratio of apprenticeship starts to people in employment, 2020/21 academic year* Source: Department for Education, ONS APS		West Yorkshire has more apprenticeships relative to its employment base than the national average but the number of starts in 2020/21 academic year was nearly a quarter down on pre-pandemic levels.
People without basic digital skills *Essential digital skills (EDS) – key indicators* Source: Lloyds Bank, UK Consumer Digital Index, 2021		Although most people have essential digital skills for life, nearly a quarter of adults do not. More than two-fifths of people lack the full range of essential digital skills for work.

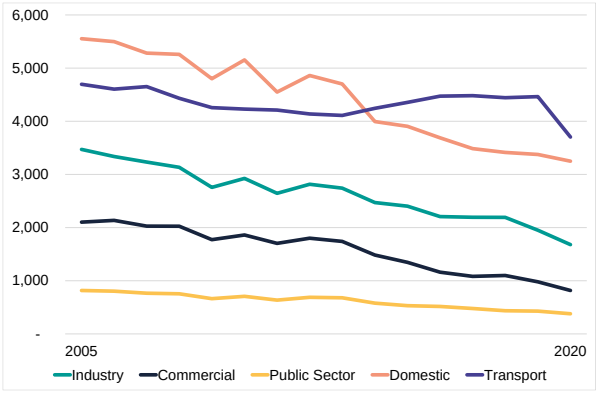
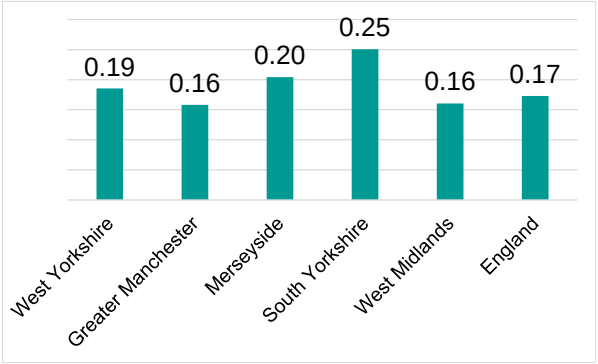
Indicator	Headline chart	Comment
NEETs *Number and proportion of 16- and 17-year-olds not in education, employment or training (NEET) or whose activity is not known* Source: NEET and participation local authority figures, Department for Education, 2022		The proportion of young people who are NEET fell in the last year in West Yorkshire but remains above the national average.
People qualified at Level 4 and above *% of people aged 16-64 whose highest qualification is at Level 4 or above* Source: ONS APS		The proportion of people qualified at this level remained largely unchanged in 2021 but the underlying trend is an improving one. A significant gap with the national average remains.

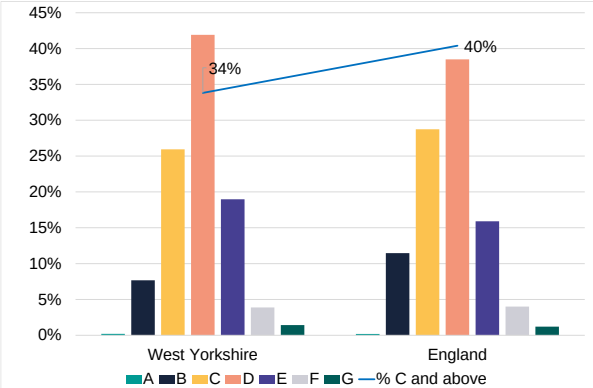
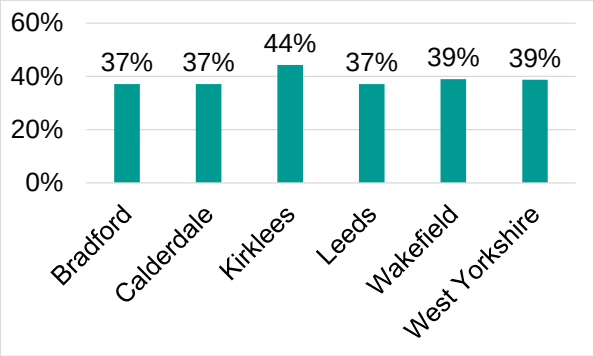
Indicator	Headline chart	Comment
Empowering our communities, towns and cities to thrive		
Healthy Life expectancy *Healthy life expectancy (HLE) at birth - estimates in years* Source: Health state life expectancy, ONS		Healthy life expectancy in West Yorkshire is below the national average for both males and females.
Net additional dwellings *Net additional dwellings per 1,000 population* Source: Department for Levelling Up, Housing & Communities		West Yorkshire has seen two successive years of decline in net additional dwellings linked to the pandemic.

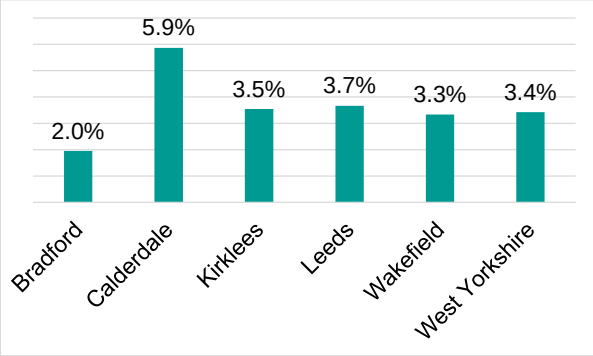
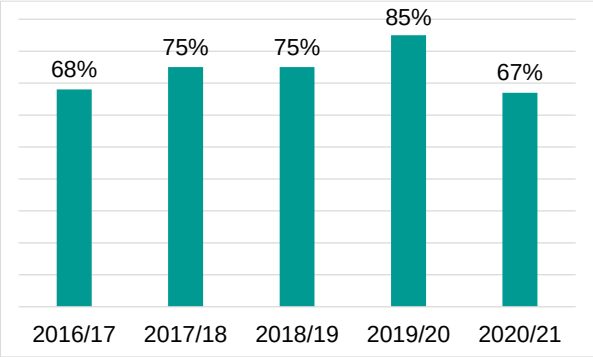
Indicator	Headline chart	Comment
Housing affordability *Affordability of House Prices – ratio of median house price to median annual wage (residence-based) at local authority level in 2021* Housing affordability in England and Wales: 2021, ONS, 2022		Housing in West Yorkshire is relatively affordable in comparison with the national average, but affordability worsened in 2021 as prices grew much more quickly than earnings
Rented housing costs *Median monthly rental prices for private sector two-bedroom properties, 2021/22* Private rental market summary statistics in England, ONS, 2022		Median private rents are below the national average in all local authorities except Leeds. National evidence shows that rental prices have increased markedly during 2022.
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 around 30% of households could be in fuel poverty this winter despite the government's price freeze plan.

Indicator	Headline chart	Comment
Gigabit-capable internet coverage *% of properties with gigabit-capable internet coverage* Source: ThinkBroadband		80% of properties in West Yorkshire have gigabit-capable internet coverage, 10 percentage points higher than the national average. This includes 47% of properties that have full-fibre coverage.
Mobile coverage *4G premises (indoor) coverage from all providers, January 2022* Source: Ofcom Connected Nations Spring Report 2022		4G coverage is growing in West Yorkshire and exceeds the national average.

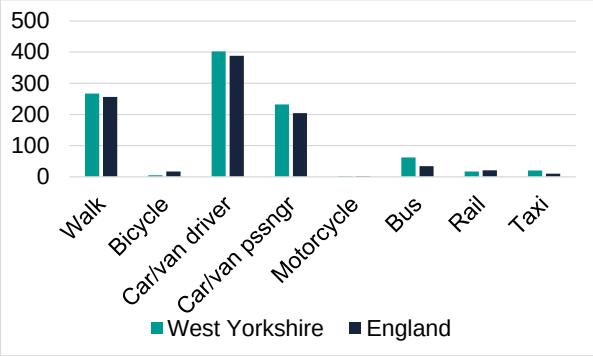
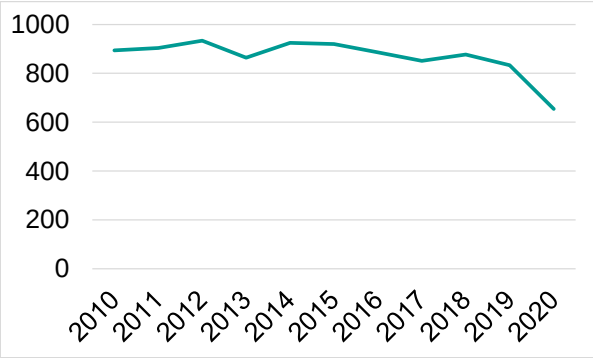
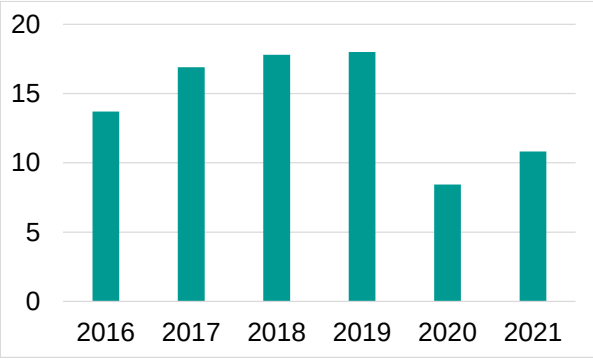
Indicator	Headline chart	Comment
Champioining culture, sport and creativity		
Employment in cultural, sport and creative activities *Trend in employment in cultural, sport and creative activities, West Yorkshire* Source: Business Register and Employment Survey		Cultural, sport and creative activities represent a substantial part of the West Yorkshire economy but employment in this area fell over the two consecutive years of 2019 and 2020. This was at least partly due to the pandemic.
Building a sustainable, nature-rich and carbon neutral region		
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. Sustained reductions are needed to achieve net zero by 2038.

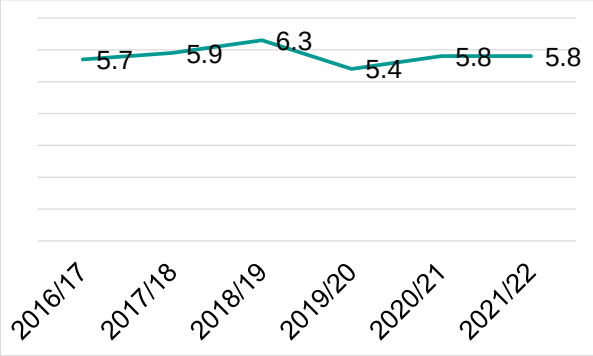
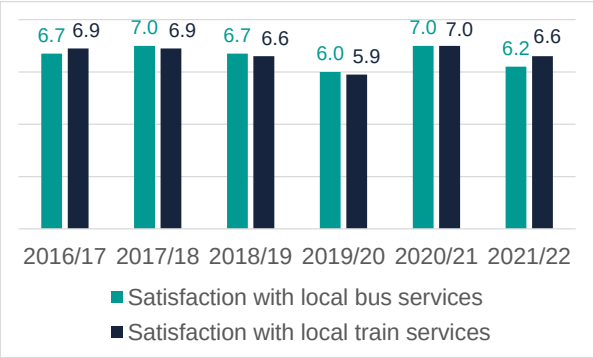
Indicator	Headline chart	Comment
Greenhouse gas emissions by sector *Greenhouse gas emissions ($ktCO_2$ equivalent) by selected sector for West Yorkshire* Source: UK local authority carbon dioxide emissions estimates 2020, Department for Business, Energy and Industrial Strategy, 2022		The transport sector was the main source of emissions reductions in 2020, linked to the impact of the pandemic.
Emissions intensity *Emissions intensity ratio, 2020 - the level of greenhouse gas emissions per unit of gross value added (GVA)* Source: UK local authority carbon dioxide emissions estimates 2020, Department for Business, Energy and Industrial Strategy, 2022; Regional gross value added (balanced) by industry: all ITL regions, ONS, 2022		The emissions intensity (ratio of emissions to economic output) is in steady decline in West Yorkshire but is higher than the national average. The gap narrowed slightly in 2020 but this was an exceptional year due to the pandemic.

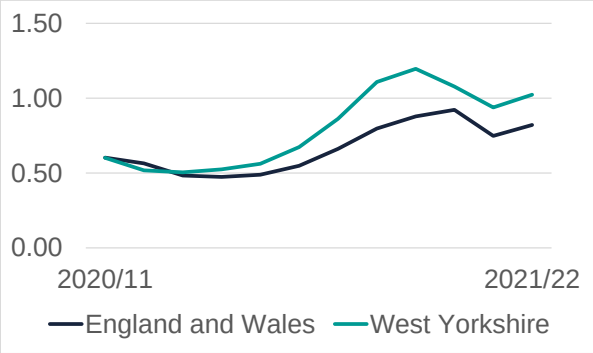
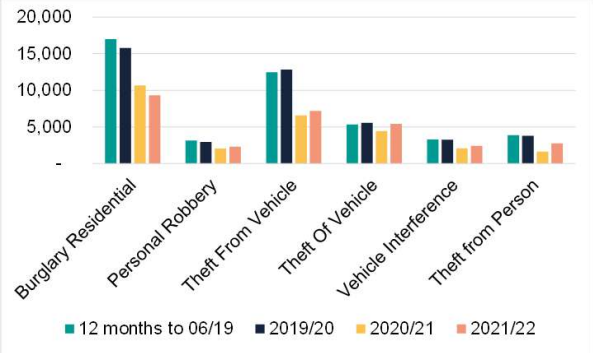
Indicator	Headline chart	Comment
Building energy efficiency *Energy Performance Certification rating by local authority* Source: Energy Performance Certificate data, Department for Levelling Up, Housing and Communities		West Yorkshire dwellings are less likely to have an energy efficiency rating of C or above compared to the national average (34% versus 40%).
Access to green space *Proportion of population with easy access to local natural greenspace* Source: Natural England 2021, ONS Mid-Year Population Estimates		Around two-fifths of West Yorkshire's population have easy access to local natural greenspace.

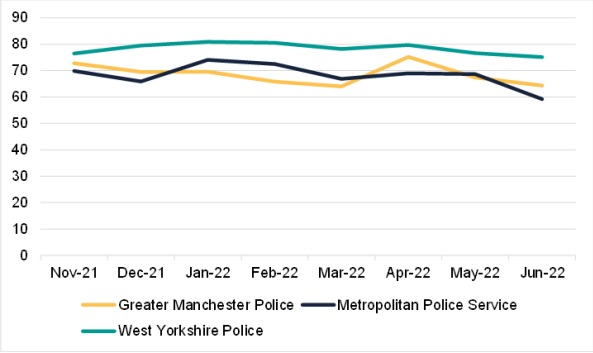
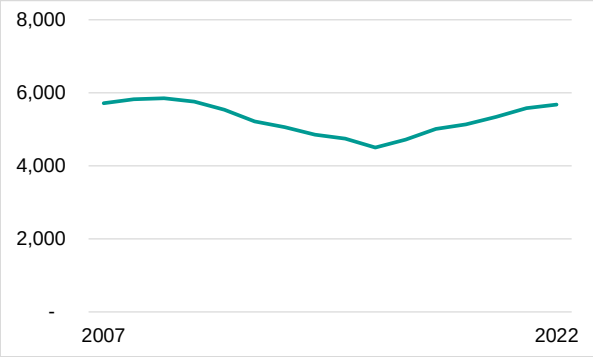
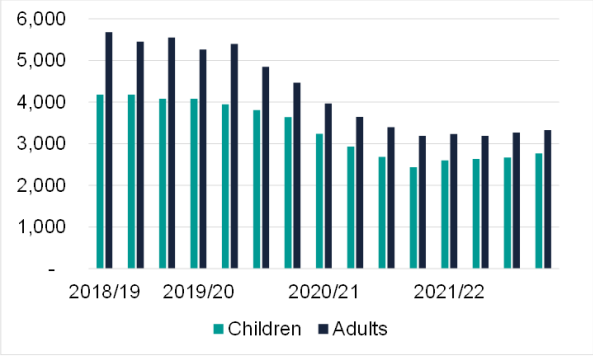
Indicator	Headline chart	Comment
Premises at risk of flooding *Proportion of residential properties in flood zones* Source: Environment Agency 2021, ONS Mid-Year Population Estimates		Around 3% of residential properties in West Yorkshire fall within a flood zone, rising to 6% in Calderdale. Flooding is likely to become a more frequent occurrence as a result of climate change.
Creating an accessible, clean and customer-focused transport system		
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.

[1] 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

Indicator	Headline chart	Comment
West Yorkshire mode share *Average trips per person and year by mode (2017/19 average)* National Travel Survey, Department for Transport, 2020		Before the pandemic West Yorkshire saw a decline in trips made by car and an increase in walking but West Yorkshire is still more reliant on the car than nationally.
Reported road casualties *Killed or seriously injured casualties (KSI) in West Yorkshire* Source: Reported Road Casualties Annual Report, Department for Transport, 2020		There was sharp decline in KSI casualties in West Yorkshire in 2020 resulting from a reduction in road traffic due to the pandemic.
MCard ticket transactions *Bus Trips made using MCard Products (millions)* Source: WYCA NERO Reports		Following a sharp reduction during the pandemic there was a modest recovery in trips made using the MCard in 2021 but trips remain well below 2019 levels.

Indicator	Headline chart	Comment
Satisfaction with highway infrastructure *Public satisfaction with highway infrastructure in West Yorkshire* (average score on scale of 1-10) Source: Residents' Perceptions of Transport Survey		Overall satisfaction with highway infrastructure remains at the same level as 2020/21. However, 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 public transport *Satisfaction with bus and rail services in the region* Source: Residents' Perceptions of Transport Survey		Satisfaction with public transport fell in 2021/22, although it remains higher than in 2019/20.

Indicator	Headline chart	Comment
Supporting community safety and accountable, proactive policing		
Serious violence *Knife crime per 1,000 population* Source: Annual Data Return from West Yorkshire Police		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.

Indicator	Headline chart	Comment
Time taken to answer 999 calls to the Police *Percentage of 999 calls answered within target (10 seconds* Source: Police.uk		West Yorkshire police have performed consistently well over time on call handling.
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.
Missing persons *Count of missing persons in West Yorkshire* Source: Quarterly Performance Report, West Yorkshire Police		The restrictions on movement linked to the pandemic led to a substantial reduction in the number of persons reported as missing and the latest figures remain well below pre-pandemic levels.

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1 Background and context

1.1 Introduction

Welcome to State of the Region 2022 – the second of our annual reviews of the performance of West Yorkshire against key socio-economic and environmental indicators.

The report provides a stocktake of where West Yorkshire currently stands, using a basket of headline indicators aligned with seven key priorities.

It is designed to be a resource for all partners across West Yorkshire but will also be useful for stakeholders from outside the region, including national government. It highlights areas of strength and positive trends in the local economy but also flags key issues and challenges that are priorities for future action.

The report aims to provide a balanced and objective view of economic performance in the region and gives insight into the difference we are making though the combined action of all partners in West Yorkshire. It does not seek to provide a review of the impact or performance of the Combined Authority, Local Enterprise Partnership or any other partner in West Yorkshire but the indicators do reflect priority areas within which the activities of partners are designed to move the dial on these indicators.

Nor does it make policy recommendations – the solutions to the problems faced by West Yorkshire are set out in the policies and strategies developed by partners in the region. Indeed, a report of this kind can only go so far in unpacking and explaining the wide range of complex issues facing the region. Nonetheless, this analysis should prove useful in prompting debate as partners seek to review their strategies in the light of the direction of travel in the economy.

The nature of the evidence relating to West Yorkshire means that there is a time lag in the picture available to us for some indicators, and this needs to be borne in mind when interpreting the analysis presented in this report. In some cases, this means that the latest data reflect the influence of the pandemic in 2020 and 2021. For example, the latest data for local greenhouse emissions is for 2020, a year in which emissions saw a unique fall due to the significant slowdown in activity linked to the pandemic. This kind of time lag also means that the latest data will not always provide a full picture of important recent developments. For example, the most recent available data relating to fuel poverty in West Yorkshire is for 2020, well before the current crisis in global energy prices became such a crucial issue. Ultimately, we are seeking to understand the underlying trends in performance in the region and the opportunities and challenges for the medium to longer term. But some current issues are of such profound importance that they cannot be overlooked and require the use of evidence beyond local statistics to provide the necessary picture, particularly where those local statistics are dated.

Medium-term prospects will also be shaped by Brexit. As well as the initial customs and border disruption the UK is currently experiencing, there will be medium- and longer-term impacts resulting from divergence from EU product standards and other regulations that will lead to restructuring in the national and local economy.

We plan to continue to update State of the Region on an annual basis, in order to track the progress that West Yorkshire is making over time.

Our interactive dashboards also provide dynamic content to show movement against the indicators in the period between annual reports and also enables the user to drill down into the more detailed data underpinning the commentary provided in this report, including cuts of the data by local authority and by demographic group (where applicable).

1.2 Overview of West Yorkshire

The work of the West Yorkshire Combined Authority and the Leeds City Region Enterprise Partnership covers the five West Yorkshire local authority areas of Bradford, Calderdale, Kirklees, Leeds and Wakefield.

West Yorkshire occupies a strategic position within the transport networks of the North of England. The M62, M1 and the A1(M) motorways all pass through the region and there are also internal urban motorways in Bradford and Leeds. West Yorkshire is within one hour's drive of 7 million people.

West Yorkshire has a large and growing population of 2.35 million, according to the 2021 Census. This is an increase of 125,900 (6%) from 2.23 million in 2011, a similar rate of increase to the England average. West Yorkshire accounts for 43% of the population of Yorkshire and the Humber and 15% of the population of the North of England.

West Yorkshire has a relatively young population. According to the 2021 Census, 19% of its people are aged under 15 years old (vs 17% in England) and 38% are aged under 30 (vs 36% in England). Bradford has the fourth highest proportion of under-15s of all local authorities in England (at 21%).

Nonetheless, the population is ageing. The number of people aged 65 and over grew by 19% between 2011 and 2021 in West Yorkshire - three times the overall rate of population growth for the region.

West Yorkshire has an employed workforce of around 1.1 million and around 95,000 businesses. The region's economic output is worth £57.4bn, making it the third largest city region (or equivalent) economy in the UK outside London.

West Yorkshire is also the third largest city region area in terms of employment but has the largest finance and insurance sector of any of the 10 combined authority areas in England.

Covering an area of 783 square miles, West Yorkshire has a population density of 1,159 people per km^2, 2.7 times more densely populated than England as a whole. It is a predominantly urban area, but its rural population is significant in absolute terms; with more than 200,000 people living in rural locations, equivalent to 9% of the total population of the region. Although this overall proportion is smaller than the national average of 18% the figures vary at local authority level, ranging from 5% in Bradford and Leeds up to 17% in Wakefield. Around 9% of West Yorkshire's businesses and 6% of its employment are located in rural areas.

West Yorkshire contains five cities and major towns, including the core city of Leeds. Leeds is the main retail and office centre on the eastern side of the Pennines and is at the heart of the West Yorkshire economy. Leeds is a renowned retail destination, is home to award winning national theatre and dance companies has a world class arena and thriving independent food scene.

Bradford has the 4th highest number of manufacturing jobs of any city in the UK (after London, Birmingham and Leeds) and has a diverse population, with people from ethnic minorities making up 36% of the total population. Bradford is UK City of Culture 2025.

Centred on Huddersfield, Kirklees has a strong manufacturing base, has world leading engineering and textile businesses and is receiving multi-million-pound investment in gigabit infrastructure

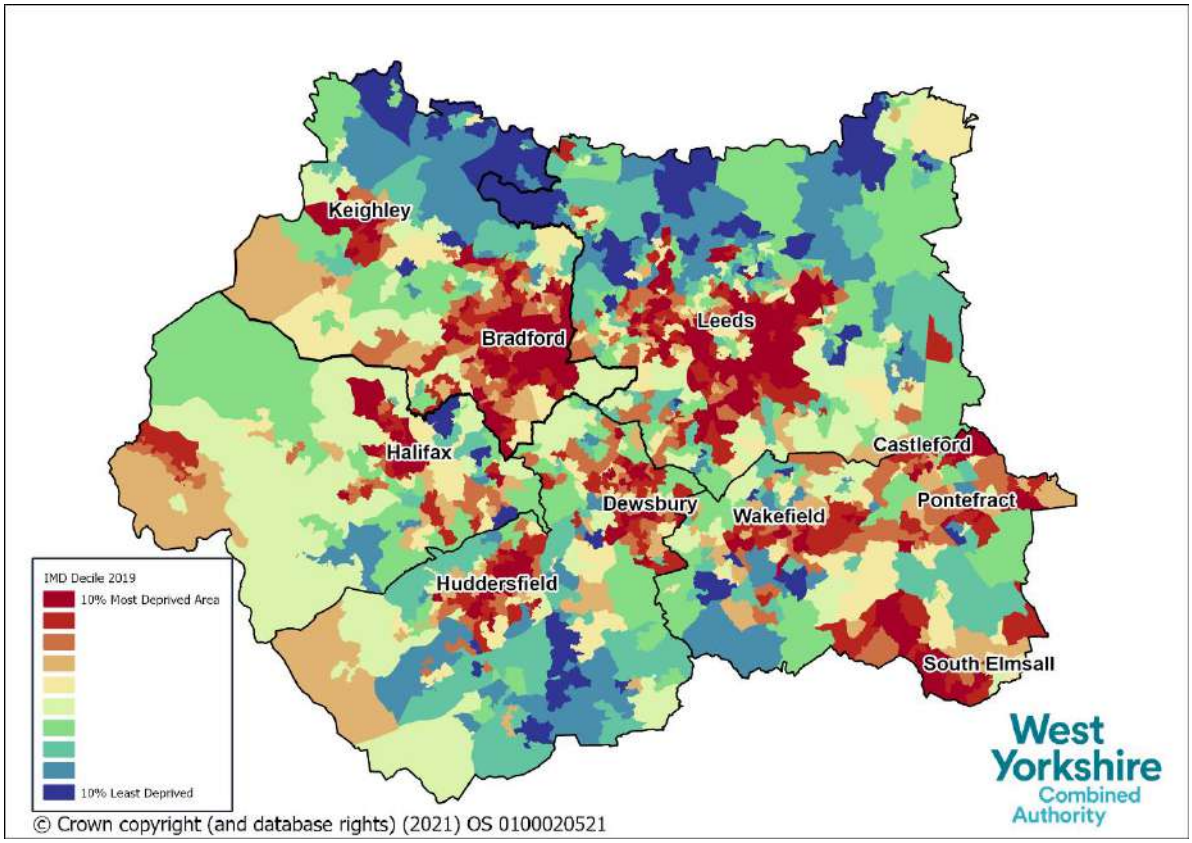
Situated between Leeds and Manchester, Calderdale is within one hour's travel of a quarter of a million businesses, eight million people and a combined economy worth around £150 billion. Calderdale has strengths in financial and professional services, and advanced manufacturing, as well as creative and digital industries, and innovation in green business.

The cathedral city of Wakefield has significant strengths in manufacturing and logistics, and benefits from being one of the United Kingdom's most accessible places by road, rail and air.

Turning to commuting flows, West Yorkshire is largely self-contained, with 90% of residents working within the area and 90% of jobs in the area being undertaken by local residents. A fifth of residents travel to a work destination outside their home district but within West Yorkshire. Nonetheless, there are substantial commuting flows in absolute terms both in and out of West Yorkshire and a net commuting inflow, overall. The most significant sources of inward commuters into West Yorkshire are Barnsley, Harrogate and Selby, followed by York and Doncaster, with Leeds being the principal destination.

More than one in five people in West Yorkshire live in areas within the 10% most deprived in England, according to the Index of Multiple Deprivation (IMD). This is equivalent to more than half a million people. The deprivation profile of our region has remained relatively unchanged between 2004 and 2019, reflecting the existence of pockets of persistent and long-standing deprivation. The most disadvantaged areas are clustered around town and city centres and their periphery. A key issue of concern is that residents from an ethnic minority group are roughly twice as likely as the population as a whole to live in areas of the most acute deprivation in our region, meaning that around a third of residents in the most deprived neighbourhoods are from an ethnic minority group.

Figure 1: West Yorkshire Index of Multiple Deprivation 2019



1.3 Priorities

State of the Region 2022 is structured around seven key priorities formulated by the Combined Authority and its partners (see Figure 2).

These priorities reflect the respective remits of the Combined Authority's six portfolio committees together with that of West Yorkshire's Police and Crime Panel. They also reflect the Combined Authority's corporate priorities and align with investment priorities contained in the West Yorkshire Investment Strategy.

The seven priorities represent an evolution of the Strategic Economic Framework priorities used in last year's State of the Region. There has been much change to the powers, functions and governance of the Combined Authority since the SEF was adopted. The devolution deal and election of the first Mayor of WY, the pandemic and the police and crime team becoming part of the Combined Authority have led to different areas of focus and new priorities.

Figure 2: Overview of priorities

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

The seven priorities are underpinned by three cross-cutting aims, as set out in more detail below.

Tackling the climate emergency

The Mayor and Combined Authority have declared a climate emergency, recognising that greenhouse gas emissions and a depleted natural environment are having a detrimental impact on the businesses and residents of West Yorkshire. The Combined Authority and its partners are targeting investment and action on reducing emissions, ensuring preparedness for the effects of a changing climate, promoting resource efficiency and supporting the natural environment.

Growing an inclusive economy

Supporting the growth of an inclusive economy is central to our ambitions for West Yorkshire and is founded on a commitment to ensure that all individuals and communities in West Yorkshire are enabled to contribute to - and benefit from - economic prosperity because they are inspired, confident and engaged. This is founded on a belief that every person - and every community - matters equally, that economic and social disparities should not just be reduced but eliminated, and that diversity - including of our people and communities - is a key strength of the region.

Embedding equality, diversity and inclusion

The West Yorkshire Combined Authority's vision is to be a leader, recognised nationally, for our focus and commitment to equality, diversity, and inclusion.

The Mayor's vision is for West Yorkshire to be the best place to live, to work, to learn, to start a business and to raise a family; where equality, diversity and inclusion is central to everything we do and there are no barriers to getting on and succeeding in life.

1.4 The indicators

The State of the Region indicators were originally developed to measure the progress West Yorkshire is making against the priorities and the overall vision of the Strategic Economic Framework.

These headline indicators are high level, strategic indicators that reflect key dimensions of performance in the West Yorkshire economy: the key areas where we would like to see change and improvement in order to support sustainable economic growth, improved living standards and inclusion.

To support the transition from the five SEF priorities to the current seven priorities we are in the process of bringing forward additional indicators to reflect more fully the extended and reconfigured range of priorities.

The **Local Plans** of the five West Yorkshire local authorities have a key influence on the full range of indicators, facilitating inclusive growth, regeneration, housing delivery and helping to address the climate emergency. Local Plans provide a vision for the future of each local area and a framework for addressing housing needs and other economic, social and environmental priorities. They set out a spatial planning framework, seeking to manage growth in a sustainable way and to balance the overall scale, distribution and phasing of development[2].

[2] Further details are set out in the Government's National Planning Policy Framework

It has not been possible to update all of the indicators contained in last year's report.

The indicator relating to Net contribution of West Yorkshire to HM Treasury drew on analysis from Greater Manchester Combined Authority's Espresso Area Comparison Tool. This has not been updated in the interim. We intend to retain this indicator and present refreshed analysis in next year's State of the Region report, subject to data becoming available.

The analysis of quality work in West Yorkshire in last year's report was based on data supplied by the Office for National Statistics. Publication of the refreshed data has been delayed and it has not been possible to update this indicator. However, last year's analysis has been retained in the report to provide a picture of the situation using the most recent data available.

Figure 3: The headline indicators and their links to the SEF priorities

●●● Primary link

●● Secondary link

Indicator Title	Driving economic growth and innovation to enable good jobs	Building a sustainable, nature rich and carbon neutral region	Championing culture, sport and creativity	Enabling a diverse, skilled workforce and accessible learning for all	Empowering our communities, towns and cities to thrive	Creating an accessible, clean and customer focused transport system	Supporting community safety and accountable, proactive policing
Economic output (GVA)	●●●				●●		
Economic output (GVA) per head	●●●				●●		
Productivity	●●●				●●		
Gross disposable household income	●●●				●●		
Private sector businesses	●●●				●●		
Businesses engaging in innovation activity	●●●				●●		
Goods / services exports as % of GVA	●●●				●●		
Private sector businesses	●●●				●●		
Businesses engaging in innovation activity	●●●				●●		
Goods / services exports as % of GVA	●●●				●●		
GHG emissions (ktCO2e) total and per capita		●●●					
GHG emissions (ktCO2) by sector		●●●					
Emissions intensity ratio		●●●					
Building energy efficiency		●●●					
Access to nature and green spaces (Green and Blue infrastructure)		●●●					
Premises at risk of flooding		●●●					
Cultural sector employment	●●		●●●		●●		
Employment rate	●●			●●●			
Employment rate gap for disadvantaged groups	●●			●●●			
Unemployment rate	●●			●●●			

Indicator Title	Driving economic growth and innovation to enable good jobs	Building a sustainable, nature rich and carbon neutral region	Championing culture, sport and creativity	Enabling a diverse, skilled workforce and accessible learning for all	Empowering our communities, towns and cities to thrive	Creating an accessible, clean and customer focused transport system	Supporting community safety and accountable, proactive policing
Jobs paying below Real Living Wage	●●			●●●			
% of employees in quality work (not updated this year)	●●			●●●			
People with no / low qualifications (% qualified below level 2)	●●			●●●			
People with higher qualifications (qualified at level 4 and above)	●●			●●●			
Apprenticeship starts	●●			●●●			
People lacking basic digital skills				●●●			
NEETs				●●●	●●●		
Health life expectancy					●●●		
Net additional dwellings (including net additional affordable)					●●●		
Housing affordability					●●●		
Rented housing costs					●●●		
Gigabit-capable internet coverage	●●				●●●		
Take-up of superfast (or above) broadband services	●●				●●●		
Mobile coverage (4G and 5G)	●●				●●●		
% of households in fuel poverty		●●			●●●		
Net contribution of West Yorkshire to HM Treasury (not updated this year)					●●●		
Access inequality ratio (employment)	●●					●●●	
West Yorkshire mode share		●●			●●	●●●	
Reported road casualties					●●	●●●	
MCard ticket transactions (bus)	●●	●●				●●●	
Satisfaction with highway infrastructure	●●				●●	●●●	
Satisfaction with bus and rail services in the region	●●	●●				●●●	
Serious violence with focus on Knife Crime					●●		●●●

Indicator Title	Driving economic growth and innovation to enable good jobs	Building a sustainable, nature rich and carbon neutral region	Championing culture, sport and creativity	Enabling a diverse, skilled workforce and accessible learning for all	Empowering our communities, towns and cities to thrive	Creating an accessible, clean and customer focused transport system	Supporting community safety and accountable, proactive policing
Neighbourhood Crime - including Burglary, Robbery, Vehicle Crime and Theft from Person.					●●		●●●
Sentencing - specifically the outcomes for Rape and Serious Sexual Offences					●●		●●●
Time taken to answer 999 calls to the Police					●●		●●●
Increase in officer numbers					●●		●●●
Offenders referred to drug treatment services from custody					●●		●●●
Numbers of missing persons					●●		●●●

1.5 Structure and content of the report

The report is structured around the seven priorities, with each of the indicators assigned to a priority, as per Figure 3.

There is a short analysis and commentary for each indicator, examining why the indicator is important, how West Yorkshire is performing against the indicator based on the latest available data and an assessment of trends / direction of travel. Additional evidence is drawn upon to provide added context and to explain the factors behind changes in performance.

To set the analysis in context, we have, where data allows, set out comparisons between West Yorkshire and the national (England) average. Comparisons are also made with selected Mayoral Combined Authority areas whose circumstances are most relevant to the experience of West Yorkshire, including Sheffield City Region, Greater Manchester City Region and West Midlands Combined Authority (CA)[1] (Greater Birmingham and Solihull is used in some instances for reasons of data availability).

[1] This is coterminous with the West Midlands Metropolitan County (ITL2 area) rather than the wider West Midlands region (ITL1).

2 Driving economic growth and innovation to enable good jobs

Key points

West Yorkshire, along with the rest of the UK, experienced a contraction of its economy in 2020 (the latest data available) due to the pandemic. It is likely that there has been a recovery since then, reflecting the return to pre-pandemic levels of output seen at national level. West Yorkshire's average growth rate between 2015-20 was slightly below the UK average.

GVA per head fell in 2020 reflecting the pandemic-related lockdown in the economy. Looking over a longer time frame, West Yorkshire's growth performance against this measure is similar to the national average but lags behind Greater Manchester, for example.

West Yorkshire's employment rate and level of employment both fell during the pandemic period. There has been a degree or recovery since then.

Despite a fall in economic output during the pandemic period, productivity increased in West Yorkshire. This reflects a temporary compositional effect as sectors with relatively low productivity performance bore the brunt of coronavirus restrictions. The underlying gap with the national average on productivity performance is largely unchanged.

West Yorkshire has a small business base compared with the national average but has seen faster net growth in its numbers of businesses in recent years, driven by sectors like transport and storage and hospitality.

The latest data show a decline in the proportion of West Yorkshire businesses undertaking innovation activity. This probably reflects the short-term impact of the pandemic but evidence of continuing low levels of R&D spend in Yorkshire and the Humber point to a structural deficit in this area for West Yorkshire.

The latest figures show that exports of goods and services were negatively impacted by the pandemic, not just in West Yorkshire but across the UK. The figures also show the importance of service exports to the West Yorkshire economy.

Gross disposable household income per head in West Yorkshire is well below the national average and the latest data shows that the gap continues to widen.

The proportion of jobs paying below the Real Living Wage in West Yorkshire is falling over time, although the proportion of jobs affected remains slightly above the national average.

2.1 Overview of the priority

A history of lower levels of skills, infrastructure investment and innovation mean that productivity in West Yorkshire has lagged behind much of the UK as well as our European peers. Weak productivity performance is the most important constraint on regional economic growth. Raising the prosperity and real terms living standards of the region can only be achieved sustainably by increasing productivity. This involves the following range of actions:

- Support business to respond to the challenges and opportunities of Brexit
- Provide businesses with intensive support to boost productivity/innovation capacity
- Attract global investors to the region, creating jobs and boosting productivity within the regional economy

- Help businesses to increase overseas trade
- Embed the Regional Digital Framework
- Make the local skills system more responsive to economic needs.

The basket of indicators for this priority is wide ranging and focuses on economic performance and its key drivers. It includes measures relating to economic growth, productivity performance, export and innovation activity and the size of the business base.

2.2 Performance against the indicators

2.2.1 Economic output (GVA)

West Yorkshire's growth rate diverged from the national average at the time of the global financial crisis. Between 2015 and 2020 West Yorkshire's average growth rate was just below the UK figure but all parts of the UK experienced a decline in 2020 linked to the pandemic.

Gross value added (GVA) is the most commonly used measure of economic output at the local level. It is a similar measure to GDP, but with the effects of taxes and subsidies included. GVA is a measure of the increase in value of the economy through the production of goods and services in a given area and time.

It is a critical indicator of the health and performance of a local economy. It gives a measure of the prosperity and living standards of an area but needs to be considered alongside demographics and employment to provide a full understanding of economic conditions. GVA growth can be driven by an expansion of the labour force, or by increases in productivity.

In 2020, the latest year for which data are available, West Yorkshire had economic output (GVA, or gross value added) of £57.4bn. That makes it a larger economy than nine EU countries, although smaller than the Greater Manchester and West Midlands Combined Authority areas.

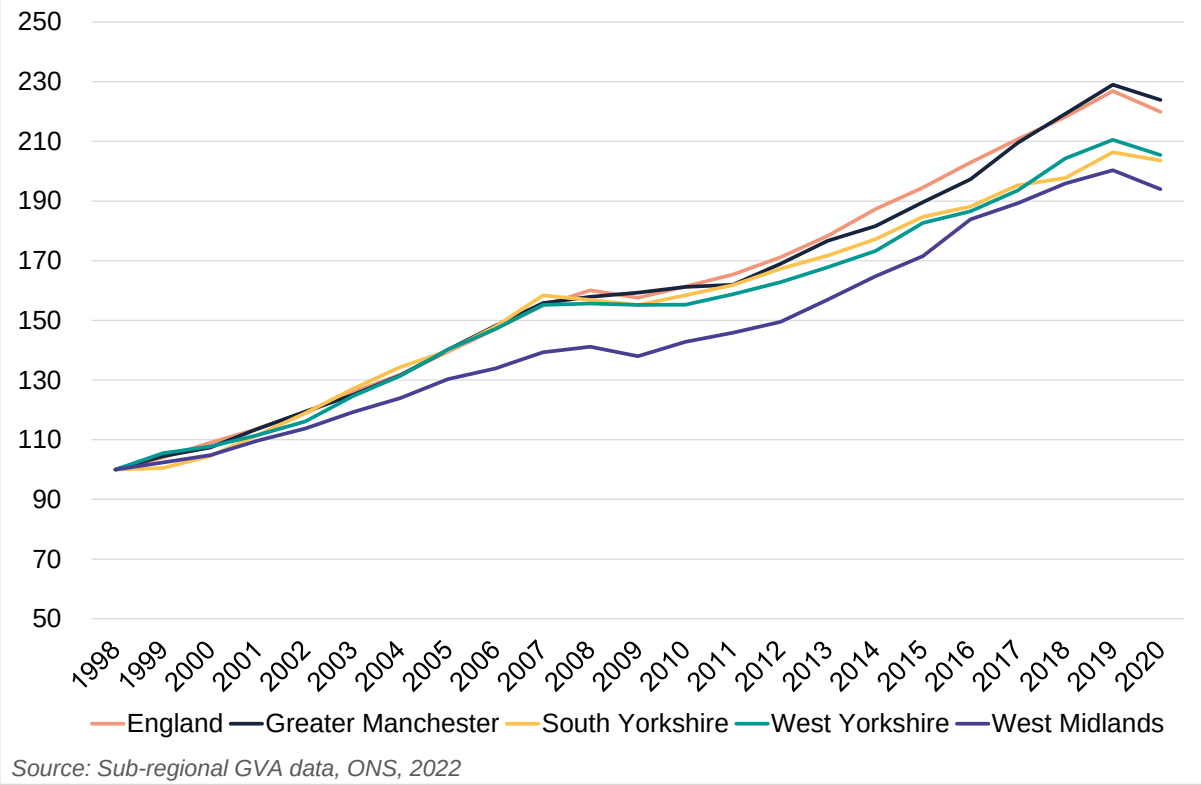
West Yorkshire's GVA growth performance was on a par with the national average between the late-1990s and the financial crisis of 2008. Since then, the paths have diverged with West Yorkshire growing more slowly. Among the comparator areas, Greater Manchester has narrowed the gap with the national average in recent years.

The coronavirus pandemic had a substantial impact on the level of economic output recorded in 2020, although West Yorkshire's GVA was impacted less severely than the England average between 2019 and 2020, falling by 2.4% in West Yorkshire compared with 3.1% across England.

National data show that, at the time of writing, the economy has recovered since 2020, returning to its pre-pandemic level in October 2021 and reaching a level 1% above this according to the latest figures[1]. It seems reasonable to assume that West Yorkshire's economy has also undergone a similar recovery during this period.

[1] Office for National Statistics, GDP monthly estimate, UK: June 2022 (2022)

Figure 4: Index of GVA growth (current prices) – West Yorkshire and key comparator areas

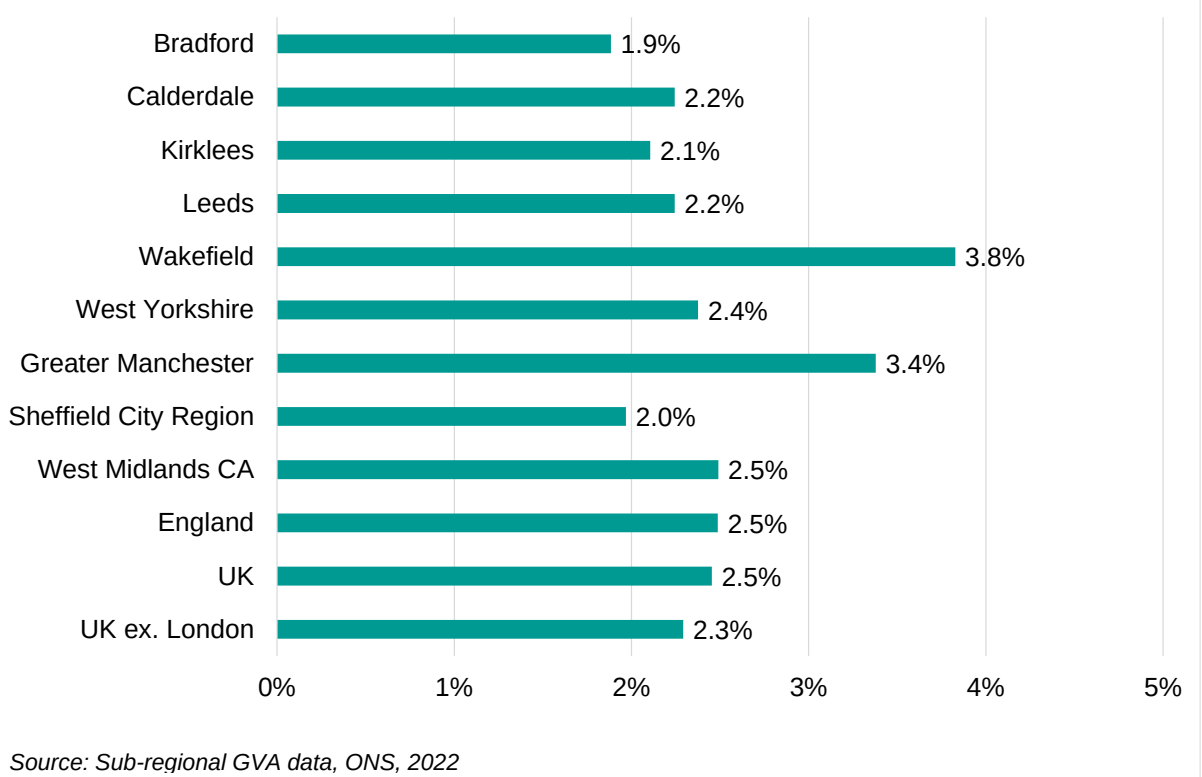


Source: Sub-regional GVA data, ONS, 2022

Growth between 2015 and 2020 was similar in West Yorkshire, at 2.4% per annum on average, to UK growth of 2.5%. This places West Yorkshire on a par with the growth rate of West Midlands Combined Authority, ahead of Sheffield City Region but well below the growth rate in Greater Manchester.

Locally, only Wakefield had an average growth rate higher than the UK figure between 2015 and 2020. Wakefield's growth rate (3.8%) was more than 1.5 times the UK average during this period. Among the remaining West Yorkshire local authorities, the average growth rate was just above 2% per annum, except in Bradford where it was slightly below.

Figure 5: Gross value added in current prices - average annual growth rate, 2015-20



Source: Sub-regional GVA data, ONS, 2022

2.2.2 Economic output (GVA) per head

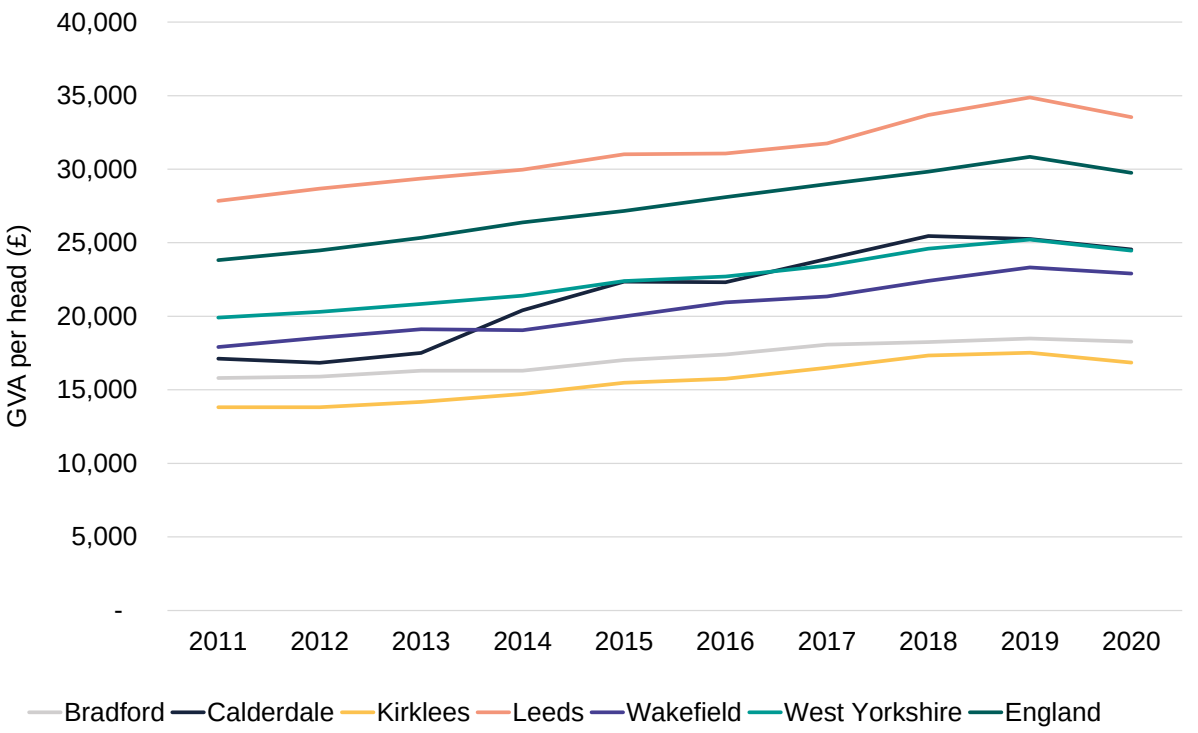
GVA per head fell in 2020 reflecting the pandemic-related lockdown in the economy. Looking over a longer time frame, West Yorkshire's growth performance against this measure is similar to the national average but lags behind Greater Manchester.

Looking at GVA per head enables better comparison between areas of different sizes and also provides a measure of an area's prosperity, by quantifying economic output per resident. However, GVA per head is not a measure of productivity –particularly as the population data will include a substantial number of people not working in the area and will not account for factors such as commuting flows and demographics.

GVA per head in West Yorkshire stood at £24,500 in 2020, which is 82% of the average for England (£29,800). With a figure of £33,500, Leeds is the only area of West Yorkshire where output per head is higher than the England average. Other areas range from £16,900 in Kirklees[1] to £24,500 in Calderdale.

