

# **COVID-19 Fortnightly Insights Report**

Research & Intelligence  
22<sup>nd</sup> January 2021



# Executive Summary – social and economic

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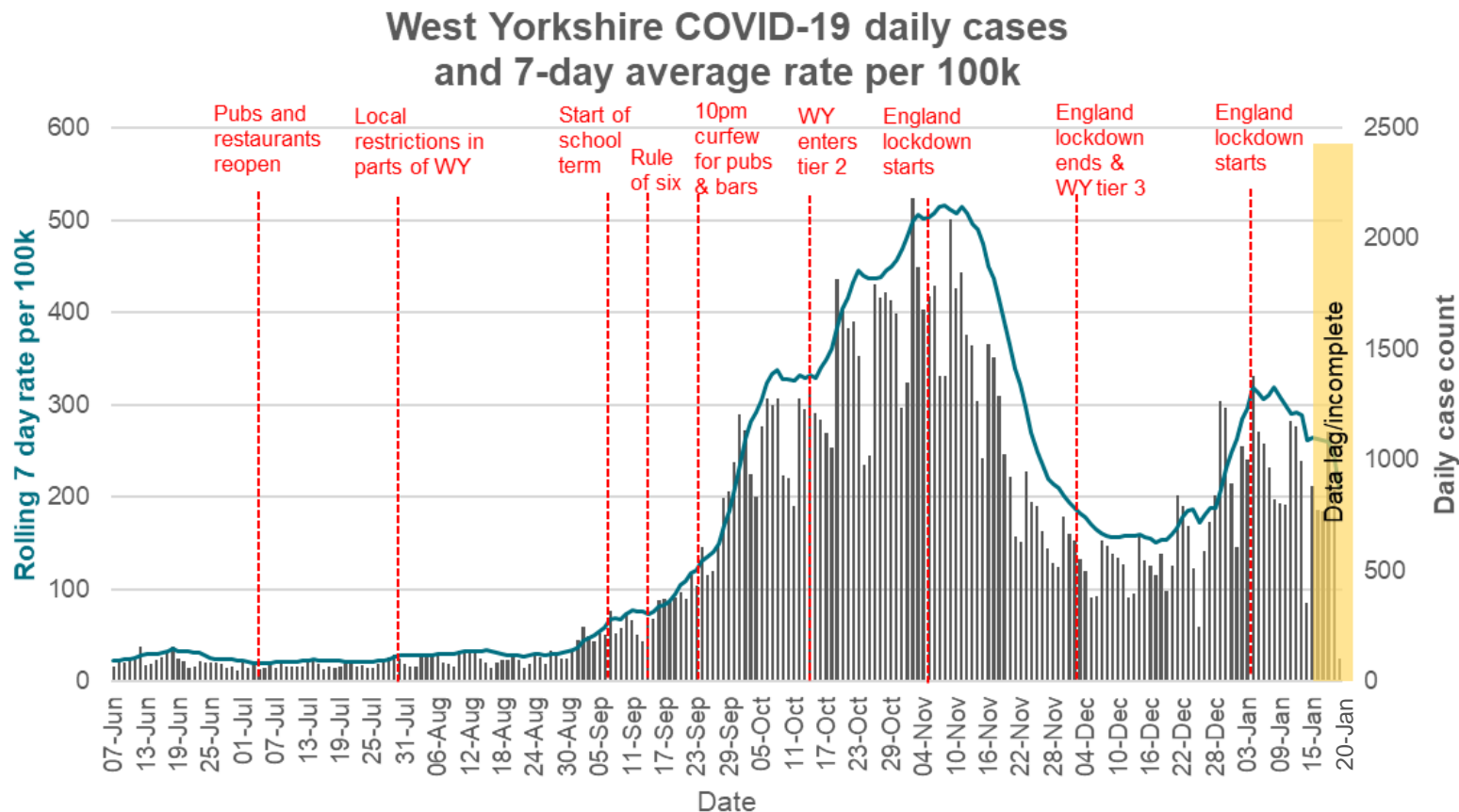
- There is evidence a further slowing in activity in town and city centres in the week to January 14<sup>th</sup>, with some data suggesting this is at a lower level than at any point since the pandemic began. The period of snowy weather is likely to have contributed to this, as well as the latest lockdown.
- Business interactions with the LEP over the past week have again highlighted the challenges facing consumer sectors with demand lowered further during lockdown. This is emphasised by national surveys by the Office for National Statistics suggesting a third of hospitality businesses are not confident they will survive the next three months.
- Data from Beauhurst supports this, with the number of businesses in West Yorkshire seeing a severe or critical impact from COVID-19 doubling between November and January. 40% of these were in leisure sectors.
- New data from the British Business Bank shows almost £2bn has been loaned to West Yorkshire businesses since the start of the pandemic through the Coronavirus Business Interruption Loan Scheme and Bounce Back loans. Around half of all businesses have taken out one of these products.
- The LEP's conversations with businesses are also identifying issues in relation to EU Exit and whilst many issues are very specific and technical, advice and challenges around importing and exporting are a driver of many contacts, along with issues around regulations and product certification.