The general reduction in output seen between 2019 and 2020, associated with the coronavirus pandemic, was also reflected in an across the board fall in GVA per head. In West Yorkshire there was a fall of 3% (in current prices), compared with a decline of 4% nationally. All five West Yorkshire local authorities saw a decline.

Figure 6: Gross value added (balanced) per head of population at current basic prices



Source: Sub-regional GVA data, ONS, 2022

Output per head in West Yorkshire increased by 9% between 2015 and 2020, which is slightly below the average for England of 10%. Whilst all comparator areas have lower output per head than the average for England, Greater Manchester is closest to the national average and has also seen the strongest growth since 2015 (14%). Sheffield City Region

[1] Kirklees GVA per head figure is distorted by high net outward commuting flows.

had the lowest growth in this group (7%), and also the lowest level of GVA per head (£19,700).

Figure 7: Gross value added (balanced) per head of population at current basic prices – West Yorkshire and comparator areas

Source: Sub-regional GVA data, ONS, 2022

At local authority level Wakefield experienced the fastest growth, of 15%, between 2015 and 2020, reflecting its strong output growth during this period. The rate of growth elsewhere ranged from 7% in Bradford to 10% in Calderdale.

2.2.3 Employment rate

West Yorkshire's employment rate fell during the pandemic and may not yet have fully recovered.

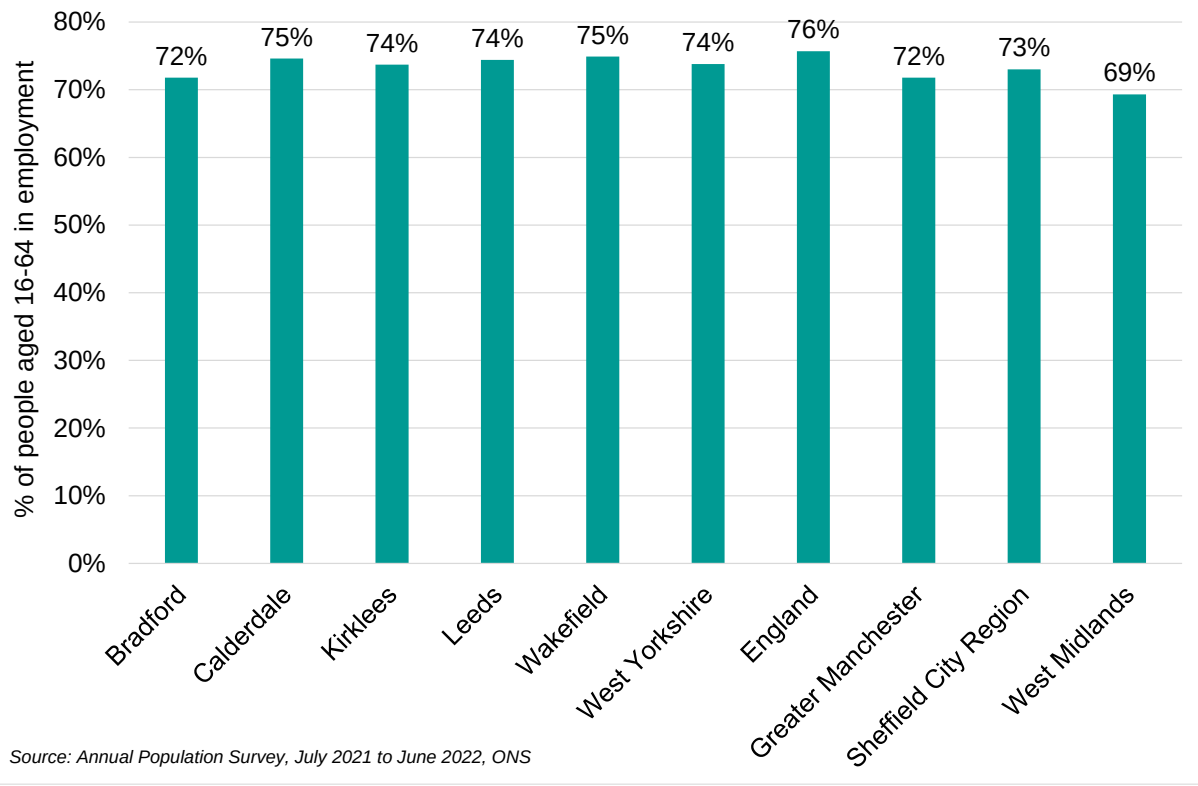
The employment rate is an important measure of the performance of the local economy because prosperity is dependent on two things: the number of people in employment and how productive those people are in their jobs. The focus here is on the first of those aspects.

It is difficult to measure the impact of COVID-19 and the subsequent recovery on employment in local economies using official data. This is because we are reliant on the Annual Population Survey, which draws on 12 months of survey data for its estimates, concealing significant changes that may be happening in the short-term.

There are 1,072,000 people in employment in West Yorkshire based on data for the July 2021 to June 2022 period. The employment rate in West Yorkshire, expressed as a proportion of the population aged 16-64, is below the national average at 74% (versus 76%). An additional 28,000 people would be in employment in West Yorkshire if the employment rate could be raised to the national average.

West Yorkshire's five local authorities have similar employment rates to the West Yorkshire average, according to the latest data. At this spatial level rates have seen a large degree of volatility in recent years, which may partly reflect the margins of error associated with the statistical estimates. Bradford's employment rate has seen a statistically significant increase in recent years, growing from 66% in 2018 to 72% in 2021.

Figure 8: Comparison of employment rates (% of population aged 16-64 in employment)



Source: Annual Population Survey, July 2021 to June 2022, ONS

About the data

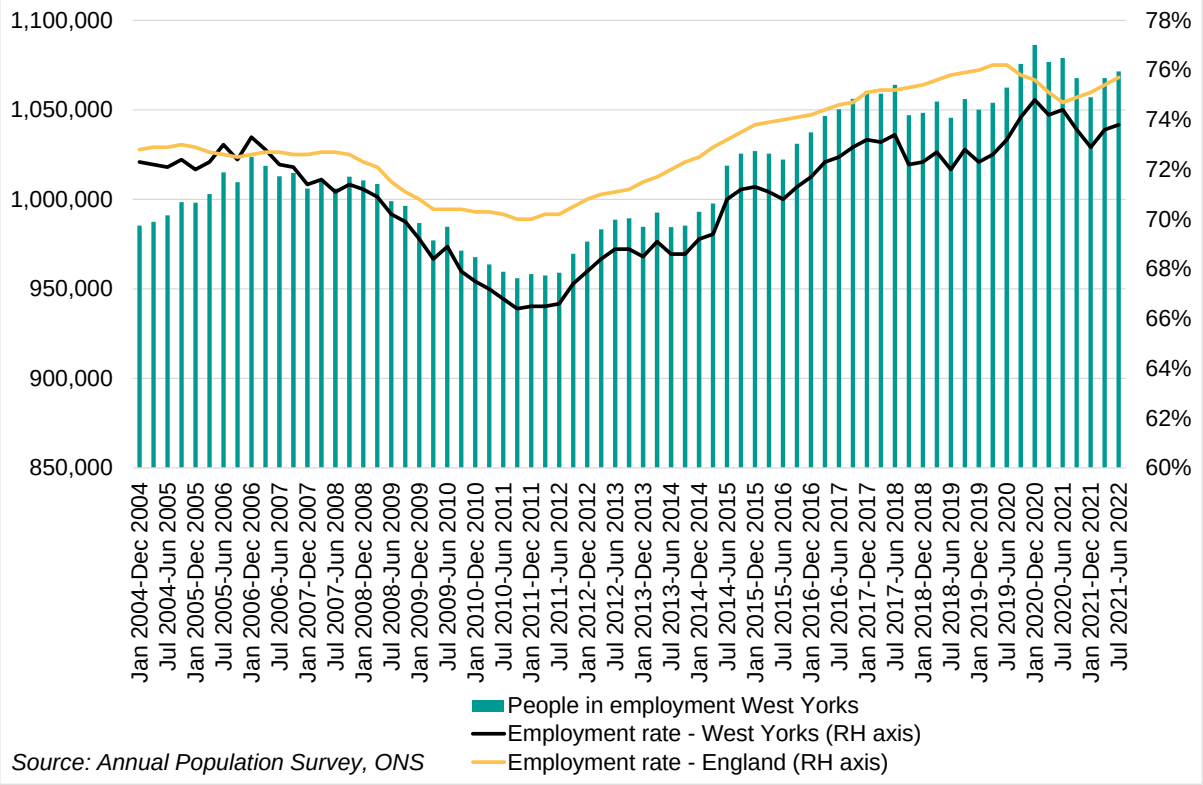
Employment rate estimates are taken from the Annual Population Survey. The Annual Population Survey is a continuous household survey covering the UK, designed to provide information on socio-economic variables at local levels. The data sets consist of 12 months of survey data and are broken down on a quarterly basis. Based on the survey, people must have done a minimum of one hour paid work in the reference week to be counted as employed.

The West Yorkshire rate has been consistently lower than the England average over the last 15 years and there was a widening of the gap following the 2008 global financial crisis. The local rate, along with the national average, has followed an upward trend since 2012, reflecting the progress of the recovery from the crisis. Between 2013/14 and 2021/22 the level of employment increased by 9% in West Yorkshire, similar to the rate of growth seen nationally, whilst the employment rate improved from 69% to 74%.

However, this incorporates a decline in the level and rate of employment during the pandemic, which has partially offset progress. According to the latest figures West Yorkshire's employment level is 15,000 off its peak, whilst its rate is 1 percentage point lower than its peak position. The employment gap with the national average (the gap between the two employment rates) has widened slightly from 1 to 2 percentage points.

The nature of the data available at local level does not provide a fully up to date picture of the local situation following the pandemic. More timely data for the national situation show that England's employment rate, although it has undergone a recovery, has not yet returned to its pre-pandemic level and this may also be the case for West Yorkshire.

Figure 9: Trend in employment rate and number of people in employment (people aged 16-64)



Source: Annual Population Survey, ONS

West Yorkshire faces challenges around strengthening the demand-side of the local economy to increase the volume of available job opportunities and addressing potential

barriers to participation in the labour market. We consider this in more detail, below, when we examine employment rates for disadvantaged groups.

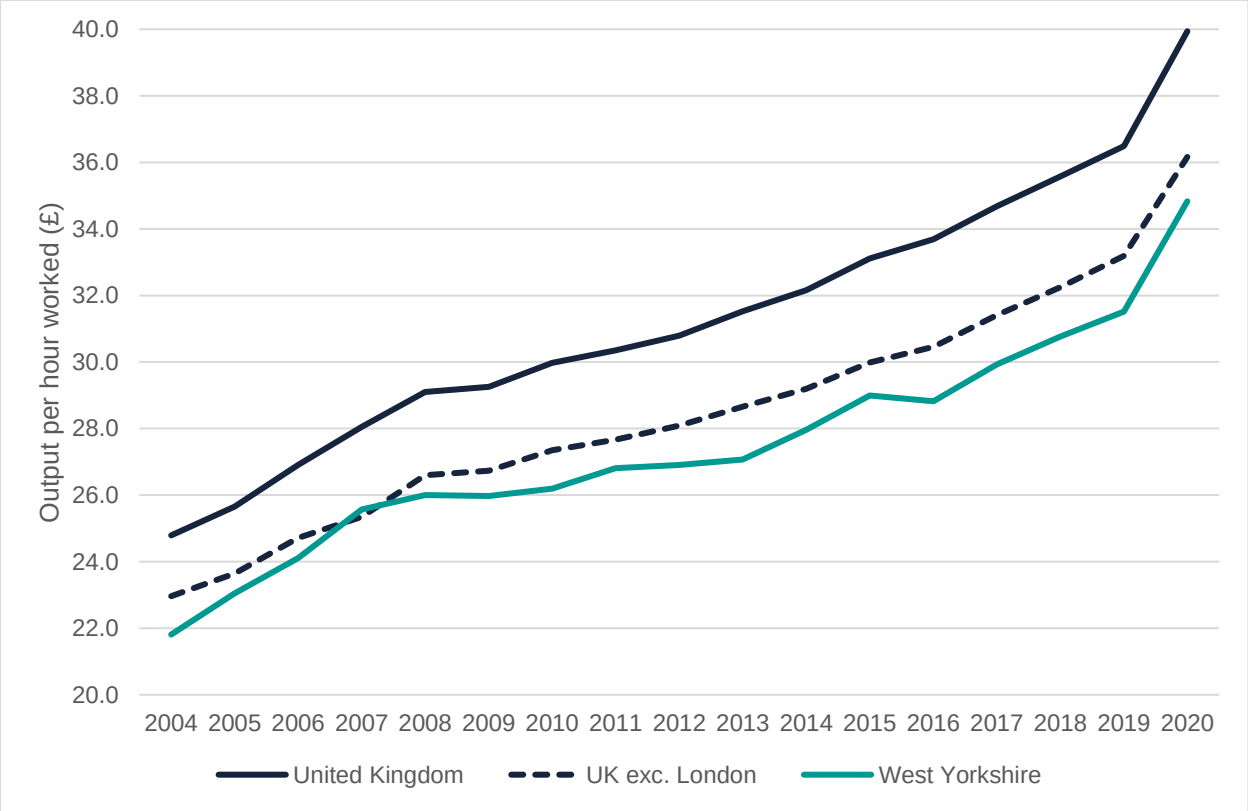
2.2.4 Productivity

Increased productivity is the main engine of local economic growth and improved living standards. During 2020 productivity increased both for West Yorkshire and at national level due to temporary compositional factors as lower productivity sectors were worse affected by the pandemic than high productivity sectors. However, underlying structural factors mean that West Yorkshire's productivity deficit persists.

Productivity refers to how efficient firms are at turning inputs, such as labour and capital, into outputs, such as goods and services. There is a direct link between productivity and living standards – higher productivity increases firms' ability to raise wages. Increased productivity also has positive impacts at the aggregate level of the economy. With greater productivity comes greater gross domestic product (GDP), which in turn brings higher tax revenues and lower government budget deficits.

Whilst UK productivity growth has remained below trend since the 2008 financial crisis, local productivity has remained markedly below national average levels, even excluding London. In 2007, the gross value added per hour worked in West Yorkshire was 91% of the UK's output per hour worked. By 2020, West Yorkshire's output per hour worked was 87% of the UK average, demonstrating a widening, rather than a narrowing, of the productivity gap. This relationship between West Yorkshire and national productivity has remained fairly constant over the past decade.

Figure 10: Unsmoothed output per hour worked, West Yorkshire and UK, 2004-2020

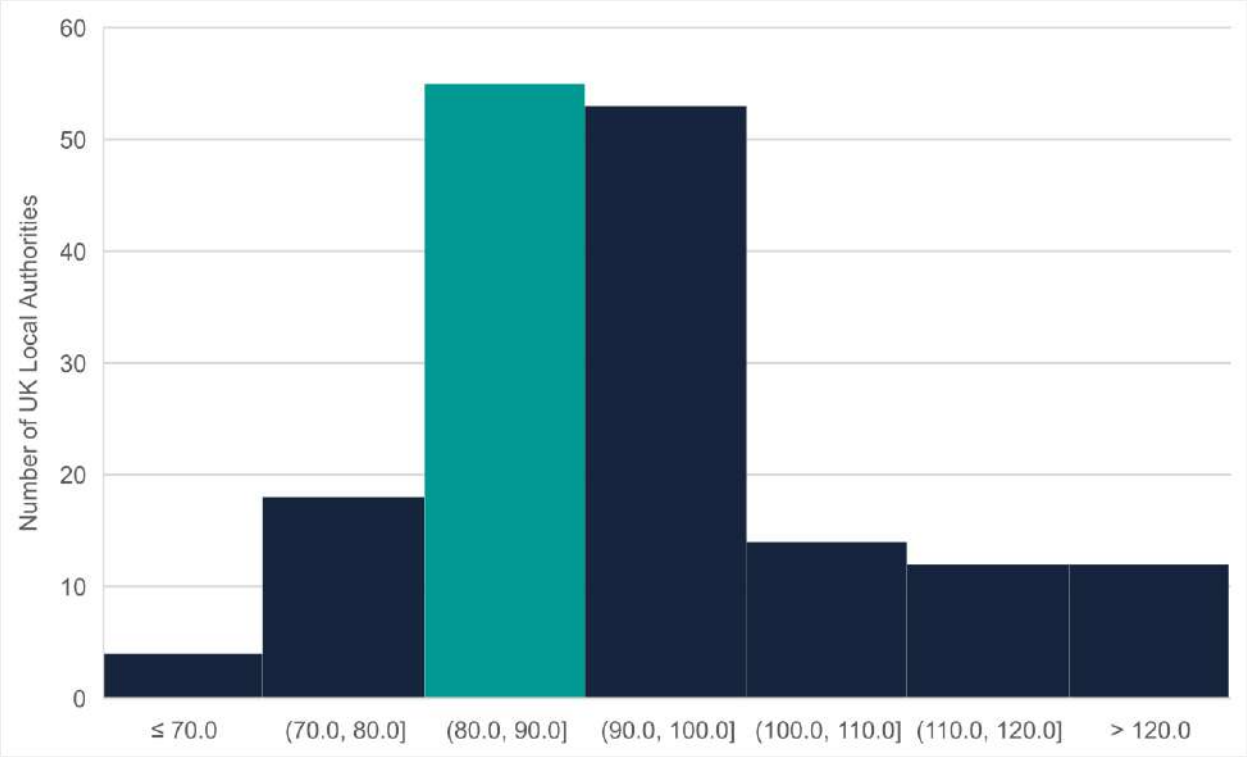


Source: Sub-regional productivity, Office for National Statistics, 2022

Due to the impact of the Covid-19 pandemic in 2020, the number of hours worked in West Yorkshire fell by 11.7%, in line with the UK-level reduction of 11.4%. Despite this, output per hour rose sharply in the UK and in West Yorkshire due to the distribution of economic activity

between industries during the pandemic. Relatively low productivity industries, such as accommodation and food services saw a disproportionately large reduction in hours worked, whilst relatively higher productivity sectors such as professional services were able to maintain the number of hours worked throughout the pandemic.

Figure 11: Indexed distribution of unsmoothed output per hour worked (UK=100), 2020



Source: Sub-regional productivity, Office for National Statistics, 2022

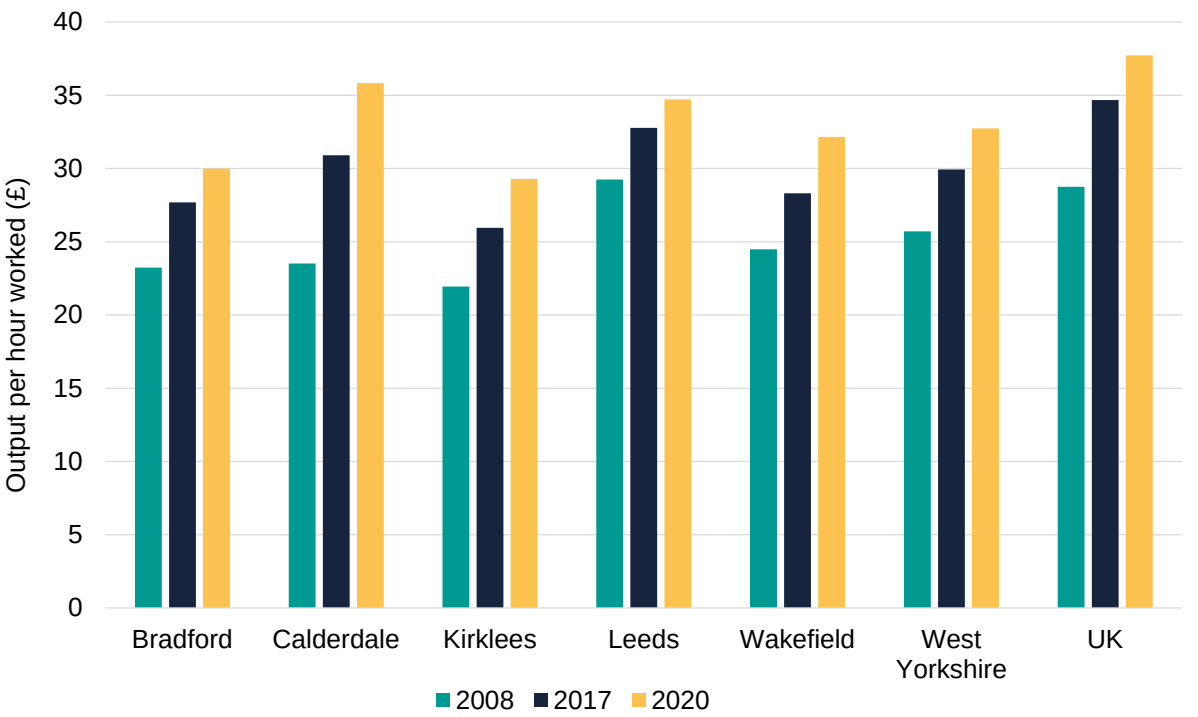
Productivity in the UK is deeply unequal across local authority areas, posing a key structural challenge. Figure 11 shows the distribution of indexed output per worker within each local authority (ITL3 region) of the UK, segmented by their level of output per hour worked as a proportion of the UK's total output per hour worked. All five local authorities within West Yorkshire produce between 80% and 90% of the UK average, with Bradford's output per hour worked representing 81.7% of the UK's level, whilst the corresponding figure for Leeds is 89.0%.

The key takeaway from this chart is that over 77% of local authorities in the UK underperform the UK average, meaning that the UK's overall productivity performance is being driven by a very small number of local authorities vastly outperforming the rest of the UK. Of the Top 10 local authorities by levels of output per hour worked, only Swindon falls outside of London and the South-East. Indeed, areas outside London with relatively high productivity are often centres of car manufacturing[1].

This configuration of the national economy demonstrates the need for Levelling Up across the regions of the UK.

[1] Office for National Statistics, What are the regional differences in income and productivity? (2021)

Figure 12: Smoothed output per hour worked, West Yorkshire local authority areas, 2008, 2017 and 2020



Source: Subregional productivity release, 2022, Office for National Statistics

At the local authority level, Calderdale has the highest output per hour worked in West Yorkshire. However, Calderdale's output per hour is still £2 below the UK level, and of the 363 local authorities in the UK, 136 have a greater output per hour than Calderdale. Whilst Calderdale has an output per hour worked £1.90 higher than the median local authority, this data demonstrates the severe inequalities both within and between regions in the UK.

About the data
Local productivity data is produced by ONS, by combining the GVA data outlined above along with data on hours worked from the Annual Population and Labour Force Surveys to produce standard measures of productivity. The focus here is on labour productivity; other factors such as capital, machinery and services also contribute to productivity, but are more complex to measure at the local level.

2.2.5 Private sector businesses

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.

The size of the private sector business base is a key measure of the health of a regional economy.

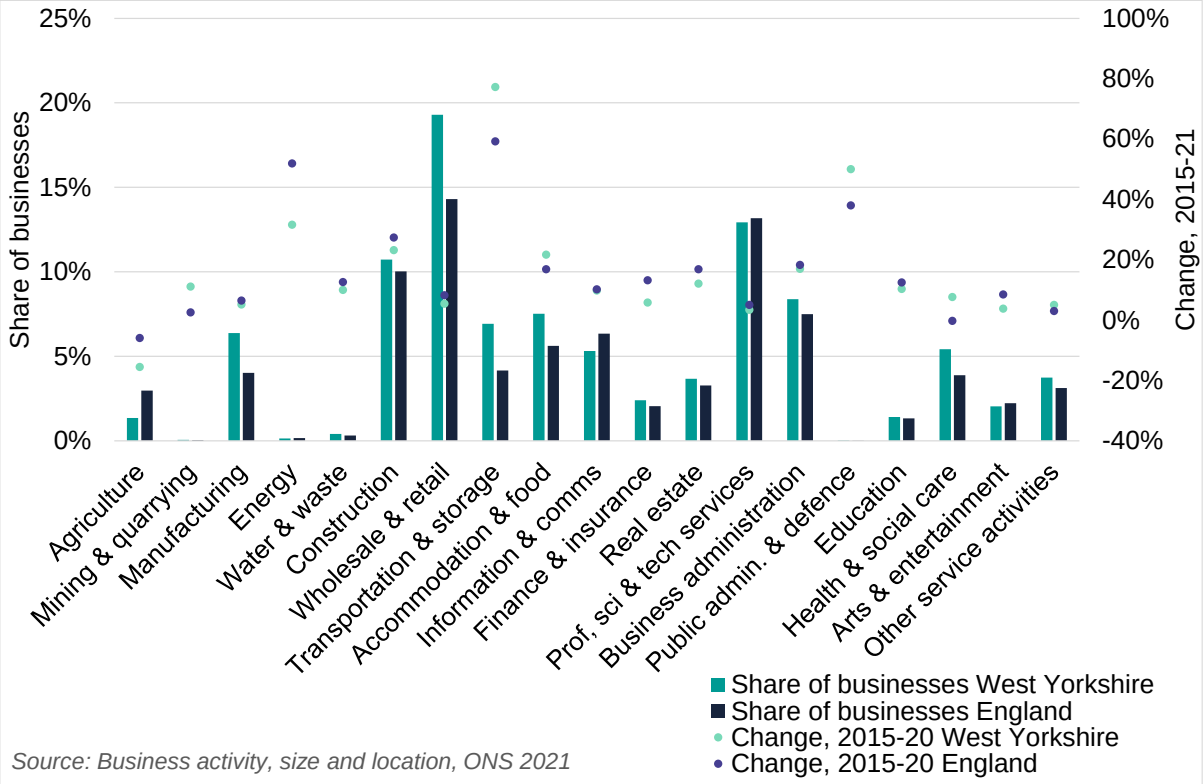
In March 2021 West Yorkshire was home to 92,800 private sector businesses[1], giving the area the third largest business base among MCAs, behind Greater Manchester and the West Midlands. Nearly all (99.6%) of local private sector businesses are small and medium sized with fewer than 250 staff. This is in line with the national average and the make-up of comparator areas.

West Yorkshire is similar to the UK in terms of its sectoral makeup but does have some notable points of difference. The share of businesses is higher locally in transport and storage (7% of businesses locally vs. 4% nationally), manufacturing (6% vs. 4%), whilst it is also higher in wholesale and retail (19% vs. 14%). Conversely, West Yorkshire has a lower share of businesses in agriculture and information and communication. This picture varies by local authority, however. All local authorities have a strong representation of manufacturing businesses, except Leeds. Transport and storage is strong in Wakefield and Leeds whilst Leeds and Calderdale feature a greater presence of professional service businesses and there is a concentration of finance businesses in Leeds.

In the past five years, West Yorkshire has seen particularly strong growth in transport and storage industries, with a net increase in the business count of 77% (compared to 59% nationally) and in accommodation and food, with growth of 22% compared with 17% across England.

[1] In this analysis businesses are equated with local units. A local unit is an individual site (for example a factory or shop) associated with an enterprise. It can also be referred to as a workplace. The total number of local units in West Yorkshire, including the public sector, is 95,500.

Figure 13: Private sector business base by sector and change, 2015-21



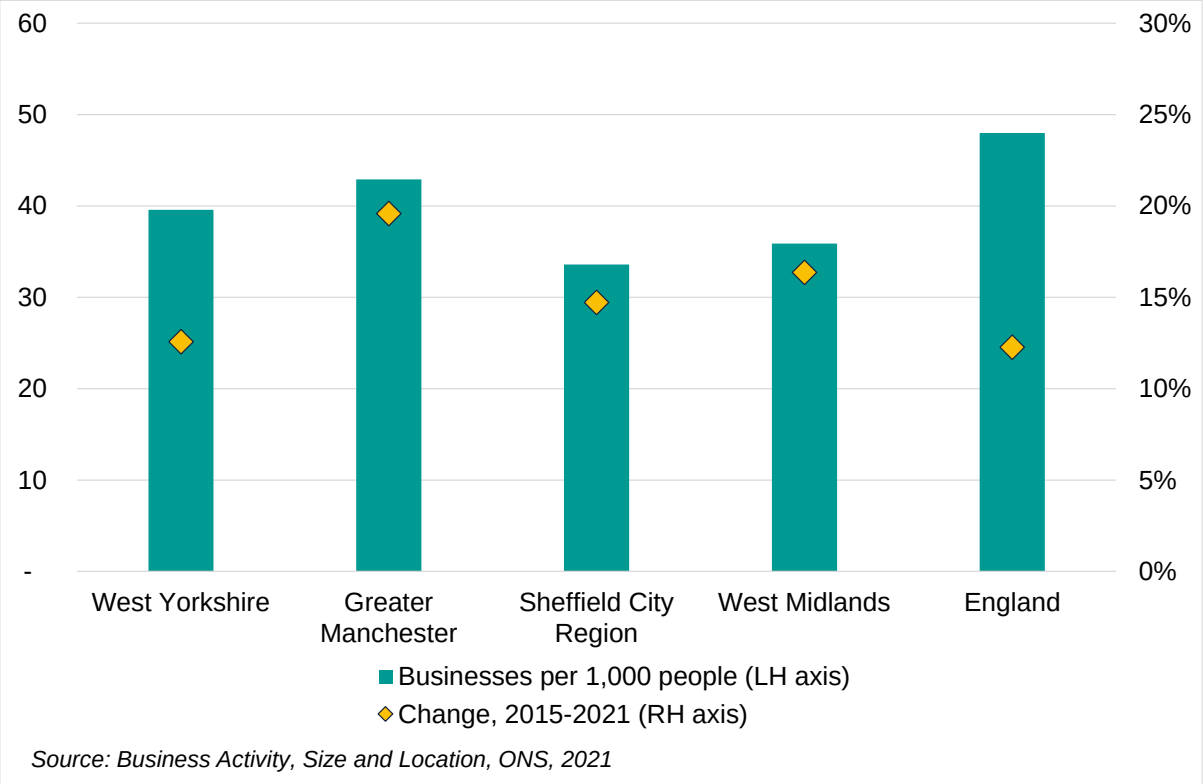
Source: Business activity, size and location, ONS 2021

About the data
Data on local areas' business stock is drawn from the Office for National Statistics' Inter-Departmental Business Register (IDBR). Business counts are taken from the ONS "Activity, Size and Location" release, which provides a count of businesses at a point in time. The data presented here is from a point in March 2021. Population figures are taken from the Mid-Year Population Estimates for 2020.

There were 39.6 private sector businesses per 1,000 population in West Yorkshire in March 2021, second only to Greater Manchester among comparator MCA areas. However, this is still below the average for England of 48 businesses per 1,000 people.

West Yorkshire slightly outperformed the national average with growth of 13% in the number of private sector businesses between 2015 and 2021, compared with 12% growth across England. However, the comparator areas saw stronger growth rates over this period, including Greater Manchester (+20%), Sheffield City Region (+15%) and West Midlands (+16%).

Figure 14: Private sector business density and growth in the business stock



Source: Business Activity, Size and Location, ONS, 2021

Within West Yorkshire, Leeds has the highest private sector business density with a figure of 44.8 per 1,000 people, followed by Calderdale with a ratio of 43.5 and Kirklees with 39.6. Wakefield (34.3) and Bradford (33.8) have the lowest business densities among the five local authorities. The five authorities experienced similar rates of business growth between 2015 and 2021, ranging from 11% in Bradford to 14% in each of Kirklees, Leeds and Wakefield. Calderdale was the exception with growth of 7% over the period.

In the latest year for which data are available, 2020 to 2021, there was growth in the count of businesses in West Yorkshire despite the pandemic. The annual increase was 1% or net growth of 930 in absolute terms. The national business count remained flat.

Nationwide, there are around 4.4 high growth businesses[1], per 1,000 firms[2]. Across West Yorkshire, there are 5.1 high growth businesses, per 1,000 firms. However, the gap between local authorities is larger than the gap in business density. Leeds has the greatest ratio of high growth businesses with 6.6 per 1,000 businesses, followed by Wakefield (5.5), Kirklees (4.1), Bradford (4), and Calderdale (3.6).

[1] High growth businesses are defined as those that have experienced growth of at least 20% per year for the previous three years in employment numbers, starting with at least 10 employees.
[2] High growth by district and section - Office for National Statistics (ons.gov.uk)

2.2.6 Innovation

Sixty-four per cent of businesses in the region are engaged in innovation-related activities according to the Leeds City Region Business Survey 2022, slightly down on previous years. The most common forms of innovation are introducing new technologies and improving new or improved services. National statistics indicate that spending on research and development is lower in Yorkshire and the Humber compared to the UK.

West Yorkshire has lagged in productivity, which puts pressure on the regional economy as it means wage increases are less forthcoming. This is particularly problematic due to the ongoing cost of living crisis. Innovation is a key part of improving productivity across the region.

Boosting research and development is a key part of the Levelling Up White Paper:

"By 2030, domestic public investment in R&D outside the Greater South East will increase by at least 40%, and over the Spending Review period by at least one third. This additional government funding will seek to leverage at least twice as much private sector investment over the long term to stimulate innovation and productivity growth."

"The target for total UK R&D investment to reach 2.4% of GDP by 2027 must see every region of the UK experience an uplift in investment."

Research and development play a key role in innovation and productivity, but it is not the only source of gains. The development of new systems to improve efficiency within a business can also play a key role in achieving productivity gains through innovative activities, for example.

The latest Leeds City Region Business Survey, carried out throughout June and July 2022, suggests that 64% of businesses in West Yorkshire had undertaken some form of innovative activity over the last three years. This is down from 69% in 2020, and 71% in 2017.

It is likely that Covid has had an impact on these figures. In some ways, Covid will have prompted innovative approaches to work, but in other areas it may have constrained cash flow, leaving less money to be used to invest in innovation.

Table 1: Results from Leeds City Region Business Survey on innovative activities among West Yorkshire businesses

Activity	% of businesses that have innovated in this area
Introduce new or significantly improved goods	19%
Introduce new or significantly improved services	38%
Introduce new or significantly improved processes for producing or supplying goods or services	32%
Introduce new technologies	38%
Participate in knowledge transfer	23%
Invest in research & development	21%
Any	64%
All	3%

Source: Leeds City Region Business Survey 2022

Whilst all high-level sectors had some businesses reporting that they had completed any of the above innovation-related activity, there were some statistically significant differences

between sectors. For example, manufacturers, and transport and storage, and businesses in the information and communication sectors were particularly high performers in innovation activities. All three sectors innovated more than businesses in construction, distribution and hotels and catering to a statistically significant level. This finding is in-line with previous versions of the Leeds City Region Business Survey.

Across local authorities, the difference in those that had completed any innovation-related activity was not statistically significant. However, there were statistically significant differences for individual activities. For example, Calderdale businesses were more likely to introduce new or significantly improved goods compared to Kirklees, Leeds, and Wakefield.

Businesses in Leeds were more likely to introduce new technologies when compared to Calderdale, Kirklees, and Wakefield. These differences can be explained in-part due to the sectoral makeup and existing comparative advantages that exist across different areas.

Although the questions used in the LCR Business Survey are similar to those used in the UK Innovation Survey, the two are not directly comparable due to the level of detail in the national survey questions, and sampling differences.

The findings of the most recent UK Innovation Survey (2021) suggests that West Yorkshire is not only lagging nationally, but also lagging in comparison to South Yorkshire, Greater Manchester, and the West Midlands for 'innovation active' businesses. The survey found that 42.5% of businesses in West Yorkshire define themselves as innovation active, compared to 57.5% in South Yorkshire. This strength within South Yorkshire is likely to be driven by the success of the Advanced Manufacturing sector within the region, with the data showing that, across the broad sectors, engineering-based manufacturing firms are most likely to be innovation active (68.5%).

Despite lagging South Yorkshire on firms identifying as innovation active, R&D Tax Credit claims are higher in West Yorkshire. In total, West Yorkshire businesses made 2,920 R&D Tax Credit claims in the fiscal year 2019/20, worth £150m. In South Yorkshire, these figures were 1,430 and £60m. When controlling for business population, West Yorkshire has a higher share of businesses submitting R&D Tax Credit claims: 36.1 West Yorkshire businesses per 1,000 submitted a claim, compared to 35.2 in South Yorkshire and 35.7 across England.

The Office for National Statistics analysis on Gross Domestic Expenditure on R&D (GERD), for example, shows the region had the lowest investment in R&D per £1m of GVA of any English region outside London. This suggests that the level or scale of innovation taking place locally may be lower than elsewhere even if the proportion of businesses engaged is relatively high.

About the data
Local data on businesses' engagement in innovation is not readily available on a consistent basis. The Leeds City Region Business Survey provides local data on this subject, asking respondents whether they have undertaken innovation activities in the past three years.

2.2.7 International trade

The latest available data show that exports of goods and services both fell during the pandemic in 2020. Trade in services is now more valuable to West Yorkshire than trade in goods and is a more important component of the West Yorkshire economy than in comparator areas.

International trade, and particularly exporting, is an important measure as there is evidence to suggest that businesses who trade internationally tend to perform better than other businesses. Internationally trading businesses often experience higher growth and are often more productive than their domestically-focused counterparts. This is due to the former operating in markets where greater competition is present, as well as the fact that they are more likely to be exposed to ideas and innovations which helps to drive their own performance.

About the data
Subnational data on international trade is published by the Office for National Statistics, following methodologies to disaggregate national and regional trade data. For goods, this draws on data on trade from HMRC. Trade in services estimates are sourced mainly from survey data, but also a variety of administrative sources.

The UK leaving the EU and the subsequent transition period, along with the impact of the coronavirus (COVID-19) pandemic, supply chain disruption and global recession, have caused high levels of volatility in trade performance in the past two years, including the period covered by the latest available statistics for West Yorkshire.

Goods exports

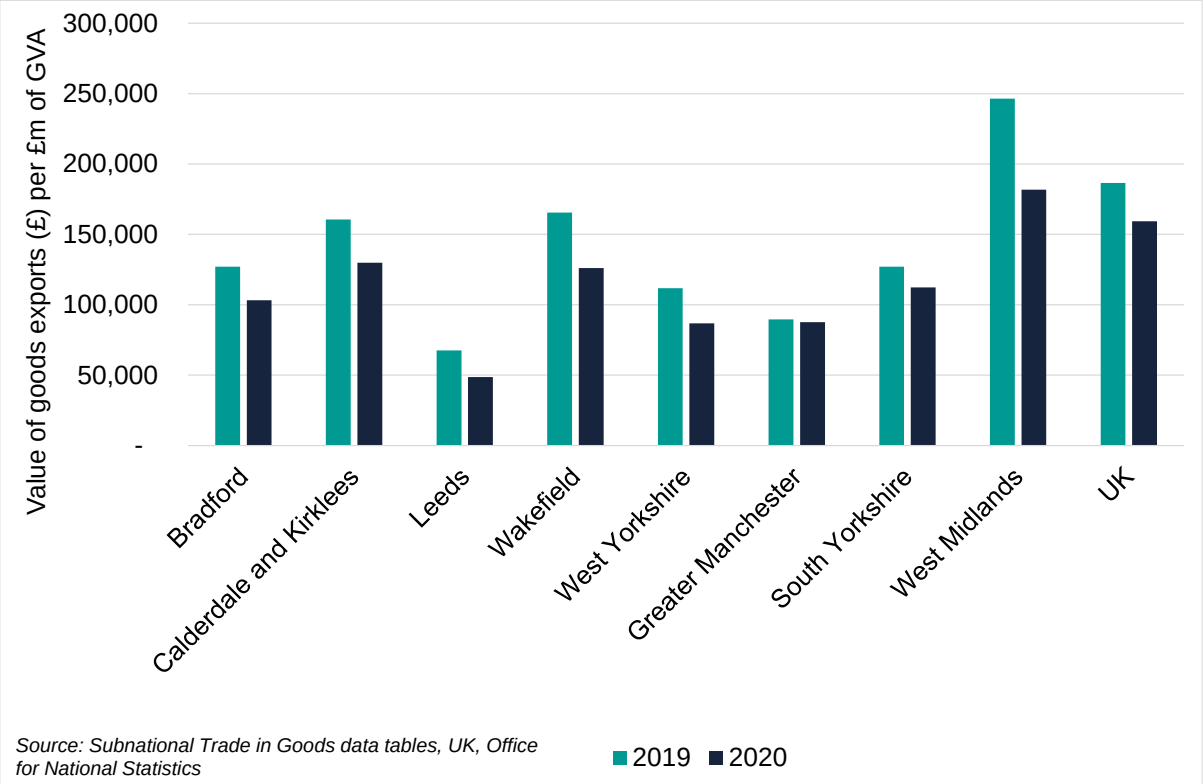
West Yorkshire exported goods worth £4.98bn in 2020, down a substantial 24% on the previous year's £6.58bn. Across the UK exports fell by 17%, whilst the impact on comparator areas was variable, ranging from a fall of 4% in Greater Manchester to a fall of 29% in the West Midlands.

At local authority level the extent of the decline ranged from 19% in Bradford to 30% in Leeds.

Looking at exports per £1 million of gross value added (GVA) shows the economic contribution exports make and enables comparison across geographies of different scale. West Yorkshire exported goods worth £87,000 for every £1m of GVA in 2020. This is similar to Greater Manchester (£88,000) but is less than South Yorkshire (£112,000) and is 45% lower than the UK figure of £159,000. With £182,000 per £1m of GVA West Midlands is the only comparator area which exports more than the UK average.

Locally, both the Calderdale/Kirklees and Wakefield areas exported goods worth similar amounts in 2020, at £130,000 and £126,000 respectively. Bradford (£103,000) was also higher than the West Yorkshire average. Conversely, Leeds exported goods worth £49,000. This clearly reflects the economic specialisms within West Yorkshire. Whilst all areas have degrees of strength in manufacturing and services, services are a greater contributor to the economy in Leeds and this is reflected in export activity.

Figure 15: Ratio of value of goods exports per £m of GVA



Source: Subnational Trade in Goods data tables, UK, Office for National Statistics

The ratio of goods exports to GVA fell significantly across all areas during 2020, reflecting the impact of the coronavirus pandemic. In 2019, West Yorkshire exports of goods were worth £112,000 per £1m of GVA, falling to £87,000 per £1m of GVA in 2020.

It is likely that the value of West Yorkshire's exports of goods has recovered to some extent since 2020, assuming that it has shared to some degree in the positive trend observed at UK level. Based on the latest data for quarter 2 of 2022, the value of UK exports of goods has grown by 53% since the low point in quarter 2 of 2020 and is 11% higher than in quarter 2 2018 (in current price terms)[1].

Services

In 2020, the value of service sector exports from West Yorkshire totalled £5.77bn, being greater than that of goods exports.

As noted in last year's State of the Region report, service sector exports grew strongly in West Yorkshire, prior to the pandemic. Their value increased by 54% between 2016 and 2018 compared with a national average increase of 22%. Over the same period Leeds saw an increase of 42%, with Bradford and Wakefield seeing much stronger increases (of 92% and 154% respectively).

The latest figures for 2020 can only be directly compared with 2019 but they show sharp declines in service exports in this later period, linked to the disruption to trade brought about by the pandemic. Across West Yorkshire service exports fell by 15% compared with a national average decline of 5%. Leeds and Wakefield were badly affected with reductions of

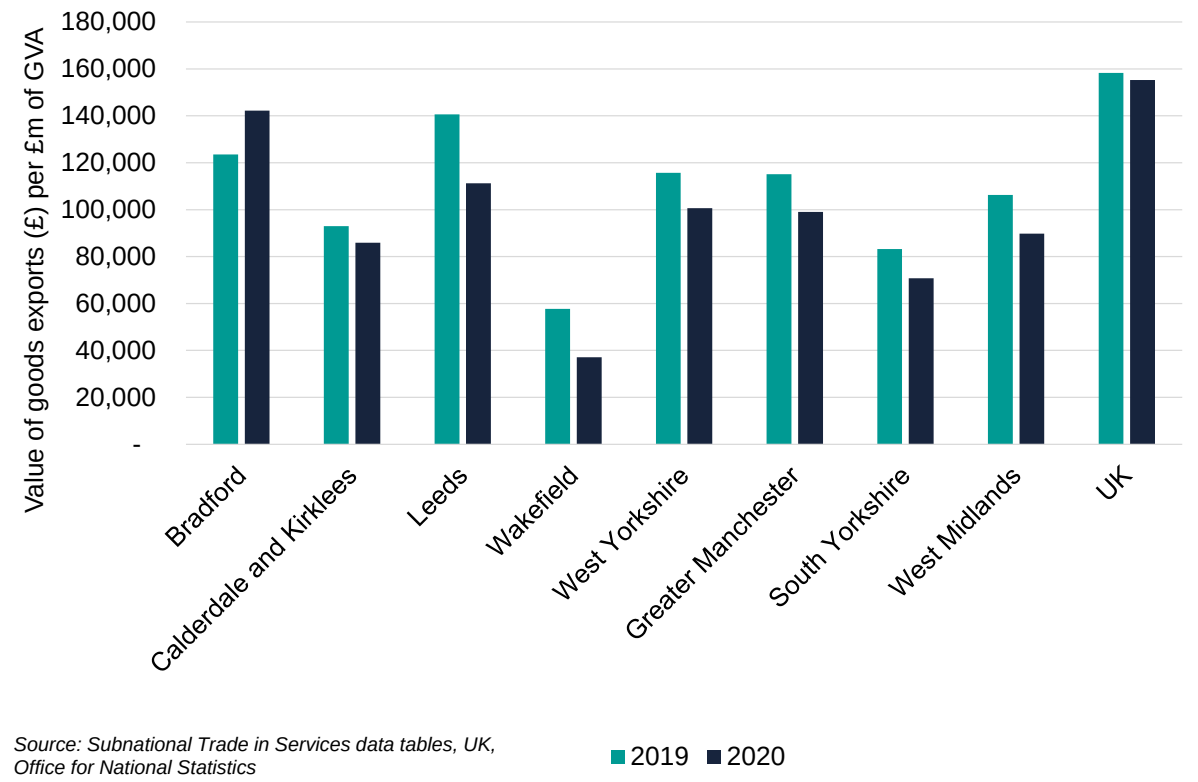
[1] Office for National Statistics, UK Trade: June 2022 (2022)

23% and 36% respectively. Calderdale / Kirklees experienced a reduction in trade of 11%, whereas Bradford saw an increase of 14%.

Leeds accounts for 51% of West Yorkshire's service exports. Prior to the pandemic Leeds had the highest ratio of service exports per £1m of GVA but this picture has changed with the decrease in the value of Leeds' exports between 2019 and 2020. Bradford now has the highest figure of £142,000 per £m, followed by Leeds with £111,000. All local authorities in West Yorkshire fall below the national average of £155,000 per £1m of GVA.

Across West Yorkshire, £101,000 of services were exported per £1m of GVA in 2020–more than in any comparator area analysed here.

Figure 16: Ratio of value of services exports per £m of GVA



Source: Subnational Trade in Services data tables, UK, Office for National Statistics

As with goods it is likely that the value of West Yorkshire's exports of services has recovered to some extent since 2020, based on the positive trend seen at UK level. Based on the latest data for quarter 2 of 2022, the value of UK exports of services has grown by 34% since the low point in quarter 2 of 2020 and is 10% higher than in quarter 2 2018 (in current price terms)[1].

[1] Office for National Statistics, UK Trade: June 2022 (2022)

2.2.8 Gross disposable household income

GDHI per head in West Yorkshire is well below the national average and the gap continues to widen over time.

Gross disposable household income (GDHI) is the amount of money that all of the individuals in the household sector have available for spending or saving after they have paid direct and indirect taxes and received any direct benefits. It is a key measure of living standards and material welfare.

We have already seen that West Yorkshire and its constituent local authorities all have levels of productivity below the national average. Analysis[1] shows that for some local areas there can be a divergence between the level of productivity and the level of incomes that people receive. Some areas have high incomes relative to their contribution to the economy in the form of productivity, whilst others are highly productive, but incomes are relatively low. In the case of the former this can reflect the effect of commuting from high income homes to work in lower income areas, with North Yorkshire being a prime example. It can also reflect higher levels of non-wage incomes that can lead to higher household incomes relative to productivity in those areas.

In the case of West Yorkshire and its local authorities both output and income are relatively low.

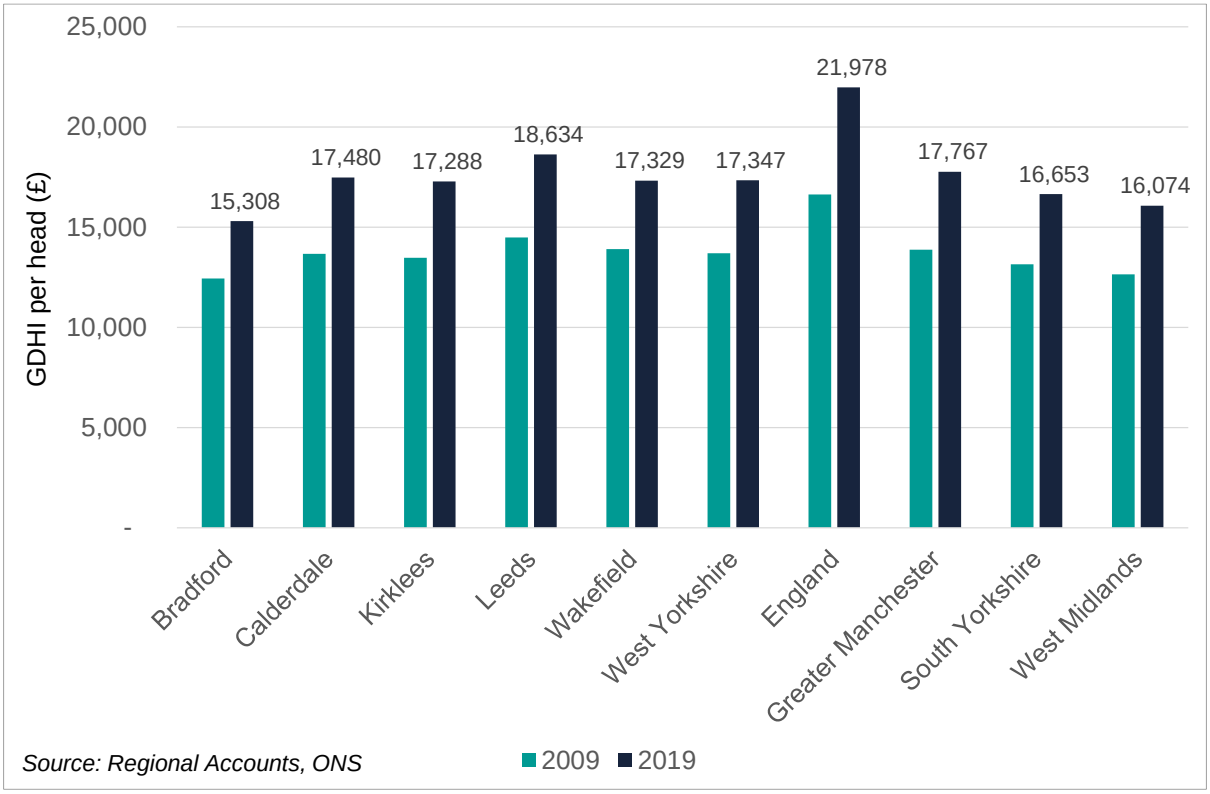
The level of GDHI per head in West Yorkshire was £17,347 in 2019, based on the latest figures available. This is 79% of the England average.

Focusing on the West Yorkshire local authorities, the current level of GDHI per head ranges from £15,308 in Bradford, only 70% of the national average, to £18,634 in Leeds, 85% of the England average. Bradford has the sixth lowest GDHI per head of any district / unitary authority in England.

The GDHI per head figure for West Yorkshire is the fourth lowest of the 34 ITL2[2] regions in England and is similar to that of Greater Manchester. It is somewhat higher than that of both Sheffield and the West Midlands, ranked second last and last among ITL2 regions on this measure. The highest performing areas in respect of this indicator are concentrated exclusively in London and the South East.

[1] Office for National Statistics, What are the regional differences in income and productivity? (2021)
[2] International Territorial Level 2 – in England these areas comprise counties or groups of counties.

Figure 17: Gross disposable household income per head (£) at current basic prices



Source: Regional Accounts, ONS

A key challenge for West Yorkshire is to tackle the widening gap with the national average. Whereas GDHI per head grew by 27% in West Yorkshire between 2009 and 2019 it grew by 32% across England[1]. The figure grew by only 23% in Bradford over this period although growth in Leeds was nearer the national average at 29%.

The most recent data available shows that between 2018 and 2019 GDHI per head grew by 2.0% in West Yorkshire but by 2.5% at national level.

The available data for West Yorkshire pre-dates the current cost of living crisis and is presented on a current price basis. The rising costs of energy, food and other essentials are cutting into the disposable income of households to a considerable degree. According to the Resolution Foundation, the typical real disposable household income at national level is projected to fall by 5% in 2022-23 and a further 6% in 2023-24. The combined reduction of 10 per cent would be the most negative two-year change in the last century at least – twice the size of the fall between 2009-10 and 2011-12 – and would equate to a £2,800 drop[2].

About the data

Gross disposable household income (GDHI) is the amount of money that households have available for spending or saving, hence 'disposable income'. This is the money left after expenditure associated with income e.g., taxes and social contributions, property ownership and provision for future pension income. GDHI is comprised of the sum of two balances, the balances of primary and secondary incomes. The balance of primary incomes is mainly employment income, self-employment income, rental income and

[1] All figures are on a current price basis and are not therefore adjusted for inflation.
[2] Resolution Foundation, In at the deep end: The living standards crisis facing the new Prime Minister, 2022

income from deposits and investments, less interest paid. The balance of secondary incomes is mainly income from benefits, pensions and insurance claims less income tax, council tax, pension contributions and insurance premia.

Total GDHI estimates in millions of pounds (£ million) are divided by the resident population of a region to give GDHI per head in pounds (£). Per head data take account of the entire resident population of regions, sub-regions and local areas including both the working population and the economically inactive.

2.2.9 Jobs paying below the real living wage

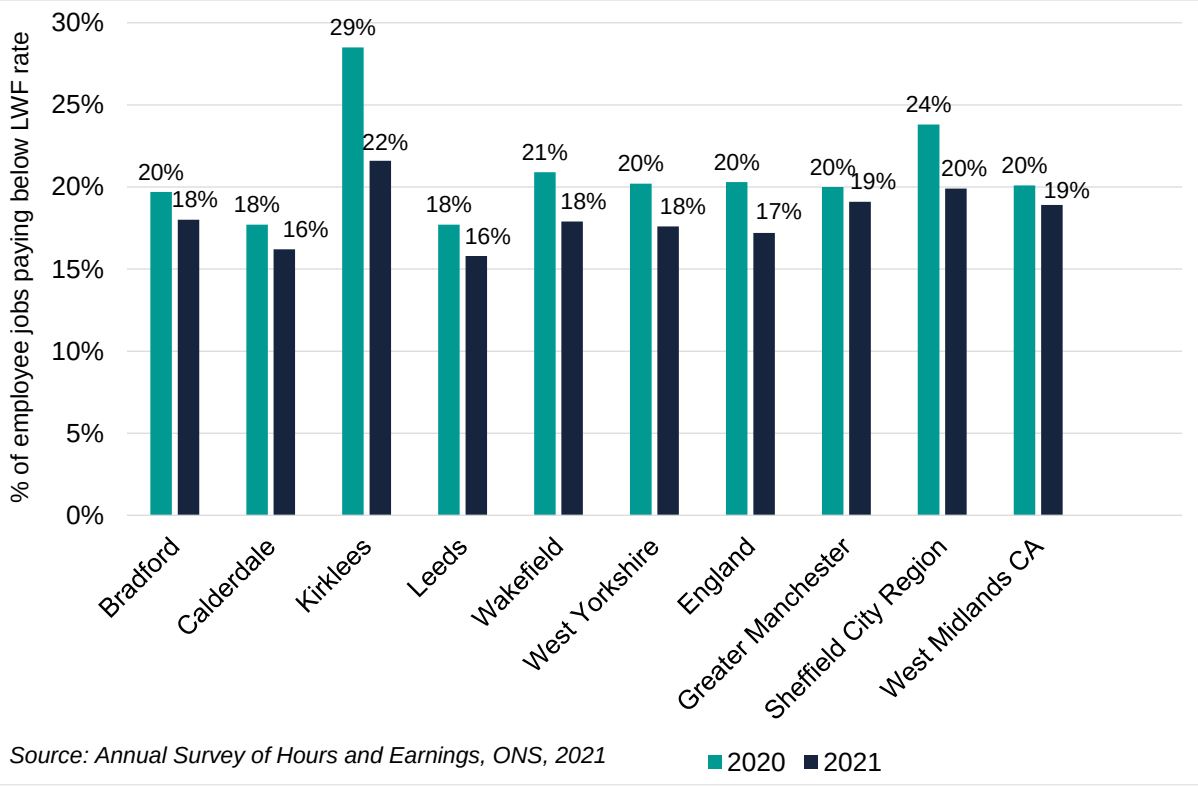
Around 170,000 jobs in West Yorkshire, or 18% of the total, pay below the Real Living Wage. The percentage increases to 32% for part-time workers. However, the proportion of jobs paying below the Real Living Wage is falling over time.

The Living Wage Foundation's Real Living Wage is independently calculated based on what people need to get by and to meet everyday needs. The value of the Real Living Wage (outside London) was £9.50 in 2021. Ensuring that jobs pay a decent wage and support an appropriate standard of living is central to the inclusive growth agenda.

The issue of low pay is a particular concern because the majority of low-paid workers remain permanently stuck in low pay or cycling in and out of higher pay.

Around 170,000 employee jobs in West Yorkshire pay below the real living wage of £9.50 per hour, based on official statistics for April 2021. This is around 18% of all such jobs in the region, similar to the national average. Kirklees has a higher proportion of jobs that are low-paid on this measure – approximately 22%.

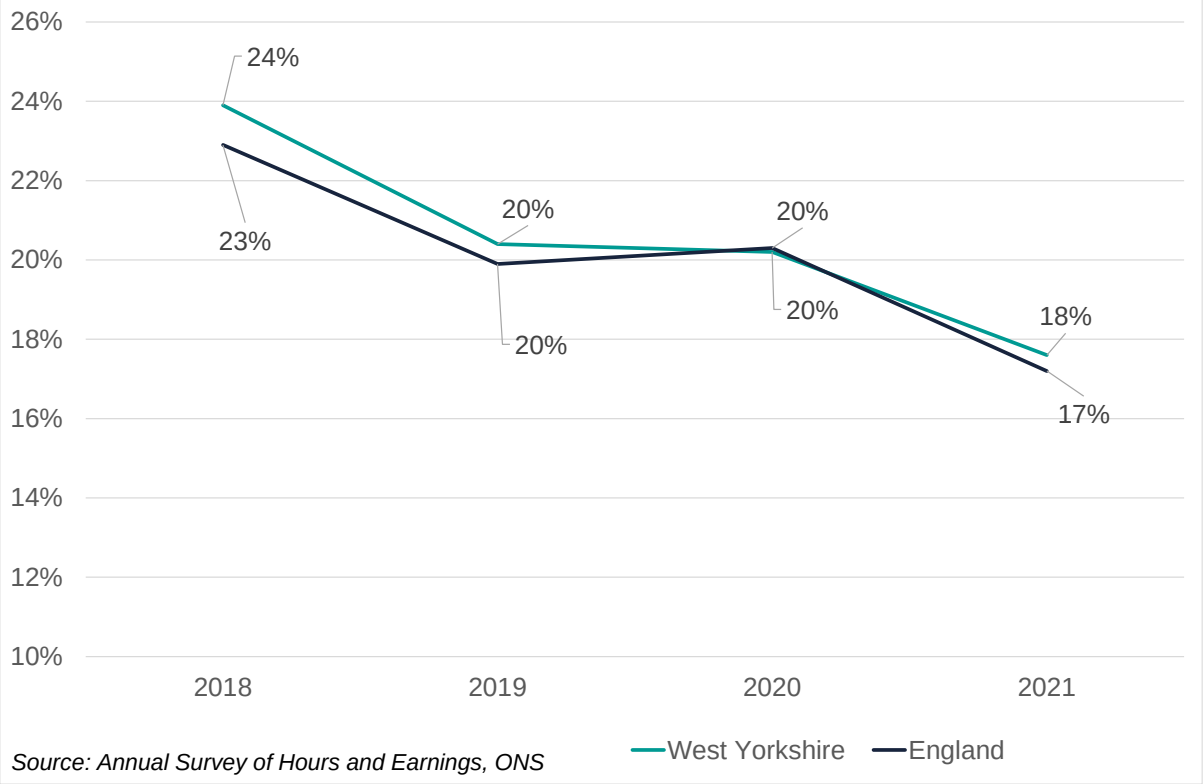
Figure 18: Proportion of all employee jobs paying below the Living Wage Foundation's real living wage rate



Source: Annual Survey of Hours and Earnings, ONS, 2021

Turning to our comparator areas, slightly higher proportions of jobs in Greater Manchester, West Midlands CA and Sheffield City Region pay below the Real Living Wage.

Figure 19: Trend in proportion of all employee jobs paying below the Living Wage Foundation's real living wage rate

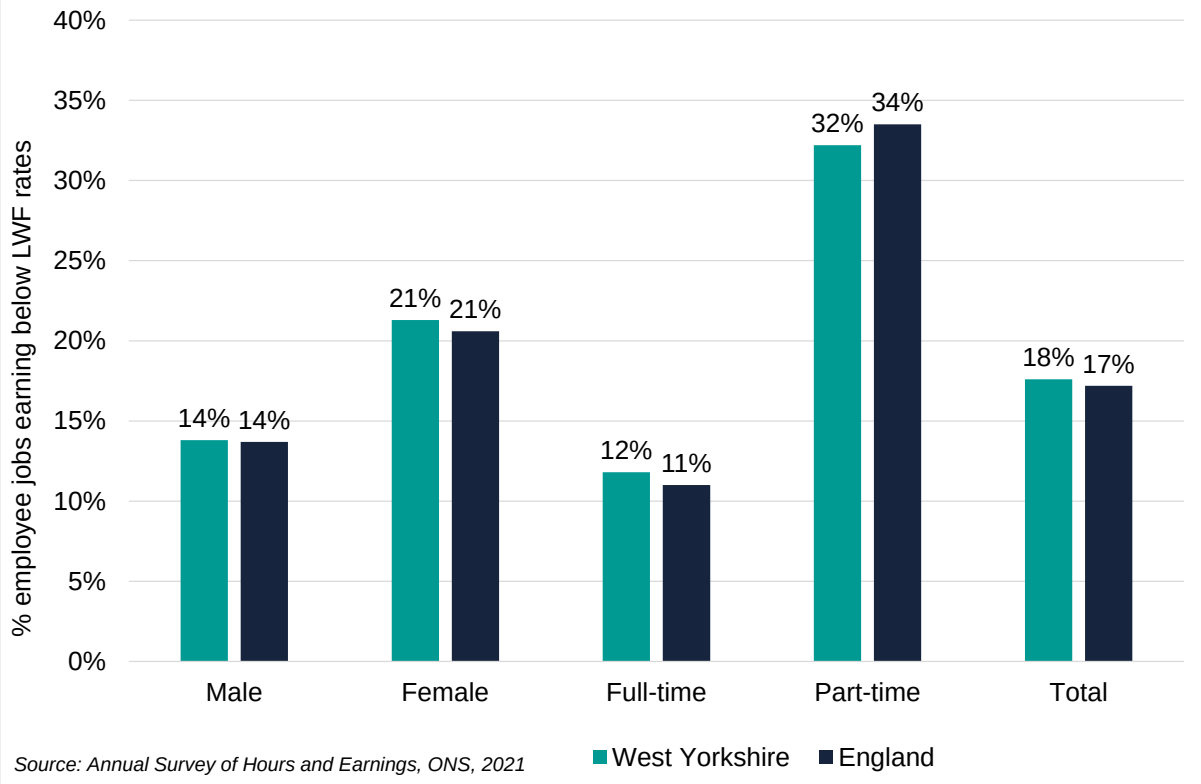


Source: Annual Survey of Hours and Earnings, ONS

West Yorkshire has improved against the real living wage measure in recent years, both in absolute and relative terms. The proportion of jobs paying below the real living wage in West Yorkshire fell by 6 percentage points (from 24% to 18%) between 2018 and 2021, running alongside a fall of 6 points nationally (23% to 17%).

What's driving the reduction in low pay against this measure? It coincides with recent increases in the National Minimum Wage (NMW) and National Living Wage (NLW) rates. The improvement also coincides with the additional increase in the NMW for those aged 23 and 24 years, who joined those aged 25 years and over in receiving the NLW in 2021.

Figure 20: Proportion of employee jobs paying below the Living Wage Foundation's real living wage rate by gender and status, 2021



Part-time jobs are more than twice as likely as full-time jobs to pay an hourly rate that is below the real living wage threshold. A larger proportion of jobs held by women than men also fall below the threshold, partly because they are more likely to work part-time; although male part-time jobs, which are relatively few in number, are most likely to pay below the real living wage (at 34% of male part-time jobs in West Yorkshire).

Other indicators show West Yorkshire lagging behind on pay, reflecting its productivity deficit.

Median gross weekly pay for full-time jobs in the region is £565, 92% of the national average of £613. This is a deficit in absolute terms of £48 per week.

Although the region has a significant proportion of people paid below the real living wage, there is large pay deficit at the upper end of the pay distribution. The pay level for jobs at the 20th percentile in West Yorkshire is 96% of the equivalent national figure; however, at the 90th percentile it is only 90% of the national figure. This reflects the under-representation in West Yorkshire of jobs in the highest skilled and highest paid occupations.

About the data

The Annual Survey of Hours and Earning (ASHE) is based on a 1% sample of employee jobs taken from HM Revenue and Customs (HMRC) Pay As You Earn (PAYE) records. Information on earnings and hours is obtained from employers and ASHE does not cover the self-employed.

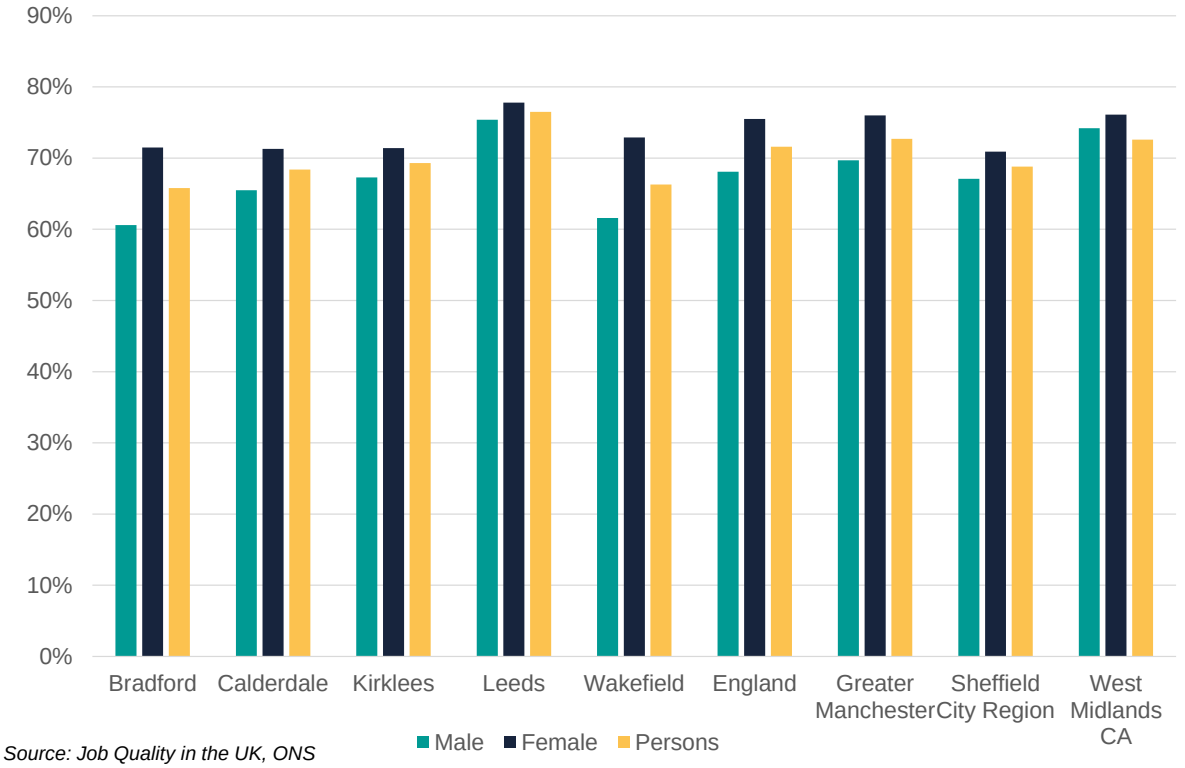
2.2.10 Quality work

All local authorities in West Yorkshire except Leeds are below the national average with regard to the proportion of jobs that offer quality work

It has not been possible to update this indicator from last year's report. The publication of the required data by the Office for National Statistics has been delayed. However, the analysis presented in last year's report has been retained below to provide a picture based on the most current data available.

This indicator provides a measure of goods jobs that extends beyond the level of pay that a job attracts. The Office for National Statistics has developed a composite measure of good work in response to recommendations in the Taylor Review of modern working practices. According to this measure, a person in quality work has all of the following characteristics: not in low pay, working satisfactory hours, and having desired contractual status.

Figure 21: Proportion of residents who are employees in quality work by sex, 2018



Source: Job Quality in the UK, ONS

Around two-thirds of resident employees are in quality work across the majority of West Yorkshire districts, somewhat below the national average[1]. Women are more likely to be in quality work, reflecting the fact that they are more likely to be working a satisfactory number of hours than men.

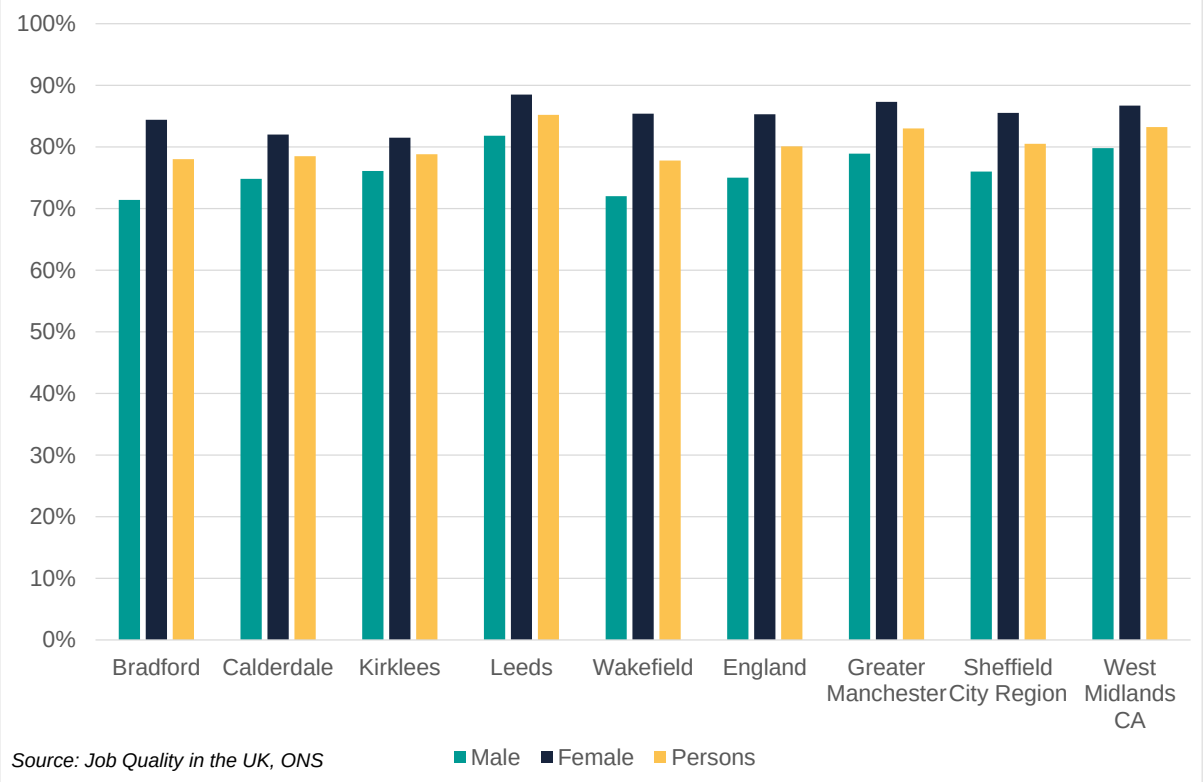
Greater Manchester and the West Midlands CA have a greater proportion of people in quality jobs than all of the West Yorkshire local authorities except Leeds.

Leeds has a considerably higher proportion of people in quality jobs than elsewhere in West Yorkshire and also outperforms the national average by 5 points. It performs consistently

[1] Figures are not available for West Yorkshire as a whole.

strongly on pay, hours and contractual status. Bradford and Wakefield have the smallest proportions of people in quality jobs in West Yorkshire.

Figure 22: Proportion of residents who are employees working satisfactory hours by sex, 2018



Source: Job Quality in the UK, ONS

Turning to the components of quality work, across most of the West Yorkshire local authorities close to four in five employees work "satisfactory hours", meaning they work 48 hours or fewer but do not consider themselves underemployed. Men are consistently less likely than women to be working satisfactory hours, due to longer hours of paid work, reflecting shift patterns. It should be noted that women shoulder the responsibility of "unpaid work", however, undertaking an estimated average of 10 hours more unpaid work then men (26 hours compared with 16 hours)[1]. The larger degree of unpaid work and desire for more flexible hours mean female employees are less likely to be in paid employment working above the 48-hour threshold, which is the principal cause of employees working unsatisfactory hours.

Almost all employees (ranging from 97% in Bradford to 99% in Calderdale, Kirklees and Leeds) have a "desired contract". This means they either have a permanent contract or non-permanent contract for a reason other than "could not find a permanent job".

Using two-thirds of the UK median hourly pay as a measure for low pay, more than nine out of 10 employees in each of the West Yorkshire local authorities were not in low pay.

About the data
This section is based on an analysis of job quality conducted by ONS using the Annual Population Survey[2]. This analysis looks at employee jobs on a resident basis that provide:

[1] Office for National Statistics, Women shoulder the responsibility of 'unpaid work (2016)
[2] Office for National Statistics, Job quality indicators in the UK – hours, pay and contracts: 2018 (2019)

- Good hours: employees working 48 or fewer hours a week and not wishing to work more hours in their current role or look for an additional job or a replacement job that offers more hours
- A desired contract type: employees either in a permanent contract or who did not accept a non-permanent contract because they could not find a permanent one
- A position not in low pay: employees who are earning above two-thirds of the hourly median pay at UK level.

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

Key points

Women, people from ethnic minorities, disabled people and older people all have relatively low employment rates. People from ethnic minorities are much less likely to be in employment in West Yorkshire than nationally.

West Yorkshire's unemployment rate remains similar to the national average and has risen slightly as a result of the pandemic. Participation in the labour force has fallen substantially with an increase in economic inactivity among working age people. However, there is some evidence that the ethnicity and disability employment rate gaps are narrowing in West Yorkshire.

The proportion of people with no qualifications or low-level qualifications remained largely unchanged during 2021 following recent improvements. More than a fifth of the working age population fall into this category, well above the national average.

The proportion of people with higher level qualifications (level 4 and above) was also unchanged in 2021, following significant progress against this measure in 2020. West Yorkshire would have 70,000 additional high qualified people if it could eliminate the gap with the national average.

The number of apprenticeship opportunities available remains well below pre-pandemic levels according to data for the most recent full academic year. Diversity issues within apprenticeships need to be tackled and access for the disadvantaged needs to be improved.

A quarter of adults in Yorkshire and the Humber lack essential digital skills for life but two-fifths of people in employment do not have essential digital skills for work.

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, with variations at local authority level.

3.1 Overview of the priority

The West Yorkshire Combined Authority and Leeds City Region Enterprise Partnership (LEP) has set out its priorities for employment and skills for 2021-2025 in its Employment and Skills Framework.

The Combined Authority's Vision is for West Yorkshire to be a world-leading region where investment in skills, training and education, and support from employers go hand in hand to create a diverse, inclusive, and highly skilled workforce with good jobs, leading to sustained improvements in the quality of life for all.

We want West Yorkshire to be a place where:

- There are no barriers to people taking up, progressing and succeeding in learning and work, and where they are supported into good employment

- Employers recognise the value of a diverse workforce and invest in their talent to develop the skills that will improve productivity and support progression in the workplace
- Individuals value lifelong learning and are able to make decisions about their development, informed by quality, relevant careers information based on the reality on the ground
- World class teaching and training provides flexible learning opportunities that align to the strategic needs of the regional economy.

The West Yorkshire Digital Skills Plan sets out a vision to create an inclusive society and thriving economy through the growth of digital skills for all. The Combined Authority will embed the Digital Skills Plan (and work of the Local Digital Skills Partnership) to address higher level Skills for the tech sector, digital skills for all businesses, the needs of the future workforce, digital upskilling, digital education and social digital inclusion.

3.2 Performance against the indicators

3.2.1 Employment rate gap for disadvantaged groups

Some groups have relatively low employment rates, although there are signs that the employment rate gap is narrowing both for disabled people and people from ethnic minorities. The ethnicity employment rate gap is much wider in West Yorkshire than nationally.

West Yorkshire's overall level of employment and employment rate have both grown steadily in recent years. However, from an inclusion perspective it is important to understand the extent to which members of different groups participate in employment.

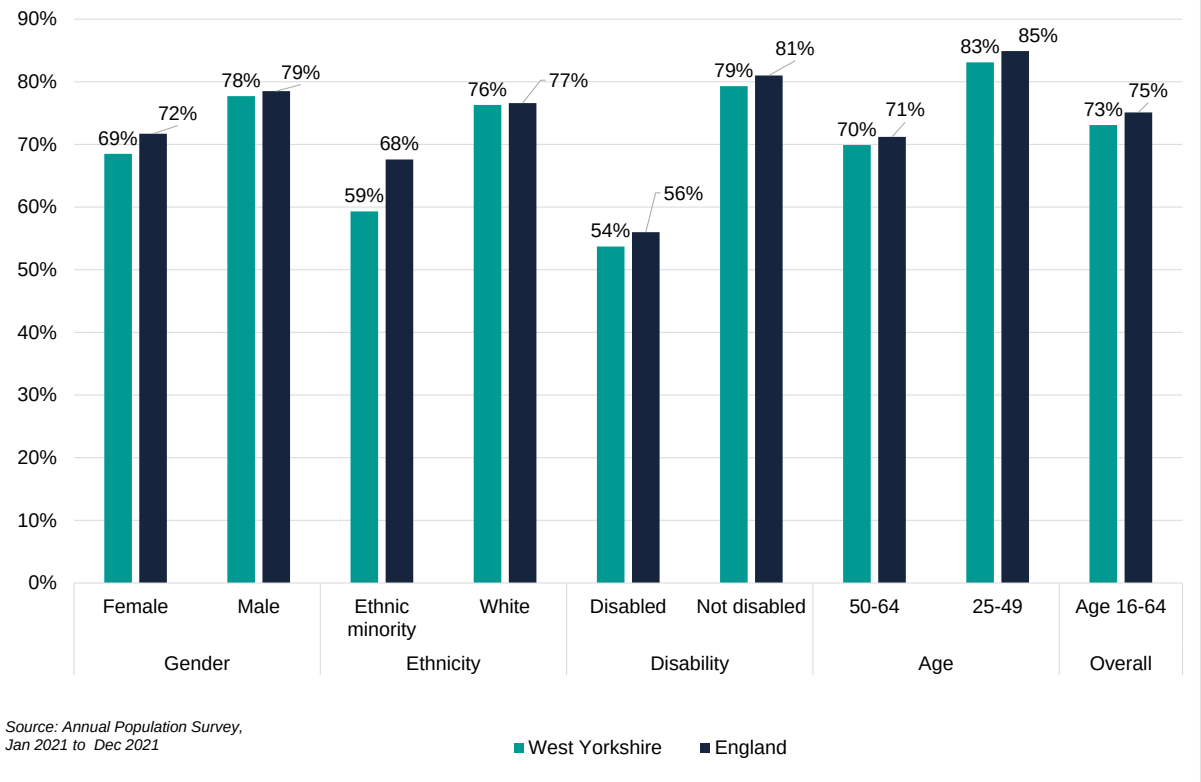
There is a range of groups who are disadvantaged in the labour market. This is reflected in relatively low employment rates. Women, people from ethnic minorities, disabled people and older people are less likely to be in employment than the wider population[1]. The picture in West Yorkshire broadly reflects the national pattern.

Only 54% of disabled people and 59% of people from ethnic minorities are in a job in West Yorkshire, according to the latest data. This compares with an overall rate of 73% for the working age population.

The largest employment rate gaps are for disabled people (26 percentage points lower than for people who are not disabled) and people from an ethnic minority (17-point gap with people who classify themselves as white). However, females face a gap of 9 points with males and older people aged 50-64 a gap of 13 points with people aged 25-49.

[1] This is not the full range of groups known to be disadvantaged in the labour market but measurement issues at local level preclude analysis of these additional groups.

Figure 23: Employment rate by group



Source: Annual Population Survey, Jan 2021 to Dec 2021

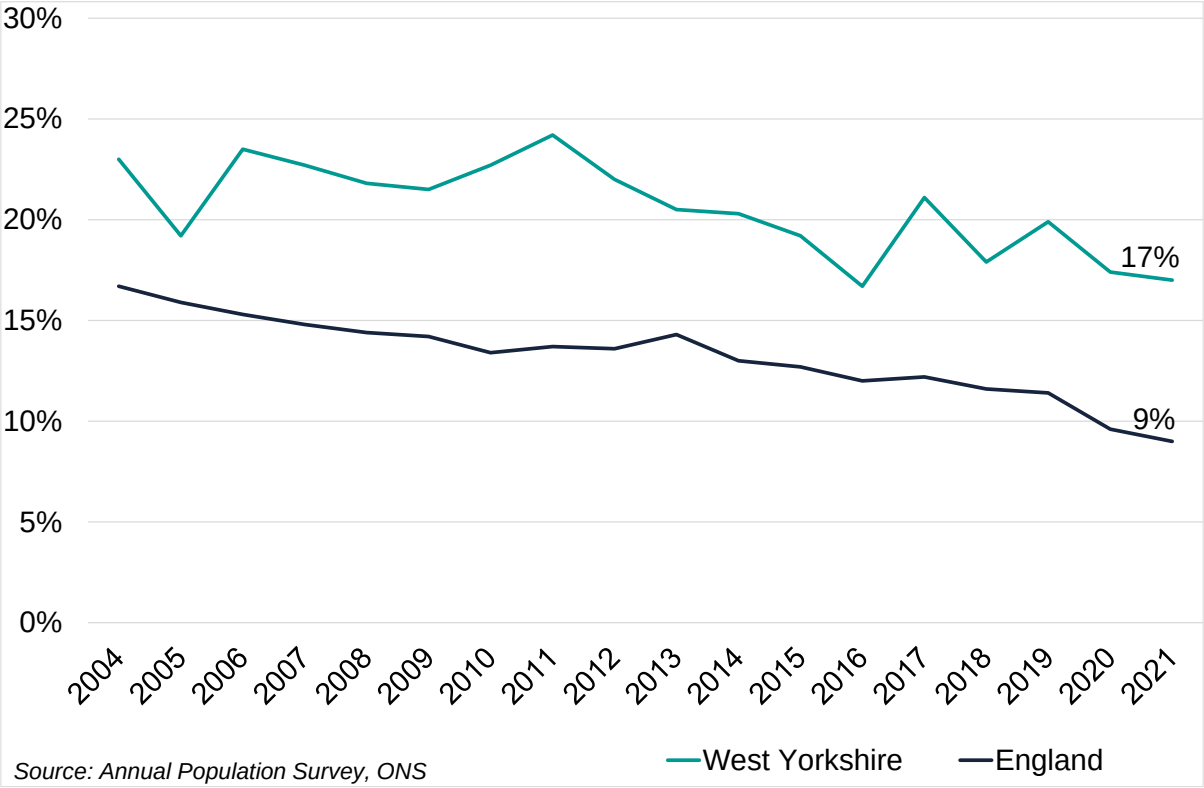
The latest data show that West Yorkshire performs similarly or slightly below the national average on employment rates for all disadvantaged groups.

Employment rates vary by different ethnic groups. National data show that the lowest rate is for the combined Pakistani and Bangladeshi ethnic group, at around 10 points lower than the overall rate for people from ethnic minorities (58% versus 68%). This helps to explain the low ethnic minority employment rate in West Yorkshire since this group accounts for more than 40% of the ethnic minority population of West Yorkshire, compared with around a fifth nationally.

There has been a narrowing over time of the employment rate gap between people from the White group and people from all ethnic minority groups combined[1]. In West Yorkshire, this gap fell from 22 points in 2012 to 17 points in 2021.

[1] Gov.uk Ethnicity facts and figures (2021)

Figure 24: Ethnicity employment rate gap (percentage point gap between employment rate of people of working age from an ethnic minority versus employment rate of white people of working age)



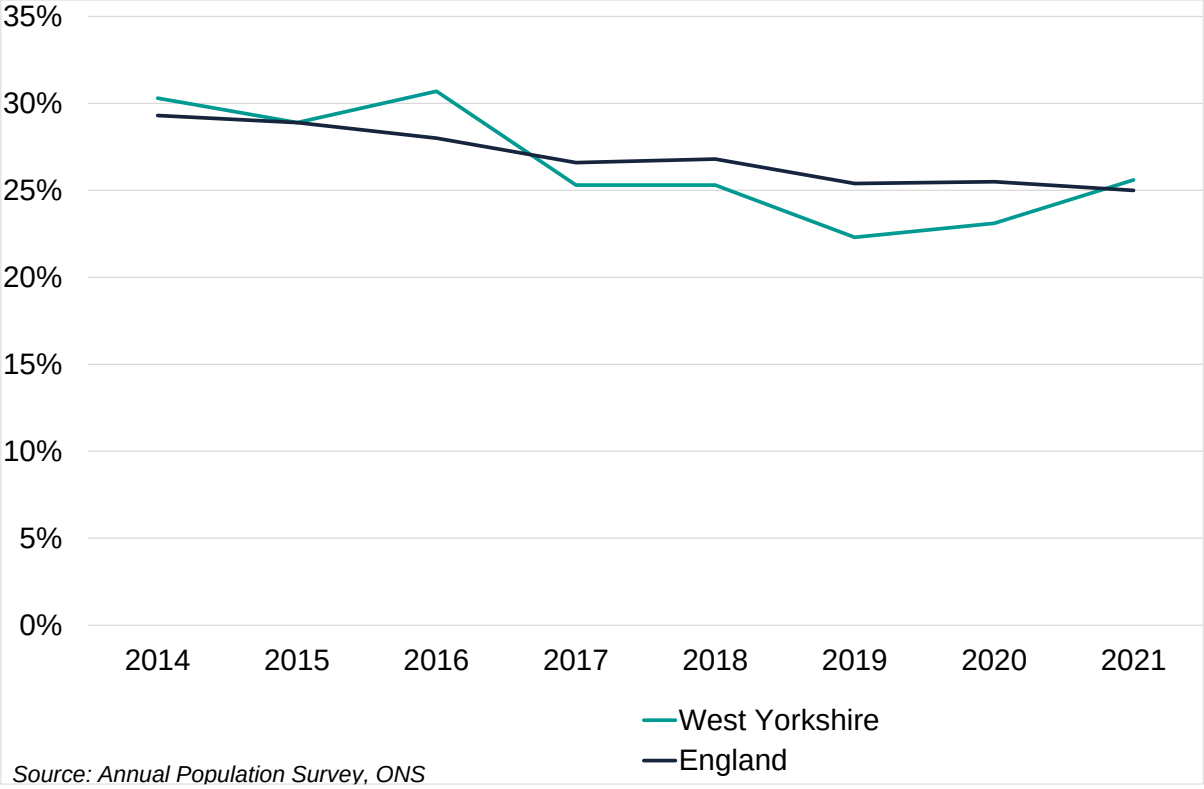
Source: Annual Population Survey, ONS

In spite of this downward trend, West Yorkshire's ethnicity employment rate gap has remained consistently wider than nationally.

At national level, the number of disabled people in employment has increased over recent years. This is due to growth in the size of the disabled population and increases in the overall employment rate, as well as a narrowing of the employment rate gap for this group[1]. A similar improvement has been seen in West Yorkshire with the level of employment among disabled people increasing from 130,000 to 191,000 between 2014 and 2020, although there was a slight fall between 2020 and 2021 that coincided with the pandemic. The employment rate gap[2] reduced from 30 percentage points to 23 percentage points between 2014 and 2020 before widening to 26 points during 2021.

[1] Department for Work and Pensions, The Employment of Disabled People: Data to 2019 (2020)
[2] The disability employment rate gap is

Figure 25: Disability employment rate gap (percentage point gap between employment rate of disabled people of working age versus employment rate of non-disabled people of working age)



Source: Annual Population Survey, ONS

3.2.2 Unemployment

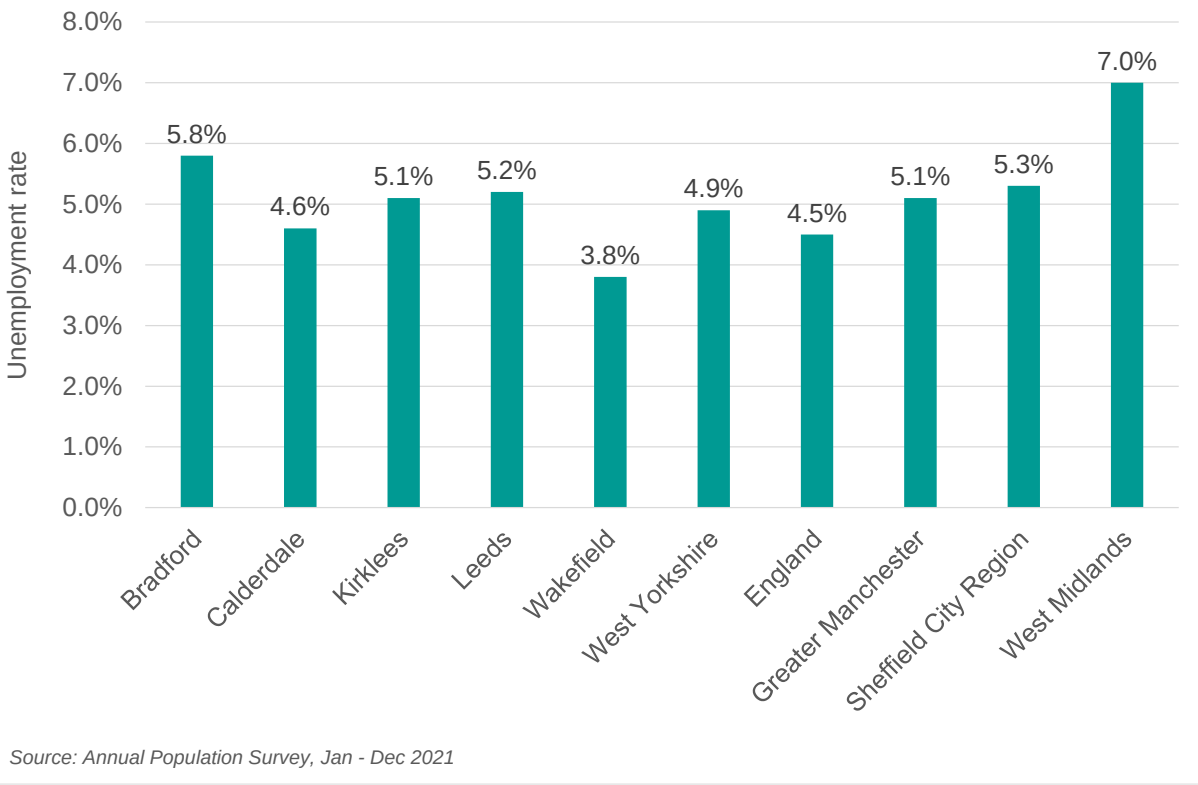
West Yorkshire's unemployment rate remains similar to the national average and has risen slightly as a result of the pandemic.

Connecting people to jobs is one of the most important ways of promoting inclusive growth. When people are unemployed their ability to contribute to growth and share in its benefits is curtailed.

Under the definition used here unemployed people are out of work and are actively seeking and available for employment. In West Yorkshire, 57,000 people were unemployed according to the latest data; this represents 4.9% of the economically active population of working age in the area. West Yorkshire's unemployment rate is similar to the national average, although Bradford's rate is well above this at around 5.8% and Wakefield's lower at less than 4%.

West Yorkshire's unemployment rate is lower than that of all three comparator MCAs and is substantially lower than the West Midlands figure.

Figure 26: Unemployment rate - % of economically active population aged 16+



Source: Annual Population Survey, Jan - Dec 2021

The level of unemployment in West Yorkshire fell by 55% or 57,000 between 2011 and 2018, faster than the rate of decline seen nationally of 45%. The unemployment rate more than halved over the same period, from around 10% to around 4%.

This progress has been partially offset by an increase in unemployment associated with the pandemic. Between 2020 and 2021 the number of people unemployed increased slightly, by 5%, in West Yorkshire

Figure 27: Trend in level and rate of unemployment

It is important to note that not all jobless people are unemployed according to the above definition. There are a further 54,000 people in West Yorkshire who are economically inactive who would like a job. These are people who do not have a job but would like one, even though they are not actively seeking work currently and / or are not available to start work in the immediate future.

National evidence shows that participation in the labour force has fallen by around 1m as a result of the pandemic, and this has particularly affected older people and people with health issues[1]. Although local level data are not timely enough to capture this trend it seems certain that economic activity has fallen significantly within West Yorkshire.

About the data

The unemployment data used here is taken from the Annual Population Survey. This is a continuous household survey covering the UK, designed to provide information on socio-economic variables at local level. The data sets consist of 12 months of survey data and is broken down on a quarterly basis. At local authority level official unemployment figures are based on model-based estimates. The model-based estimate improves on the APS estimate by borrowing strength from the claimant count.

The survey uses the international definition of unemployment specified by the International Labour Organisation (ILO). This ILO definition defines unemployed people as being:

- without a job, have been actively seeking work in the past four weeks and are available to start work in the next two weeks
- out of work, have found a job and are waiting to start it in the next two weeks.

[1] Institute for Employment Studies, Labour Market Statistics, July 2022 (2022)

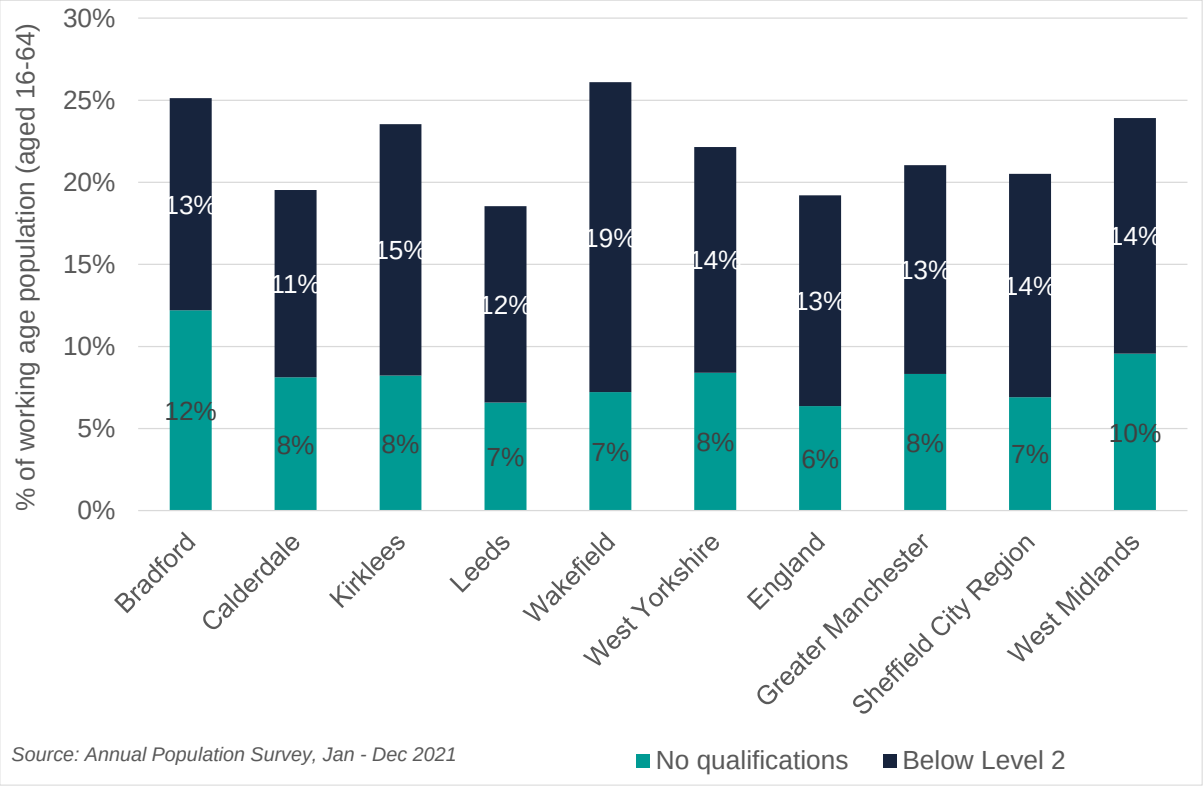
3.2.3 People with no / low qualifications (qualified below level 2)

More than one-in-five (22%) of people in West Yorkshire have no qualifications or are qualified to a low level. There has been an improving trend against this measure in recent years but there was little change in 2021.

A lack of skills and qualifications is a major barrier to getting a job and progressing within employment. Attainment at level 2 is often regarded as the threshold for basic employability. And a lack of basic qualifications can be a barrier to meeting the entry requirements for an apprenticeship, a technical course or for many jobs. This is illustrated by the fact that the employment rate for people with no formal qualifications in West Yorkshire, at 44%, is barely half that of people qualified at level 4 and above, at 85%.

Twenty-two per cent of the working age population of West Yorkshire has no or low qualifications. In absolute terms, this equates to 121,000 people (8%) with no formal qualifications and 199,000 people (14%) whose highest qualification is below level 2.

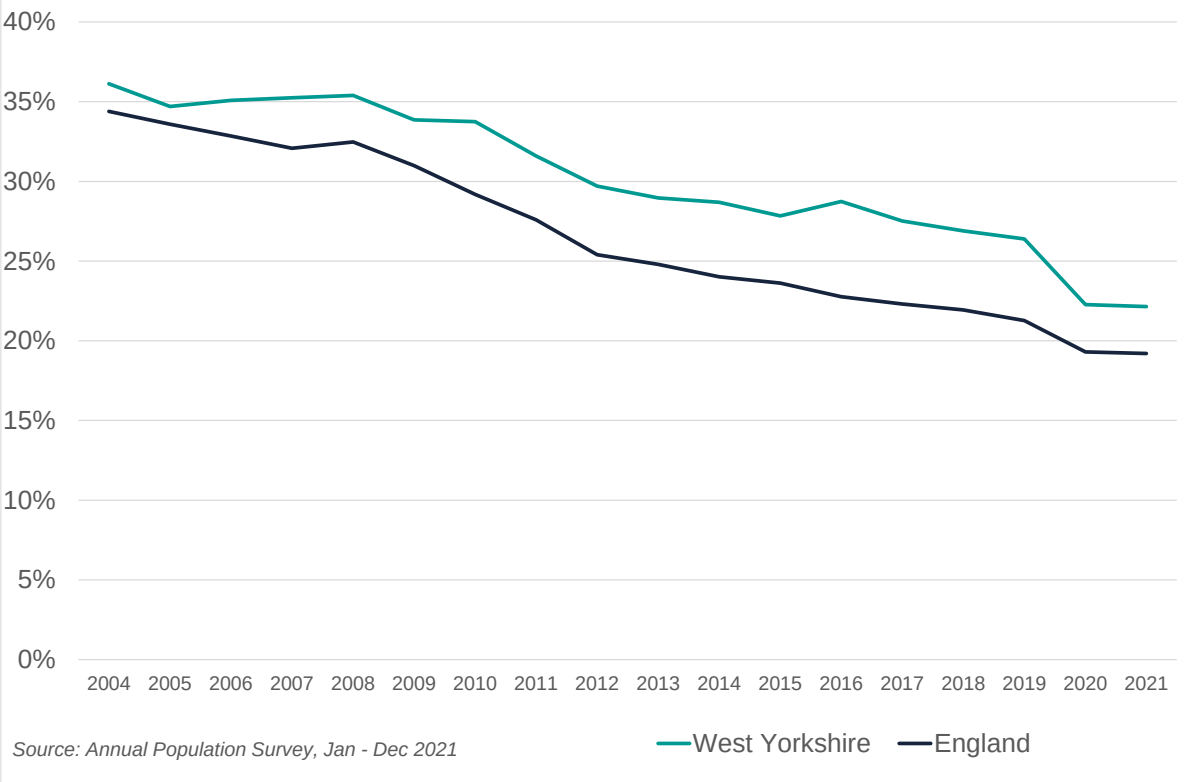
Figure 28: Proportion of working age population with no qualifications / qualified below Level 2



The proportion of people with no / low qualifications rises to around a quarter of the population of Bradford and of Wakefield. The equivalent proportion nationally is only 19%. Both Sheffield City Region and Greater Manchester have similar proportions of people with no / low qualifications to West Yorkshire, although West Midlands CA's is higher at 24%.