# Executive Summary – transport

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- Regardless of data source, travel trends during to the most recent lockdown all have a common theme – activity levels are higher compared to lockdown 1.
  - GB level transport use for motor vehicle, bus and rail travel remained notably higher than the levels seen in the first full week
  - Apple mobility data (requests for directions in Apple Maps for driving and public transport) reveals activity levels are considerably higher during lockdown 3 than lockdown 1 in all cities where data is available.
  - Proxies for local rail and bus use also remain at higher levels than March lockdown (13% and 17% respectively).
- Pedestrian footfall in Leeds City Centre in the first two weeks of January 2021 was lower than levels recorded during November 2019 (lockdown 2).
- December saw an increase in recorded cycle trips compared to the previous years, especially at weekends and along the Calder and Hebble Navigation. This indicates a continued increase in leisure cycling.

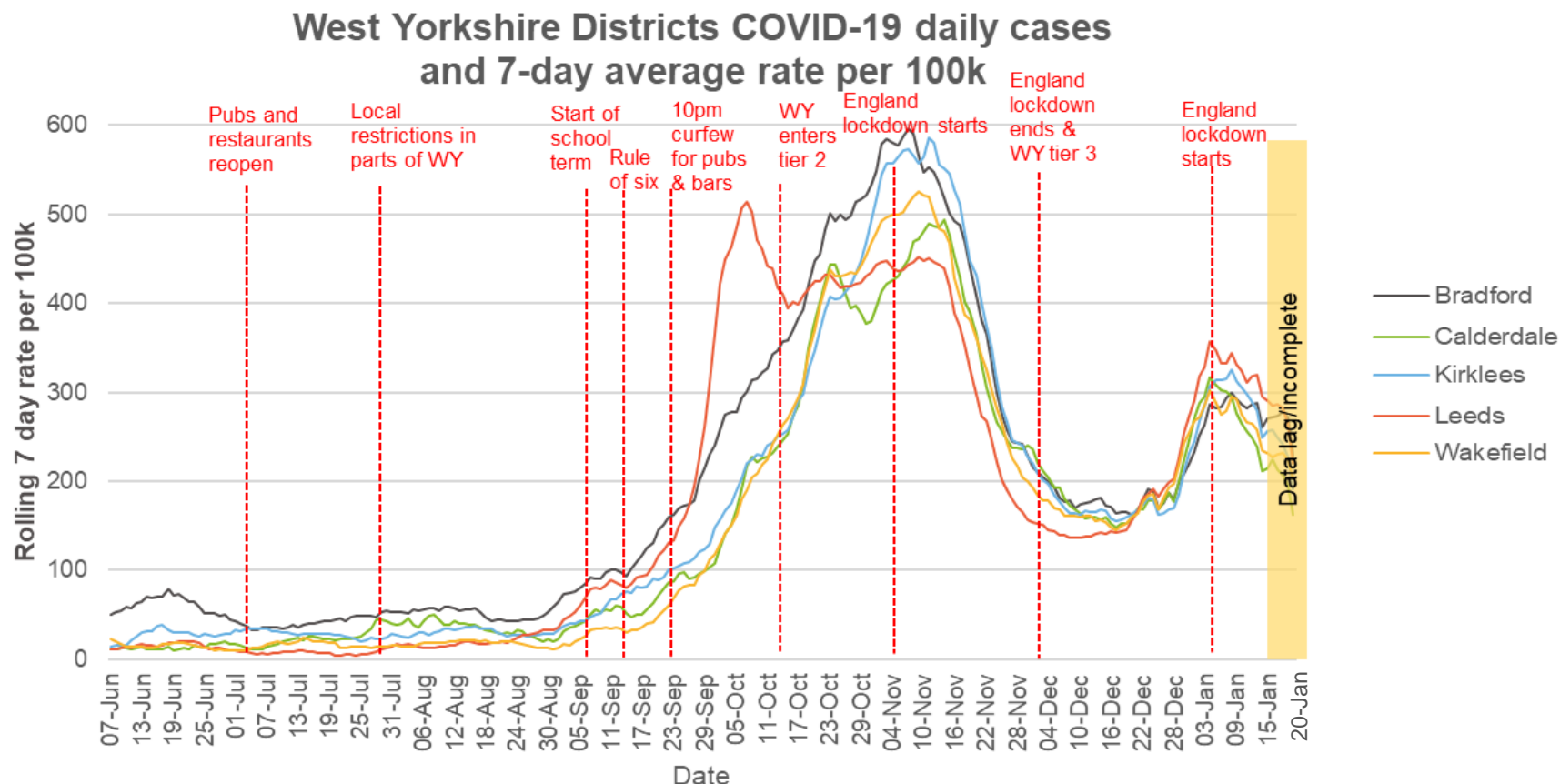
# Virus prevalence – West Yorkshire trend



The chart above reveals the trend in the number of daily COVID-19 cases in West Yorkshire and the 7-day rolling rate per 100k population. As of the 16<sup>th</sup> January 2021, the 7-day moving average **West Yorkshire COVID-19 rate was 262.8 cases per 100k, down from 307.9 per 100k the week before.** These rates are in-line with the Yorkshire and the Humber rate (257.3 per 100k), but well below the England rate (484 per 100k).