Following a marked improvement in performance in 2020, the position of West Yorkshire remained static in 2021, reflecting that of the national average.

Figure 29: Trend in proportion of working age population with no qualifications / qualified below Level 2



Source: Annual Population Survey, Jan - Dec 2021

Although West Yorkshire's continuing deficit against this measure is partly due to the qualification profile of adults already in the labour force, data[1] relating to the qualifications of young people at age 19 suggests that new entrants also contribute to the poor performance. Young people in West Yorkshire are less likely to have achieved a level 2 qualification by the age of 19 than their national counterparts. The proportion is 78%, 4 points lower than the England average of 82%. Two local authorities (Calderdale and Kirklees) match the national average but in Bradford only 74% achieve level 2 by the age of 19, 7 points behind the national average.

About the data
Level 2 qualifications are equivalent to GCSEs at grades 9, 8, 7, 6, 5, 4 or grades A*, A, B, C.[2]. The qualifications held by individuals are measured using the Annual Population Survey, a continuous household survey covering the UK designed to provide information on socio-economic variables at local levels.

[1] Department for Education, Level 2 and 3 attainment by young people (2022)
[2] See *What Qualifications Levels Mean* for a full breakdown What qualification levels mean: England, Wales and Northern Ireland - GOV.UK (www.gov.uk)

3.2.4 Apprenticeships

Take-up of apprenticeships in West Yorkshire is strong relative to other areas but there has been a negative effect on starts resulting from COVID-19. Apprenticeships need to be made more inclusive.

Apprenticeships are crucial to inclusive growth because they can serve as a ladder for social mobility. They can support employability and enable individuals to gain skills in a non-academic context. They can also upskill and reskill workers, giving a second chance to those already in employment. People from less privileged backgrounds who complete an apprenticeship get a bigger boost in their earnings than other learners. This is particularly true at intermediate level – the first step on the apprenticeship journey[1].

Apprenticeships are also important to boosting productivity, by enabling employers to grow their own skills to meet business priorities and to put innovative ideas into practice.

For an area like West Yorkshire where manufacturing forms a key part of the local economy, apprenticeships are especially important, since they offer an established route into this sector.

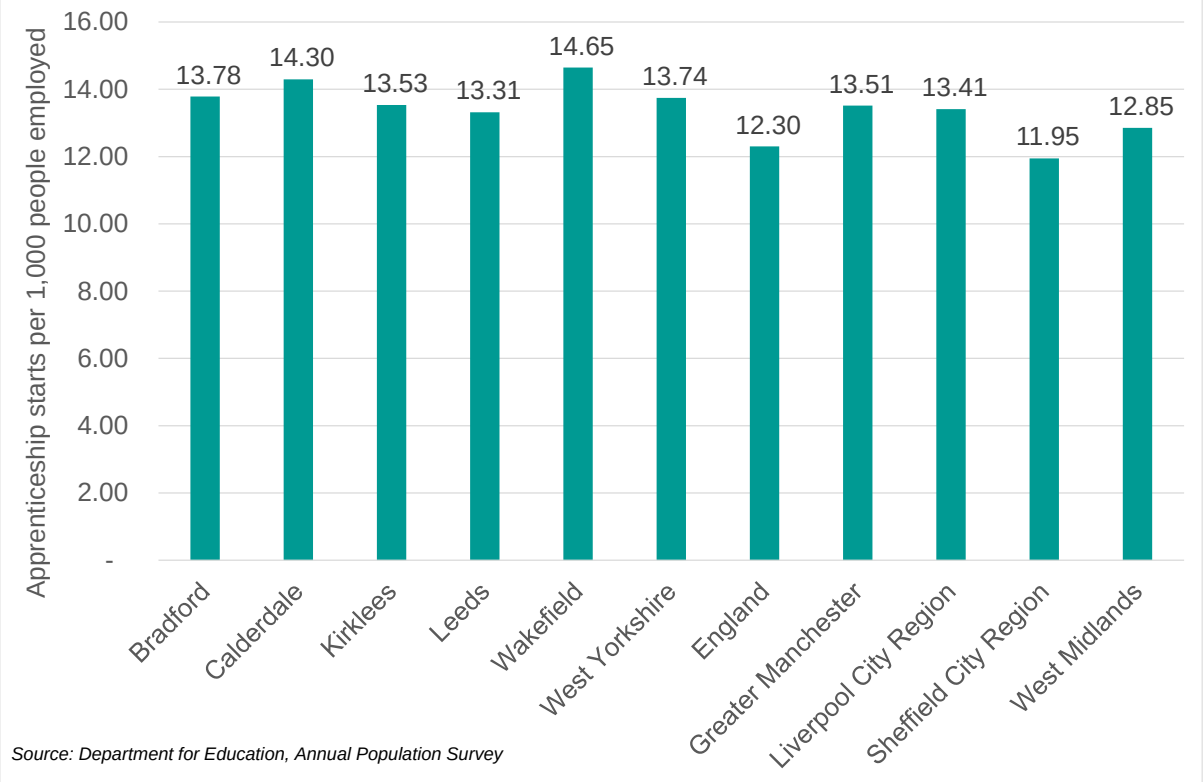
The take-up of apprenticeships in West Yorkshire is relatively strong. With 14,528 apprenticeship starts during the 2020/21 academic year, there were around 13.7 apprenticeship starts per 1,000 people in employment, somewhat above the national average of 12.3.

In Calderdale and Wakefield, the ratio is higher than the West Yorkshire average; but it is slightly lower in Leeds, reflecting its local industry structure. West Yorkshire's ratio of apprentices to employment is broadly in line with the comparator MCAs and somewhat higher than Sheffield City Region and West Midlands.

About the data
Apprenticeship start figures reflect the number of apprenticeships that began during a given time period, in this case academic year. In a small number of cases individuals may start more than one apprenticeship during an academic year. The apprenticeship data in this analysis is based on data return from apprenticeship training, collected via the Individualised Learner Record (ILR). The ILR is an administrative data collection system designed primarily for operational use in order to fund training providers for learners in FE and on apprenticeship programmes.

[1] Social Mobility Commission Apprenticeships and social mobility: Fulfilling potential (2020)

Figure 30: Ratio of apprenticeship starts (2020/21) to 1,000 people in employment



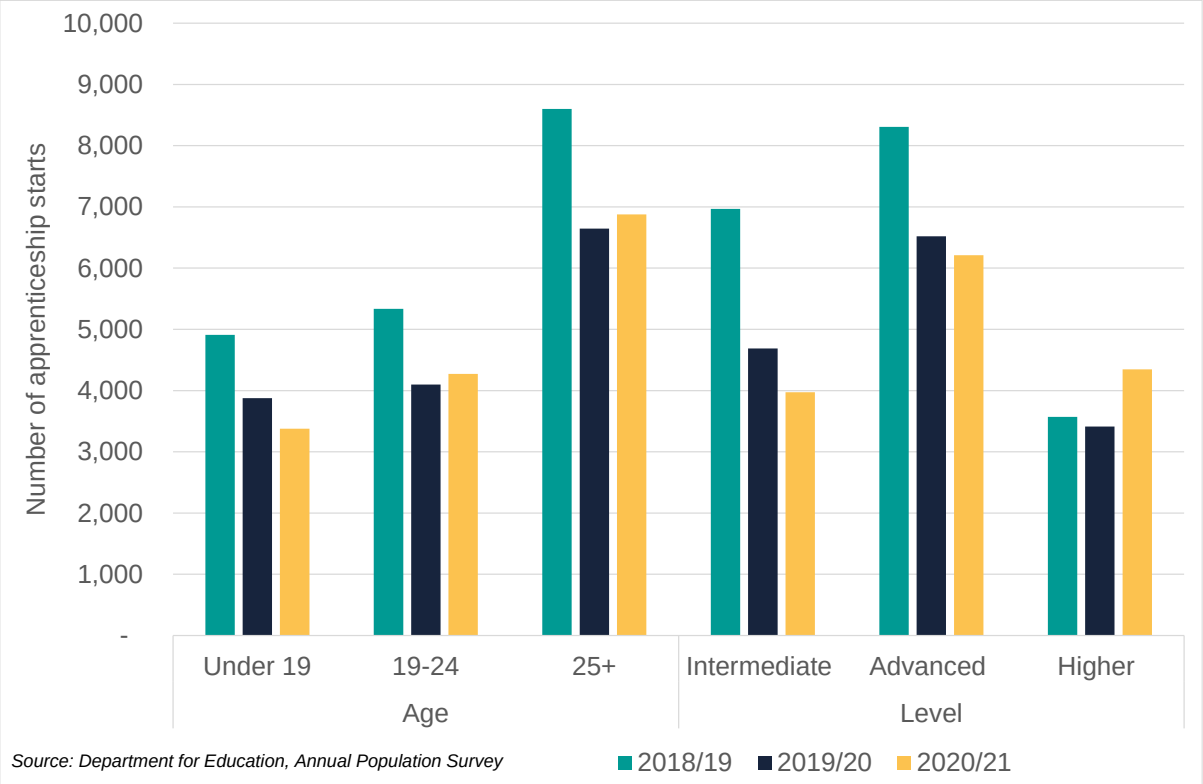
Source: Department for Education, Annual Population Survey

The entry rate into apprenticeships for young people is higher in West Yorkshire than nationally after both Key Stage 4 and Key Stage 5[1].

However, the number of apprenticeship starts in West Yorkshire has fallen significantly as a result of COVID-19 and this follows previous reductions linked to the recent apprenticeship policy reforms. Compared with 2018/19 (pre-pandemic), total starts were 23% lower in 2020/21 in the region and 18% lower nationally. There has been a particularly sharp fall in intermediate apprenticeships, which declined by 43% compared with 2018/19.

[1] West Yorkshire Combined Authority, Labour Market Report (2021)

Figure 31: Trend in apprenticeship starts by age and level, West Yorkshire



Source: Department for Education, Annual Population Survey

Higher apprenticeships have grown rapidly in West Yorkshire and across the country and form an increasingly important route into higher skilled employment in occupations like accountancy and nursing. Thirty per cent of apprenticeship starts in West Yorkshire are for higher apprentices, similar to the national average of 31% and broadly in line with the comparator MCAs. However, West Yorkshire is well below Cambridgeshire and Peterborough (39%) and Greater London (34%).

In view of its importance as a mechanism for social mobility and inclusion, it is crucial that apprenticeships are as diverse as possible. However, there are a number of key issues to consider in this regard[1]:

- Female participation in apprenticeships is strongly concentrated in certain subjects such as health and care and is under-represented in some areas that offer strong pay and career prospects, like engineering, construction and digital.
- Take-up of apprenticeships among people from ethnic minority backgrounds is relatively low among under-19s.
- Take-up of apprenticeships by young people has fallen sharply in recent years. Coupled with this, opportunities at intermediate level have also seen a significant reduction.
- Disadvantaged pupils eligible for free school meals are less likely to take up an apprenticeship than other pupils.

These issues are considered in more detail in the accompanying equality, diversity and inclusion report.

[1] ibid

3.2.5 Basic digital skills

Although most people have essential digital skills for life, a quarter of adults do not. More than two-fifths of people lack the full range of essential digital skills for work.

Along with access to digital infrastructure, inspiring people about the benefits of the internet and ensuring organisations are creating accessible services, digital skills are vital to tech adoption.

Digital technologies provide an important lifeline and became even more important during the pandemic. They enable people to connect with family and friends and to organise their life better. People who are engaged digitally tend to feel more part of the community and are better able to manage their physical and mental well-being[1].

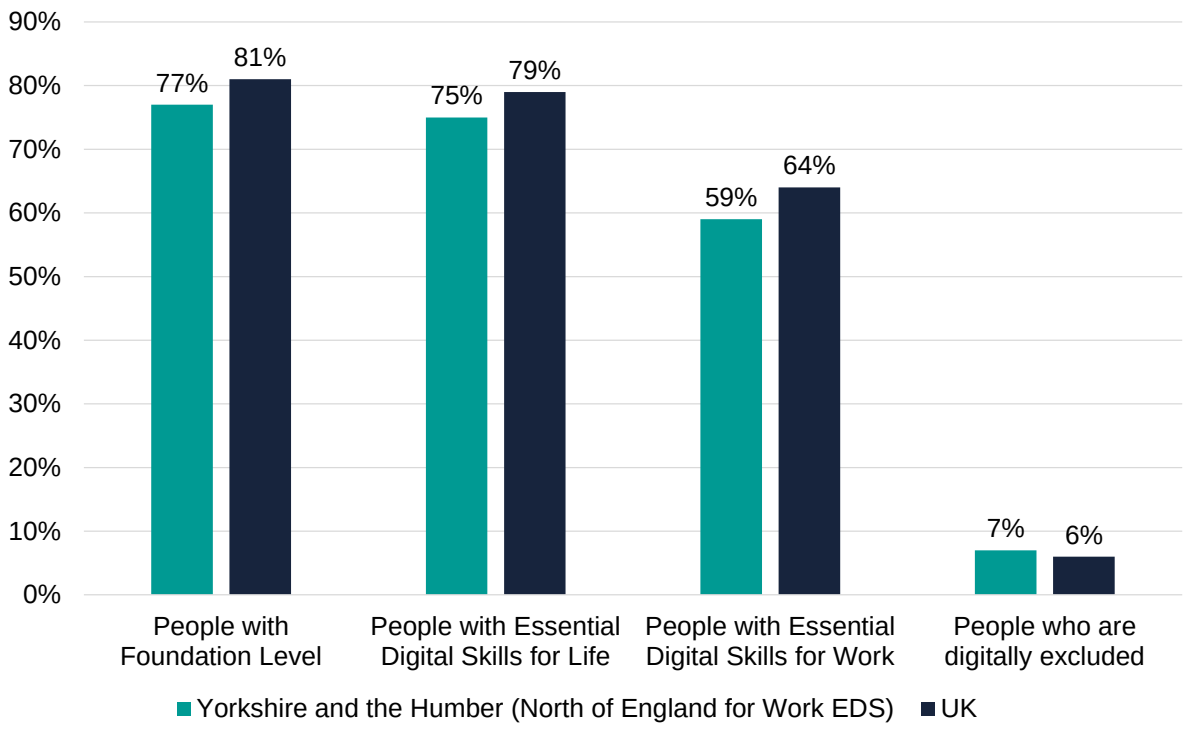
With people staying at home during the health crisis, technology has become a necessity for keeping connected, working remotely and supporting home schooling.

People who are not digitally engaged face genuine disadvantages. For example, they are more likely to be paying higher households bills for essentials such as utilities.

Digital exclusion is most widespread among older people, who are also susceptible to isolation within the community. It also disproportionately affects people with an impairment, people on low incomes and benefit claimants.

In a workplace context, digital skills are increasingly necessary in applying for a job and with the majority of jobs now requiring digital skills are vital to people's wider job prospects.

Figure 32: Digital skills – proportion of people aged 18+ who have each skill level



Source: Essential Digital Skills 2021, Lloyds Bank

[1] Lloyds Bank, Essential Digital Skills UK (2021)

Foundation digital skills relate to the ability to perform the basic tasks that enable an individual to get online by themselves. This includes tasks like connecting a device to a Wi-Fi network, finding and opening applications on a device and opening an Internet browser to find and use websites. Although 77% of adults can perform these tasks this still leaves almost a quarter who are unable to do so.

People who have the Foundation skill are counted as having essential digital skills for life if they can do at least one digital task in each of five skills categories, including communicating (e.g. set up an email account), transacting (e.g. make online payments), problem solving (e.g. use internet to find information to solve problems), handling information and content (e.g. manage content using files and folders) and being safe and legal online (e.g. avoid suspicious links in emails etc).

Three quarters of adults (75%) have essential digital skills for life, although again this leaves a quarter of people who lack this level of capability. Although the proportion is unchanged on the previous year, 54% of people in Yorkshire and The Humber believe their digital skills have improved in the last year.

Members of the workforce are required to have both the foundation and life skills before qualifying for the essential digital skills for work. Then, they must be able to do at least one task in each of the five skills by themselves in a work environment. Again, the skill areas relate to communicating, transacting, problem solving, handling information and content and being safe and legal online.

Despite a significant improvement between 2020 and 2021, more than two-fifths (41%) of the workforce lack essential digital skills for work in the North of England, somewhat higher than the UK average of 36%. This means that 16% of the workforce have foundation and life skills but not work skills.

There is evidence to show that employees' lack of digital skills impacts on business performance. West Yorkshire employers flag basic digital skills as one of the key areas in which their staff lack the proficiency that is needed to meet business objectives[1].

About the data
Lloyds Bank in partnership with Ipsos MORI conduct an annual study tracking year-on-year changes in digital skills and assessing the range of online tasks that people in the UK are able to perform. This is based on a survey of over 4,100 people, nationally representative of 18+ in the UK which is used to measure the UK's level of essential digital skills and track its progress.

[1] West Yorkshire Combined Authority, Labour Market Report 2021, p133

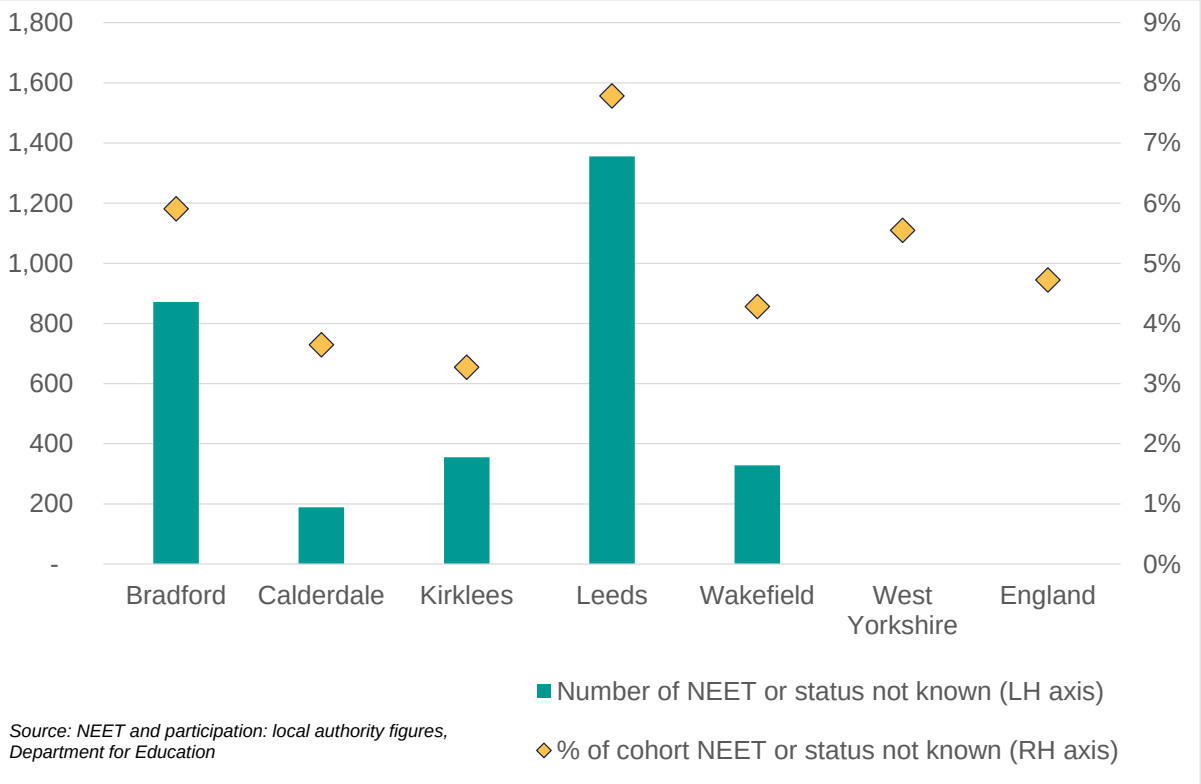
3.2.6 NEETs

The proportion of young people who are NEET in West Yorkshire fell between 2021 and 2022 but remains slightly above the national average, with variations at local authority level.

Young people who become NEET (not in education, employment or training) face an increased likelihood of unemployment, low wages, or low-quality work later on in life. Being NEET can also have an impact on involvement in crime, as well as a detrimental effect on physical and mental health, particularly when time spent NEET is at a younger age or lasts for longer[1]. Local authorities have a duty to track young people's activity to identify those not participating and support them to do so.

Based on the latest published figures, there was an average of 3,100 young people aged 16 and 17 who were NEET or whose status was not known in West Yorkshire during the months of December 2021 to February 2022. This equates to around 5.5% of all 16- and 17-year-olds known to their respective local authorities, which is slightly above the England average of 4.7%.

Figure 33: Number and proportion of 16- and 17-year-olds not in education, employment or training (NEET) or whose activity is not known (average of December 2021, January 2022 and February 2022)



Source: NEET and participation: local authority figures, Department for Education

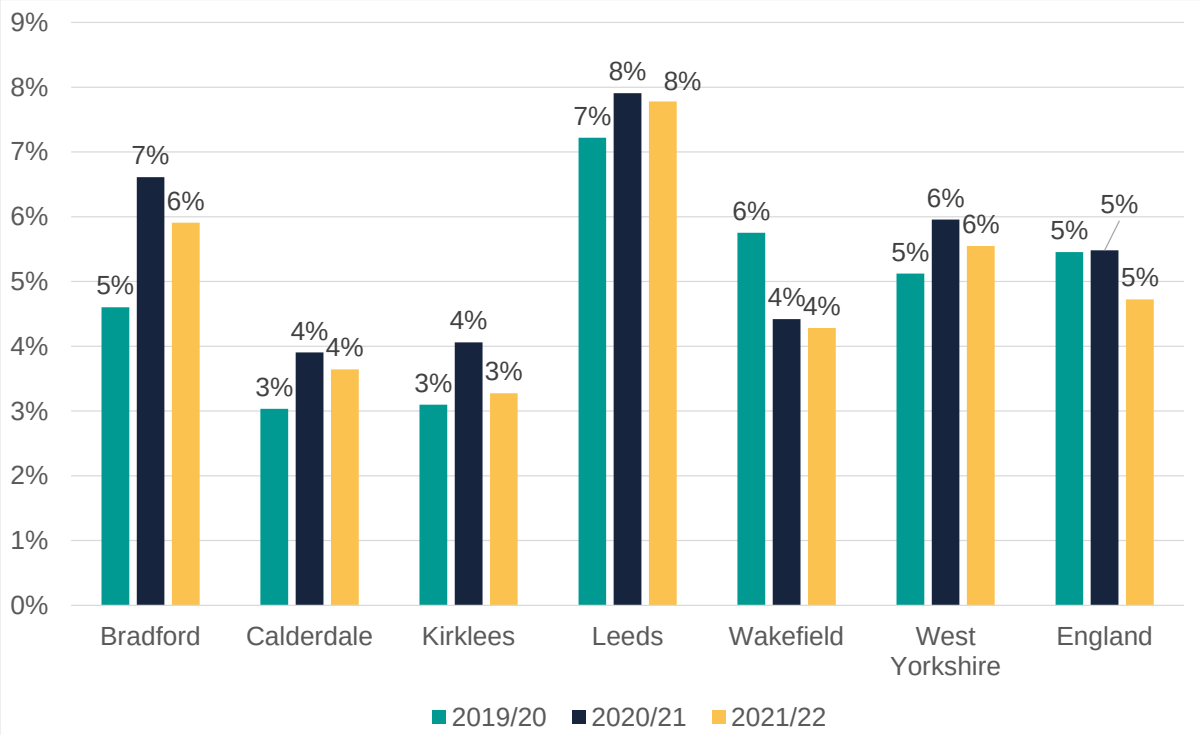
The prevalence of NEETs varies across West Yorkshire local authorities, with some below the national average and some well above. Around 3% to 4% of 16- and 17-year-olds in each of Calderdale, Kirklees and Wakefield are NEET or not known, with the proportion increasing to around 6% in Bradford. The proportion is highest in Leeds at nearly 8%.

[1] Public Health England, Local action on health inequalities: Reducing the number of young people not in employment, education or training (NEET) (2014)

The number and proportion of young people NEET and not known in West Yorkshire fell in 2021/22, following an increase in the previous year. The number decreased by 120 or 4%, whilst the proportion of the cohort fell by a marginal 0.4 percentage points, from 6.0% to 5.5% (figures appear inconsistent due to rounding). Three out of five local authorities shared in the reduction, including an 18% fall in the number in Kirklees, a fall of 9% in Bradford and a small reduction of 2% in Calderdale. Leeds saw a 4% increase, whilst Wakefield remained static.

Nationally, there was a bigger fall in the number of young people NEET and not known in 2021/22, of 12%.

Figure 34: Trend in proportion of 16- and 17-year-olds not in education, employment or training (NEET) or whose activity is not known



Source: NEET and participation: local authority figures, Department for Education

Young people from an ethnic minority group are, in general, less likely to become NEET in West Yorkshire. Around 5% of young people from an ethnic minority were NEET or not known as of December 2020, compared with 6% of white young people. Asian / Asian British and Black / Black British groups both had rates below the overall average, although the proportion of mixed-race young people who were NEET or not known was above average at 8%.

9% of young people with special education needs and disability (SEND)[1] and 9% of young people in receipt of SEN support[2] were NEET or not known as of December 2020 compared with 6% of the overall cohort.

[1] A child or young person has special educational needs and disabilities if they have a learning difficulty and/or a disability that means they need special health and education support.
[2] Support given in school or college, such as speech therapy.

About the data
Local authorities have a duty to track young people's activity to identify those not participating and support them to do so. Statutory guidance that underpins this duty directs local authorities to collect information to identify young people who are not participating, or who are at risk of not doing so, and to target their resources on those who need them most. Information about a young person's activity is recorded on each authority's client database with data collated centrally by the Department for Education.

3.2.7 People qualified at level 4 and above

West Yorkshire underperforms on the proportion of its population qualified to a higher level and there was no narrowing of the gap with the national average during 2021, although the underlying trend is upwards.

One of the key challenges facing West Yorkshire is a deficit in its skills base relative to other parts of the UK. This is closely associated with its underperformance on productivity and innovation. For example, according to one study, higher skill levels among London's workforce explain about two-thirds of the productivity gap between the capital and the rest of the country[1].

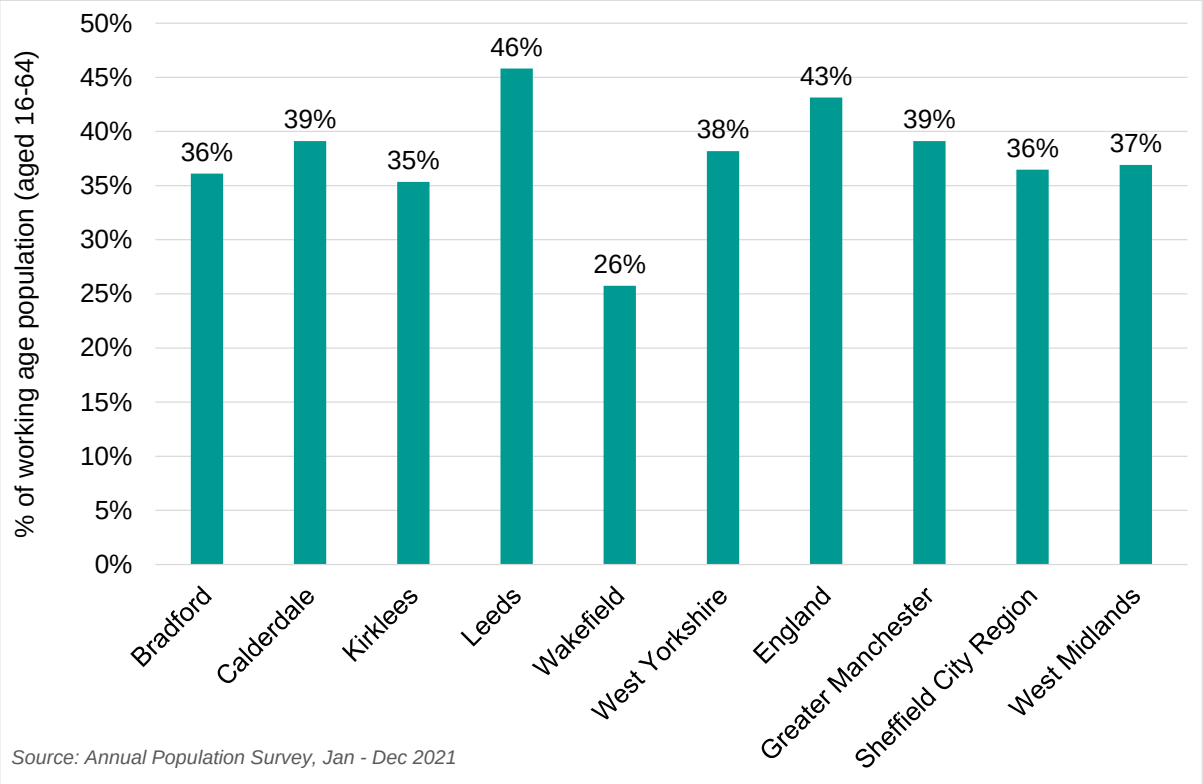
Even before COVID-19, it was clear that the world of work in 2030 was going to look considerably different to today. Tasks, roles and entire jobs were set to transform, as technology rapidly changes work and drives up demand for new and higher skills.

The availability of people with higher level qualifications at Level 4 and above is a key area of under-performance for the region. With 38% of its population qualified to this level, West Yorkshire is five points below the national average of 43%. In absolute terms this equates to 71,000 fewer people qualified at Level 4 and above in the region than would be the case if West Yorkshire matched the national average.

West Yorkshire performance against this measure is similar to the comparator City Regions – slightly below Greater Manchester but higher than Sheffield City Region and the West Midlands Combined Authority.

[1] Industrial Strategy Council, UK Skills Mismatch in 2030 (2020)

Figure 35: Proportion of working age population qualified at Level 4 and above



Source: Annual Population Survey, Jan - Dec 2021

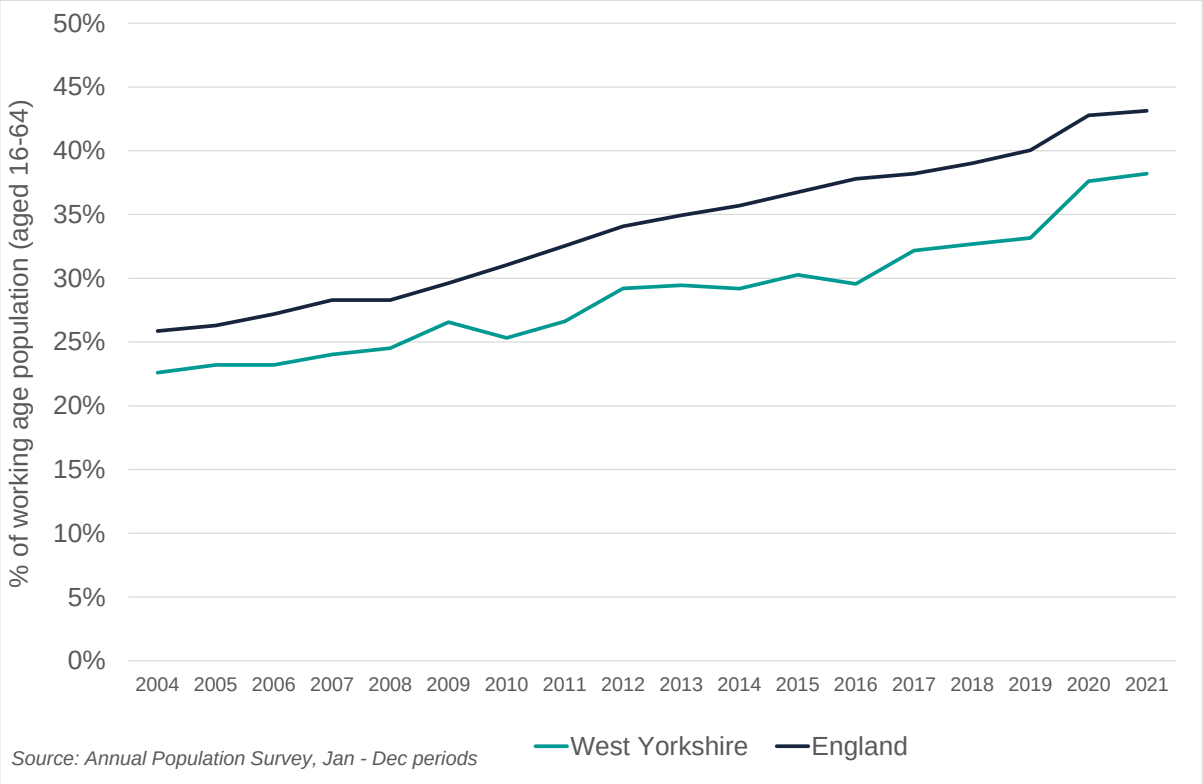
The proportion of the working age population qualified to degree level (level 6) and above in West Yorkshire is lower than the national average at 33% and 37% respectively. Around 6% hold a higher education qualification below degree level, similar to the England average of 7%.

The proportion of people qualified at level 4 and above in West Yorkshire has followed a sustained upward trend over the last decade. A sharp increase of five percentage points in 2020 narrowed the gap with the national average, but there has been little change seen in 2021, either for West Yorkshire or at national level. The proportion qualified at this level remained at 38% in West Yorkshire and the England average remained at 43%.

About the data
Level 4 and above includes all higher education qualifications, from Level 4 qualifications such as a higher national certificate (HNC), through to Level 8, which includes doctorate-level qualifications. Honours degrees are at Level 6[1]. Qualifications serve as a proxy for the level of skills and knowledge held by individuals. The qualifications held by individuals are measured using the Annual Population Survey, a continuous household survey covering the UK designed to provide information on socio-economic variables at local levels.

[1] See *What Qualifications Levels Mean* for a full breakdown [What qualification levels mean: England, Wales and Northern Ireland - GOV.UK (www.gov.uk)]

Figure 36: Trend in proportion of working age population qualified at Level 4+



Source: Annual Population Survey, Jan - Dec periods

4 Empowering our communities, towns and cities to thrive

Key points

Healthy life expectancy in West Yorkshire is below the national average for both males and females.

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.

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.

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.

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

Almost 9-out-of-10 premises have mobile 4G coverage, which is again above the national average.

4.1 Overview of the priority

The Combined Authority's aim is to work with its partners to develop well-connected neighbourhoods which support inclusive growth with good quality homes in places where people want to live.

This involves enabling housing growth and supporting our places to maximise their potential through effective place making that will leverage private sector investment. This approach recognises that people are not bound by geographies when choosing where they want to live, incorporating other factors such as transport, access to jobs, education and community.

Local partners invest in priority projects delivered in our Spatial Priority Areas, urban centres and growth zones through the West Yorkshire Strategic Housing Pipeline which meets the needs of our communities.

The Combined Authority is committed to building strong strategic relationships with Homes England, Housing Associations and private developers with greater investment in housing which delivers well designed homes and neighbourhoods, a good quality choice across tenures and greater use of modern methods of construction.

The Combined Authority is also working with partners to build a world-class digital infrastructure, which supports innovation in the region and promotes its global competitiveness.

4.2 Performance against the indicators

4.2.1 Healthy life expectancy

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.

Healthy Life expectancy is a measure of the average number of years a person can expect to live in good health (rather than with a disability or in poor health), based on contemporary mortality rates and prevalence of self-reported good health. For a particular area and time period, it is an estimate of the average number of years a new-born baby would live in good health if he or she experienced the age-specific mortality rates and prevalence of good health for that area and time period throughout his or her life. Overall life expectancy and healthy life expectancy are important measures of mortality and morbidity, and inequality in life expectancy is a key high-level health inequalities outcome, which is core to the aims of the Department of Health. There is also a significant divergence in life expectancy by socio economic group[1], making it an important indicator of inclusion.

Both female and male healthy life expectancy at birth in West Yorkshire is statistically significantly lower than the England average and has been since this indicator has been routinely published. The latest figure for healthy life expectancy (2018/2020, a 3-year average) for a girl and boy born in West Yorkshire was 62.0 and 60.7 years respectively, lower than the England average of 63.9 and 63.1 years respectively.

At local authority level within West Yorkshire, there is some variation in healthy life expectancy. For women, healthy life expectancy is significantly lower than the England average in Wakefield (56.7 years) and Kirklees (61.2 years), whist for men this is true all West Yorkshire districts apart from Kirklees.

[1] Longevity Science Panel, Life Expectancy: Past and Future Variations by Socio-economic Group in England and Wales (2018)

Figure 37: Life expectancy and healthy life expectancy at birth (2018-2020)

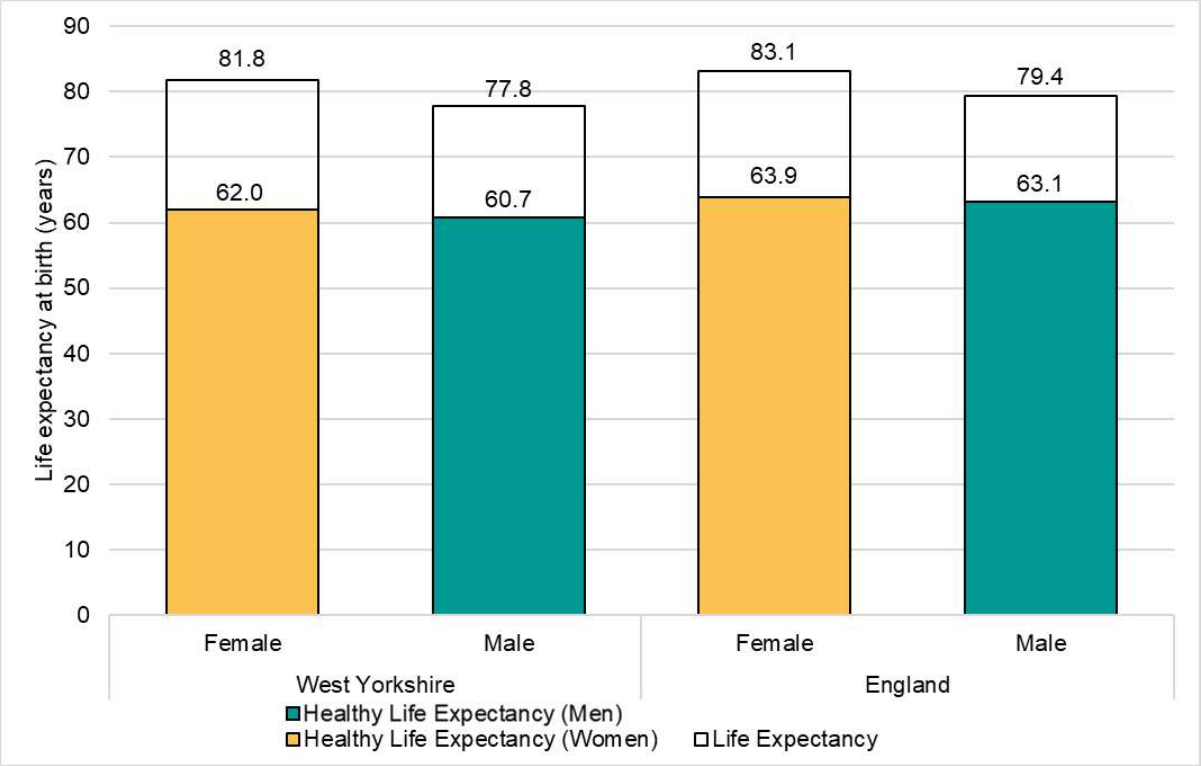
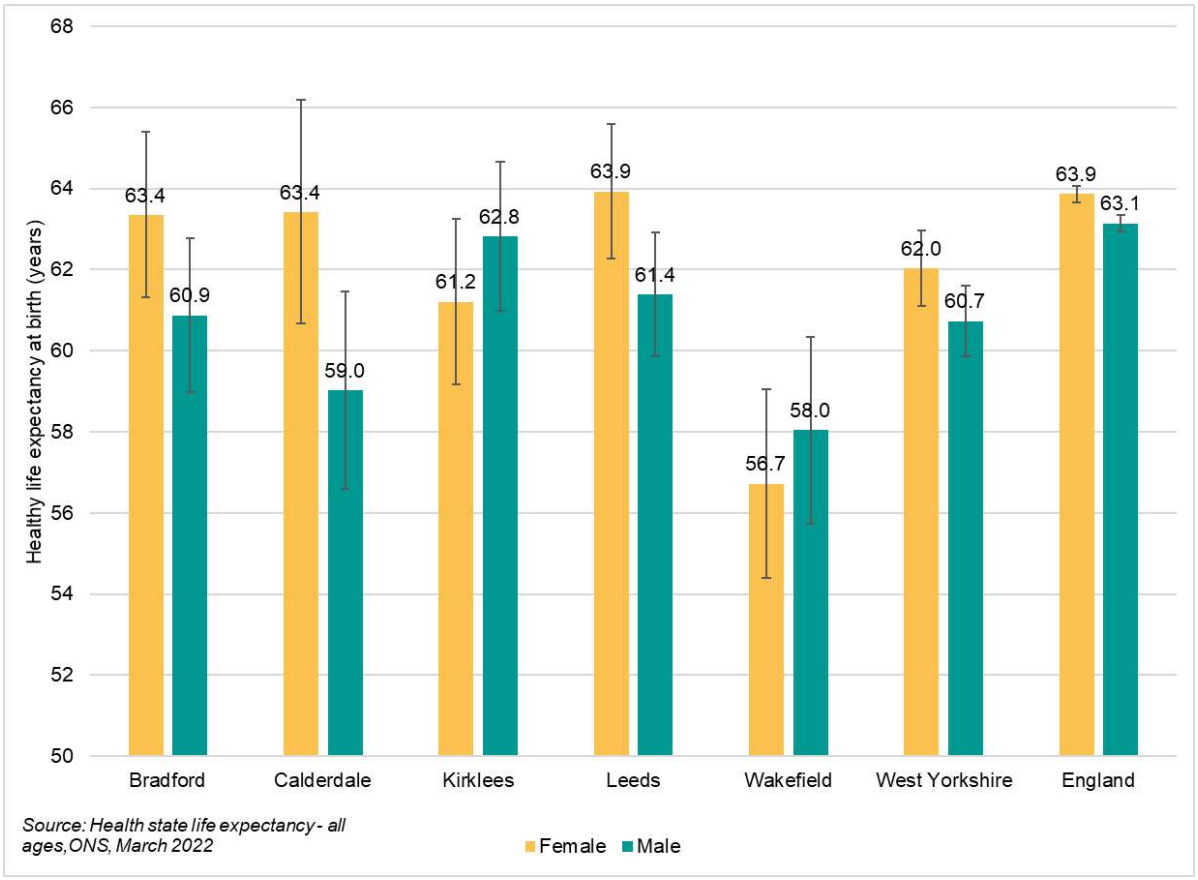


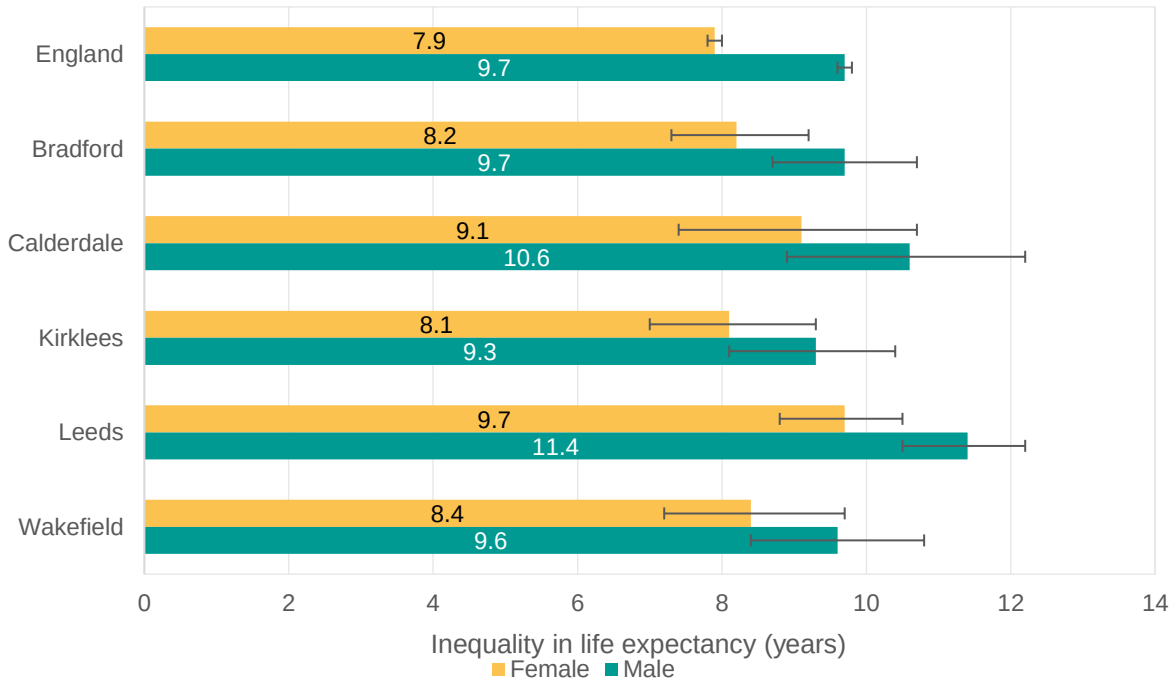
Figure 38: Healthy life expectancy at birth (2018-2020), West Yorkshire Districts vs England



Inequality in life expectancy, or the slope index of inequality (SII) is a measure of the social gradient in life expectancy, i.e., how much life expectancy varies with deprivation. It takes account of health inequalities across the whole range of deprivation within each area and summarises this in a single number, the SII. The greater the value of the SII, the greater the average difference in life expectancy between the least deprived and most deprived neighbourhoods within a given area.

The latest SII data (2018-2020) shows that within West Yorkshire, Leeds is the only area that has a statistically significantly larger (steeper) SII of life expectancy for both women and men compared to the England average. This means that the disparity between life expectancy in the most and least deprived neighbourhoods is more severe than the England average. In practical terms, it means that on average a boy or girl born in an area of Leeds that falls within the most deprived (worst 10%) neighbourhoods in England will live 11.4 or 9.7 years (girls and boys respectively) fewer than a boy or girl born in area of Leeds that falls within the least deprived (best 10%) neighbourhoods.

Figure 39: Inequality in life expectancy at birth (2018-2020)



Source: Inequality in life expectancy, Public Health England, 2018-2020

About the data

Healthy life expectancy is a measure of the average number of years a person would expect to live in good health based on contemporary mortality rates and prevalence of self-reported good health. The prevalence of good health is derived from responses to a survey question on general health within the Annual Population Survey. For a particular area and time period, it is an estimate of the average number of years a new-born baby would live in good general health if he or she experienced the age-specific mortality rates and prevalence of good health for that area and time period throughout his or her life. Figures are calculated from deaths from all causes, mid-year population estimates, and self-reported general health status, based on data aggregated over a 3-year period. Figures reflect the prevalence of good health and mortality among those living in an area

in each time period, rather than what will be experienced throughout life among those born in the area. The figures are not therefore the number of years a baby born in the area could actually expect to live in good general health, both because the health prevalence and mortality rates of the area are likely to change in the future and because many of those born in the area will live elsewhere for at least some part of their lives.

4.2.2 Net additional dwellings

A substantial number of net additional dwellings are being delivered each year in West Yorkshire, adding to the region's housing stock. However, in 2020/21 West Yorkshire saw a second consecutive annual fall against this measure, with net additional dwellings 35% lower than pre-pandemic.

The Combined Authority is committed to supporting well-connected neighbourhoods with good quality homes, in places where people want to live. This involves improving the supply of homes through the West Yorkshire Strategic Housing Pipeline.

'Net additional dwellings' is the primary and most comprehensive measure of housing supply.

In 2020/21, a total of 5,983 net additional dwellings were delivered across West Yorkshire. This represents a decrease over previous years. Overall, the cumulative losses to housing stock across the region stood at 837.

About the data
Net additional dwelling statistics track changes in the size of the dwelling stock due to new builds, flat conversion, change of use and demolition. The figures used here are taken from the Live Tables on Housing Supply, produced by the Ministry for Housing, Communities and Local Government. The population estimates are taken from the Office for National Statistics annual population estimates.

Over the previous 10 years net housing completions reached a low of 3,889 in 2012/13 following the crash of 2008. Subsequently, net housing completions increased year on year, up to 9,261 in 2018/19.

All local authorities in West Yorkshire registered a broad upward trend in their annual figures for net additional dwellings over this period, except Calderdale.

In the last two years, however, all local authorities in West Yorkshire underwent a substantial decline in net additional dwellings. In the two-year period between 2018/19 and 2020/21 Bradford saw the biggest fall of 68% (down by 48% in 2020/21 alone) with big falls in Calderdale (-53%), Wakefield (-42%) and Kirklees (-34%). The decline in Leeds was much smaller at -14%.

Across West Yorkshire the figure for 2020/21 was 21% lower than in 2019/20 and 35% lower than in 2018/19. The respective falls at national level were less pronounced at 11% and 10% respectively. West Yorkshire's count of net additional dwellings is at its lowest level since 2014/15 but is still 54% above the figure recorded in 2012/13.

Table 2: Net additional dwellings by local authority

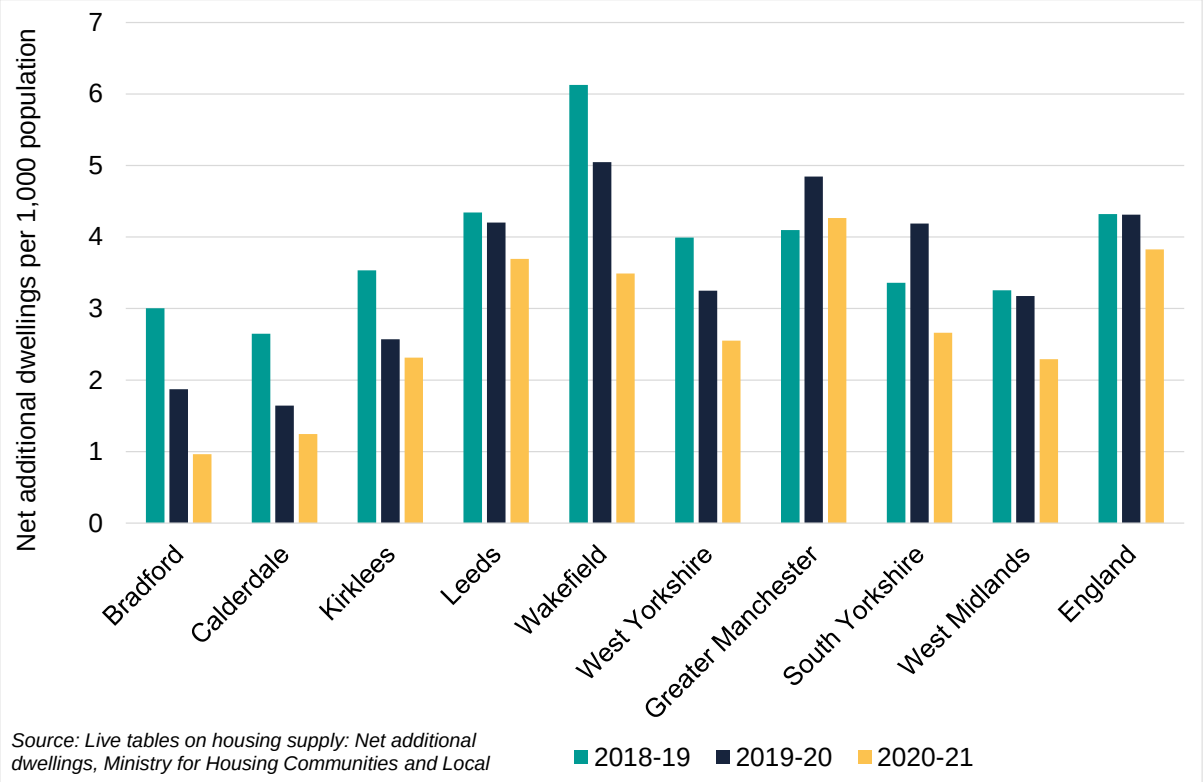
	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Bradford	733	721	874	1,134	907	1,488	1,621	1,614	1,010	522
Calderdale	372	495	327	564	329	376	294	556	347	263
Kirklees	940	581	1,036	521	1,134	983	1,330	1,550	1,131	1,021
Leeds	1,931	1,558	2,229	1,979	2,474	2,824	2,283	3,427	3,333	2,950
Wakefield	852	534	806	1,132	1,921	1,816	1,759	2,114	1,758	1,227
West Yorkshire	4,828	3,889	5,272	5,330	6,765	7,487	7,287	9,261	7,579	5,983

Source: Live tables on housing supply: net additional dwellings, Department for Levelling Up, Housing and Communities

The ratio of net additional dwellings per 1,000 population provides an insight into the relative performance of areas in terms of housing supply.

Within West Yorkshire Wakefield and Leeds have recorded the highest level of net additional dwellings per 1,000 residents in recent years. Wakefield outperformed the national average in 2018/19 and 2019/20 but fell well below the average in 2020/21. Leeds' performance has stayed close to the national average on this measure over the last three years.

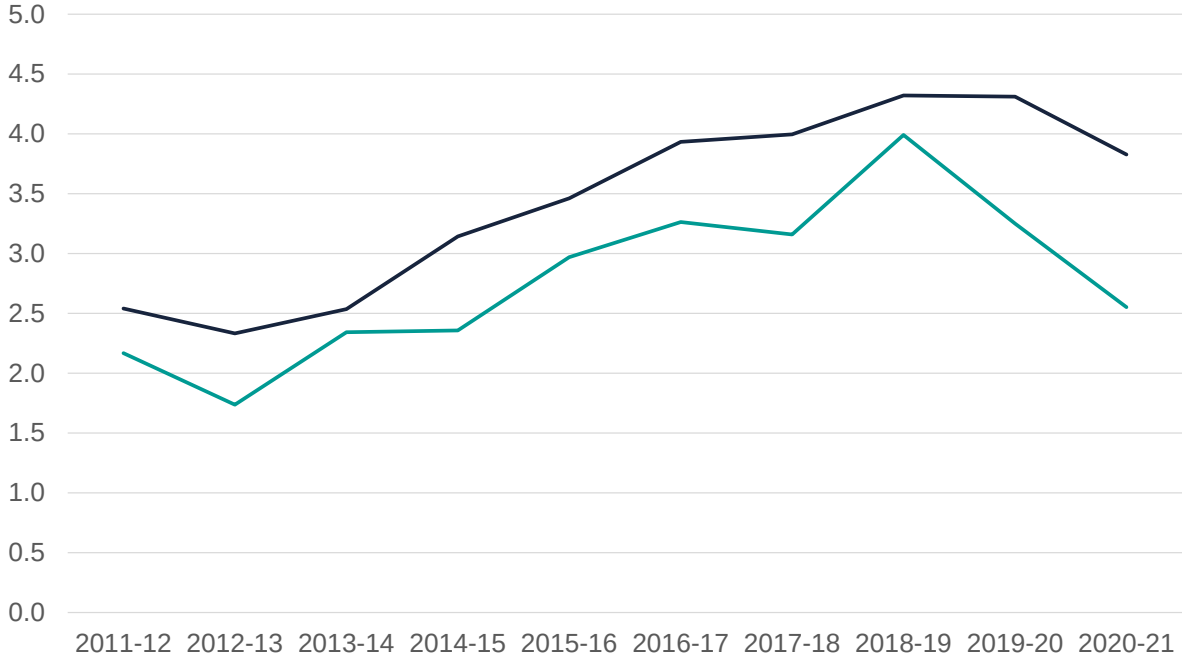
Figure 40: Net additional dwellings per 1,000 population



Source: Live tables on housing supply: Net additional dwellings, Ministry for Housing Communities and Local

Looking at a longer time series, West Yorkshire has consistently delivered fewer net additional dwellings per 1,000 population since 2011/12.

Figure 41: Trend in net additional dwellings per 1,000 population



Source: Live tables on housing supply: Net additional dwellings, Ministry for Housing Communities and Local Government

4.2.3 Housing affordability

Housing in West Yorkshire is relatively affordable in comparison with the national average, based on a simple price / wage affordability ratio. Housing affordability worsened in 2021 as prices grew much more quickly than earnings. It should be noted that the affordability ratio takes no account of the quality and condition of local housing stock and disguises issues of affordability faced by particular groups, such as households in poverty.

Housing is an important contributor to both economic activity and quality of life. For the former, a sufficient supply of appropriate, affordable housing is essential for enabling people to access employment opportunities and other services they require. The cost and quality of housing can also directly affect quality of life –for most people it is the single biggest expense, particularly for those on lower incomes. Poor quality housing can also affect health and wellbeing.

It should be noted that some of the most affordable housing can also be of the poorest quality, such as pre-1919 terraces in some urban areas, including in West Yorkshire. However, the necessary data are not available to allow us to produce quality-adjusted analysis of the affordability of local housing.

About the data

House price data in the UK is robust with the ONS collating and presenting data on sales, volumes and prices broken down to Lower Super Output Area level. Because of this we can give a detailed picture of the real estate market in the local area.

Housing affordability is taken as a ratio between median house price and the median gross annual earnings of the same area. This measure does not provide a complete picture on how accessible the housing market is to individuals, and the Combined Authority has undertaken more detailed analysis to explore these issues[1]. But the measure used here does give an indication of how easily people in the local area could afford to buy there.

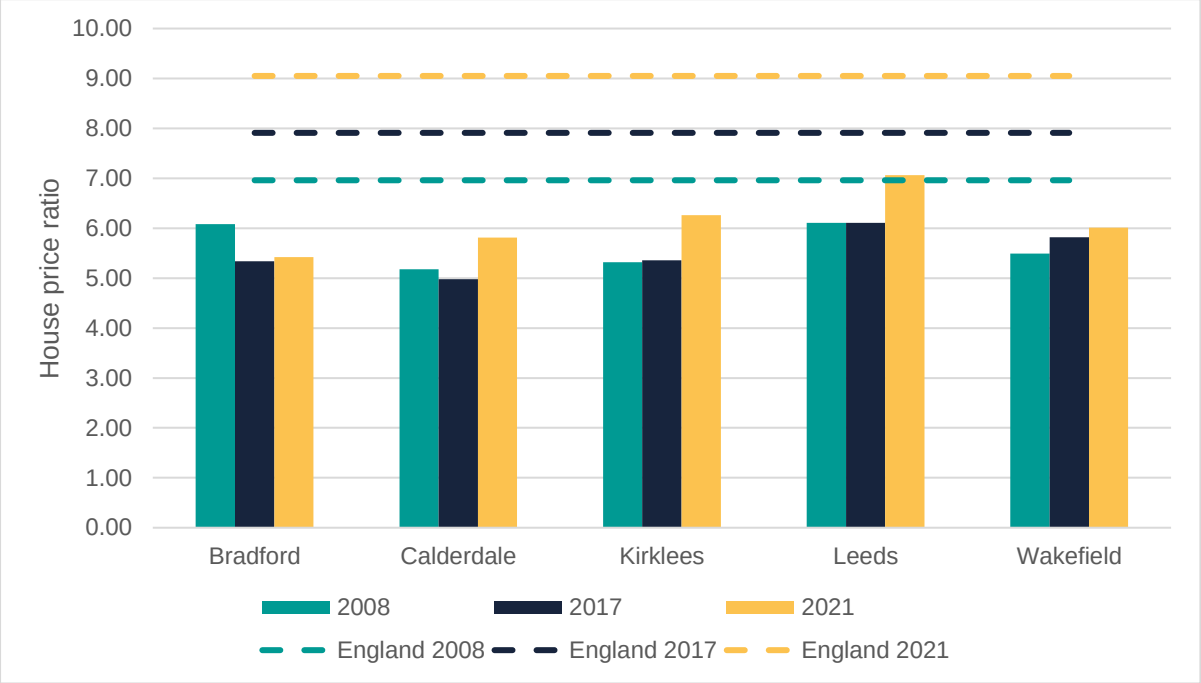
The latest data[2] shows that the median house price in West Yorkshire was £180,000 in the year ending December 2021, well below the England median house price of £280,000.

The house price affordability ratio in England has risen consistently since 2008, with the average house costing 6.96 times median wages in 2008, to 7.91 times mean wages in 2017, and now costing 9.05 times median wages in 2021. On average, houses have continued to become less affordable across England since 2018.

[1] Sheffield Hallam University Centre for Regional Economic & Social Research, Leeds City Region Housing Affordability and Need Study, 2020

[2] Office for National Statistics, House price statistics for small areas in England and Wales: year ending December 2021 (2022)

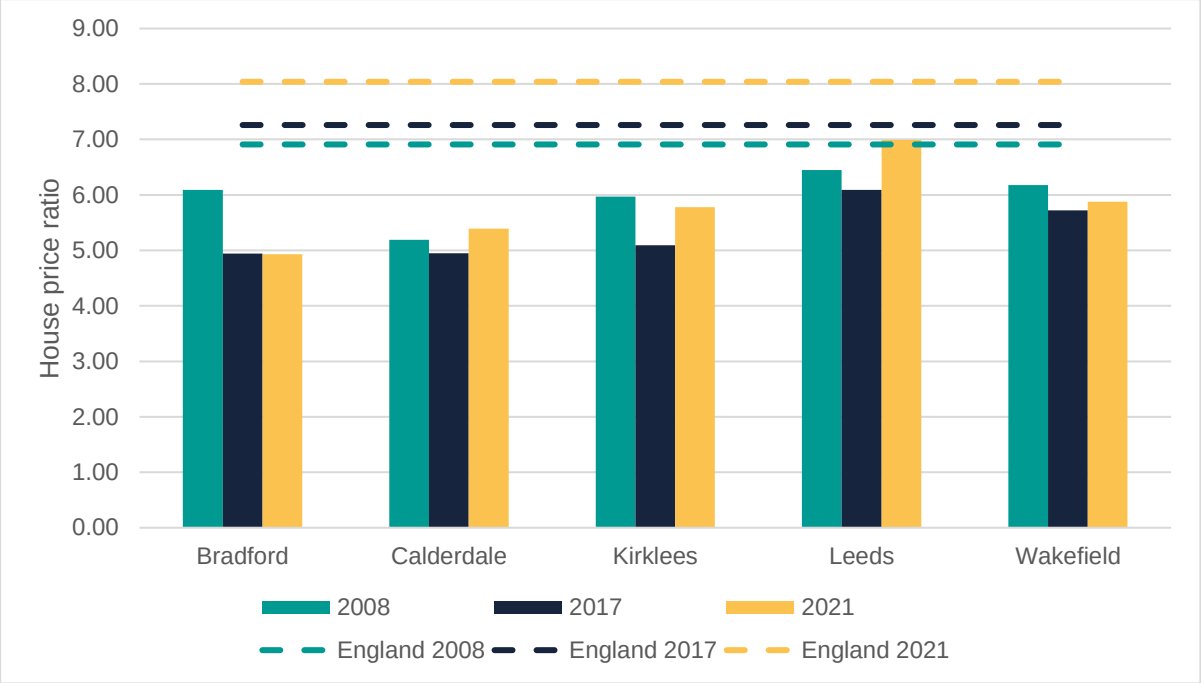
Figure 42: Affordability of house prices 2008, 2017 and 2021 – ratio of median house price to median gross annual earnings (residence-based), West Yorkshire local authorities



Source: Housing affordability in England and Wales: 2021, ONS

In contrast, housing in West Yorkshire has remained affordable relative to the national average over this period. Between 2008 and 2017, housing affordability remained static across the region, and improved in Bradford. House prices were more affordable in all West Yorkshire local authorities (except Leeds) in 2021 than they were in England in 2008.

Figure 43: Lower quartile house price affordability 2008, 2017 and 2021 – ratio of lower quartile house price to lower quartile gross annual earnings (residence-based), West Yorkshire local authorities

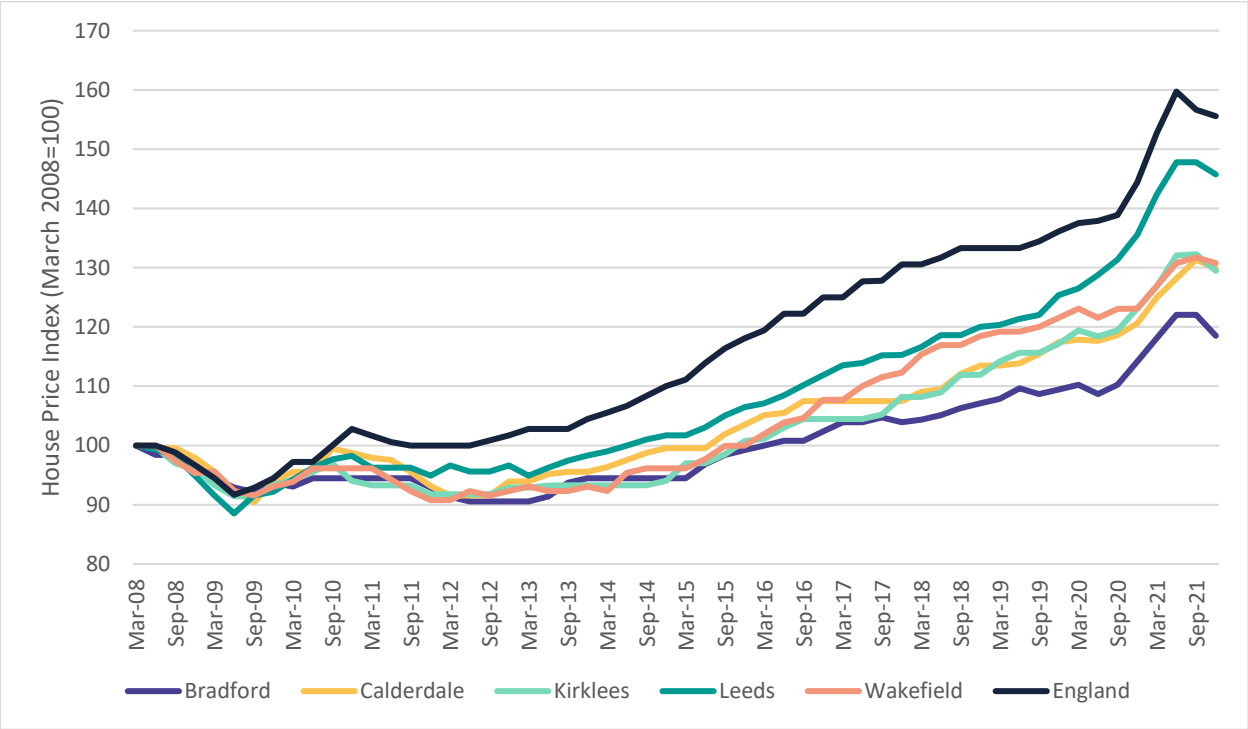


Source: Housing affordability in England and Wales: 2021, ONS

The ratio of lower quartile house prices to lower quartile annual wages follows a similar pattern to average housing affordability, in that the housing affordability ratio in England for those on lower wages rose between 2008 and 2017, and again between 2017 and 2021. Lower quartile house prices were 6.91 times lower quartile annual wages in 2008, and are now at 8.04 in 2021, representing a worsening in housing affordability for those on lower earnings.

The picture in West Yorkshire is slightly different, with lower quartile house prices being more affordable in 2021 for those on lower wages in Bradford, Kirklees and Wakefield than was the case in 2008. Whilst house price affordability has worsened for those on low wages in Calderdale, the current ratio of 5.39 times lower quartile wages remains much lower than even the 2008 national figure. In Leeds, the lower quartile house price affordability ratio is 7.06 times lower quartile earnings in 2021, making lower quartile housing more affordable in Leeds in 2021 than was the case nationally in 2017. West Yorkshire remains a more affordable place to live across the income distribution than the national average.

Figure 44: Median house price in West Yorkshire local authorities, March 2008 – December 2021



Source: House price statistics for small areas, ONS, 2022

A long-term analysis of median house prices across West Yorkshire shows that, following the financial crisis of 2008, it took over 7 years for house prices to recover to March 2008 levels in most areas of West Yorkshire. Whilst Calderdale and Leeds experienced relatively quicker recoveries in house prices, albeit below the national average, it took until March 2016 for all five authorities of West Yorkshire to return to pre-crisis price levels, by which time the median house price in England was 20% higher than in March 2008.

The more recent data shows the spike in median house prices during the pandemic, as individuals increased savings, meaning that a greater pool of potential house buyers were competing for a limited supply of housing. Another component was that, during the lockdowns, people placed a higher value on gardens or extra space within the house. Coupled with the topical issue of unsafe cladding on apartment buildings, this further increased the demand for housing from people living in apartments.

Housing affordability worsened at national level in the year to September 2021 as prices increased by 14% whilst median wages fell by 1%[1]. Prices also grew strongly in West Yorkshire, with increases ranging from 7% in Wakefield to 13% in Leeds, alongside increases of 10% in Bradford and 9% in both Calderdale and Kirklees. Affordability worsened in West Yorkshire as wages generally grew much more slowly, by 2% or less across three of the five local authorities and falling by 3% in Calderdale. Wakefield was an outlier with growth in median earnings of 8%.

Since mid-2021, the latest data shows that house prices are cooling.

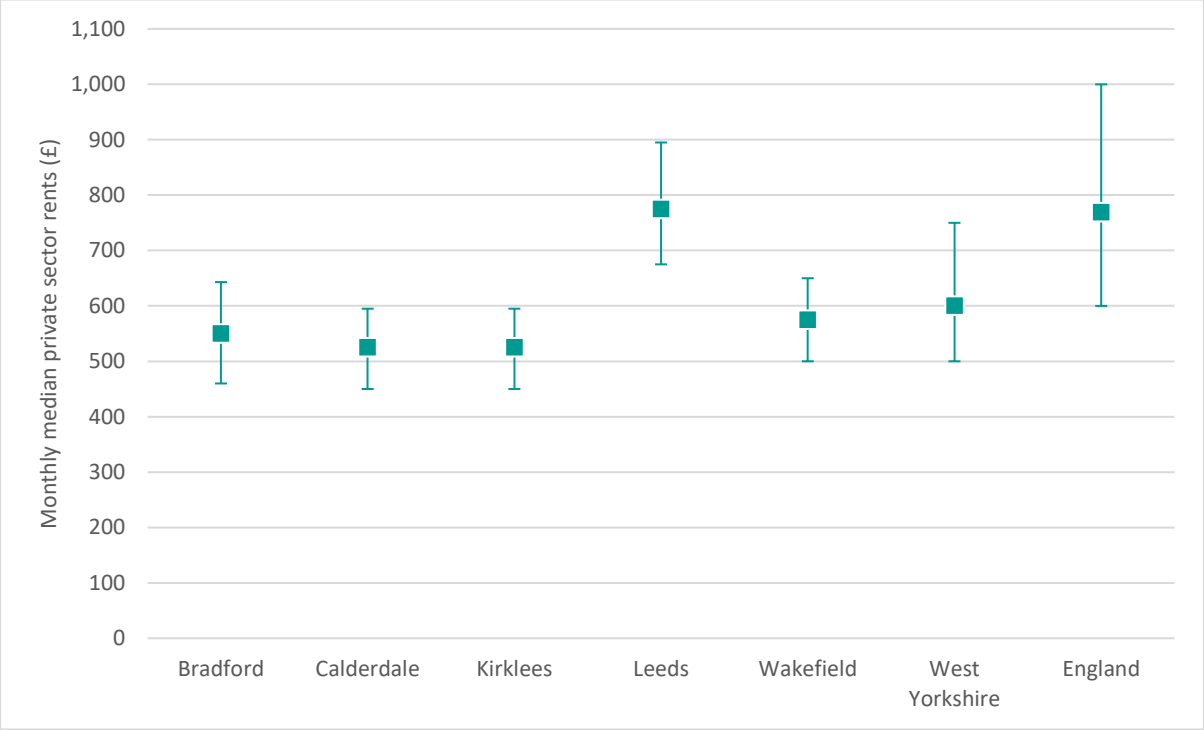
[1] Office for National Statistics, Housing affordability in England and Wales: 2021, 2022

4.2.4 Rented housing costs

The median private monthly rent for two-bedroom properties in West Yorkshire is 80% of the national figure. Median rents are below the national average in all five local authorities except Leeds. More timely national data indicates that rental prices are currently increasing at a rapid rate.

The cost of private housing rental prices is a key indicator of how the cost of living is changing with potential implications for households living in poverty.

Figure 45: Median private sector two-bedroom monthly rents in 2021/22, West Yorkshire local authorities



Source: Private rental sector market statistics, Valuation Office Agency

Median private sector rents for two-bedroom properties were slightly higher in Leeds than in England for 2021/22, at £775 in Leeds compared with £769 nationally. This represents a closing of the gap between Leeds and England, with Leeds currently being £6 per month more expensive than England, compared with £25 more expensive last year. However, median rents for a two-bedroom dwelling have increased considerably, from £725 in 2020/21 to £775 in 2021/22. The error bars on the above chart show the upper and lower quartile rents, which have a much wider range in England than in Leeds.

Median rents are considerably lower in the other local authorities of West Yorkshire, ranging from £525 in Calderdale and Kirklees to £575 in Wakefield. At the West Yorkshire level, median rents are £600 per month, 78% of the national figure.

ONS do not a publish a time series for the Private Rental Market Statistics upon which the above analysis is based. However, data from the Index of Private Housing Rental Prices[1], shows that private rental prices paid by tenants in the UK increased by 3.0% in the 12 months to June 2022, representing the largest annual growth rate since this series began in January

[1] Office for National Statistics, Index of Private Housing Rental Prices, UK: July 2022 (2022)

2016. A range of evidence shows that high demand from prospective tenants is driving up rents.

About the data
The data presented is the median monthly rent for two-bedroom properties between April 2021 and March 2022. Two-bedroom properties are used as a benchmark to take account of the differing composition of housing stock across areas. The data is published by the Office for National Statistics and is calculated using data from the Valuation Office Agency and Office for National Statistics. The data also comes with the lower and upper quartile of rents which can give good insight into the range of different rents available in a local authority. This data looks at properties rated from private landlords, as opposed to local authority and housing association rents.

4.2.5 Fuel poverty

The latest available official data for 2020 show that round 176,000 households in West Yorkshire (18% of all households) were in fuel poverty, a prevalence that was above the national average (13%). This shows that West Yorkshire is relatively poorly positioned to cope with the current energy price crisis.

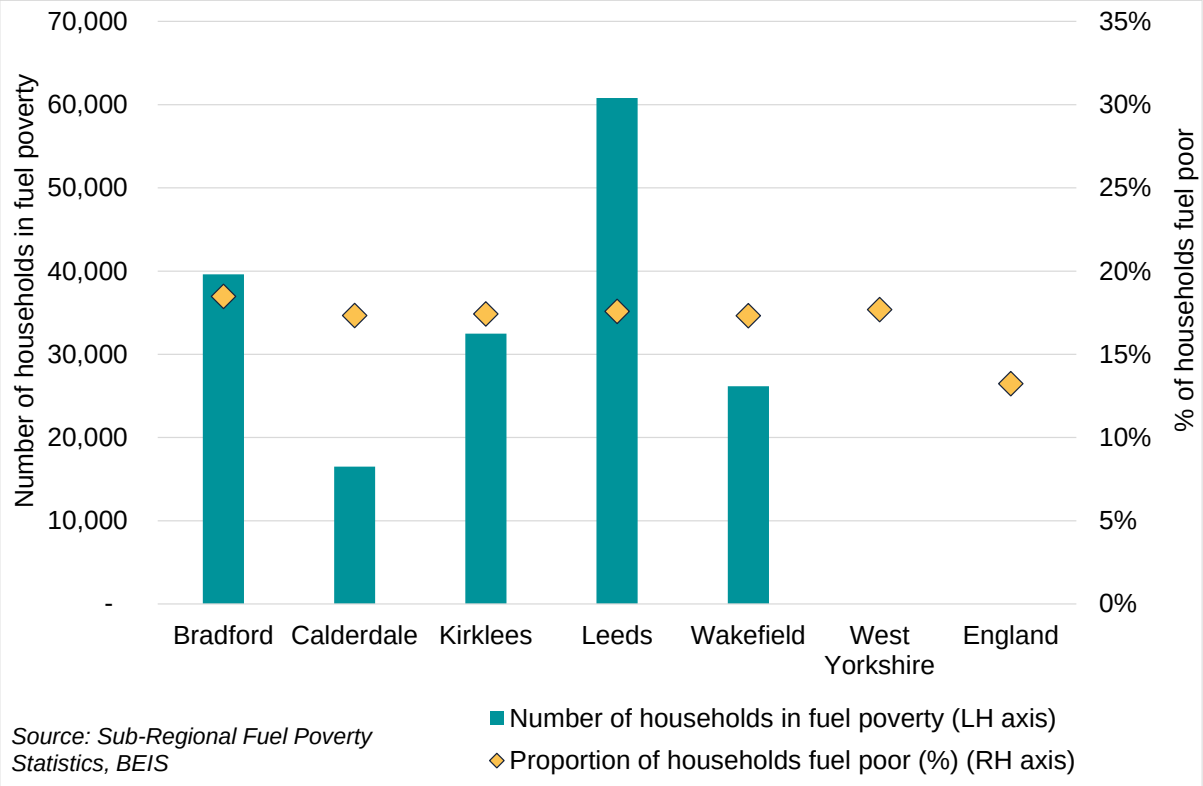
Fuel poverty is the problem faced by households living on a low income in a home which cannot be kept warm at reasonable cost. As well as providing a measure of deprivation, in terms of low incomes relative to an essential element of living costs, the prevalence of fuel poverty points to an issue that can be alleviated through investment in energy efficiency measures. These measures are an important contributor to reducing emissions and tackling the climate emergency.

Fuel poverty has become a much more pressing issue in recent months. A key determinant of the extent of fuel poverty is the level of fuel prices and these have increased in an unprecedented manner since the economy re-opened following the pandemic and the Russian invasion of Ukraine. Prices are expected to see further large increases in the near future. According to one industry analyst, the typical domestic customer is likely to pay £3,200 a year from October 2022, then £3,400 a year from January 2023. The typical bill at present is about £2,000 a year, after the last price cap increase in April 2022. This is already £600 more than the average bill was in October 2021.

The most recent data available is for 2020 – it does not capture the current situation in terms of fuel prices. However, it does show that West Yorkshire already faced a significant fuel poverty challenge prior to recent developments in energy markets.

Around 176,000 households in West Yorkshire were in fuel poverty in 2020, equivalent to 18% of total households in the region. The prevalence of fuel poverty in West Yorkshire is higher than the national average of 13% and also higher than in Greater Manchester (15%) but slightly lower than in Sheffield City Region (18%) and West Midlands CA (19%).

Figure 46: Number and proportion of households in fuel poverty, 2020



Source: Sub-Regional Fuel Poverty Statistics, BEIS

Bradford and Leeds have the highest prevalence of fuel poverty in West Yorkshire, each with 18% of its households classed as fuel poor. The presence of fuel poverty is very similar across the remaining three local authorities in the region, affecting approximately 17% of households in each case.

The government's switch to a new fuel poverty metric in 2021 (see "About the data", below) means that consistent time series data are only available for 2019 and 2020. Between 2019 and 2020 the estimated number of households in fuel poverty grew by about 7,000, an increase in prevalence of one percentage point, from 17% to 18%.

A household's fuel poverty status depends on the interaction of three key drivers:

- Energy efficiency - as households become more energy efficient, they have lower required energy costs (see section 6.2.5)
- Energy prices
- Incomes.

Dwelling characteristics also influence the likelihood of a household being in fuel poverty. For example, age, size and main fuel type used have an influence. Household characteristics also play a part and, for example, ethnic minority households and households with an unemployed head are more likely to be in fuel poverty.

According to estimates by the Resolution Foundation, families in energy-inefficient homes will face monthly gas bills £231 higher than those living in equivalent homes that already meet the Government's efficiency target (EPC C). Over the 2022-23 winter period, this penalty adds up to £849, an average of £141 a month.

According to one forecast, from the End Fuel Poverty Coalition, 29% of households in Yorkshire and the Humber could be in fuel poverty this winter despite the government's price

freeze plan[1]. In some neighbourhoods (including parts of West Yorkshire) almost every home could fall into fuel poverty.

About the data

As announced in the government's fuel poverty strategy 2021, fuel poverty in England is now measured using the Low Income Low Energy Efficiency (LILEE) indicator.

Under the LILEE indicator, a household is considered to be fuel poor if:

-They are living in a property with a fuel poverty energy efficiency rating of band D or below
-When they spend the required amount to heat their home, they are left with a residual income below the official poverty line.

Fuel poverty is measured based on required energy bills rather than actual spending. This ensures that those households who have low energy bills simply because they actively limit their use of energy at home, for example, by not heating their home, are not overlooked.

1

4.2.6 Gigabit capable internet coverage

West Yorkshire has overtaken the national average in terms of gigabit-capable internet coverage and outperforms the national average with regard to full-fibre coverage.

Delivering fast and reliable broadband is vital to the economic performance of West Yorkshire and supports the Combined Authority's strategic objective of delivering inclusive growth by removing barriers to education, training and employment opportunities.

Digital connectivity has the potential to improve the accessibility of training and employment opportunities by improving access to digital resources and remote learning for students and enabling people who spend a large amount of time at home to adopt more flexible working practices or start up a business at home. Improved digital connectivity also increases the range of occupations which can be carried out at home. As well as professional roles, this could include lower skilled occupations such as call centre operators, which may be suited to people who have spent a long time outside the labour market.

Broadband Technologies

Superfast broadband (SFBB), defined as download speeds above 30 Mbps, has traditionally provided enough bandwidth for home Internet use. However, increases in content streaming and working from home, and especially teleconferencing, have created a need for ever increasing bandwidth speeds.

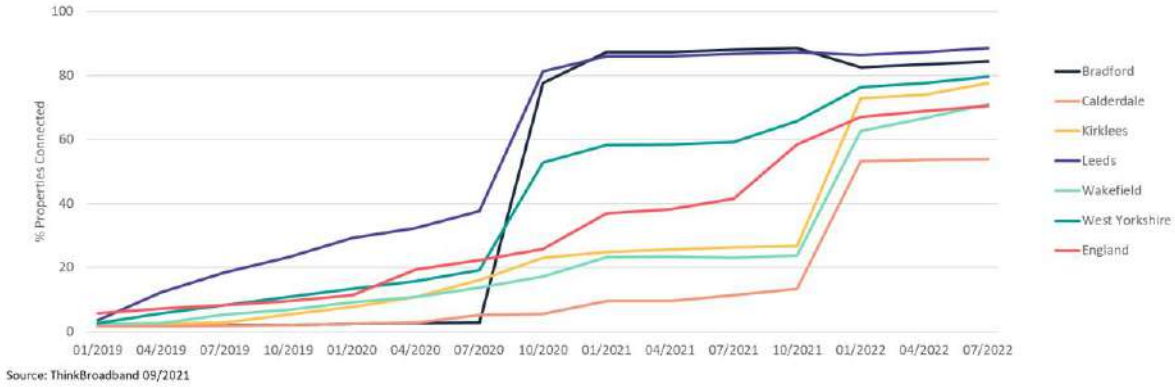
Full Fibre Internet provides download speeds up to 900 Mbps, thirty times faster than SFBB. Whereas SFBB uses fibre optic cable to link to local cabinets and then copper cabling to link to properties, Full Fibre runs fibre optic cables directly to properties.

In addition to Full Fibre broadband similar connection speeds can also be provided through other technologies, such as Data Over Cable Service Interface Specification (DOCSIS), a provision of high bandwidth data transfer though existing cable television infrastructure, and through 5G.

Building Digital UK, part of the Department for Digital, Culture, Media & Sport (DCMS), is supporting the Government's Project Gigabit plan to connect all properties to gigabit capable connections (1 Gbps or 1,000Mbps) through a combination of high-speed broadband and 5G technology. Gigabit broadband is being rolled out across England rapidly –from 10% households in 2019 to almost 70% in 2022. In 2020 the Combined Authority secured £9.11M from Building Digital UK to deploy SFBB and Full Fibre to 1,7000 businesses and 5,000 homes in rural areas over the next two years.

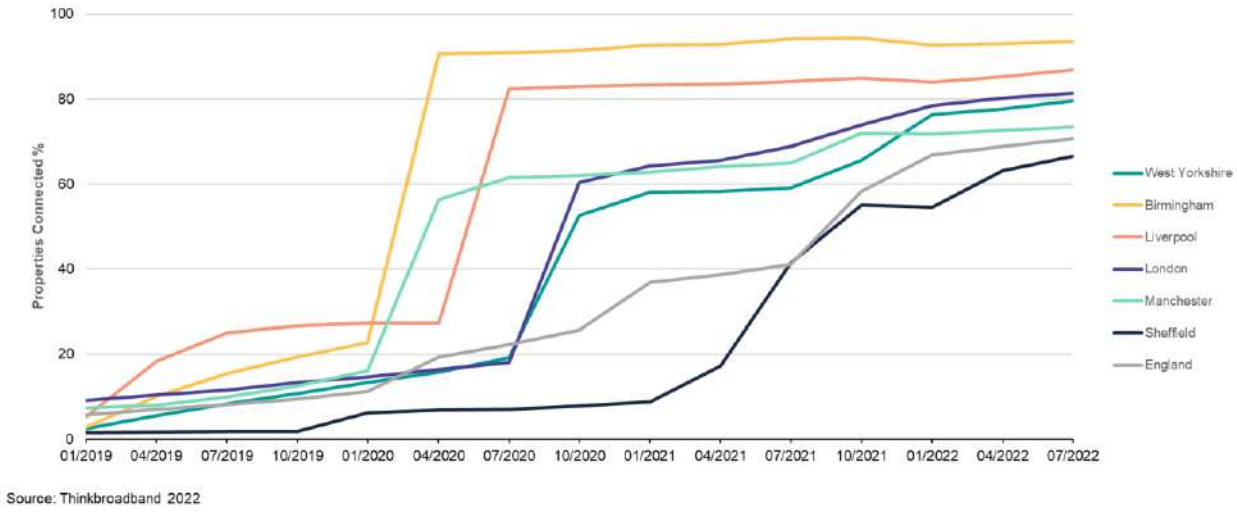
At the start of 2019, the proportion of residential and commercial properties connected to gigabit-capable home Internet in West Yorkshire was less than half the coverage in England. However, as a result of the Superfast West Yorkshire and York roll out programme, West Yorkshire connections have increased to 80%, while coverage in England has only increased to 70%.

Figure 47: West Yorkshire Gigabit-capable internet coverage



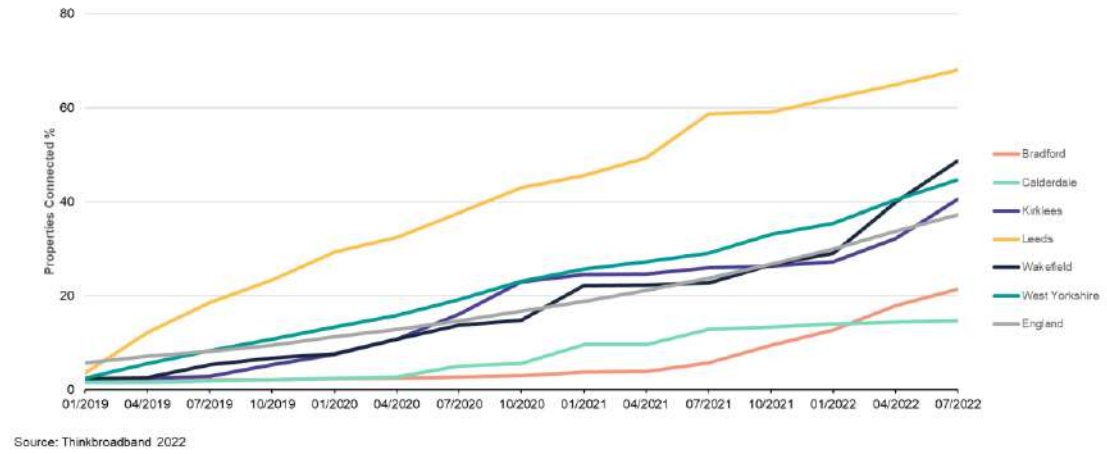
Bradford and Leeds have the highest proportion of properties connected to full fibre, with 84% and 89% of properties connected respectively, exceeding the connection levels of comparator metropolitan areas including Sheffield (66%), Manchester (73%) and the London region (81%).

Figure 48: Gigabit-capable Internet Connections by Metropolitan Areas



At the start of 2019, the proportion of residential and commercial properties connected to Full Fibre in West Yorkshire was less than half the coverage level in England. However, because of the Superfast West Yorkshire and York (SWYY) roll out programme, by the end of 2019 local coverage had exceeded the levels for England and since then has outperformed the national average.

Figure 49: Residential and commercial properties connected to Full Fibre broadband

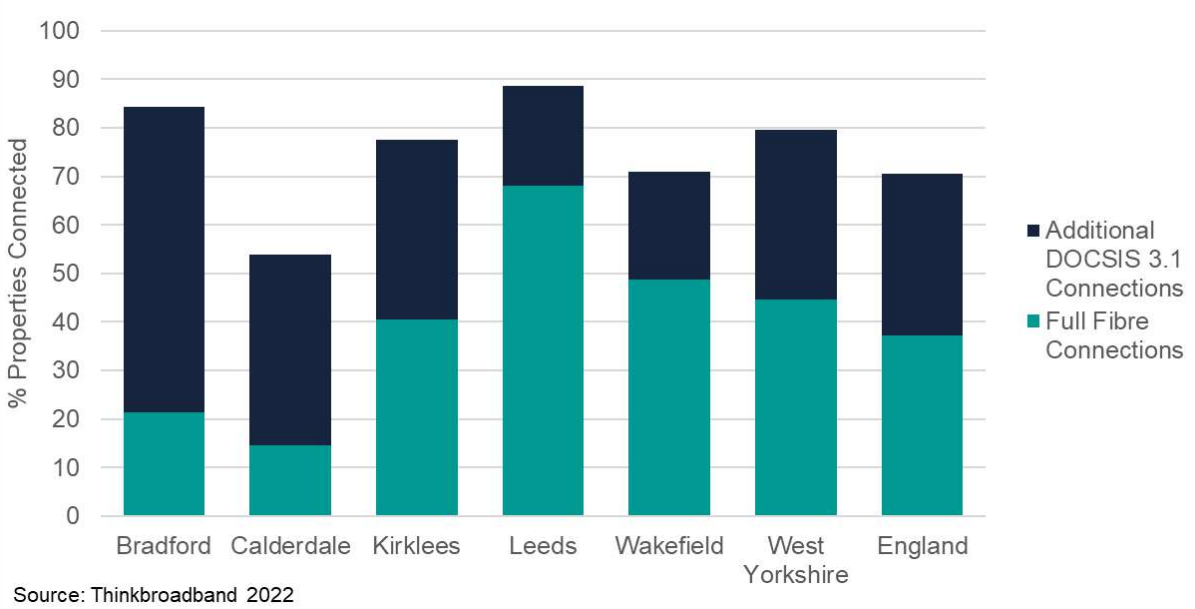


Source: Thinkbroadband 2022

Leeds has the highest proportion of properties connected to Full Fibre with 68% of properties connected, exceeding the connection levels of comparator metropolitan areas including Sheffield (46%), Manchester (35%) and Birmingham (47%) and the London region (44%).

Despite this, connectivity remains low in Calderdale, a district with large rural areas and challenging geography, where installing infrastructure is prohibitively expensive.

Figure 50: West Yorkshire Gigabit-capable Internet connections by type



Source: Thinkbroadband 2022

While the proportion of properties connected to full fibre in West Yorkshire exceeds the coverage level for England, it falls behind that of other metropolitan areas such as Birmingham and Liverpool.

Table 3: Broadband Connections by Type

	Superfast Access >=30 Mbps	Gigabit DOCSIS 3.1 or FTTP	Full Fibre
Birmingham	98	94	47
Liverpool	98	87	47
London	98	82	44
Manchester	96	73	36
West Yorkshire	**98**	**80**	**45**
England	**98**	**71**	**37**

Source: ThinkBroadband 2022

4.2.7 Mobile coverage (4G and 5G)

4G coverage in West Yorkshire is above the national average but usage is relatively low.

Current 4G networks provide download speeds up to 10 Mbps, with maximum speeds up to 40 Mbps, matching SFBB speeds. Mobile data is an increasingly important part of our daily lives, from people checking news, emails and social media while out and about to utilities companies using it to provide gigabit-capable internet in isolated and hard to reach communities where traditional broadband solutions are not viable.

Future 5G technologies will provide average download speeds of 150-200 Mbps and peak speeds of over 1 gigabyte per second. A robust 5G mobile Internet network will play a transformative role in the future development of the region. As well as supporting local business and services development and providing internet coverage for large sites such as warehouses and hospitals, 5G will enable gigabit-capable Internet connections. The technology will also connect rural or isolated dwellings and provide the bandwidth necessary for autonomous vehicles and other mobility as a service transport solutions.

West Yorkshire has historically had better 4G coverage than the rest of the country, with 79% of properties in the region having indoor 4G coverage from all network providers since June 2017, a time at which only 68% of properties in England had this level of coverage.

Coverage in West Yorkshire has since risen to 86% of all properties, with the gap in coverage compared to the rest of England decreasing to two percentage points.

West Yorkshire's 4G coverage outperforms the England average by 3 percentage points, based on the measure presented in the table below. Eighty-six per cent of premises are covered compared with the England average of 83%. Leeds has the highest coverage with a figure of 90% and Kirklees has the lowest, at 81%, but this is still only 2 points below the national average.

Table 4: Mobile broadband coverage

Area	4G Premises (Indoor) Coverage from All Providers January 2022
Bradford	85%
Calderdale	88%
Kirklees	81%
Leeds	90%
Wakefield	82%
West Yorkshire Average	**86%**
England	**83%**

Source: Ofcom Connected Nations Spring Report 2022

While the volume of mobile data downloaded continues to increase as coverage expands and banking, ticketing and email apps become a part of daily life, download volumes in West Yorkshire are below the level for England.

5G Connectivity

5G transmitters are providing coverage in all five West Yorkshire district centres, as well as in Dewsbury, Mirfield, Morley and Pontefract. However, the detailed information about the extent of coverage is not publicly available. This will be a key indicator for the future.

5 Championing culture, sport and creativity

Summary

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 well represented in Leeds. Culture, sport and creative activities were exposed to the coronavirus restrictions, resulting in a fall in employment in 2020.

At the time of writing additional indicators were being consulted on as part of the Culture, Heritage and Sport Framework and will be incorporated into future iterations of State of the Region.

5.1 Overview of the priority

Culture, heritage and sport are at the heart of the Mayor's vision for a just, fair and lasting economic recovery. The Mayor has established a Culture, heritage and sport Committee to provide strategic oversight for this important work to support the creative and cultural sectors of West Yorkshire.

Engagement in cultural activities transforms the lives of individuals, communities and place, playing a key role in delivering a stronger economy and more inclusive communities. That is why the creative and cultural industries are central to the region's strategy for economic recovery.

The Combined Authority's Culture, Heritage and Sport Framework is currently under development and is our plan to grow and sustain culture, heritage and sport in the region.

The draft framework is arranged into four themes, which form the focus for investment and activity in Culture, Heritage and Sport. They are:

- People - Everyone in West Yorkshire can enjoy culture, heritage and sport
- Place - West Yorkshire is a creative, sustainable and vibrant region with culture, heritage and sport at its heart
- Skills - You can build a great career in culture, heritage or sport in West Yorkshire
- Business - West Yorkshire is the place to grow your creative business.

Additional indicators will be developed for this priority once the framework has been finalised.

5.2 Performance against the indicators

5.2.1 Employment in cultural, sport and creative activities

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.

The culture, sport and creative sectors are not traditional industries in the context of the National Accounts and published statistics. However, the Department for Digital, Culture, Media and Sport (DCMS) has developed standard definitions[1] of the sectors for which it has responsibility, which are used as the basis for the following analysis. These sectors are:

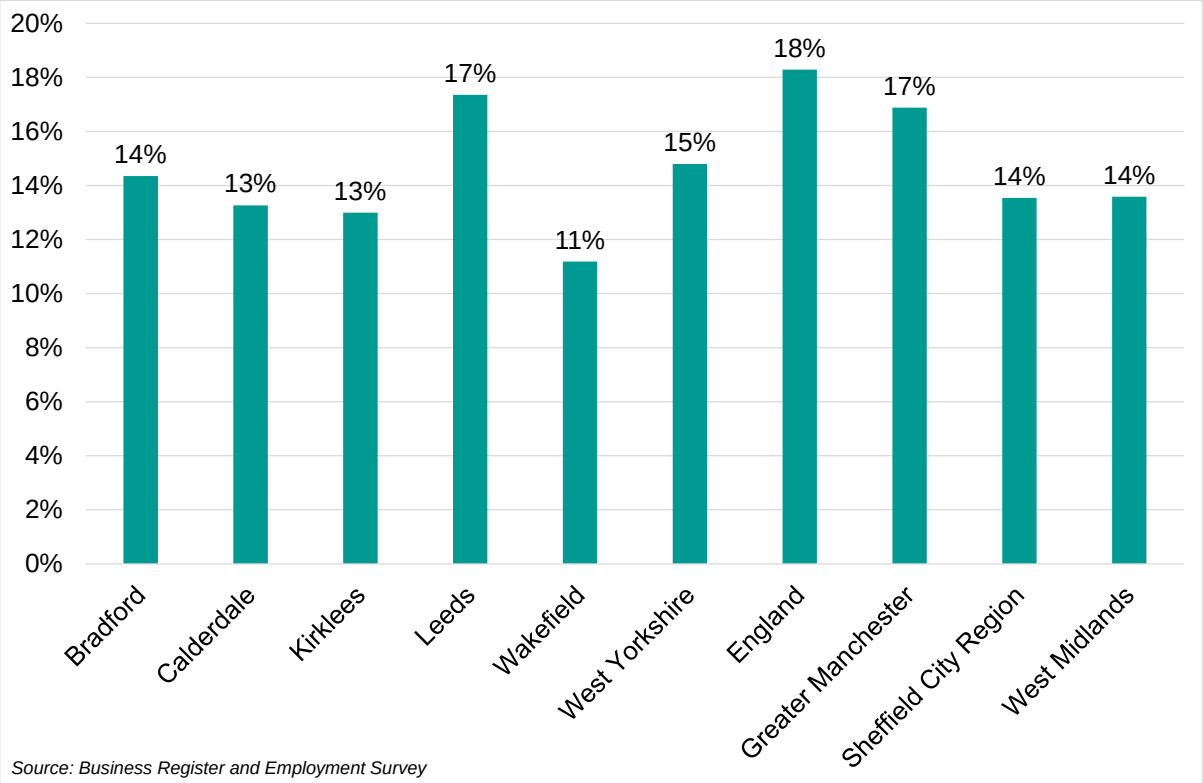
- Creative Industries
- Cultural Sector
- Digital Sector
- Gambling
- Sport
- Telecoms
- Tourism.

The tourism sector includes hospitality activities, elements of transport and travel agency activities. The sport sector includes operation of sports facilities and sports clubs.

Around 15% of employment in West Yorkshire is in the culture, sport and creative sector based on this definition, equivalent to 158,000 jobs. The prevalence of employment in these activities varies by local authority within West Yorkshire; it is highest in Leeds, with similar figures for the remaining authorities, except Wakefield, which is somewhat lower than the West Yorkshire average.

[1] Department for Digital, Culture, Media and Sports, DCMS Sector Economic Estimates Methodology (2021)

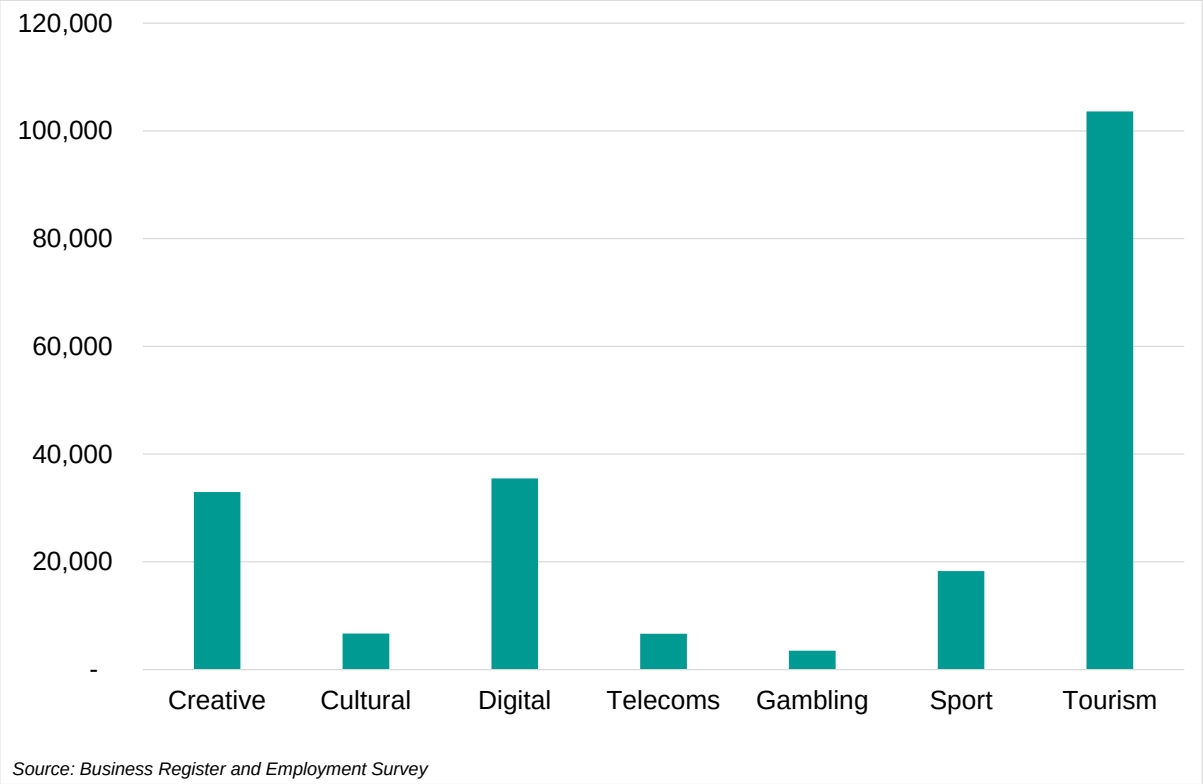
Figure 51: Employment in cultural, sport and creative activities as a proportion of total employment, 2020



Source: Business Register and Employment Survey

Cultural employment in West Yorkshire is below the national average in proportionate terms. It is also lower than in Greater Manchester but slightly higher than in the comparator areas of Sheffield City Region and West Midlands CA.

Figure 52: Employment by DCMS sector[1], West Yorkshire, 2020



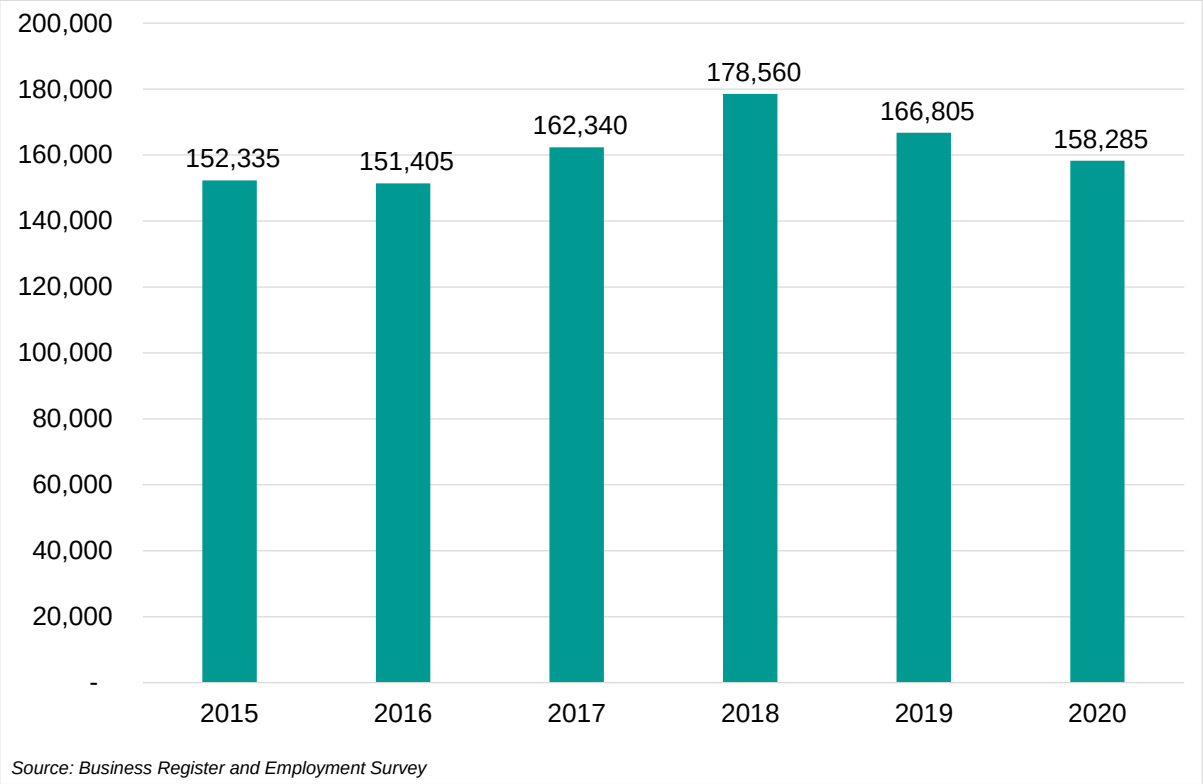
Source: Business Register and Employment Survey

The sector with the biggest employment within this category is tourism, followed by digital and creative.

Employment in culture, sport and creative was on an upward trend in the period to 2018 but declined in both 2019 and 2020. The latest employment figure for 2020 was 11% lower than at its peak in 2018.

[1] It should be noted that there is a degree of overlap between the DCMS sectors, reflecting the development of individual sector definitions in isolation as new sectors have fallen within the department's remit. The figures for these individual sectors do not sum to the total figure for employment in the DCMS sectors cited above.

Figure 53: Trend in employment in culture, sport and creative activities



Source: Business Register and Employment Survey

Employment in these activities also fell at national level between 2019 and 2020, by 5%.

About the data
The Business Register and Employment Survey (BRES) is the official source of employee and employment estimates by detailed geography and industry. The survey collects employment information from businesses across the whole of the UK economy for each site that they operate. BRES includes self-employed workers (within the employment estimates) as long as they are registered for Value Added Tax (VAT) or Pay as You Earn (PAYE) schemes.

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

Key points

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

There was a sharp fall in greenhouse gas emissions between 2019 and 2020 in West Yorkshire of 12% - four times the annual average rate of reduction in the previous decade. This reflects the impact of the pandemic and future data is expected to show an increase in emissions.

The bulk of the reduction in West Yorkshire's emissions was due to a fall in transport emissions of 17% in one year, accounting for more than half of the overall net decrease.

The greenhouse gas emissions intensity of the West Yorkshire economy, in terms of CO2 equivalent emissions (kt) per £m of GVA, is above the national average. The region's emissions intensity continues to fall with a bigger decrease in 2020 than that seen nationally.

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 (34% versus 40%). Poor energy efficiency has a major bearing on a household's susceptibility to fuel poverty as well as contributing to greenhouse gas emissions.

6.1 Overview of the priority

In June 2019, a climate emergency was declared for West Yorkshire and we are now prioritising our commitment to clean growth and our ambition to become a net zero carbon economy by 2038, with significant progress by 2030. The increasing severity of flooding in West Yorkshire, demonstrates that climate change poses a very real threat to the economy and the livelihoods of many in our region.

The mayor's Climate and Environment Plan sets out how West Yorkshire can become a place where everyone can enjoy the economic, health and environmental benefits of a net zero carbon economy by 2038. It sets out the actions that will be taken across a range of themes.

The headline indicators for this priority focus on West Yorkshire's performance on carbon emissions, the region's exposure to flooding, progress on energy efficiency and residents' access to green and blue infrastructure.

Several of these indicators are relevant to additional priorities beyond tackling the climate emergency. For example, progress on building energy efficiency supports inclusive growth by reducing living costs and can contribute to the alleviation of poverty. More generally, deprived communities have a greater exposure to the impact of climate change resulting from CO_2 emissions, in the form of flooding, for example.

6.2 Performance against the indicators

6.2.1 Greenhouse[1] gas emissions

There was a sharp fall in greenhouse gas emissions between 2019 and 2020 in West Yorkshire of 12% - four times the annual average rate of reduction in the previous decade. This reflects the impact of the pandemic and is not expected to be fully sustained into 2021.

In June 2019 a climate emergency was declared for West Yorkshire. The Combined Authority and its partners are placing increased emphasis on a commitment to clean growth and the stated ambition is for the region to become a net zero carbon economy by 2038.

The central indicator of progress is the region's level of greenhouse gas (including carbon dioxide) emissions. As of 2020, the latest year for which data are available, West Yorkshire emitted 10,629 kt CO_2 equivalent. This equates to 4.5 tonnes per capita, slightly below the national average of 5.1 tonnes.

Total emissions data for the wider range of greenhouse gases is only available for the 2018 to 2020 period. These show the impact of the pandemic on emissions in 2020. Between 2019 and 2020 emissions in West Yorkshire fell by 12% compared with a reduction of 10% nationally. In Wakefield there was a decline of 16%. The Combined Authority comparator areas also saw reductions of between 9% and 10%.

Carbon dioxide emissions, which form the bulk of greenhouse gas emissions, are in long-term decline, having fallen by 41% in West Yorkshire between 2005 and 2020, a somewhat slower rate of decrease than the 44% seen nationally. Carbon dioxide emissions fell by 12% between 2019 and 2020 in West Yorkshire, compared with an average annual rate of decline in the previous decade of 3%. This shows the scale of the impact of the coronavirus pandemic.

The large reduction in emissions seen in 2020 is not sustainable. More timely UK figures show that territorial greenhouse gas emissions were 4.7% higher than 2020, although they were still 5.2% lower than 2019[2].

The main driver of the decrease in UK greenhouse emissions is a change in the fuel mix for electricity generation, with a decrease in the use of coal and gas and more use of renewables. In West Yorkshire, electricity generation through renewables increased by 95% between 2014 and 2020[3].

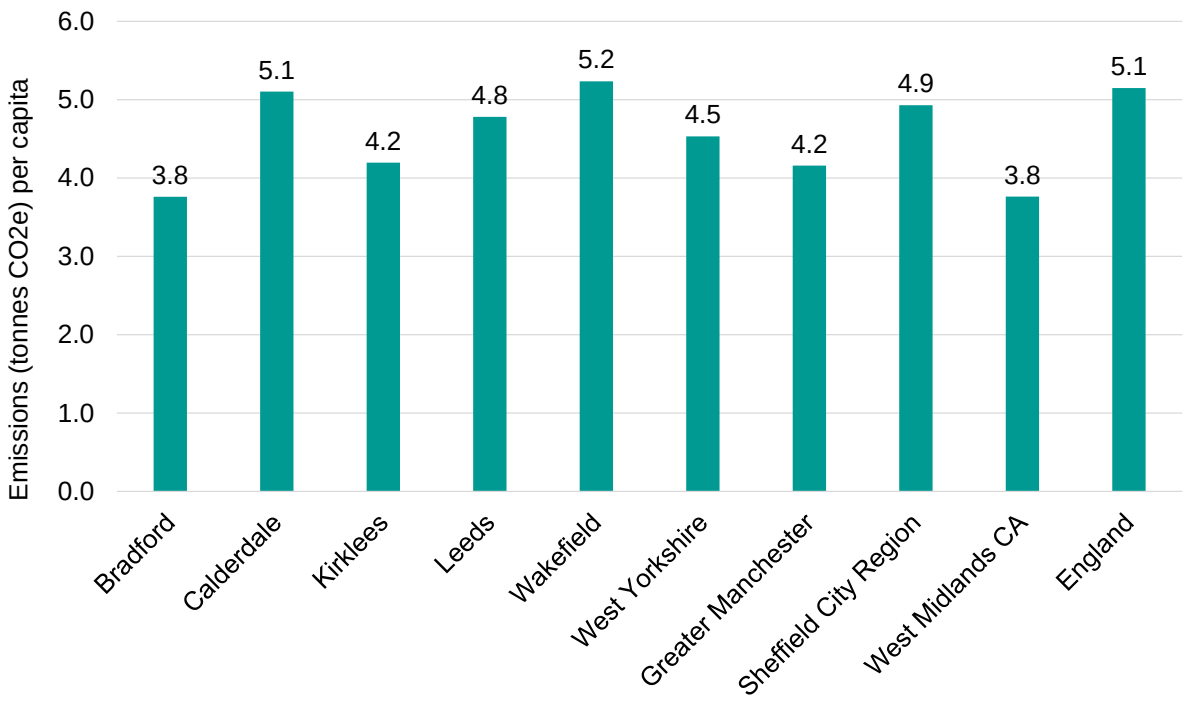
The Baseline Scenario set out in the West Yorkshire Carbon Emissions Reduction Pathways study, which reflects the likely outcome with current policies, projects a reduction of only 32% in emissions between 2020 and 2038, due to a lack of strong incentives for consumers and businesses to switch to low carbon heat, transport and other practices[4].

By local authority, Leeds has the highest level of emissions, reflecting the size of its economy. In per capita terms the figures range from 3.8 tonnes in Bradford to 5.2 tonnes in

[1] The analysis presented here is based on data relating to emissions of carbon dioxide (CO2), methane (CH4) and nitrous oxide (N2O), but not fluorinated gases.
[2] Department for Business, Energy and Industrial Strategy, Provisional UK greenhouse gas emissions national statistics 2021 (2022)
[33] Department for Business, Energy and Industrial Strategy, Regional Renewable Statistics (2021)
[4] West Yorkshire Combined Authority, West Yorkshire Carbon Emissions Reduction Pathways, 2020

Wakefield. Leeds and Calderdale are both close to 5 tonnes per capita, whereas in Kirklees emissions stand at 4.2 tonnes per capita.

Figure 54: Per capita greenhouse gas emissions



Source: UK local authority and regional greenhouse gas emissions national statistics: 2005 to 2020, Department for Business, Energy & Industrial Strategy, June 2022

Per capita emissions in West Yorkshire as a whole, are slightly lower than those in Sheffield City Region and England, but higher than those in Greater Manchester and the West Midlands CA area.

About the data

The source of the data is the UK National Statistics publication 'UK local authority and regional greenhouse gas emissions national statistics' from the Department for Business, Energy and Industrial Strategy (published annually). This provides the latest estimates of territorial greenhouse gas (CO_2 equivalent) emissions for local authority areas for 2005-2020. The statistics show estimated emissions allocated on an "end-user" basis where emissions are distributed according to the point of energy consumption (or point of emission if not energy related). Except for the energy industry, emissions from the production of goods are assigned to where the production takes place. Therefore, emissions from the production of goods which are exported will be included, and emissions from the production of goods which are imported are excluded.

Performance against emissions reduction pathways

The Carbon Emission Reduction Pathways (CERP) study provides a baseline forecast (the likely levels of greenhouse gas emissions if no new action to reduce them is taken) and three possible scenarios to decarbonise the economy by 2038. The three scenarios are:

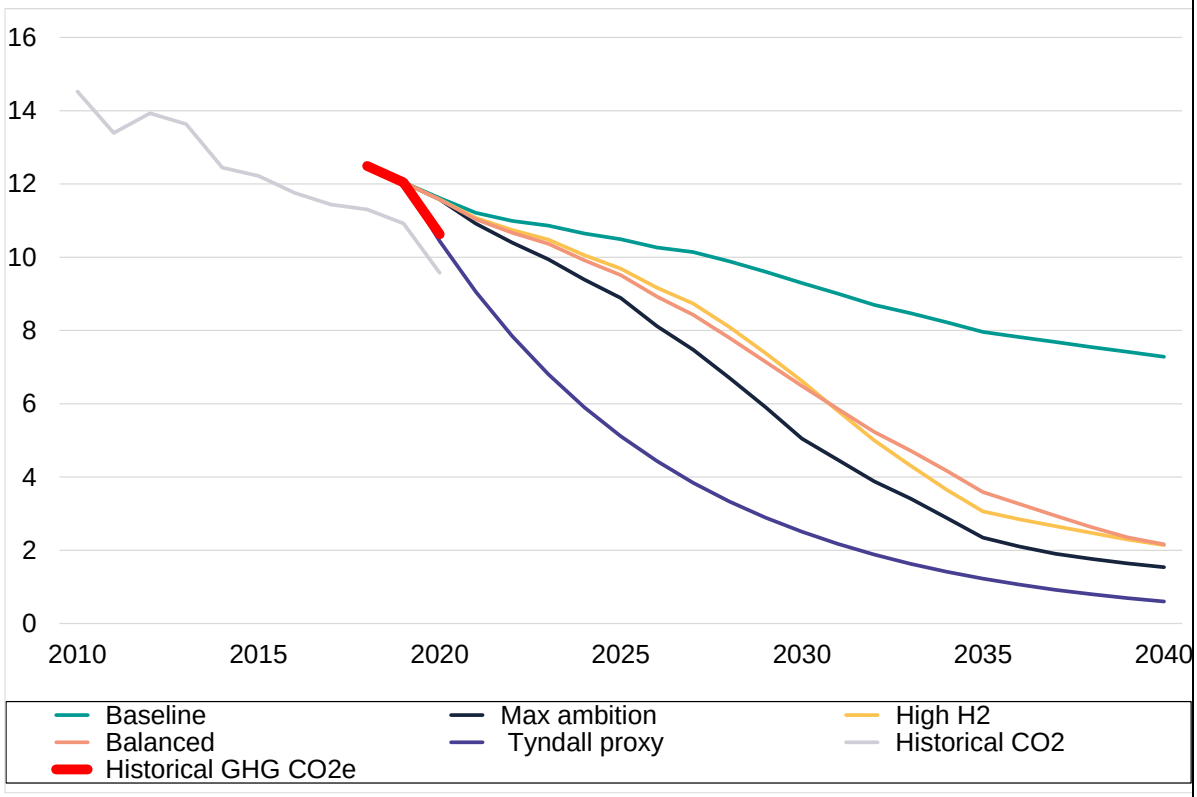
- Max Ambition – This assumes significant electrification of heat, transport and industry supported by enabling technologies such as demand-side response and energy storage. This also includes significant increases in low carbon power generation with accelerated negative emission technologies and ambitious forest planting rates.
- High Hydrogen (High H2) - Promotes large-scale hydrogen use and carbon capture and storage roll-out. The existing gas network is repurposed for hydrogen, enabling significant hydrogen use in buildings, heating, industry, power and transport. This is supported accelerated forest planting and bioenergy production.
- Balanced – Encompasses a balanced mix of technology across all sectors with contributions from hydrogen, electrification, bioenergy, carbon capture and storage, and decentralised energy production.

Carbon budgets, which are consistent with both the CERP scenario pathways and the statistics published by the government, have been developed by the Combined Authority. These give the total amount of greenhouse gases (in carbon dioxide equivalent terms) which can be emitted while staying within the CERP carbon reduction pathways. These carbon budgets can therefore be used for monitoring progress against the CERP pathways.

The Tyndall Centre for Climate Change Research provides a carbon budget tool on its website which automatically generates a carbon budget report for any local authority or collection of local authorities. This suggests what the implications of the United Nations Paris Agreement are for the relevant local authority in terms of reductions of carbon dioxide emissions only.

Figure 55 shows the three CERP carbon reduction pathways, together with the CERP (business as usual) Baseline. The Tyndall proxy line shown is the result of simply reducing emissions by 13.3% per year from 2019 (as suggested in the Tyndall Centre carbon budget report). The carbon dioxide equivalent figures are shown for 2018-2020 (these are all the years for which these figures are currently available). Historical carbon dioxide emissions for 2010-2020 are shown for comparison.

Figure 55: West Yorkshire emissions reduction pathways



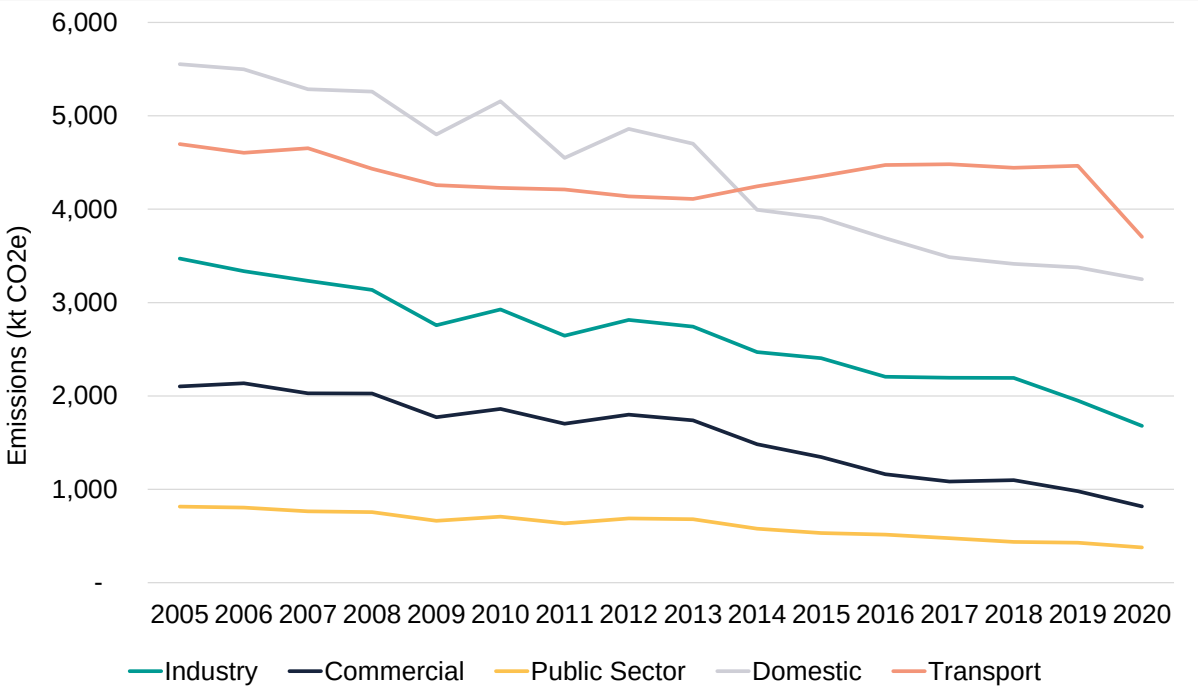
It is clear that 2020 was an unusual year due to the impact of the pandemic. The effect of the downturn in carbon emissions in 2020 is that carbon budgets dipped below all three of the CERP carbon reduction pathways, however the reduction was not quite enough to achieve the Tyndall proxy reduction pathway (the 2019 to 2020 reduction was slightly less than 13.3%).

6.2.2 Greenhouse gas emissions by sector

The biggest driver of the fall in emissions in 2020 was the transport sector.

Emissions from all main sectors of end users (domestic, industry, commercial, public sector and transport) have fallen over the period from 2005 to 2020 in West Yorkshire. The rates of decline for this period for industry (-52%), commercial (-61%), public sector (-54%) and domestic (-41%) all far exceeded the rate for transport (-21%). As a result, transport is now the largest sector by emissions in West Yorkshire, accounting for 35% of the total. This is likely to be because the bulk of the reduction between 2005 and 2019 was driven by the significant decarbonisation of electricity generation, which has comparatively little impact on transport, as this largely remains fossil fuel powered.

Figure 56: Trend in greenhouse gas emissions by selected sectors, West Yorkshire

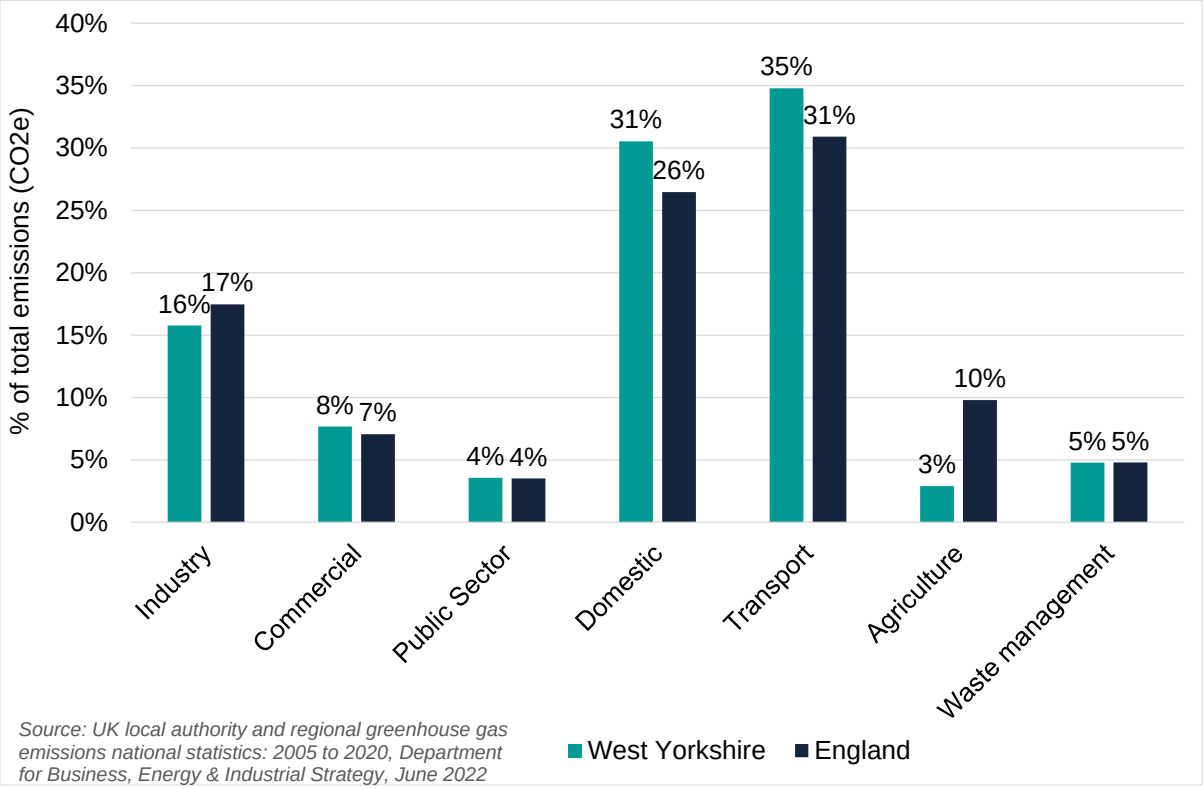


Source: UK local authority and regional greenhouse gas emissions national statistics: 2005 to 2020, Department for Business, Energy & Industrial Strategy, June 2022

All broad sectors saw substantial reductions in emissions between 2019 and 2020, mainly because of the pandemic. Transport emissions fell by 17% in a single year and since this is the biggest source of emissions in West Yorkshire this equated to 54% of the total decline for 2019/20.

In West Yorkshire, 16% of CO_2e emissions were attributed to the industrial sector in 2020, 8% to the commercial sector, 4% to the public sector, 35% to transport and 31% to the domestic sector. Compared with the national average, emissions in West Yorkshire are weighted towards the domestic sector and transport, with industry and agriculture accounting for smaller proportions. West Yorkshire's lower emissions from industry and agriculture

Figure 57: Profile of greenhouse gas emissions by sector, 2020

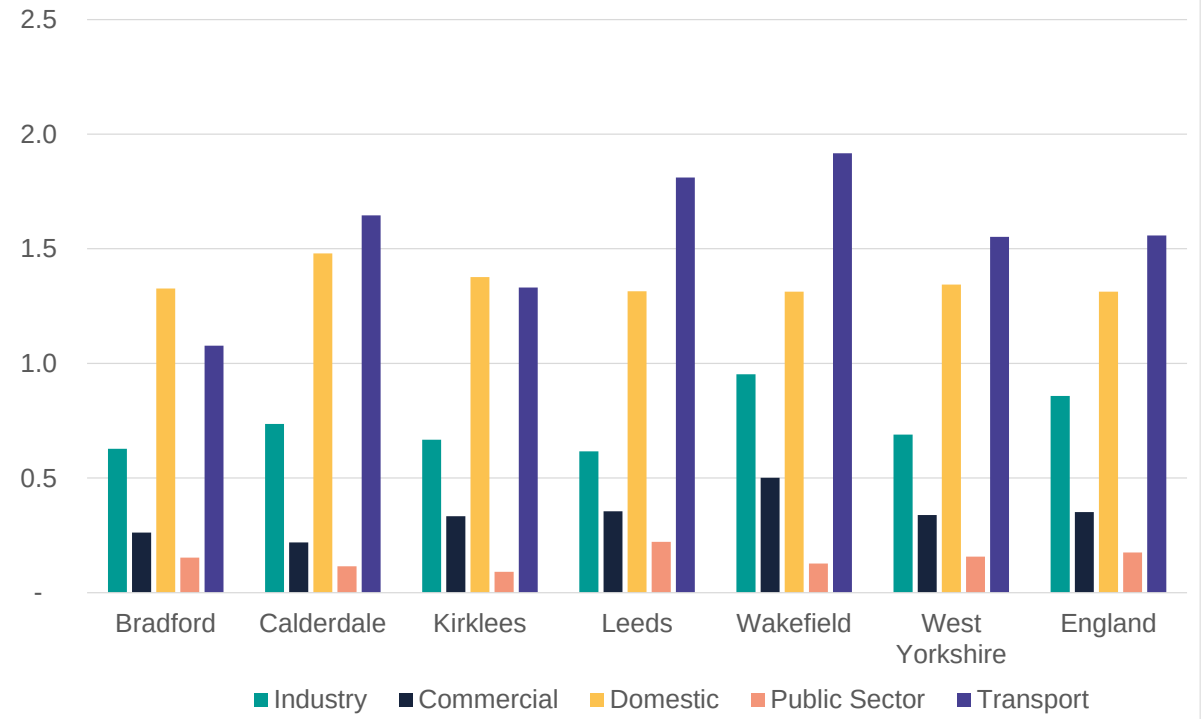


Source: UK local authority and regional greenhouse gas emissions national statistics: 2005 to 2020, Department for Business, Energy & Industrial Strategy, June 2022

Per capita domestic emissions are at a fairly similar level across the West Yorkshire local authorities. This is also the case for industry and commercial, except for Wakefield, where emissions from industry are much higher, reflecting emissions from industrial gas and industrial electricity. Per capita transport emissions vary widely and are highest in Wakefield and Leeds, followed by Calderdale. They are lower in Kirklees and particularly in Bradford.

Road transport is the main contributor to overall transport emissions. Although vehicle efficiency improved during this period, this was probably offset by changes in demand and road mileage.

Figure 58: Per capita emissions by selected sector, 2020



Source: UK local authority and regional greenhouse gas emissions national statistics: 2005 to 2020, Department for Business, Energy & Industrial Strategy, June 2022

6.2.3 Emissions intensity ratio

The greenhouse gas emissions intensity of the West Yorkshire economy, in terms of CO_2 equivalent emissions (kt) per £m of GVA, is above the national average and above some of the comparator areas. The region's emissions intensity continues to fall with a bigger decrease in 2020 than that seen nationally.

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. It is an important measure because a reduction in emissions intensity may indicate a shift towards a greener and more sustainable economy. This could be through industries becoming more efficient in their processes and emitting less per unit of GVA. At the same time, it may also reflect changes to the structure of the economy, for example, a change from manufacturing to services, which produce fewer greenhouse gas emissions.

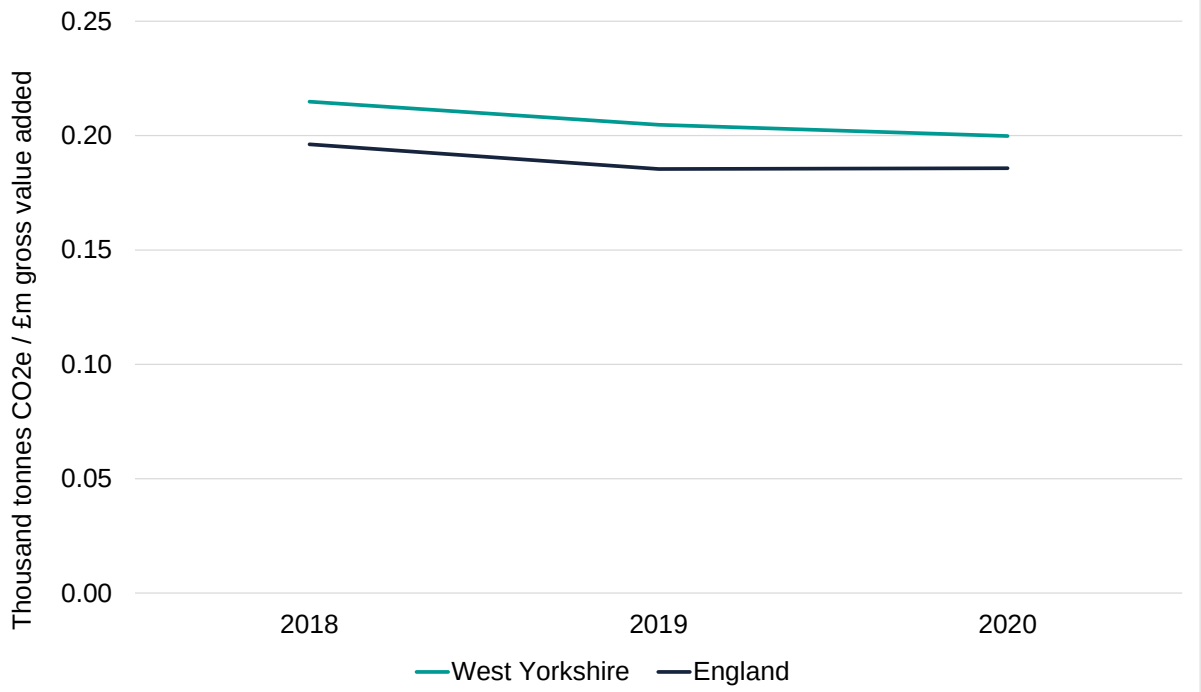
There are wide local variations in emissions intensity, mainly because of the economy and geography of different local areas.

Figure 59: Greenhouse gas emissions intensity, 2020

Source: UK local authority and regional greenhouse gas emissions national statistics: 2005 to 2020, Department for Business, Energy & Industrial Strategy, June 2022

In 2020, greenhouse gas emissions intensity for West Yorkshire was around 0.19 thousand tonnes of CO_2 equivalent per £ million of GVA. This is slightly above the national average of 0.17 and above the comparator areas, except South Yorkshire. The latter has a particularly high intensity possibly because of the concentration of energy-intensive industries such as steel in the area.

Figure 60: Trend in greenhouse gas emissions intensity[1]



Source: UK local authority and regional greenhouse gas emissions national statistics: 2005 to 2020, Department for Business, Energy & Industrial Strategy, June 2022

Greenhouse gas emissions data are only available for the 2018 to 2020 period. They show that emissions intensity fell by 7% in West Yorkshire compared with 5% at national level.

A longer time series of data is available for carbon dioxide emissions. Carbon dioxide emissions intensity for West Yorkshire fell by 46% between 2005 and 2020. There was a faster rate of reduction at national level of 51% over the same period. The region's emissions intensity was similar to the national average in 2005 but a gap has opened up since then, although this seems to have slightly narrowed in 2020, reflecting the position for the wider range of greenhouse gases.

In the absence of detailed figures for industry sector emissions at local level, it is difficult to assess the relative contributions of changing industry structure and increased efficiency to the reduced emissions intensity in West Yorkshire. As noted above, UK data shows a marked reduction in emissions intensity in the energy supply sector, due to the switch from fossil fuels to renewables but there were also reductions in intensity in the manufacturing and transport sectors[2].

About the data
Emissions intensity is calculated by dividing the level of greenhouse gas emissions in thousands of tonnes of carbon dioxide equivalent by gross value added (GVA) in £m. GVA is the difference between output and intermediate consumption, that is, the difference between the value of goods and services produced (output) and the cost of raw materials and other inputs which are used up in production (intermediate consumption). The GVA

[1] The data presented in this figure do not exactly correspond to those contained in Figure 59 since the GVA data used are chained volume measures in 2019 money, in order to adjust for inflation; whereas the analysis contained in Figure 59 is based on GVA in current price values for 2020.
[2] Office for National Statistics , Greenhouse gas emissions intensity, UK: 2020 provisional estimates (2021)

data used in the denominator are in current prices for Figure 59 and in chained volume measures, in constant prices, with 2019 as the base year[1], for Figure 60.

[1] Office for National Statistics, Regional gross value added (balanced) by industry: all ITL regions (2021)

6.2.4 Access to green space

Almost 40% of West Yorkshire's population have easy access to local natural green space.

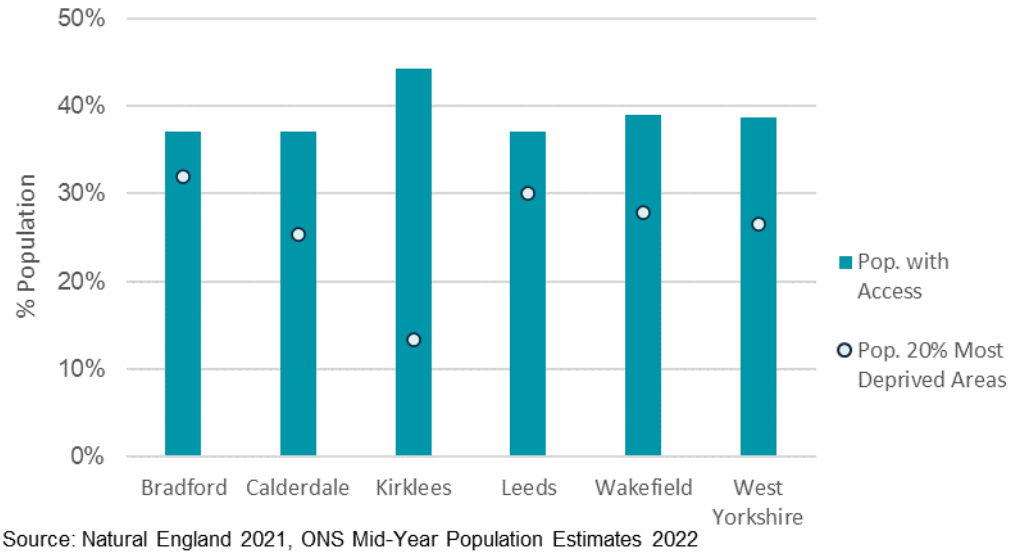
Green and blue Infrastructure is the green space and water environment essential to the quality of our lives and ecosystem. It is referred to as 'infrastructure' as it is as important as other types of infrastructure such as roads, schools and hospitals[1].

The Green and Blue Infrastructure Strategy aims to ensure that everybody in West Yorkshire is within easy reach of an outstanding and well used network of green and blue infrastructure that reduces flood risks and supports health, the economy, the environment and a superb quality of life by providing local people with access to nature. There are a range of priorities for action, including planting and managing more trees and woodlands, building green and blue infrastructure into physical development and housing and integrating green and blue infrastructure within the transport routes that link our towns, cities and rural areas.

Natural England has developed an Accessible Natural Greenspace Standard (ANGSt)[2], which has been used as a basis for our indicators. The headline indicator we have selected for access to green space is:

Proportion of the population who have access to local greenspace; that is, they live within 300m (As the crow flies) of an area of accessible natural greenspace of at least 2 hectares in size.

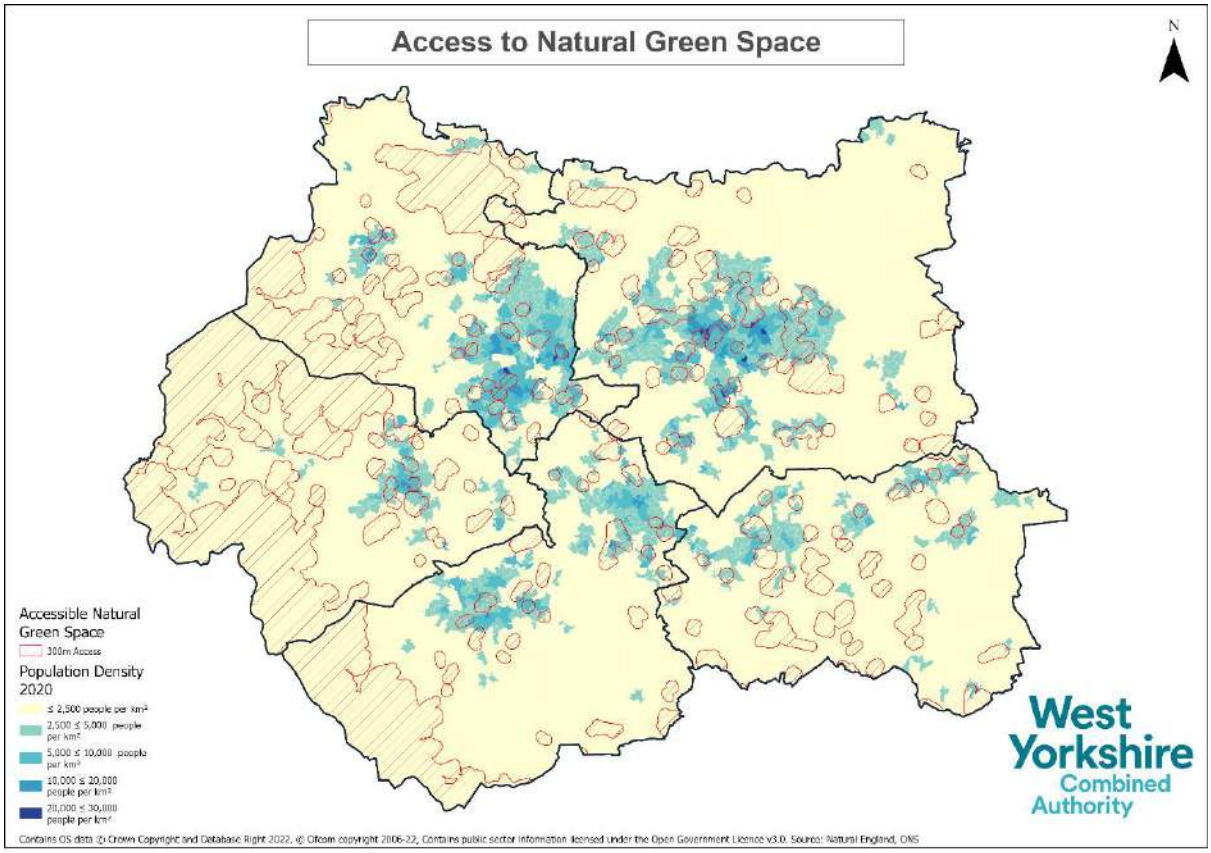
Figure 61: Access to natural greenspace in West Yorkshire



Source: Natural England 2021, ONS Mid-Year Population Estimates 2022

[1] Green infrastructure is defined in the National Planning Policy Framework as "a network of multi-functional green space, urban and rural, which is capable of delivering a wide range of environmental and quality of life benefits for local communities". Ministry of Housing, Communities and Local Government, National Planning Policy Framework (2019)

[2] "'Nature Nearby' Accessible Natural Greenspace Guidance", Natural England, March 2010



Currently, around **39%** of West Yorkshire residents have local natural greenspace within easy access (2021 baseline) –5-to-10-minute walking distance depending on walking speed.

Within the region, there is some variation between local authorities: in Kirklees the proportion is somewhat higher, at 44%; but the remaining area are similar ranging from 37% to 39%. A series of sub-indicators have been developed based on the ANGSt thresholds, to show the proportion of the population that have access to larger areas of accessible natural greenspace.

Table 5: Access to natural greenspace in West Yorkshire

Greenspace Type	Wider Neighbourhood; Parks and Public Gardens	District; Country Parks and Accessible Woodland	Sub-Regional; Access Land and Largest Nature Reserves
Distance	**2km**	**5km**	**10km**
Size	**20ha**	**100ha**	**500ha**
Bradford	63%	56%	92%
Calderdale	82%	93%	90%
Kirklees	39%	52%	44%
Leeds	76%	68%	76%
Wakefield	65%	69%	6%
West Yorkshire	65%	64%	65%

Wider neighbourhood - proportion of the population who are within 2km of an accessible 20-hectare site, such as parks and public gardens.

Almost two thirds (65%) of West Yorkshire's population have this kind of access. There is wide variation at local authority level, however, with the proportion ranging from 39% in Kirklees to 82% in Calderdale and 76% in Leeds. Bradford and Wakefield are both close to the West Yorkshire average with figures of 63% and 65% respectively.

District - proportion of the population who are within 5 km of a 100-hectare site e.g., country parks, access land, accessible woodland

This indicator gives a proxy for a 20-minute cycle journey. Sixty-four per cent of West Yorkshire's population fall within the catchment of this kind of site, based on these criteria, ranging from 52% in Kirklees to 93% in Calderdale.

Sub regional - proportion of the population who are within 10km of a 500-hectare site e.g., access land, accessible woodland, and the largest nature reserves

This indicator provides a proxy for a 40-minute cycle journey. The proportion of residents who have this level of access is very similar to the previous two indicators at 65%. Around nine out of 10 residents in Bradford and Calderdale are within 10km of a 50-hectare site. At the other extreme only 6% of Wakefield residents fall within the catchment area for this type of site.

About the data

The analysis uses Natural England's Accessible Natural Greenspace Standard thresholds for distance and size but also filters on "naturalness" score, only including sites with a score of 1 or 2, such as parks and gardens, woodland, country parks and national parks. Playing fields, tennis courts, allotments and golf courses are excluded.

Natural England's methodology measured distance from LSOA population weighted centroids through the OS Highways road and footpath network to polygons defined as green space in OS MasterMap. The proportion of residents with access to green space is based on ONS 2018 mid-year population estimates.

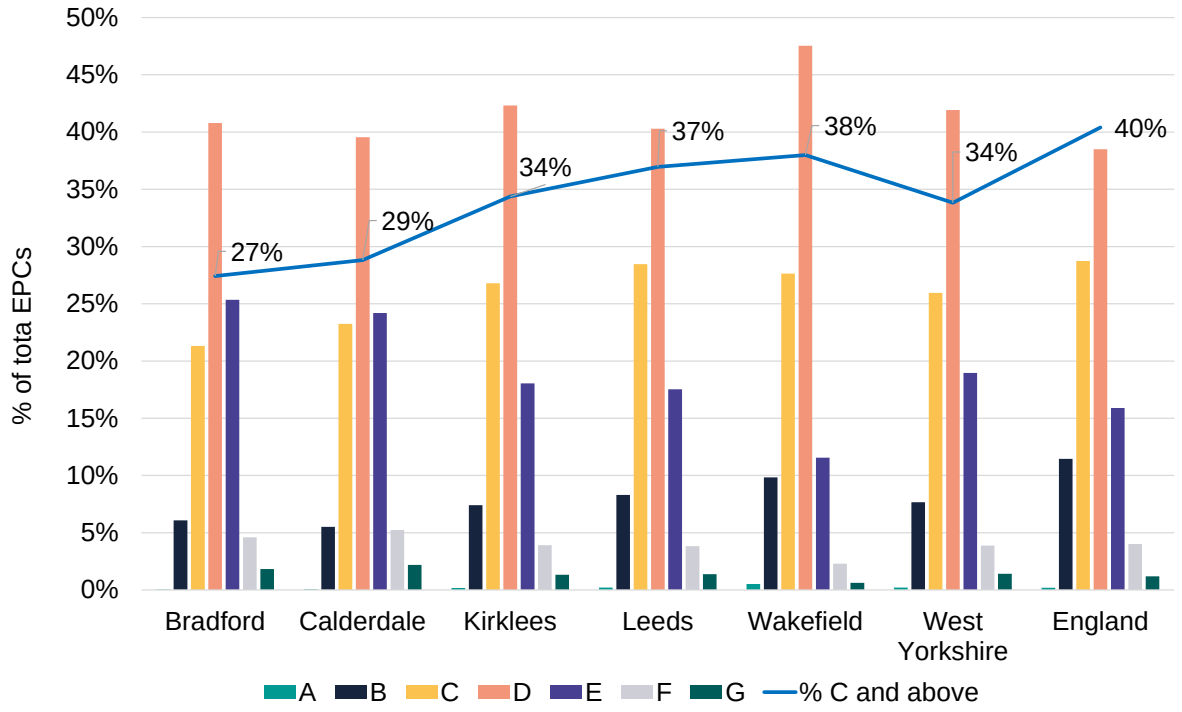
6.2.5 Building energy efficiency

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 (34% versus 40%). There are also wide variations against this measure at local authority level.

Buildings are responsible for almost 40% of the UK's energy consumption and carbon emissions. Improving the energy efficiency of properties is an important lever for reducing emissions but also for helping households to manage their living costs.

Energy Performance Certificates are needed any time a property is sold, built or rented. They contain information about a property's energy use and typical energy cost as well as recommendations on how to reduce energy and save money. Normally they have a rating between A (Most efficient) to G (Least efficient).

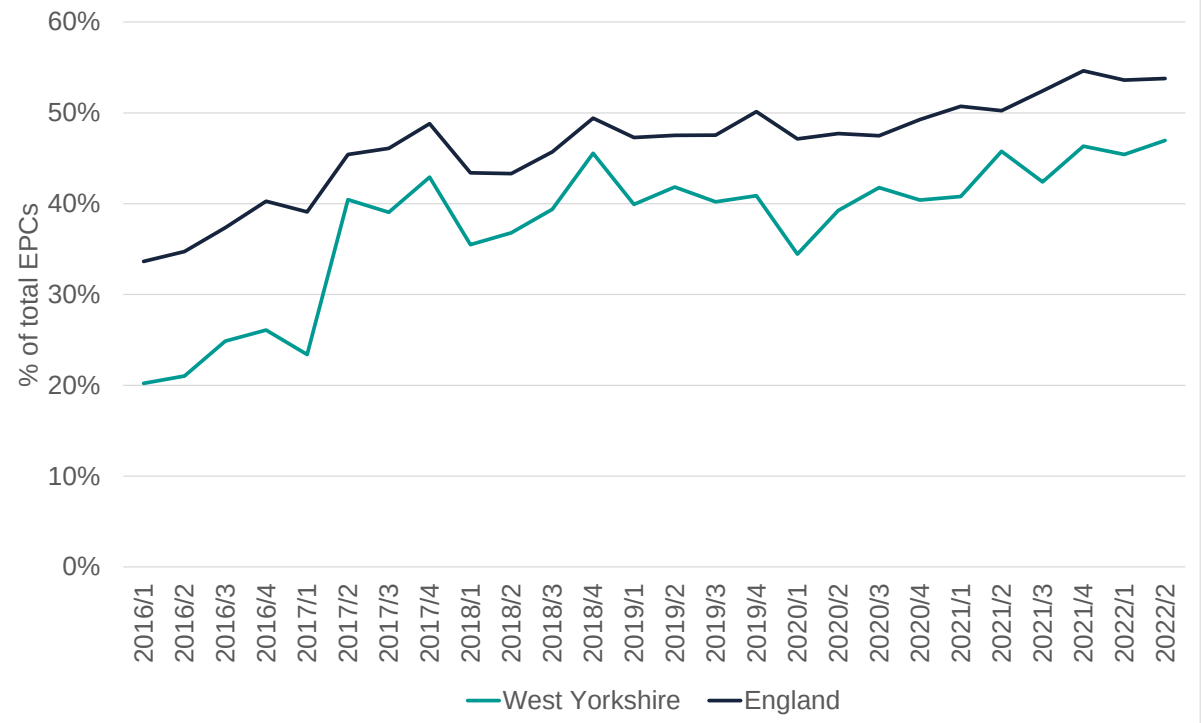
Figure 62: Profile of Energy Performance Certificates by local authority and Energy Efficiency Rating, as of Quarter 2 2022



Source: Energy Performance Certificate data, Department for Levelling Up, Housing and Communities

A key headline measure is the proportion of dwellings with a rating of C or above. In West Yorkshire 34% of all dwellings with an EPC fall into category, somewhat lower than the national average of 40%. Leeds and Wakefield have the highest proportions of dwellings that meet this threshold, but the figures are much lower for Bradford (27%) and Calderdale (29%).

Figure 63: Trend in proportion of Energy Performance Certificates with Energy Efficiency Rating of C and above based on each quarter's EPC lodgements



Source: Energy Performance Certificate data, Department for Levelling Up, Housing and Communities

In the latest quarter, April to June 2022, 16,400 domestic EPCs were lodged on the Register in West Yorkshire, a small increase of 0.6% on the same quarter of 2021. Forty-seven per cent of properties in the region were given an energy efficiency rating of C or above based on the lodgements for this latest quarter, compared with 54% nationally.

The proportion of EPCs lodged with an energy efficiency rating of C or above in West Yorkshire has increased over time but has remained consistently below the national figure.

About the data

These statistics are based on information from Energy Performance Certificates (EPCs) lodged on the Energy Performance for Buildings Certificates Register for England and Wales. The purpose of an EPC is to show prospective tenants or buyers the energy efficiency of the property. The requirement for EPCs was introduced in phases and fully implemented for domestic properties by autumn 2008. EPCs are valid for 10 years.

6.2.6 Premises at risk of flooding

Around 3% of residential properties in West Yorkshire fall within a flood zone, rising to 6% in Calderdale. Many neighbourhoods in Bradford and Calderdale are acutely vulnerable to the effects of flooding. Flooding is likely to become a more frequent occurrence as a result of climate change.

Rivers, reservoirs and canals are defining features of West Yorkshire's landscape, enhancing our living environment with places for exercise and leisure and providing habitat for fish, birds and mammals. A consequence of this however is that some residents live in areas prone to flooding, either Defra Flood Zone 3, areas with properties facing a risk of flooding once every hundred years or Flood Zone 2, where properties face a risk of flooding once every 1,000 years. The frequency of flooding in these areas is likely to increase as a result of climate change.

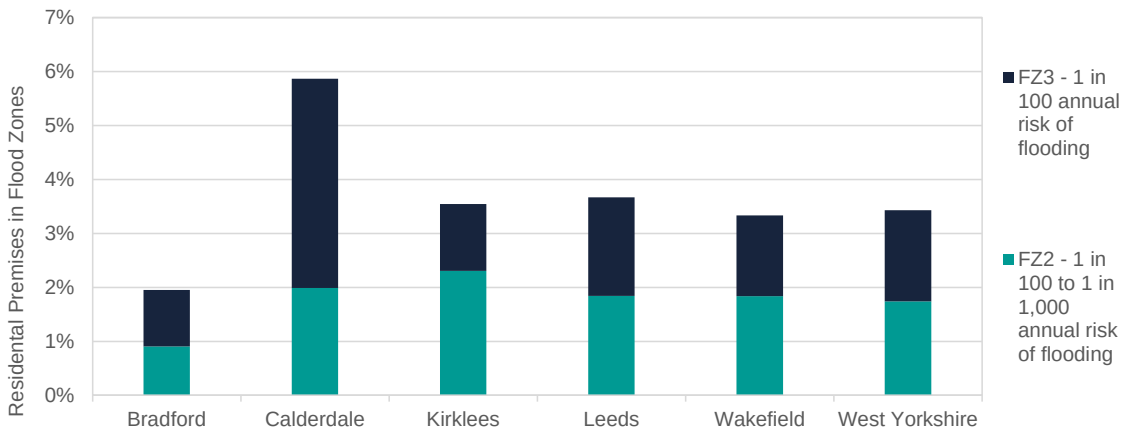
Recent events, such as the Boxing Day Floods of 2015 highlighted the risk that flooding presents to residential and commercial properties in West Yorkshire, with this event alone flooding 3,260 homes and 1,686 businesses, and the economic cost of £227 million and £36.8m worth of damage to local infrastructure[1].

The ongoing flood risk reinforces the economic, social and environmental arguments for securing capital investment to allow our communities to be more resilient and avoid both the human suffering and economic cost that comes with these events.

The Combined Authority is currently working with partners to update its ambitious pipeline of 30 additional flood alleviation schemes for the next six-year funding period from 2021/22. The plan requires £120 million of government investment and will safeguard approximately 3,400 homes, 2,500 businesses and 4,600 existing jobs, equating to c.£246 million in Gross Value Added per annum.

Over 17,400 West Yorkshire residential properties are located in Flood Zone 3 areas and at risk of flooding once every hundred years, with an additional 18,000 located in Flood Zone 2, which is at risk of flooding once every 100 to 1,000 years. Together this accounts for 3.4% of West Yorkshire residential properties.

Figure 64: Proportion of residential properties in flood zones

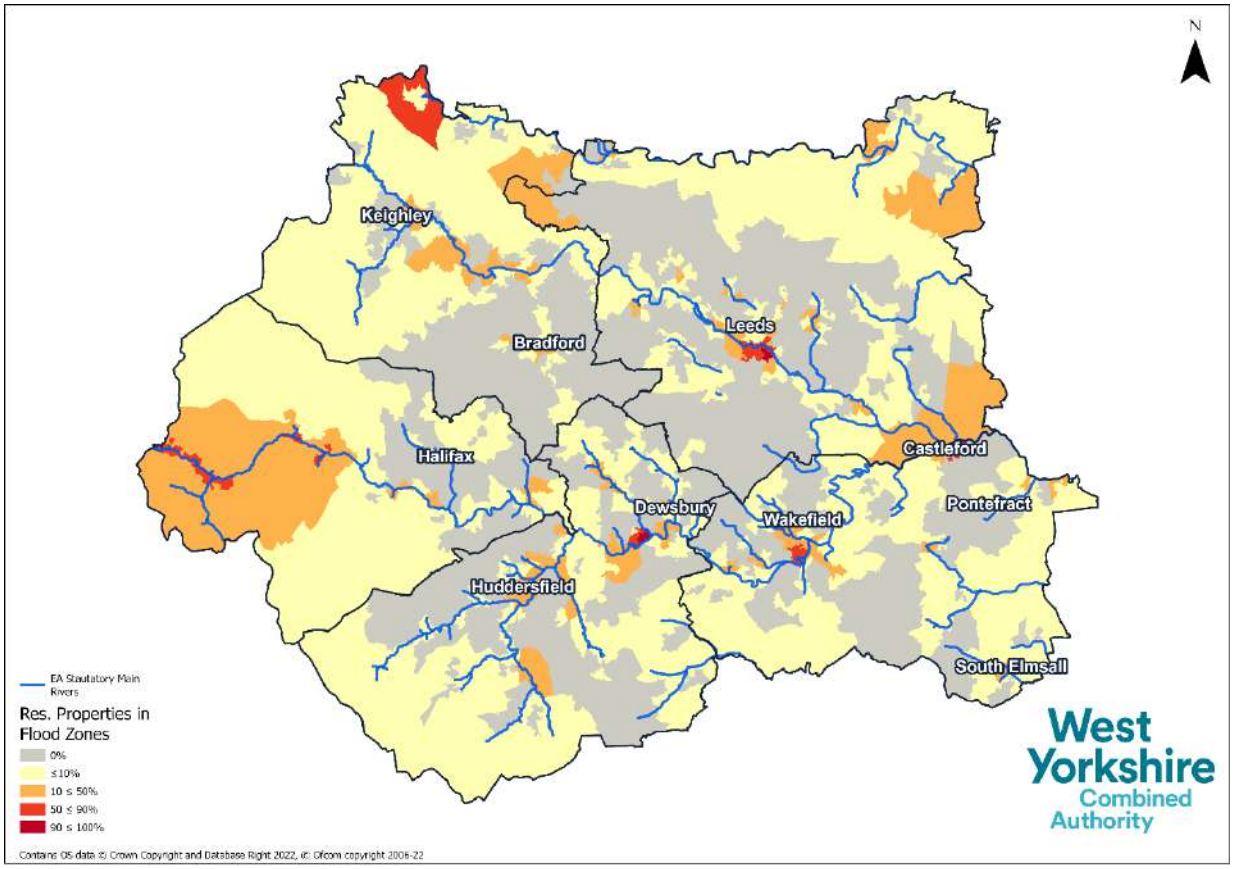


Source: Ordnance Survey 2021, Environment Agency 2021

[1] West Yorkshire Combined Authority, Leeds City Region Flood Review Report (2016)

Calderdale has the highest proportion of residential properties lying within flood zones at nearly 6% of the total.

Figure 65: West Yorkshire residential properties in flood zones



There are also longer-term effects on businesses and districts that will impact on them financially and economically. These include rising insurance costs, a negative impact on long-term investment decisions and the possibility of relocating as part of a risk mitigation strategy.

Around 20,000 commercial properties fall within flood zones in West Yorkshire. Calderdale has the highest proportion of commercial properties at risk of flooding, with 11% at risk of flooding once every hundred years and an additional 10% at risk of flooding once every thousand years.

Figure 66: Commercial properties in flood zones

District	Commercial Properties in Flood Zone 3: 1 in 100 Annual Risk of Flooding	Commercial Properties in Flood Zone 2: 1 in 1,000 Annual Risk of Flooding	Total Flood Zone Commercial Properties
Bradford	4.8%	4.10%	8.93%
Calderdale	11.4%	9.72%	21.14%
Kirklees	11.7%	11.83%	23.50%
Leeds	5.9%	4.02%	9.92%
Wakefield	6.3%	7.16%	13.50%
West Yorkshire	7.2%	6.25%	13.49%

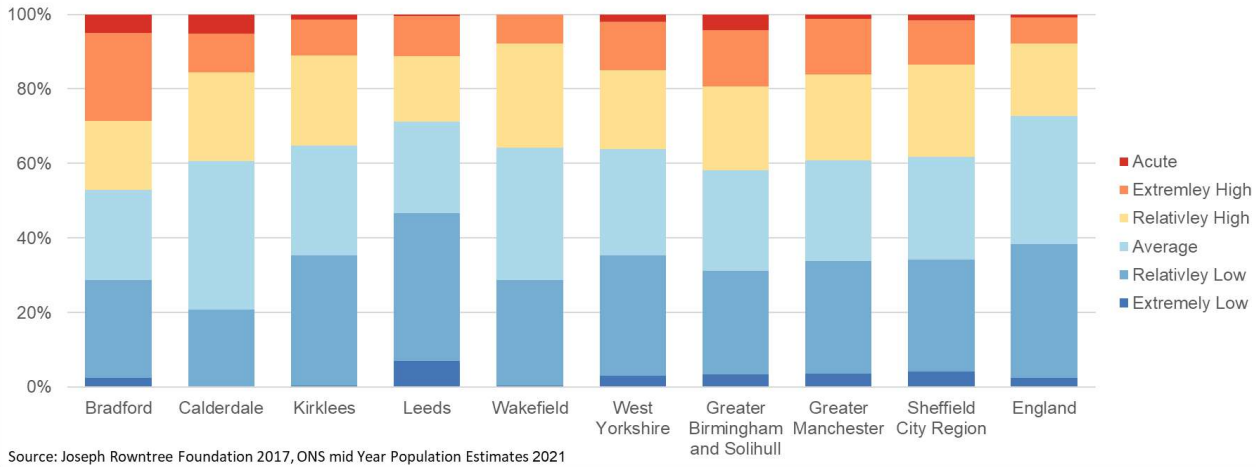
Source: Defra, Royal Mail

Community Flood Vulnerability Index

The Joseph Rowntree Flood Vulnerability Index measures how socially vulnerable residents of a neighbourhood are should flooding occur, quantifying their ability to prepare, respond and recover to flooding. Vulnerability is calculated according to proximity to flood zones, their physical wellbeing and their ability to access and understand pre and post flooding support.

The proportion of socially vulnerable neighbourhoods at extreme or acute risk of flooding in West Yorkshire is below that in England but matches that of other LEPs. This analysis does however highlight how vulnerability varies across West Yorkshire, with significant proportions of neighbourhoods in Bradford and Calderdale acutely vulnerable and 40% of all Calderdale neighbourhoods at an extremely high risk.

Figure 67: Neighbourhood Flood Vulnerability Index



7 Creating an accessible, clean and customer focused transport system

Key points

West Yorkshire's access inequality ratio has worsened substantially, as the number of jobs accessible by the bus network from deprived neighbourhoods feel relative to those accessible by private car. This is attributable to a reduction in services in 2020 as a result of the COVID-19 pandemic, when only essential travel was supported; but it also illustrates the barriers to travel faced by certain groups.

Almost two-thirds of trips in West Yorkshire are made by car but more timely national data suggest that the car's share of total trips is likely to have fallen during the pandemic, whilst walking increased its share. The bus plays a vital role for those who lack access to a car, but its share of trips is also falling over time, a trend intensified by the pandemic, although bus plays a more important part in the transport mix in West Yorkshire than nationally.

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.

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.

Satisfaction with highway infrastructure remains relatively low, at 5.8 (out of 10), the same score as in 2020/21. However, 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.

7.1 Overview of the priority

West Yorkshire's transport network is under increasing pressure and the region's diverse geography presents challenges in balancing transport priorities and funding.

Investment in transport has not kept pace with economic and population growth, resulting in congestion on roads and overcrowding on public transport. Private vehicles still make up a significant proportion of journeys in the region, contributing to serious public health and environmental challenges.

The six headline indicators selected for this priority are key measures of progress towards a more effective and efficient transport infrastructure for West Yorkshire.

However, performance against these indicators also provides an insight into the important contribution of transport to our other priorities. For example, enabling people from deprived communities to access employment opportunities via public transport contributes to inclusive growth, while achieving shifts in mode share towards public transport and active travel and away from private cars is key to reducing carbon emissions from the transport sector.

More detailed analysis of West Yorkshire's transport performance and its indicators is contained in the Combined Authority's State of Transport report.

7.2 Performance against the indicators

7.2.1 Access inequality ratio (employment)

Inequality of access to employment from the most deprived areas in West Yorkshire worsened substantially in 2020/21. This is attributable to a reduction in services in 2020 as a result of the COVID-19 pandemic, when only essential travel was supported; but it also illustrates the barriers to travel faced by certain groups.

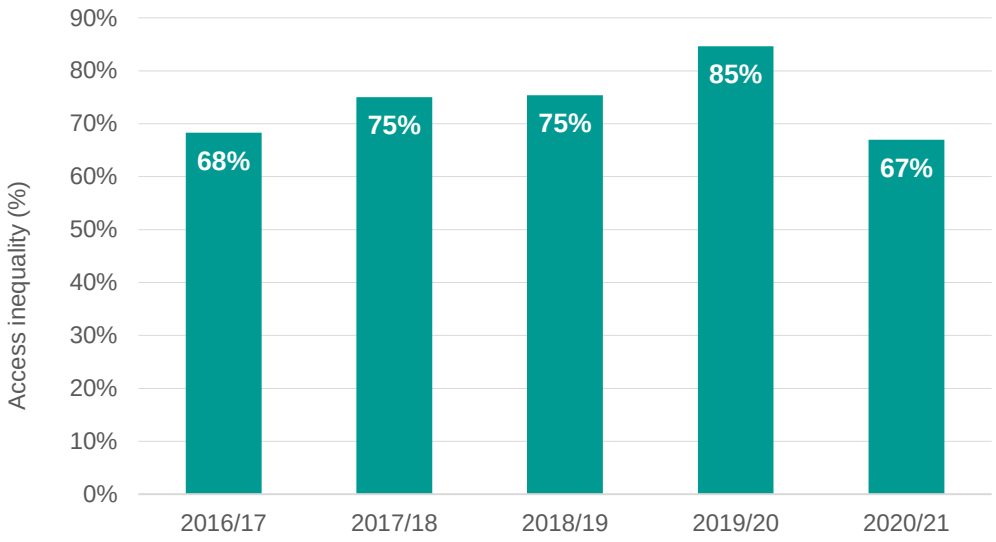
People travel to participate in society; however, their capacity to access opportunity may vary greatly, depending on a number of factors, such as their physical ability, the range of transport modes available to them, the speed of these modes, the connectivity of the network or the affordability of the options available to name just a few.

Car drivers are the least mobility-constrained and have higher levels of access to opportunity; individuals from low-income households, on the other hand, are more constrained by affordability issues and are less likely to own a car. In 2020, 35% of households in the lowest income quintile did not have access to a car, compared with 21% across all income levels. Those in the lowest income quintile also made 78% more bus trips than the average across all income levels[1], a bigger relative difference than the previous year, precisely during a time when public transport usage was discouraged in response to the Covid-19 pandemic. Improving public transport options for those with no access to a car, is therefore a way to tackle inequality, by making it easier for everyone to access services and activities, including employment.

To capture transport aspects of access inequality, we have defined an 'access inequality ratio'. This is defined as the ratio (expressed as a percentage), of the number of jobs accessible in 30 minutes using the frequent bus network[2] and the number of jobs accessible by car in 30 minutes, from areas within the 10% most deprived in West Yorkshire, during the morning peak. The rationale is that all else remaining equal, by improving accessibility by public transport (whether this is by improving its frequency, connectivity or speed), the number of opportunities available to those with no access to a car is also improved, thereby reducing access inequality.

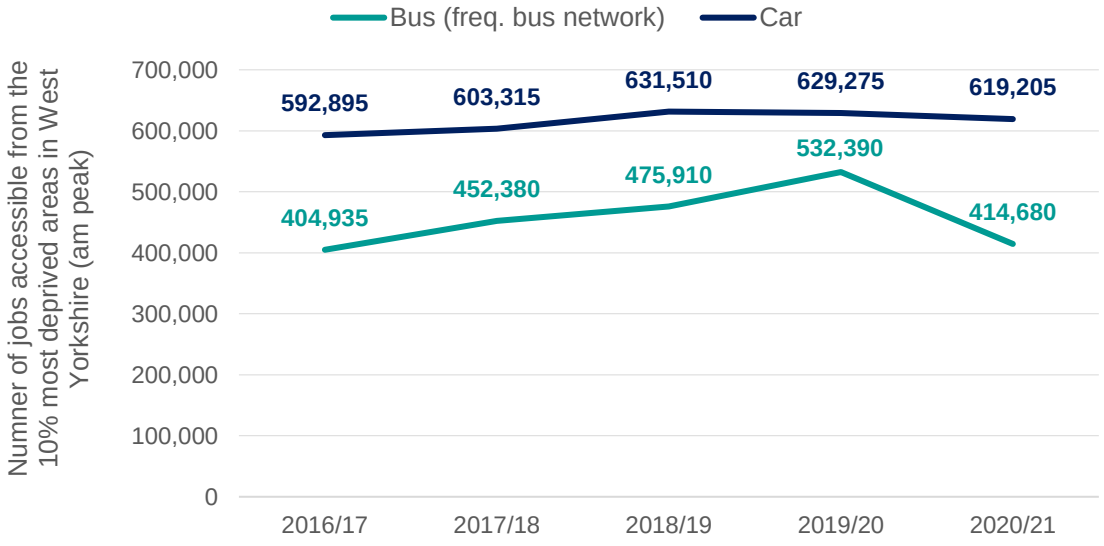
[1] Source: National Travel Survey 2019, DfT, 2020
[2] The frequent bus network is defined as routes with a frequency of four buses per hour or better.

Figure 68: Access inequality (employment) – Proportion of jobs in major employment centres accessible within 30 min by bus in the morning peak, relative to jobs accessible by car



Following a peak in 2019, the value of the indicator in 2020 was 67%, the lowest since we started to monitor it. This is explained by the fact that during a great part of 2020, emergency timetables with a reduced number of services were run in response to the COVID-19 pandemic.

Figure 69: Morning peak access to major employment centres by the frequent bus network, from the 10% most deprived areas in West Yorkshire, vs car accessibility



It has to be noted that this indicator captures only some of the *physical* components of access to employment; there are other factors that impact the range of employments that are available to low income groups; amongst them, the affordability of public transport itself, or the nature of employment, which results in a 'skill mismatch' for those with lower qualifications; this is because higher-skilled jobs are typically based in city centres or main transport corridors in cities, well served by public transport, whereas low-skilled jobs are

increasingly dispersed outside city centres and are often difficult to reach by residents in low-income areas[1]. This is exacerbated by the fact that a number of low-skilled jobs in occupations such as distribution, warehousing, hospitality, retail and cleaning often require unconventional working hours, at times where public transport is infrequent or just not available.

About the data

Data for this indicator is calculated using accessibility software. This software allows the calculation of travel time and distance between origin and destination points for different modes of transport, based on the origin and destination location relative to the road network, link speeds and public transport timetables. As with any model, a number of assumptions are made:

- *Origin points: these are the centroids (population weighted) of the areas falling within the 10% most deprived neighbourhoods in West Yorkshire i.e., travel time from the whole area is assumed to be the same as from its centroid.*
- *Employment centres are defined as those areas with 1,500 employees or more, as per the Business Register and Employment Survey for the corresponding year. As before, travel time to all jobs in an area is assumed to be the same as that to its centroid.*
- *The departure time for bus trips is 07:30 am, which we compare with journey times for car.*
- *The catchment areas are defined based on the minimum travel time from the set of locations taken as origin. This means it will not be possible to reach the selected destination in the maximum travel time (in this case 30 minutes) from all the origins; or in other words, contours reflect the destination that is fastest to access.*
- *The calculations do not consider the effect of congestion i.e., car travel time is modelled as per the speed limit of links; bus travel time is based on published timetables.*
- *We are calculating bus accessibility using the frequent bus network. This means that only bus services with a frequency of 4 buses per hour or more are considered in the analysis. The maximum distance from an origin to the first stop is 600 m. The maximum interchange distance is 400m. Walk speed is 4.8 km/h.*

[1] See, for example Crisp, R. et Al, 2018, Tackling transport-related barriers in low income neighbourhoods, Joseph Rowntree Foundation

7.2.2 Mode share

West Yorkshire residents make more trips per head than the England average but travel fewer miles. Most of these trips are made by car, although its share had started to decline before the pandemic, in parallel with a substantial increase in walking. Bus usage is declining, but more bus trips per head are made in West Yorkshire than nationally[1].

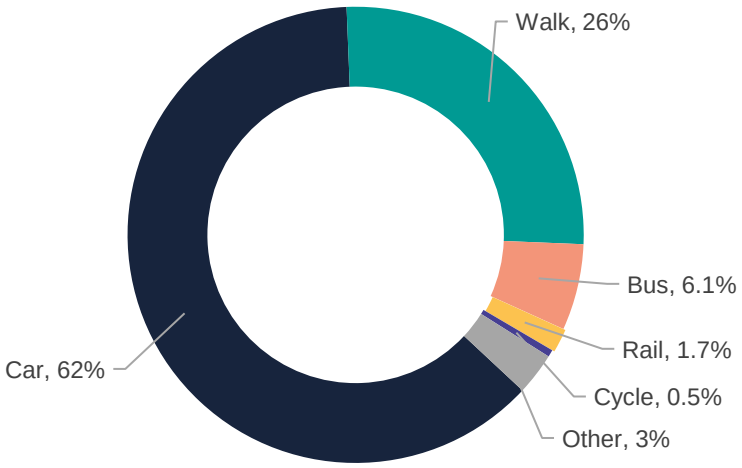
Mode share is an indicator of not only people's travel habits, but of how the way we travel adapts to economic, technological, and social changes. Travel demand is relevant not only for the design of infrastructure and transport policies, but for other important policy areas, such as inclusive growth –as it reflects access to opportunity for all groups, including those with no access to a car– and tackling the climate emergency –as we must ensure necessary mobility does not impact negatively on the environment and the health of our residents.

In the 3-year period ending 2019 (the last time this indicator was available for West Yorkshire):

- 62% of trips by West Yorkshire residents were made by private car (either as a driver or a passenger), a higher proportion than the England average for the same period (55%). The private car was also the predominant mode of travel in terms of distance, accounting for 77% of the distance travelled by West Yorkshire residents, slightly less than the England average (78%).
- Walking accounted for 26% of all the trips made by West Yorkshire residents, being the mode with the highest share growth in recent years (4 percent points since 2016); however, the share of walking is still lower than the England average (32%).
- 6% of trips by West Yorkshire residents were made by bus, a higher proportion than the England average (3.4%). However, the bus share has continued to decline in recent years, resulting in a loss of approximately a percentage point per decade. The bus accounted for 5.4% of the distance travelled by West Yorkshire residents, compared to 3.3% in England.
- Rail accounted for 1.7% of the trips made by West Yorkshire residents, and 8.7% of the distance (compared to 2.2% and 9.2%, respectively, for England).
- Cycle trips represented 0.5% of all trips by West Yorkshire residents, which was less than a third of cycle share in England for the same period.

[1] Based on 2019 data (See *About the data* box)

Figure 70: Share of trips by mode, West Yorkshire, 2017/19 (3-year rolling average)



Source: National Travel Survey (bespoke West Yorkshire), DfT (2020)

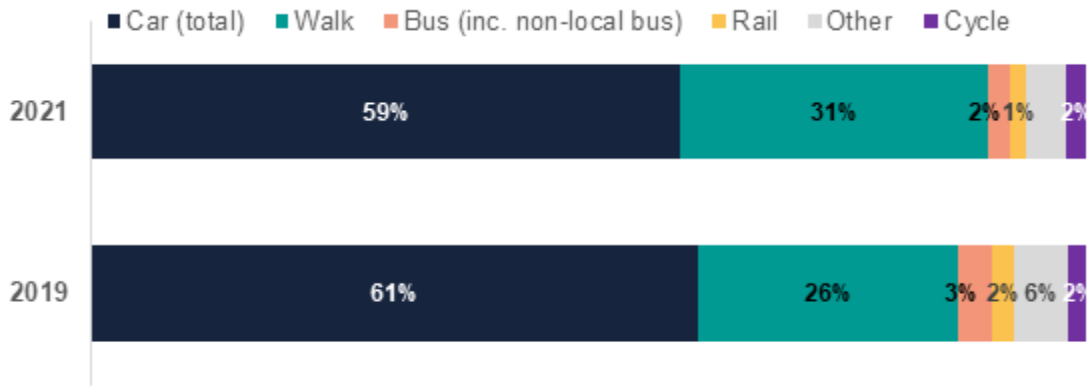
The data analysed suggest that the trend of fewer trips and distance travelled seen in England has started later in West Yorkshire than in other areas of the country. Although the higher trip rates in West Yorkshire is partly compensated for by shorter distances travelled, there is also a higher dependence on the car for shorter distances than in other areas, with its negative effects for the environment and health of West Yorkshire's residents.

The above figures also show that the bus, an essential mode to meet the travel needs of those with no access to a car, continues to be the most accessible form of public transport. Reversing bus decline is vital to sustainable transport priorities, especially considering the risk that a bounce back of the car during the recovery from the pandemic can pose to the progress made to date.

The disruption caused by the COVID-19 pandemic on National Travel Survey data collection means bespoke data for West Yorkshire is not available after 2019. However, figures for England (see Figure 71) serve to illustrate how changes in travel patterns after the pandemic have been reflected in the mix of modes. In 2021, the share of the private car was 2 percentage points lower than pre-pandemic, and walking increased its share by 5

percentage points. Both bus **and** rail lost 1 percentage point of their share each, relative to 2019.

Figure 71: Share of trips by mode, England, 2019 and 2021

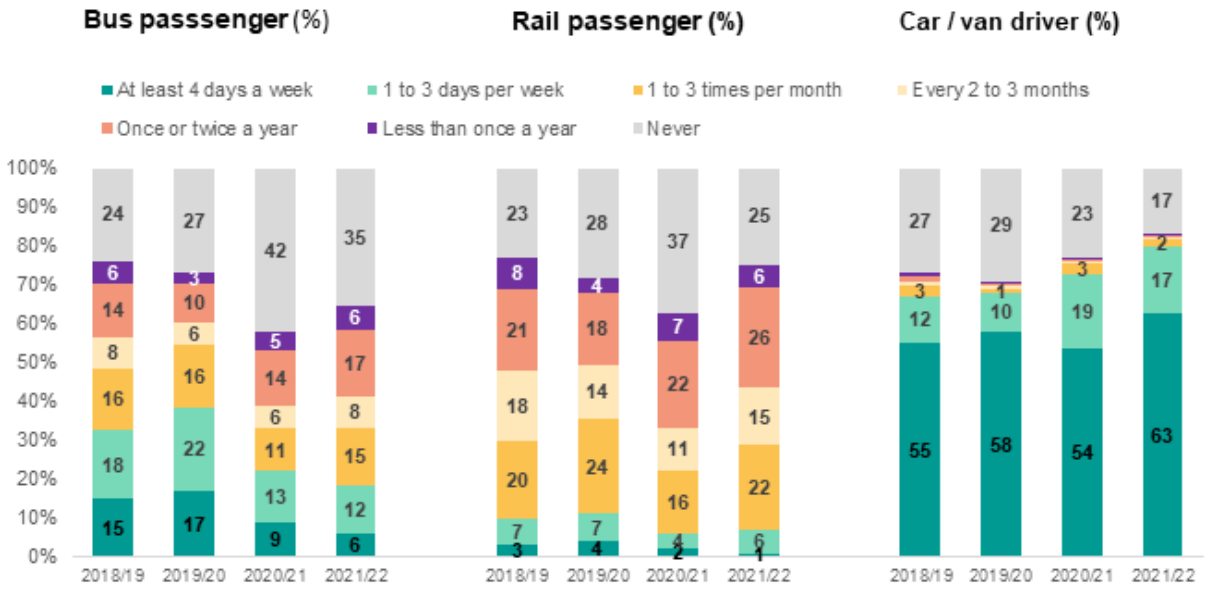


Source: National Travel Survey 2021. DfT (2022)

Indicators from the Residents Perceptions of Transport Survey suggest that while general travel activity has been increasing year-on-year, public transport usage is still below pre-pandemic. Analysis of modal usage in recent years shows that:

- The proportions of West Yorkshire residents travelling at least monthly by car, taxi, train as well as walking have increased from the previous year, but cycling has reduced from 14% to 11%
- Those using a bus at least monthly remains lower than the two years before the COVID-19 pandemic (33%) with 18% of West Yorkshire residents catching a bus at least weekly.
- The proportion of West Yorkshire residents using the train at least monthly has increased from 22% to 29% in the latest year, close to the 2018/19 proportion of 30% but lower than 2019/20. Seven per cent of West Yorkshire residents travel by train at least weekly.

Figure 72: Share of trips by mode, England, 2019 and 2021



Source: Residents perceptions of Transport Survey, West Yorkshire Combined Authority (2022)

About the data

Mode share data is taken from the National Travel Survey. This survey is designed to be representative of England's population and therefore, it has limitations when analysing lower-level geographies e.g., 3 years of data combined are necessary to obtain a robust sample size for West Yorkshire, therefore the use of a 3-year rolling average for this indicator.

The disruption in the survey introduced by the COVID-19 pandemic means that although national figures for 2020 are available, the minimum sample size was not achieved for West Yorkshire, and therefore the latest value of this indicator does not capture the effects of the COVID-19 pandemic.

7.2.3 Killed or seriously injured casualties (KSI)

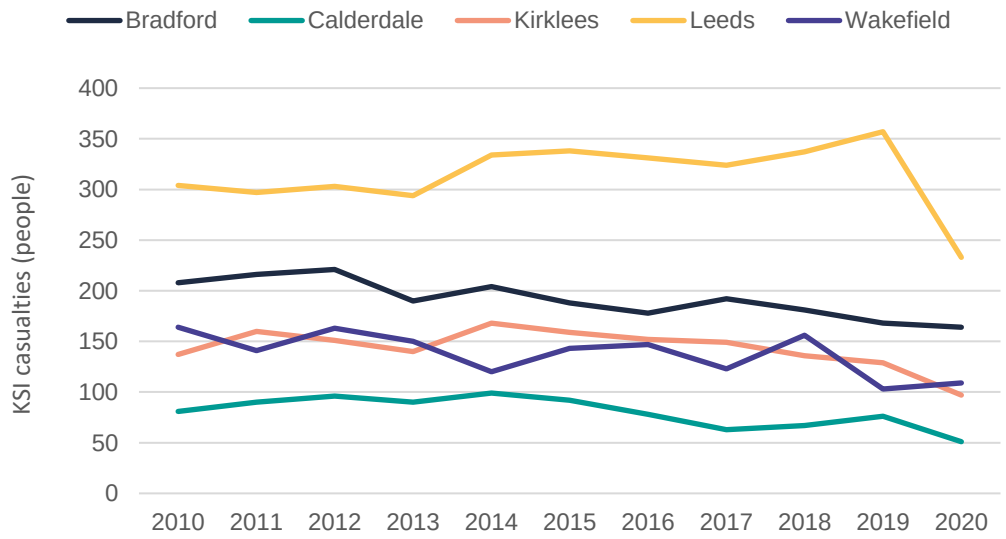
Absolute counts of KSI casualties in West Yorkshire show a declining trend in recent years (27% reduction since 2010[1]). KSI casualties fell by 21% between 2019 and 2020, a decrease largely attributable to the lower road traffic as a result of the restrictions implemented in response to the COVID-19 pandemic. Despite this, Wakefield saw an increase in KSI casualties in 2021.

A key focus of our transport investment is to create clean, safe, healthy places for communities and businesses. Ensuring the safety of all users of our streets and highway network and reducing the risk of being killed or seriously injured on our roads is essential to meet these objectives, and for people to feel confident to walk and cycle more. There is also an important inclusion dimension, since people who live in more deprived areas are at greater risk than those living in affluent areas. Reducing the number of people killed and seriously injured on our roads is therefore crucial to our priorities of delivering 21st century transport systems, enabling inclusion and boosting productivity.

There were 654 KSI casualties in West Yorkshire in 2020, a reduction of 21% from 2019. This is in line with the 20% reduction seen in England during this period, largely attributable to the reduction in road traffic seen during 2020 as a result of the travel restrictions implemented in response to the COVID-19 pandemic.

However, not all districts have seen a similar decrease in their KSI casualty statistics; in Leeds and Calderdale we saw reductions of 35% and 33% respectively, higher than the national average, whereas in Wakefield there was an increase of 6% from the previous year.

Figure 73: KSI by West Yorkshire district and year, 2011-2020



Source: Reported fatal casualties by country, region and local authority, Great Britain, 2010 - 2020. DfT, 2021.

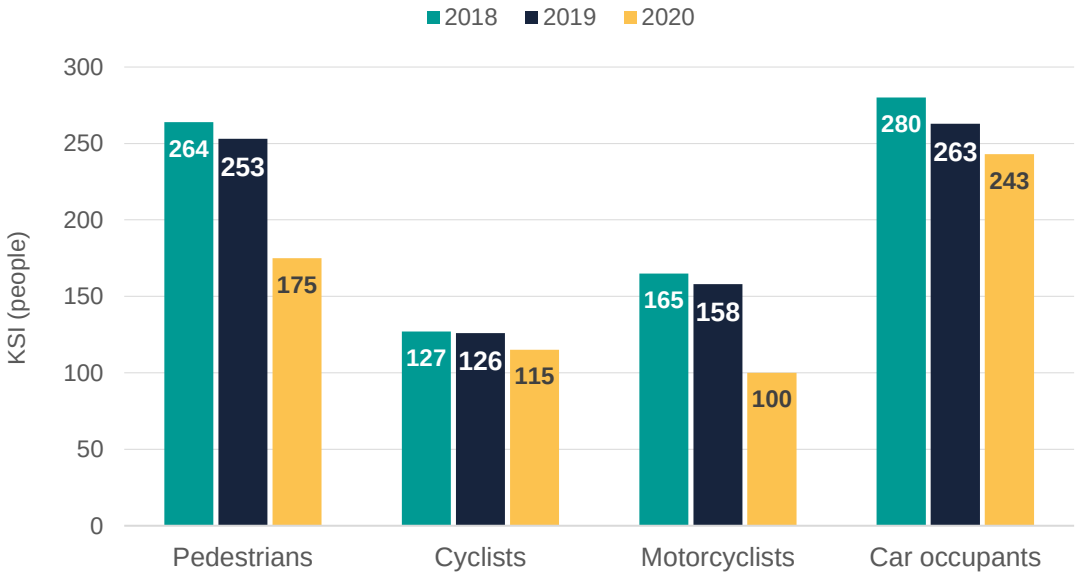
The reduction in KSI casualties between 2019 and 2020 varied by user type. It was larger for motorcyclists (37% reduction) and pedestrians (31% reduction), whereas there was a smaller reduction for pedal cyclists (11% reduction) and car occupants (8% reduction). The fall in pedestrian KSI casualties is notable, considering the reported increases in walking during the pandemic, and may be due to the general reduction in motorised traffic.

1

Pedestrians, motorcyclists and cyclists continue to be the most vulnerable group, accounting for 60% of total KSI casualties in 2020, compared to 32% of car occupants.

In 2020 there was also a 25% increase in other vehicle occupants KSI casualties, which may be linked to the growth in the number of vehicles classified in this group (e.g., scooters).

Figure 74: West Yorkshire KSI casualties by user type



Source: Reported Killed or Seriously Injured (KSI) (unadjusted) casualties by country, region, local authority and road user type, Great Britain, 2020. DfT (2021)

About the data

Casualty data for West Yorkshire and partner districts have been taken from the Reported Road Casualties Great Britain, annual report: 2020, which provides the number of personal injury road traffic accidents in Great Britain that were reported by the police using the STATS19 reporting system. It also includes the number of people killed or injured in these accidents and which road user group they were in.

7.2.4 MCard Ticket Transactions (bus)

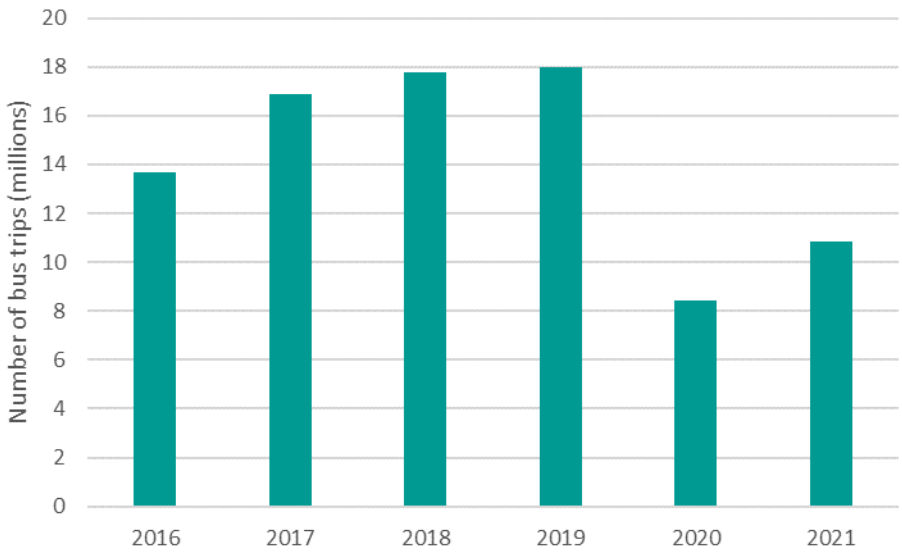
Following a sharp reduction during the pandemic there was a modest recovery in trips made using the MCard in 2021. The pandemic seems to have accelerated a shift to digital channels for the purchase of MCard trips.

MCard is the multi-operator, multi-mode travel smartcard for West Yorkshire. The number of trips made using MCard products is an important measure of the take-up of smart ticketing technology which is part of efforts to plan and manage transport network more effectively to transform the affordability, ease, and experience of passengers.

Before 2020 the number of trips made on buses using MCard products increased year on year from 2017 onwards, during a time when overall trips on buses decreased in West Yorkshire.

The number of MCard trips fell by 53% between 2019 and 2020 due to the impact of the pandemic. There was a recovery in 2021, with trips growing by 28% year-on-year but the annual number of trips remained 40% below its 2019 level.

Figure 75: Bus Trips made using MCard Products

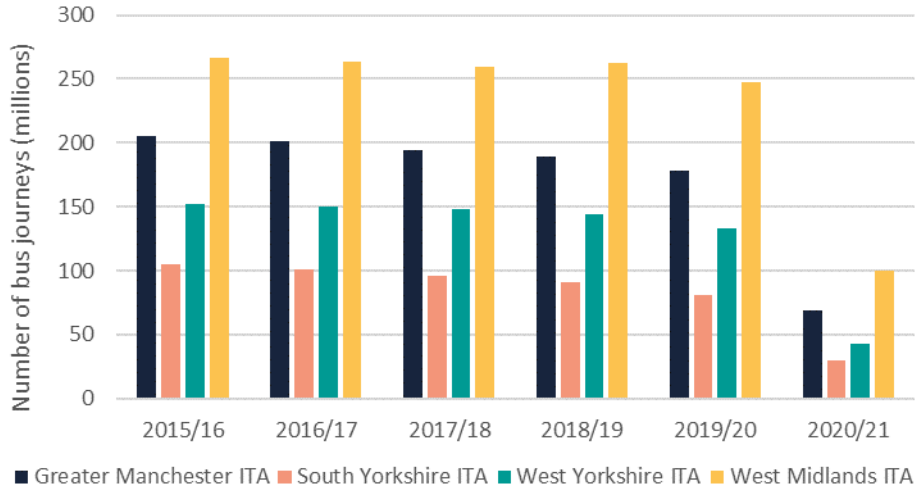


Source: WYCA NERO Reports and MCard Mobile App

About the data
The data includes all bus trips made using MCard products (West Yorkshire Ticketing Company Limited Prepaid tickets) recorded in the data management and reporting system, NERO, and in the MCard Mobile App.

The total number of trips made on buses was falling steadily within West Yorkshire and other metropolitan areas before the impact of Covid-19 which caused a large reduction in bus journeys.

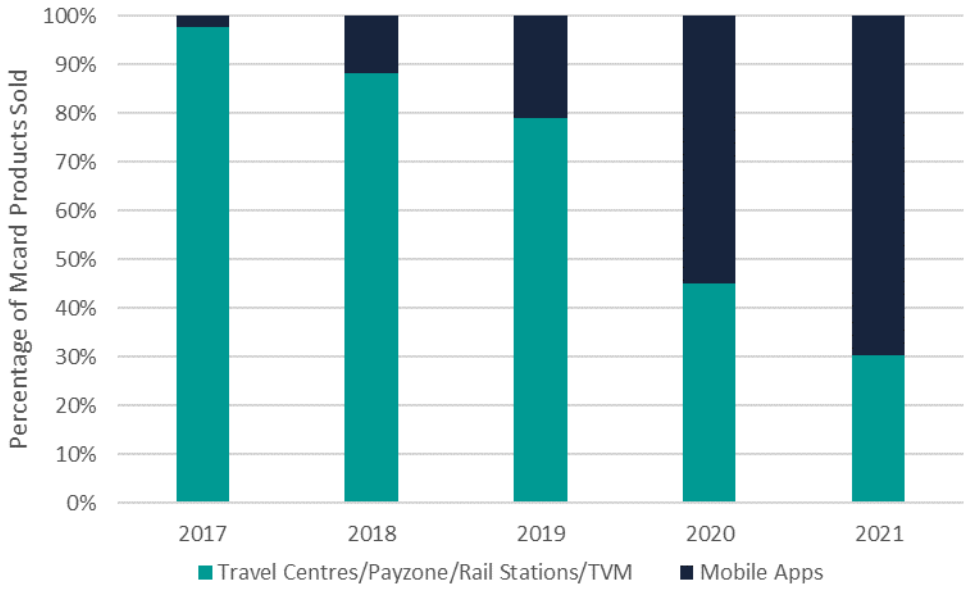
Figure 76: Trend in bus usage



Source: DoT Annual Bus Statistics

West Yorkshire has launched two mobile apps since 2017 increasing the percentage of products bought this way to 70% in 2021. Changes in product choice owing to changes in travel patterns may have impacted on MCard use. The move towards contactless purchase methods may have been accelerated by Covid-19.

Figure 77: Percentage of MCard products purchased through digital channels



Source: WYCA Dream Reports

7.2.5 Satisfaction with highway infrastructure

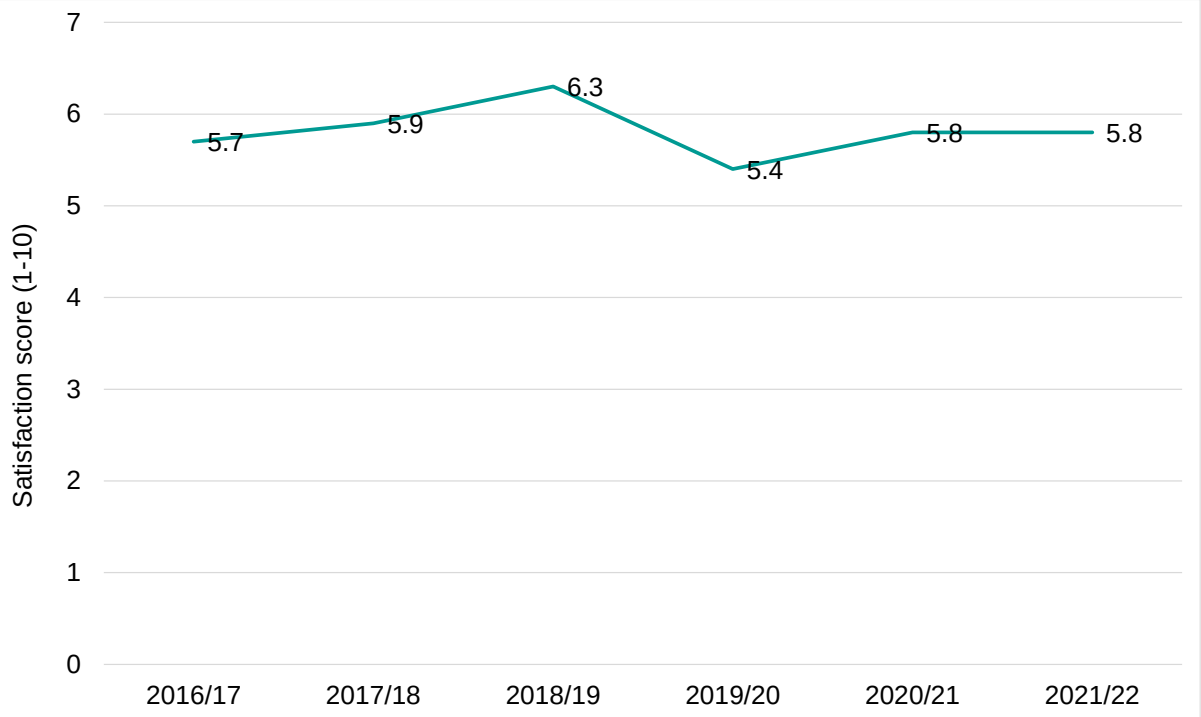
Satisfaction with highway infrastructure remains at 5.8 (out of 10), the same score as in 2020/21. However, satisfaction with the provision of cycling routes and facilities as well as with most elements of road surface and pavement maintenance has worsened.

Highway infrastructure is an essential public asset. It allows access to services and opportunities and the movement of goods. Well maintained streets and roads are safer and more comfortable for walkers, riders and passengers. They are also part of the visual landscape and contribute to create a sense of place.

In order to achieve our ambition to make best use of our infrastructure, we must ensure our assets are fit for purpose and managed in a safe, sustainable and cost-effective way, so that they are resilient into the future. One of the indicators used to measure progress towards this objective is public satisfaction, reflecting the impact that highway assets have on people's daily activities.

Historically, satisfaction with highway infrastructure has been low. In 2021/22, it was 5.8 (out of 10), the same as the previous year.

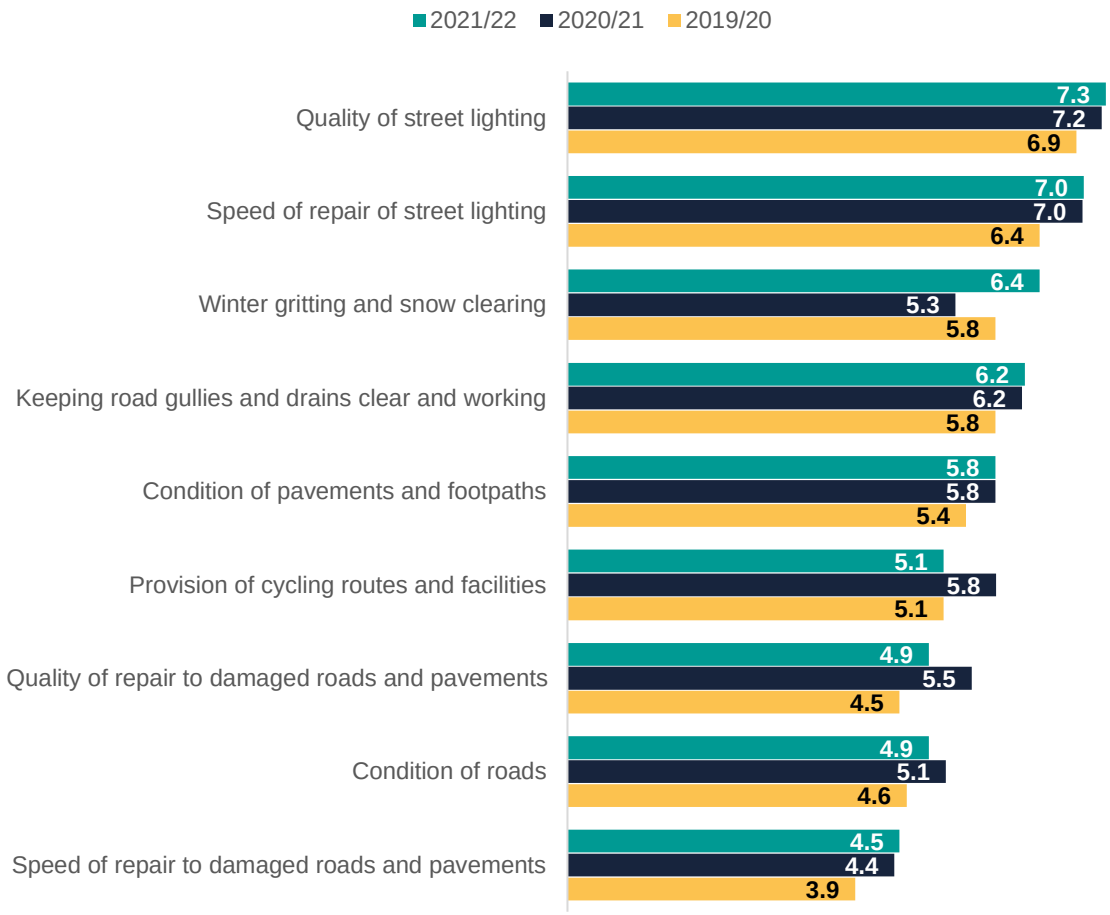
Figure 78: Satisfaction with highway infrastructure 2016/17 to 2021/22



Source: Residents' Perceptions of Transport Survey, WYCA,(2022)

Despite the composite indicator having the same value as in 2020/21, satisfaction with individual elements has changed. It is notable the drop in satisfaction with cycle routes and facilities (-0.7 points), particularly considering the reported increase in cycling after he Covid-19 pandemic. Most aspects related with road and pavement maintenance, which typically are also the ones with the lowest satisfaction, also received a lower rating than in 2020/21. Expectations in relation to these aspects is high, as shown by the high importance attributed to them by residents (see Figure 80). High standards of asset maintenance continue to be essential for the safety and efficiency of our networks, and more needs to be done to ensure that residents also perceive it.

Figure 79: Change in scores for components of the highway infrastructure satisfaction (1-10), 2019/20 to 2021/22

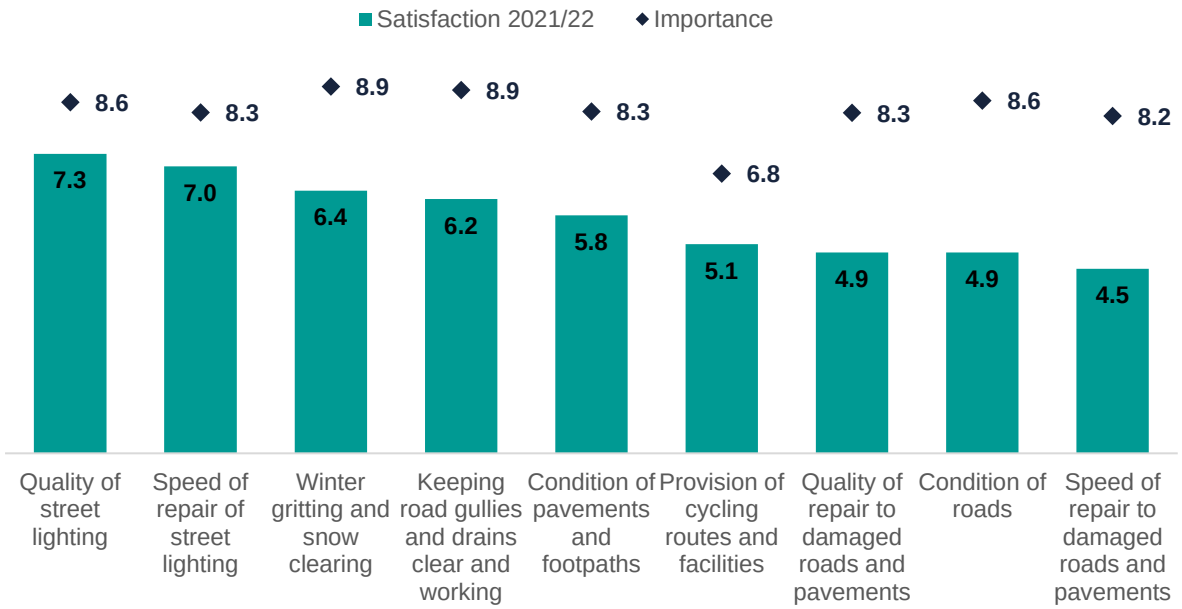


Source: West Yorkshire Residents Perceptions of Transport Survey, WYCA (2022)

About the data

Satisfaction with different elements of asset maintenance is collected through the Residents' Perceptions of Transport Survey, a survey of perceptions of transport infrastructure, information and services conducted annually by the Combined Authority. The final score for satisfaction with highway infrastructure is obtained by weighting the individual scores for the different elements of highway maintenance, based on their relative importance to respondents.

Figure 80: Importance and satisfaction with the elements included in the indicator: satisfaction with highway infrastructure (Score 1-10)



Source: West Yorkshire Residents Perceptions of Transport Survey, WYCA (2022)

7.2.6 Satisfaction with public transport

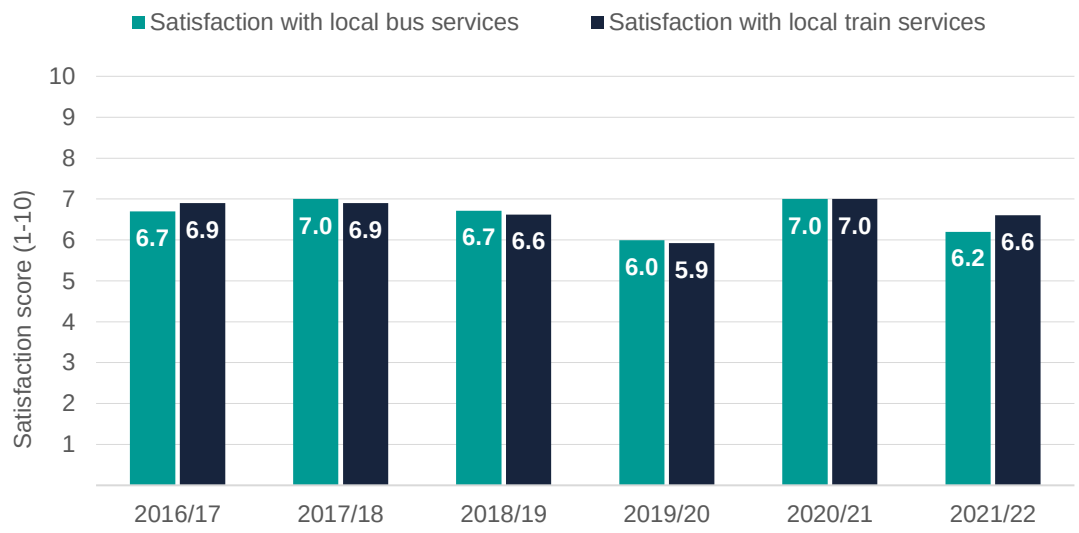
Satisfaction with public transport fell in 2021/22, although it remains higher than in 2019/20.

Public transport is one of the five themes of the West Yorkshire Transport Strategy 2040. The Strategy states the Combined Authority's aim to "transform the performance, image and experience of public transport to make it an attractive choice for all". We have selected satisfaction with public transport as an indicator of the extent to which this objective is being realised, and which aspects might potentially require further attention.

Satisfaction with local public transport in West Yorkshire is relatively high, when compared with other transport items. In 2021/22, the satisfaction scores (out of 10) for bus and rail services in West Yorkshire were 6.2 and 6.6, respectively.

The fact that we have seen the maximum satisfaction to date in 2020/21 continues to be surprising. Although there seems to be certain volatility in the results of satisfaction surveys year on year, the COVID-19 pandemic and the focus that society put on the importance of public services may have influenced the response to this question. As we return to life without restrictions, and public transport usage slowly grows, satisfaction scores also return to levels in line with those observed in previous years; we observe some improvement from 2019/20, particularly for rail, but satisfaction is still below the 2016/17 baseline.

Figure 81: Satisfaction with local bus and train services



About the data

Satisfaction with local bus and rail services is obtained from the West Yorkshire Residents Perceptions of Transport Survey. This is a survey conducted annually by the Combined Authority, aimed at measuring public perceptions of aspects of transport infrastructure and passenger transport provision in West Yorkshire. The last wave of the survey, corresponding to the period 2021/22, was undertaken between the months of January and February 2022, and is based on a sample of 1,200 respondents.

8 Supporting community safety and accountable, proactive policing

Key points

Knife crime increased in 2021/22 compared with the previous year but remains below pre-pandemic levels in West Yorkshire

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

West Yorkshire achieves high numbers of charge/summons for a range of offences when compared to other Metropolitan Forces and Forces nationally.

West Yorkshire police have performed consistently well over time on emergency call handling.

Officer numbers in West Yorkshire have increased by 26% between 2016 and 2022.

There was a 14% increase in referrals to the West Yorkshire Liaison and Diversion service in 2021/22

The restrictions on movement linked to the pandemic led to a substantial reduction in the number of persons reported as missing and the latest figures remain well below pre-pandemic levels.

8.1 Overview of the priority

The Police Reform and Social Responsibility Act 2011 as modified by the West Yorkshire Combined Authority (Election of Mayor and Functions) Order 2021 sets out the requirement for the Mayor to issue a Police and Crime Plan within the first year of office.

The objectives of the Police and Crime Plan and the actions that underpin them are informed by:

- A comprehensive understanding of local needs and resources
- Based on local performance data
- Officer, staff and stakeholder consultation
- Financial information, amongst other resources.

The West Yorkshire police and crime plan was launched in March 2022 and the priorities in the plan are backed by a compendium of measures. These measures are reported on a quarterly basis in the Performance Monitoring report which is presented to the West Yorkshire Police and Crime panel.

The range of measures presented in this report have been chosen to indicate the progress for each of priorities in the plan and to convey the current position of the Mayoral Pledges for Policing and Crime which are:

- To recruit 750 more frontline police officers and staff to reduce crime and
- To put keeping women and girls safe at the heart of the policing plan.

The national context also has to be considered when looking at the priorities for West Yorkshire. After a period on non-interference the current government have started to put in place central measures which hold the police to account.

This started with the Serious Violence Strategy in April 2018, which led to the formation of the 18 Violence Reduction Units (VRU) and the monies that came with it were aligned to a series of common measures which were agreed to track the progress of the units.

On 6th May 2021 the government laid before parliament the Elected Local Policing Bodies Specified Information order 2021. This requires that the Police and Crime Commissioners (including Mayors with policing) publish certain information to allow the public to hold them to account, including what contribution their force is making to improve the outcomes from the National Crime and Policing Measures.

The following indicators track outcomes for both the VRU and the National Crime and Policing Measures as well as the Mayoral pledges and priorities.

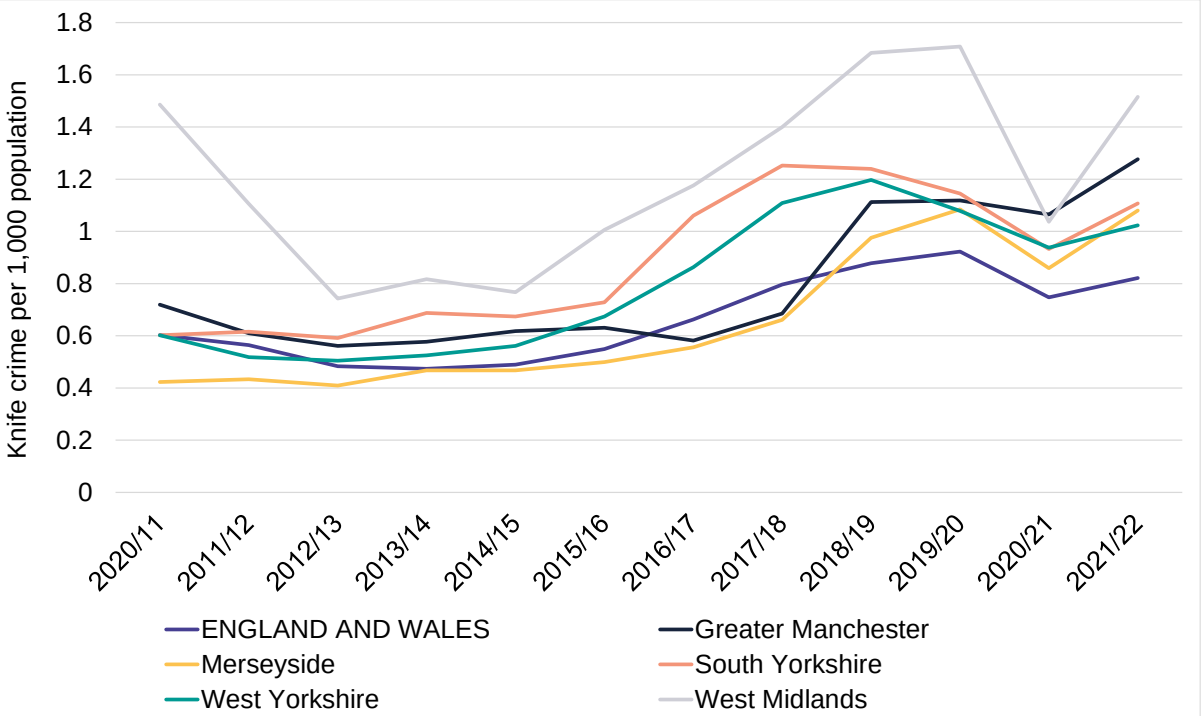
8.2 Performance against the indicators

8.2.1 Serious violence

Knife crime increased in 2021/22 compared with the previous year but remains below pre-pandemic levels in West Yorkshire

This indicator focuses specifically on knife crime as a measure of serious violence. The data matches with the Office for National Statistics release of Knife Crime data and includes a range of offences which link to serious violence including assault with injury and robbery.

Figure 82: Knife crime per 1,000 population



Source: Police force area data tables, Office for National Statistics

Knife crime increased between 2014 and 2019 across many areas of England and Wales, and this prompted the start of Violence Reduction Units in 18 forces (of which West Yorkshire was one). Knife Crime did then drop during the pandemic, although it is still not back to 2019 levels.

One thing to note is that currently 37 forces supply data based on a new methodology (the National Data Quality Improvement Service methodology) for identifying whether an offence included a knife or sharp instrument or not. On implementation of this methodology all forces saw an increase in the number of offences that fell into this category. All of the areas highlighted in the graph have implemented this methodology, so the data is comparable, but until all forces use the methodology, the comparison with the England and Wales average is not equivalent.

8.2.2 Neighbourhood Crime

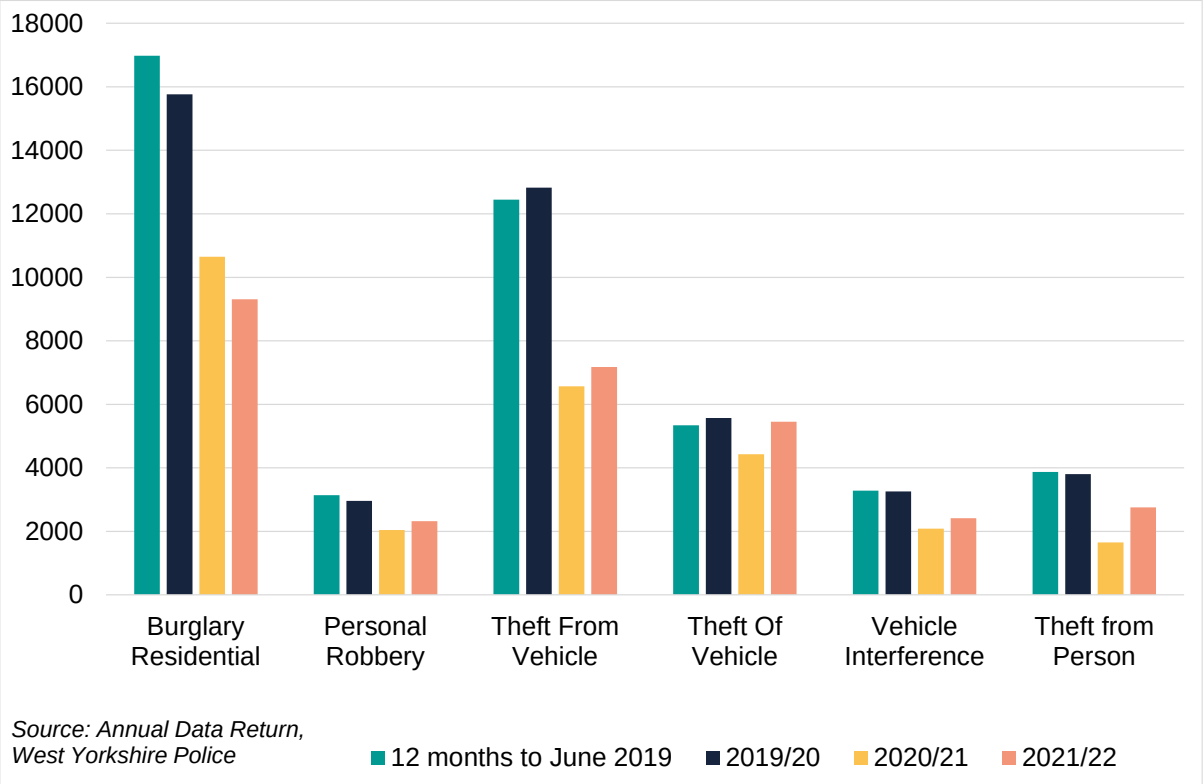
Neighbourhood crime fell during the pandemic and remains below the level recorded in 2019.

Neighbourhood crime was a termed coined by the National Policing Measures to highlight those offences which blight neighbourhoods across the country. It covers Burglary, Robbery, Vehicle Crime and Theft from Person. In order to track progress, the government set a baseline of 12 months to June 2019.

This measure of Neighbourhood Crime is covered in the indicators for the Police and Crime plan and is scrutinised on a quarterly basis

For West Yorkshire, these crime types saw a drop in the pandemic, and have not yet risen back to 2019 levels.

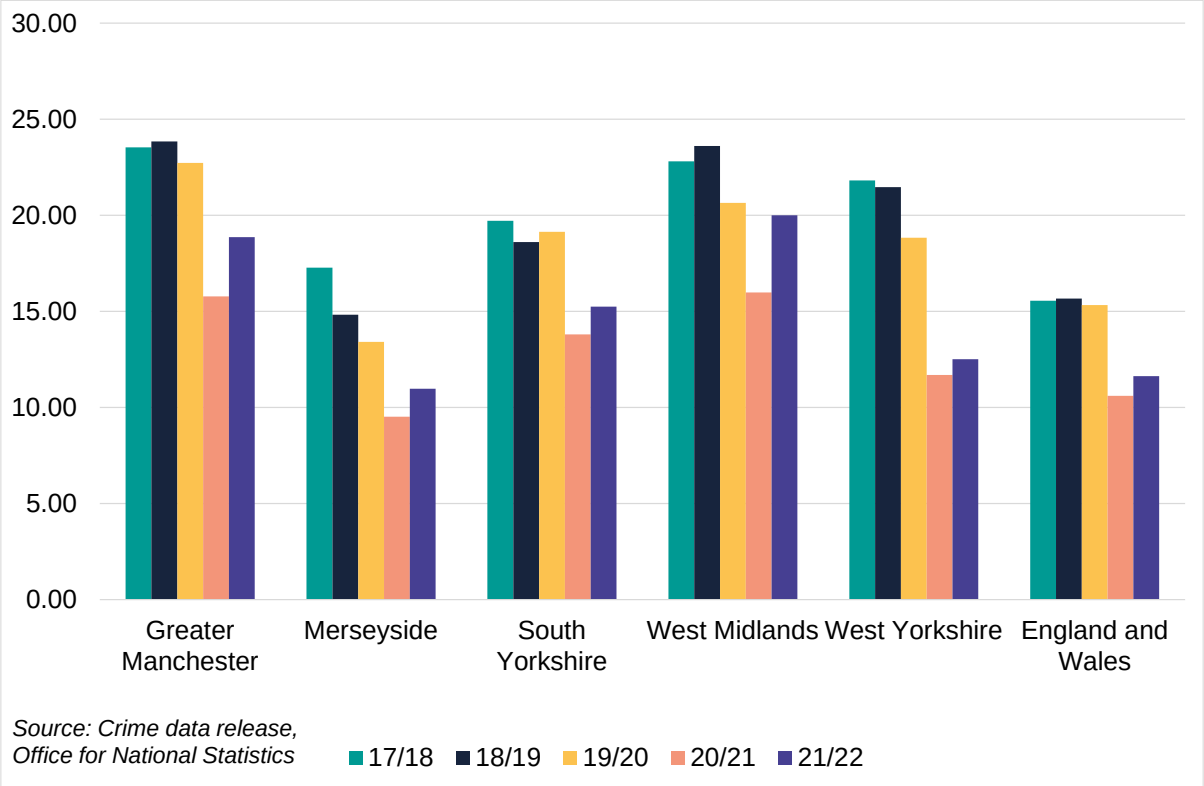
Figure 83: Neighbourhood crime in West Yorkshire



Source: Annual Data Return, West Yorkshire Police

This picture is similar for other areas in the country with a drop during the pandemic and then a slight rise since.

Figure 84: Total neighbourhood crime per 1,000 of population



Source: Crime data release, Office for National Statistics

8.2.3 Positive Outcomes for Rape and Serious Sexual Offences

West Yorkshire achieves high numbers of charge/summons for a range of offences when compared to other Metropolitan Forces and Forces nationally

Positive outcomes are seen as a way of monitoring progress in this area. A positive outcome is counted when the police procure a charge/summons or out of court disposal for the suspect in the case. For more information on outcomes please see Crime outcomes in England and Wales: Technical Annex - GOV.UK (www.gov.uk).

These measures speak to the Safety of Women and Girls which is at the heart of the police and crime plan. As part of the national Violence against Women and Girls Strategy, Rape and Serious Sexual Offences are highlighted as offence types which disproportionately affect Women and Girls.

Comparing the overall numbers for these crime types would not give a true picture of what is happening in an area. It is known that these are underreported offence types so increases could be seen as either more offences happening or more victims having the confidence to report the offences, and vice versa if there are decreases.

Rape Outcomes	Bradford	Calderdale	Kirklees	Leeds	Wakefield	W Yorks
Recorded crime April 2021 to March 2022	913	331	689	1282	449	3664
Outcome Rate (1-8)	6.1%	13.3%	14.9%	5.2%	6.0%	8.1%
Outcome Rate (1-8) full year 2020/21	7.1%	9.2%	15.2%	4.7%	8.4%	8.2%
Change from previous year	-1.0%	4.1%	-0.3%	0.5%	-2.4%	-0.1%
Vol. change (1-8) 2021/22 from 2020/21	-2	6	19	22	-4	41

Source: Police recorded crime and outcomes open data tables, Home Office

The above table shows that although the positive outcome rate (outcomes 1-8 compared to recorded crime) has fallen slightly (-0.1%) there has actually been an increase of 41 offences with a positive outcome.

Serious Sexual Offences	Bradford	Calderdale	Kirklees	Leeds	Wakefield	W Yorks
Recorded crime April 2021 to March 2022	1915	720	1382	2710	1080	7807
Outcome Rate (1-8)	6.5%	10.8%	11.4%	6.5%	5.8%	7.7%
Outcome Rate (1-8) full year 2020/21	8.6%	11.1%	13.6%	7.8%	9.4%	9.6%
Change from previous year	-2.1%	-0.3%	-2.2%	-1.3%	-3.6%	-1.9%
Vol. change (1-8) 2021/22 from 2020/21	-9	3	14	19	-12	16

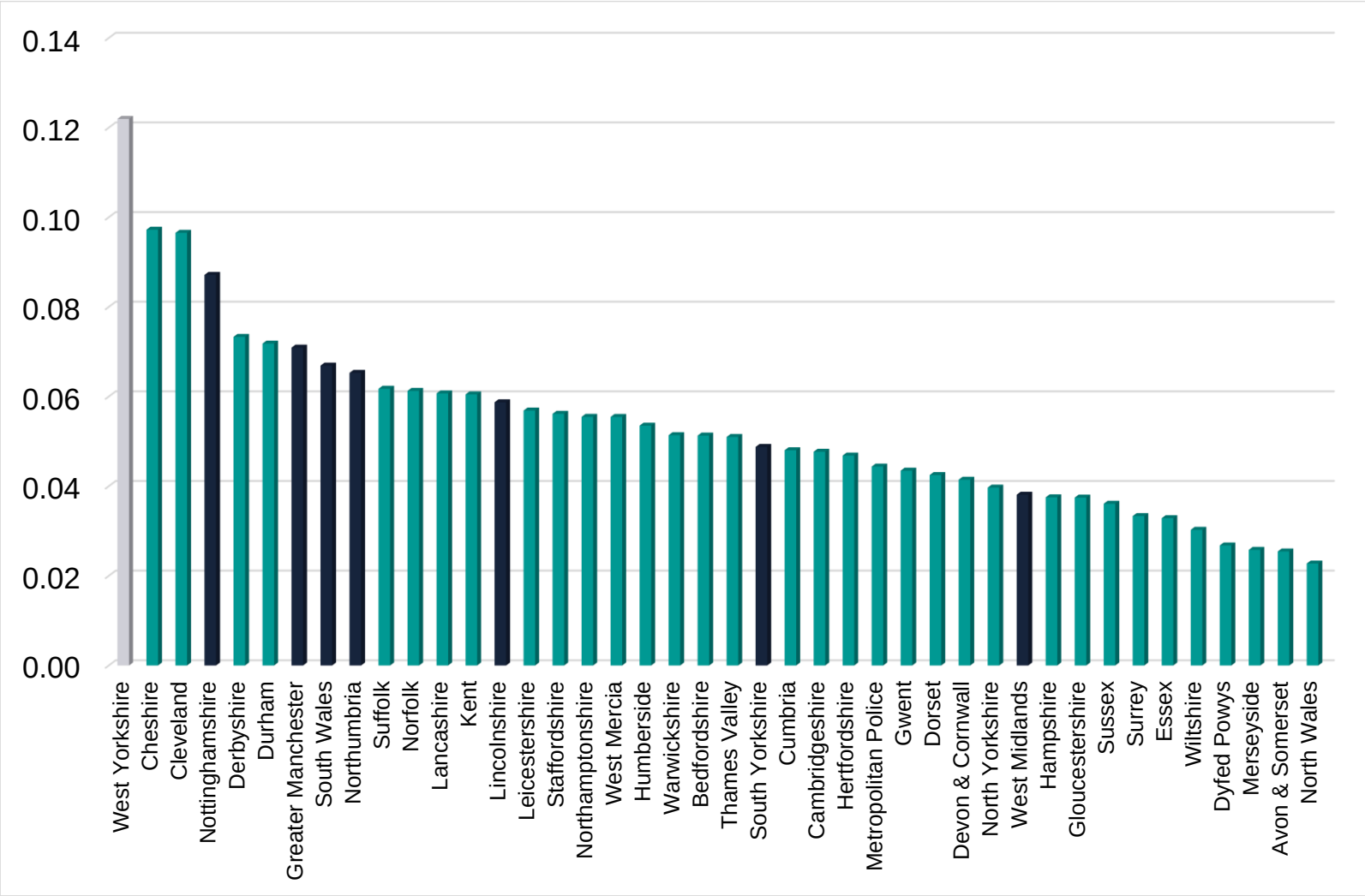
Source: Police recorded crime and outcomes open data tables, Home Office

Similarly for Serious Sexual offences, the outcome rate has fallen slightly but there have been 16 more offences with a positive outcome

The charts below report the actual number of Charge/Summons achieved by each Force nationally and in the context of the local population. West Yorkshire are reported as achieving high numbers of charge/summons for a range of offences when compared to other Metropolitan Forces and all Forces nationally.

Source https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1092650/prc-outcomes-open-data-mar2022-tables-210722-v2.ods

Figure 85: Rape – charges per 10,000 of population



8.2.4 Time taken to answer 999 calls to the Police

West Yorkshire police have performed consistently well over time on call handling.

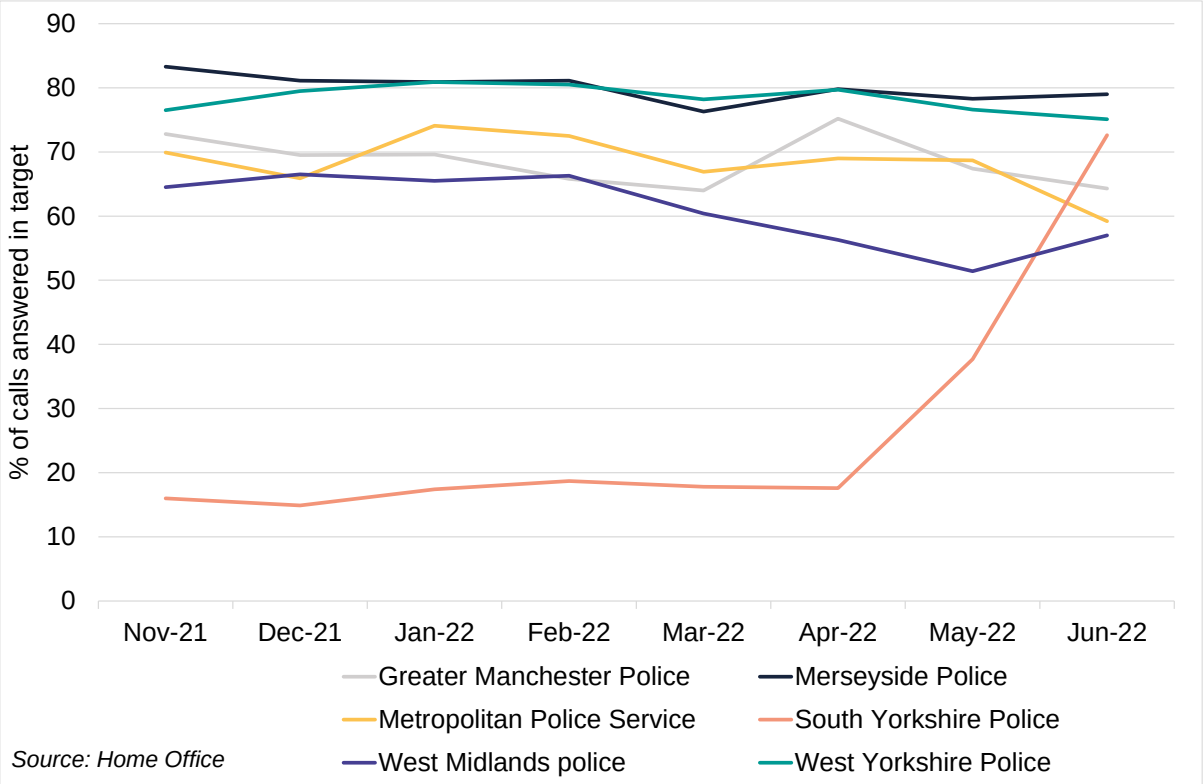
In October 2021 the government sent out its strategic approach in the 'Beating Crime' plan. One of the measures from this plan was to develop league tables for answering calls and ensuring that the public know how responsive their local force is when they call them for help.

In May 2022 the first datasets for 999 calls were published on Police.uk. This new national dataset gives the opportunity to compare the current performance of West Yorkshire Police to other force areas.

To this put into context, in the latest 12 months online contacts account for 15% of all contacts into the Force whilst 101 contacts now account for just 49% whilst 999s have **increased to 32%.** In comparison for 2016/17 just 5% of contacts were made online whilst 101 calls accounted for over 60% of all contacts.

For the 999 data set, the main target is to answer the calls in under 10 seconds – the data is only available from November 2021 – but is supplied monthly and the most recent is up to June 22.

Figure 86: Percentage of 999 calls answered within target (10 seconds)



Source: Home Office

The above statistics also contains answer times including transfer times from BT, which can be 4-6 seconds and can vary across Forces. This makes the 10 second answer time hard to hit with some of the time already used up before the call lands in force.

Some areas have been able to work with BT to understand and rectify where it appears the force are not hitting the target, but this is due to circumstances out of their control – the difference for South Yorkshire in the chart is a clear example of this.

There are other factors which can also impact on this target. Forces are in a buddy system with other areas so calls are directly transferred over to adjoining areas if there is a sudden influx due to a large incident. These calls will then show as a miss for the new force.

For West Yorkshire the call handling has been consistent over the period monitored and it is a subject of immense pride that West Yorkshire Police have not dropped one 999 calls in 5 years.

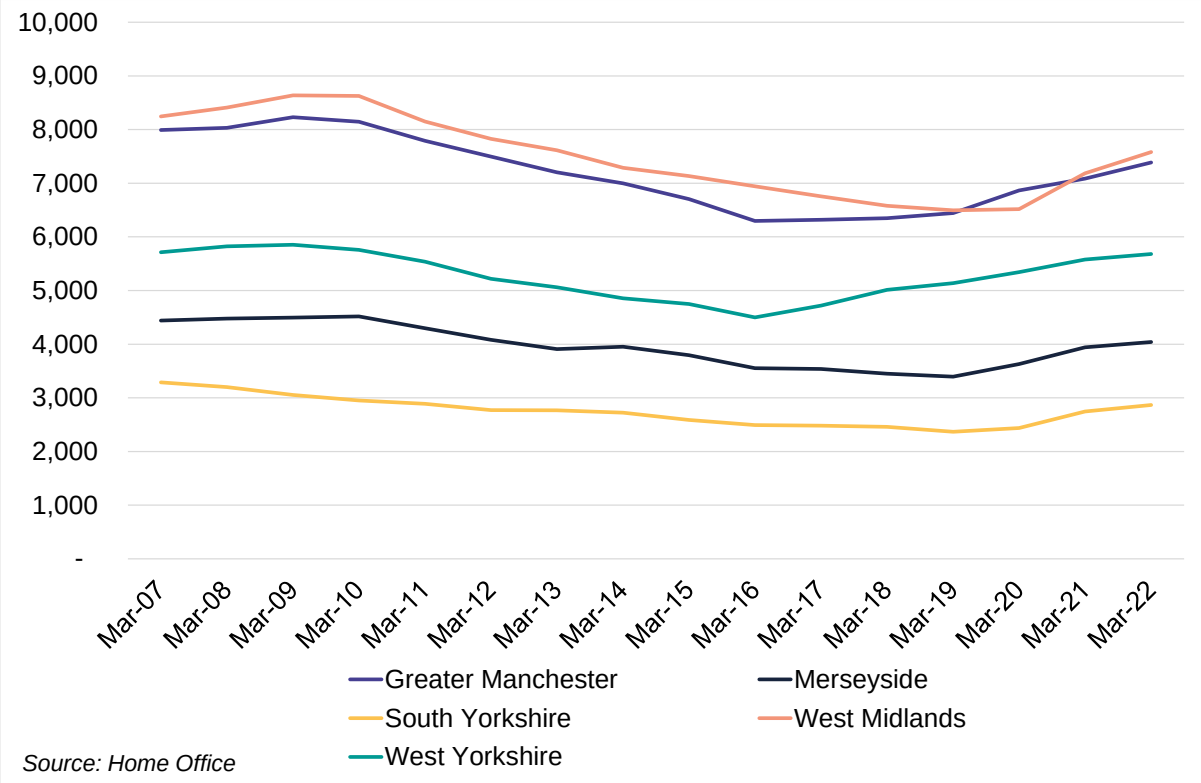
8.2.5 Police Officer numbers

Officer numbers in West Yorkshire are on an upward trend.

The increase in officer numbers is a pledge of the Mayor and also part of the government's election promise to recruit 20,000 officers across the country.

Data is released on the Gov.uk website with a count of officers both headcount and full-time equivalents (FTE).

Figure 87: Count of full-time equivalent Police Officers by force



Source: Home Office

The reduction in the number of Police Officers due to austerity is clearly seen in the above chart and between March 2009 and March 2016 West Yorkshire lost 1,353 FTE officers.

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%.

The latest workforce statistics indicate that 37.7% of Police Officers and 57.8% of Police Staff are female whilst analysis of employees ages identifies that the workforce is much younger than it has been historically and this is particularly true of Police Officers.

8.2.6 Offenders referred to drug treatment services from custody

There was a 14% increase in referrals to the West Yorkshire Liaison and Diversion service in 2021/22

One of the priorities from the Police and Crime plan is 'Responding to Multiple and Complex Needs'. Substance Misuse is widely agreed to be part of the toxic trio in Safeguarding (along with mental health and Domestic Abuse), so this measure looks at ensuring that those users who come to the attention of the Police are referred to relevant agencies to help.

The NHS has commissioned the Liaison and Diversion Service (L&D) which looks to identify people who have mental health, learning disability, substance misuse or other vulnerabilities when they first come into contact with the criminal justice system as suspects, defendants or offenders.

The service can then support people through the early stages of criminal system pathway, refer them for appropriate health or social care or enable them to be diverted away from the criminal justice system into a more appropriate setting, if required.

L&D services aim to improve overall health outcomes for people and to support people in the reduction of re-offending. It also aims to identify vulnerabilities in people earlier on which reduces the likelihood that people will reach a crisis-point and helps to ensure the right support can be put in place from the start.

The following are the statistics from the West Yorkshire L&D service. These are updated quarterly and are shared as part of the Police and crime plan performance monitoring report.

Table 6: Referrals to West Yorkshire Liaison and Diversion Service

Adults	West Yorks	Bradford	Calderdale	Kirklees	Leeds	Wakefield
Referrals into L&D service 2021-22	5,272	1,118	705	786	1637	1,026
Formal pathway referrals made by L&D into support services	2,539	433	447	258	897	504
Other pathway contacts (e.g., already in service, liaison with support services, no formal referral)	1,977	339	320	239	577	502

Young People	West Yorks	Bradford	Calderdale	Kirklees	Leeds	Wakefield
Referrals into L&D service 2021 -22	2,290	469	649	276	583	313
Formal pathway referrals made by L&D into support services	828	26	241	75	159	327
Other pathway contacts (e.g., already in service, liaison with support services, no formal referral)	318	38	34	75	42	129

Source: West Yorkshire Liaison and Diversion Service

The above represents a 14% increase in referrals into the L&D service in comparison to the previous year.

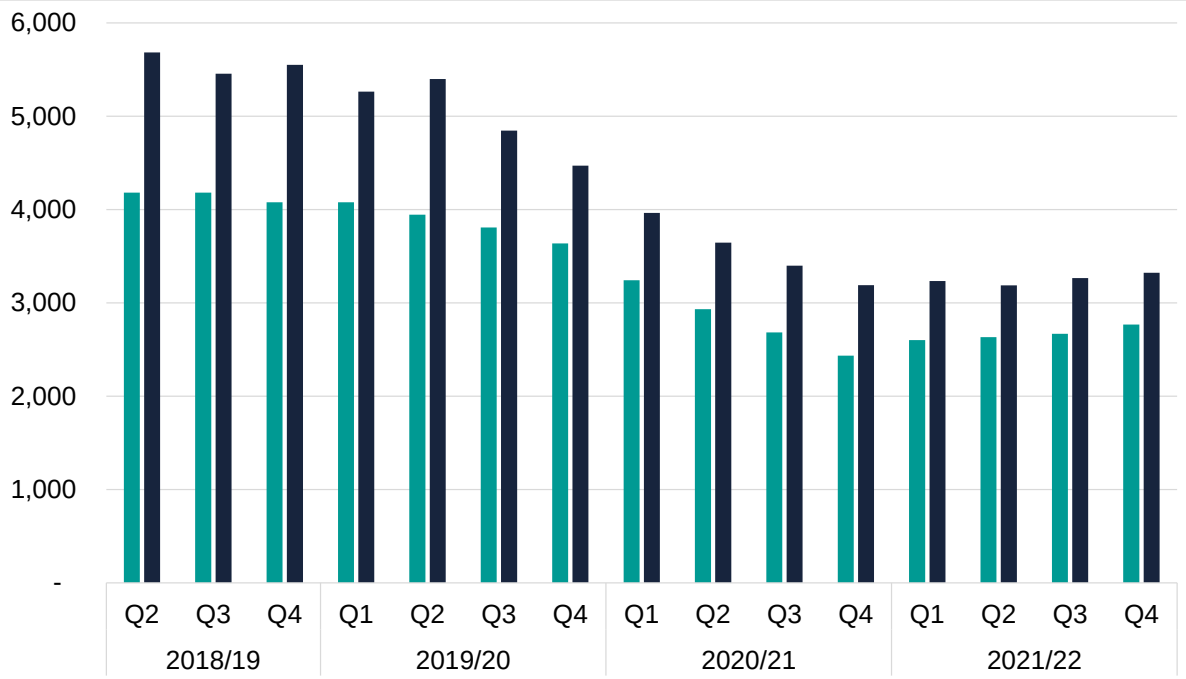
8.2.7 Numbers of missing persons

The restrictions on movement linked to the pandemic led to a substantial reduction in the number of persons reported as missing and the latest figures remain well below pre-pandemic levels

Numbers of missing persons are collated by West Yorkshire Police and shared with the Policing and Crime office on a quarterly basis in their Quarterly Performance Report. The data is then shared with the Police and Crime panel. The data is split down between adults and children by quarter to give an indication of the trends.

The below looks at missing persons across West Yorkshire as a whole and is split between Adults and Children. Omitted from these statistics are those where an age is not recorded.

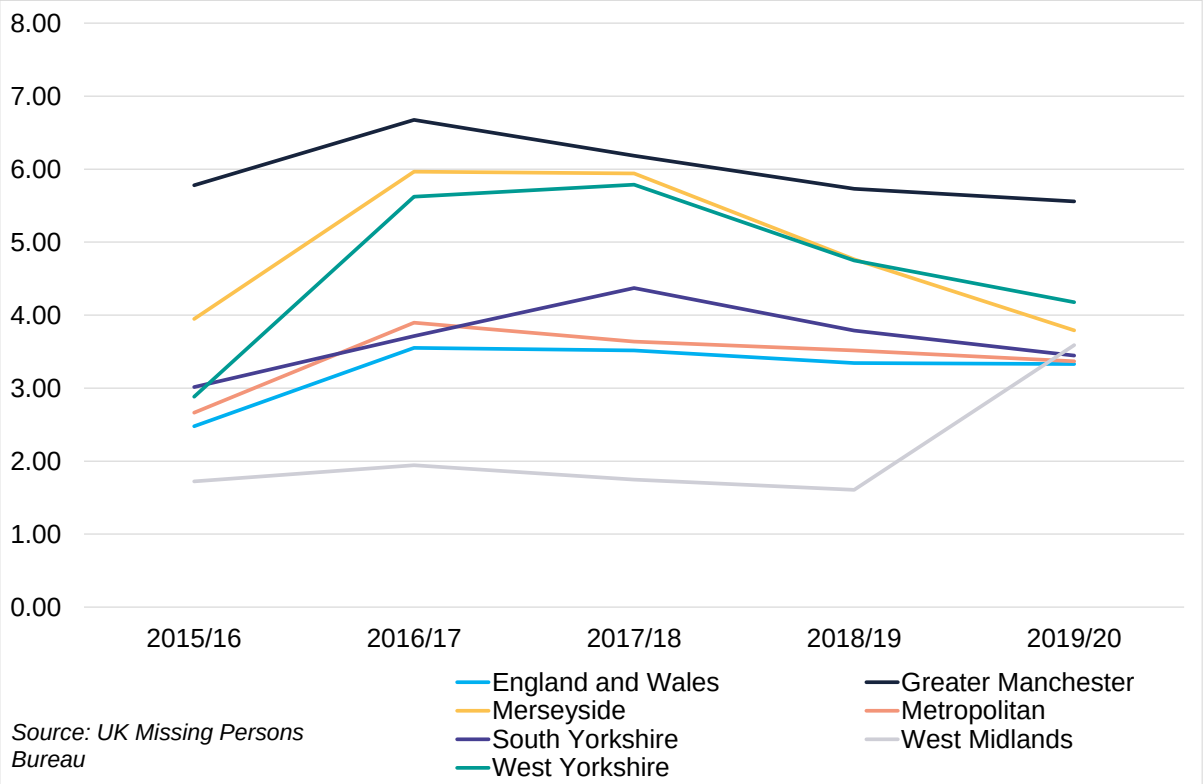
Figure 88: Missing persons



Source: Quarterly Performance Report, West Yorkshire Police

Nationally, the numbers of missing persons are collated by the UK Missing Persons Bureau. Currently the most recent statistics on the website are up to March 2020. The below is a comparison (by 1,000 population) for missing person incidents since 2015/16.

Figure 89: Missing incidents per 1,000 population



Source: UK Missing Persons Bureau

The most recent report on the UK Missing Persons Bureau website is for 2020/21 and this report also shows the striking impact of COVID-19 on missing behaviour. Almost all forces saw a significant decrease in the number of individuals reported as missing during this period as restrictions on movement were introduced. In 2020/21 there were 17.8% fewer missing related calls in England and Wales compared with forces supplying data the previous year.

9 Conclusions

Due to the lack of timeliness of the latest available data the picture presented by our indicators is heavily coloured by the impact of the pandemic. We do not have a clear view of how the situation has changed since the lifting of restrictions, although more timely national data indicates that there has been recovery in respect of some indicators. This itself may soon be superseded as the UK economy stands on the edge of a potential downturn resulting from the current cost of living crisis.

Driving economic growth and innovation to enable good jobs

Regarding economic fundamentals, the latest data for West Yorkshire show that the economy contracted during 2020, employment fell (based on annual average data for 2021) whilst productivity increased during 2020, due to a short-term effect of the pandemic.

More timely national data shows that the economy has since returned to its pre-pandemic size while employment has recovered, although not yet to its pre-coronavirus position. Meanwhile, productivity performance exceeds its 2019 level and is being driven by productivity growth within industries rather than reallocation of activity between industries as seen during the pandemic. West Yorkshire is likely to have shared in this recovery, although the extent of this is not fully clear.

However, the underlying disparities between West Yorkshire and the national average relating to some of these fundamental indicators remains. A key exception is the size of the private sector business base, which has grown slightly faster than nationally in West Yorkshire.

West Yorkshire's exports of both goods and services were particularly hard hit by the pandemic in 2020. The extent to which the value of exports may have recovered since then is unclear but trade performance will play an important role in improving the region's prospects for productivity growth.

There is no evidence that innovation is becoming more prevalent among West Yorkshire firms.

There is still much progress to be made on addressing the disparity in the standard of living for West Yorkshire residents, which is central to the levelling up agenda. There has been a continuing widening of the gap between the level of household income per head in West Yorkshire compared with the national average.

Pay is a central measure of job quality as well as living standards. The proportion of jobs that pay below the Real Living Wage fell in West Yorkshire between 2020 and 2021, coming close to parity with the national average. Although a positive development, this largely reflects enhancements to the National Minimum Wage and National Living Wage rather than an improvement in the performance of the local economy.

Enabling a diverse, skilled workforce and accessible learning for all

West Yorkshire's workforce is becoming more diverse. The employment rate gaps facing disabled people and people from ethnic minorities are reducing over time, although West Yorkshire has a larger ethnic minority employment rate gap than nationally.

There are clear trends that show that West Yorkshire is becoming better qualified over time, although progress was limited in 2021 in terms of the extent of growth in the proportion of people with higher qualifications and the decline in those lacking qualifications or qualified to

the lowest level. To set this into context better qualified areas are also improving their position over time and West Yorkshire must respond to the challenge to compete for investment and address the productivity gap with such areas.

The significant proportions of people who lack digital skills for life and for the workplace presents a major challenge for social inclusion and for productivity.

Apprenticeships are a relatively strong feature of West Yorkshire's skills system and present a key mechanism for promoting social mobility. It is a concern that the level of participation on apprenticeships is still down on pre-pandemic levels. Apprenticeships continue to face specific diversity issues, such as gender segregation based on subject area.

Tackling exclusion in the form of young people who are NEET remains a key priority. Although numbers have fallen in the last year, NEET prevalence is still above the national average.

The fall-out of the current cost of living crisis is a key concern with regard to this priority, since progress on promoting diversity and tackling inequality has typically been stymied during past downturns.

Empowering our communities, towns and cities to thrive

West Yorkshire's relatively low healthy life expectancy and the inequality of life expectancy within the region reflect the socio-economic challenges that the area faces.

The growing cost of living crisis will present added challenges. West Yorkshire already has a higher prevalence of fuel poverty than nationally and this is expected to grow substantially despite government support.

Other challenges relating to housing have intensified due to the pandemic.

Although housing is relatively affordable in West Yorkshire compared with nationally, house prices spiked during 2021 and the evidence suggests that rental prices have increased sharply during 2022.

At the same time the supply of housing was negatively affected by the health crisis with two successive annual falls in net additional dwellings.

Digital Infrastructure underpins the digital, cultural and social infrastructures to develop places where people want to live, work and visit. Digital networks provide the enabling infrastructure that drives economic growth and productivity. West Yorkshire outperforms the national average on key measures in this area relating to gigabit-capable and mobile 4G coverage.

Building a sustainable, nature-rich and carbon neutral region

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. Based on more timely national data, it seems certain that this reduction will not be sustained in the data for 2021 due to the re-opening of the economy and the shift towards previous patterns of travel behaviour.

Creating an accessible, clean and customer focused transport system

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 this needs to be addressed to enable progress towards our net zero commitment and offer the potential for a more efficient and reliable road network.

However, the pandemic also prompted a reduction in public transport availability and use, impacting on the ability of the transport system to connect people from deprived communities to jobs via the bus network. It is not clear whether levels of accessibility have fully recovered since then.

Transport-related greenhouse gas emissions fell markedly as a result of the pandemic, following a period during which they remained at a stable level. Since this was due to high exceptional circumstances, we can expect to see a net increase on 2020 emissions levels as new data becomes available. West Yorkshire still has a strong reliance on the car for travel and radical changes in behaviour are required to make sustained reductions in transport emissions at the scale required to achieve net zero.

Supporting community safety and accountable, proactive policing

The latest figures show the continuing influence of the health crisis on key policing indicators. Neighbourhood crime, knife crime and the number of persons reported as missing remain below pre-pandemic levels. The challenge will be to make sustained progress in the medium to longer term.

Although currently showing as positive, recent trends show an unprecedented increase in 999 calls and there is an increasing complexity of crime and demand. The nature of crime is changing with increases in online crime and criminal use of technology posing challenges for digital investigative capacity and capability.

Demands around safeguarding are increasing with historic complex crimes draining police resources and the investigative capacity and capability stretched in line with the gap in detective capacity seen nationwide. This could hinder progress in increasing positive outcomes.

This is all framed by the national challenges to legitimacy in policing and runs alongside financial challenges with the requirement to make significant savings against the backdrop of increasing costs.

To keep track on these and more of the Police and Crime Plan measures, see the Performance Monitoring Reports (previously called Delivery Quarterly) on the website https://www.westyorks-ca.gov.uk/policing-and-crime/holding-the-chief-constable-to-account/, for detailed reports on other policing and crime topics please see the Community Outcomes Meeting Reports here.

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