Source: Secure COVID-19 PHE data portal. Note there is a lag in the very latest data PHE COVID-19 data to account for all test results to be processed and recorded.

# Virus prevalence – District overall trend











The chart shows the trends in the 7-day rolling COVID-19 rate per 100k population at district level. Within West Yorkshire, as of the 16<sup>th</sup> January rates are lowest in Calderdale and Wakefield (225 and 226 per 100k) and highest in Leeds (285.3 per 100k). Rates fell in all districts in the last week, with the greatest absolute falls in Wakefield.

Source: Secure COVID-19 PHE data portal. Note there is a lag in the very latest data PHE COVID-19 data to account for all test results to be processed and recorded.

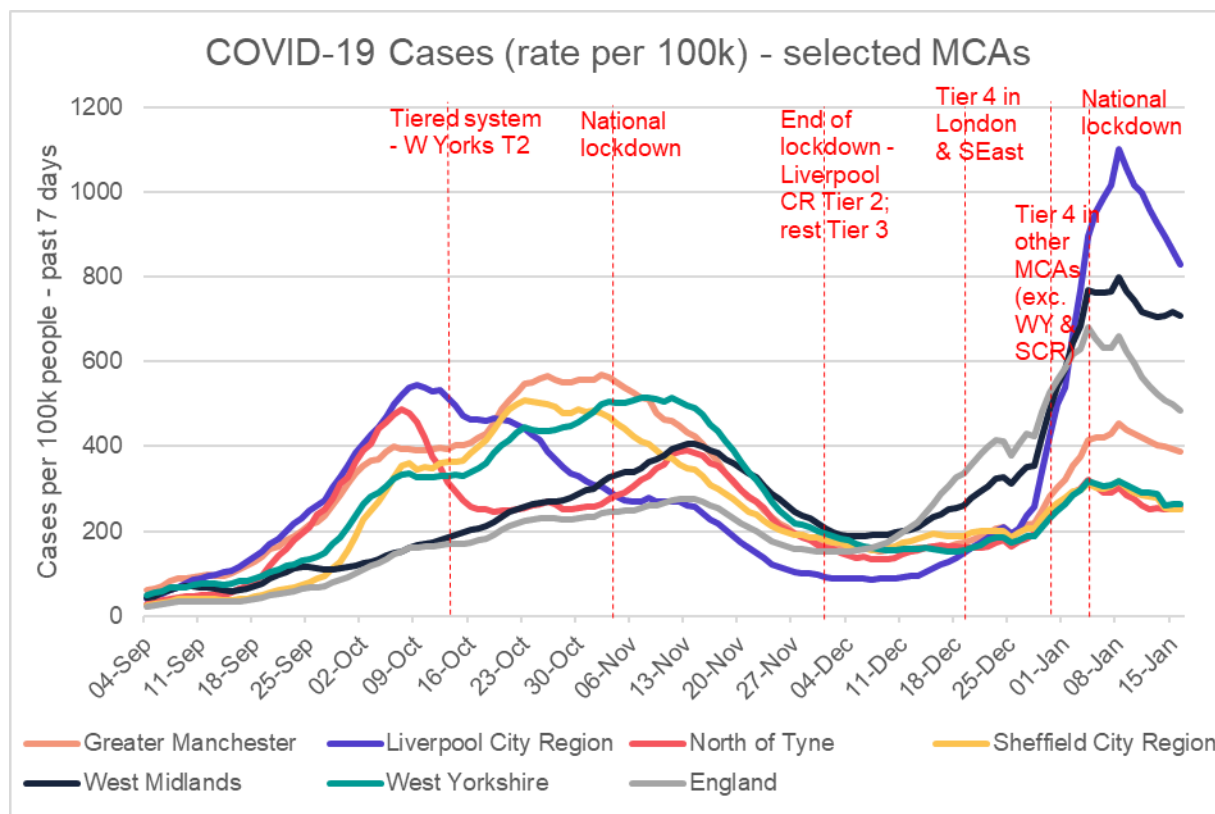
# Virus prevalence – West Yorkshire

Table shows the most recent COVID-19 case data from Public Health England's (PHE) secure data portal. Note due to reporting delays for comparison between Local Authorities the most recent 4 days are excluded from the calculations of rates and moving averages.

Area	Total cases per 100k people (10 Jan – 16 Jan)	Total cases per 100k people (3 – 9 Jan)	Absolute Difference
	Most recent data week	Previous week	
Bradford	271.4	291.6	-20.2 
Calderdale	225.1	276.2	-51.1 
Kirklees	258.3	312.9	-54.6 
Leeds	285.3	331.7	-46.4 
Wakefield	226.8	292.0	-65.2 
West Yorkshire	262.8	307.9	-45.1 
Yorkshire & the Humber	257.3	319.3	-62.0 
England	484	624.8	-140.8 

# Rates beginning to fall across MCAs

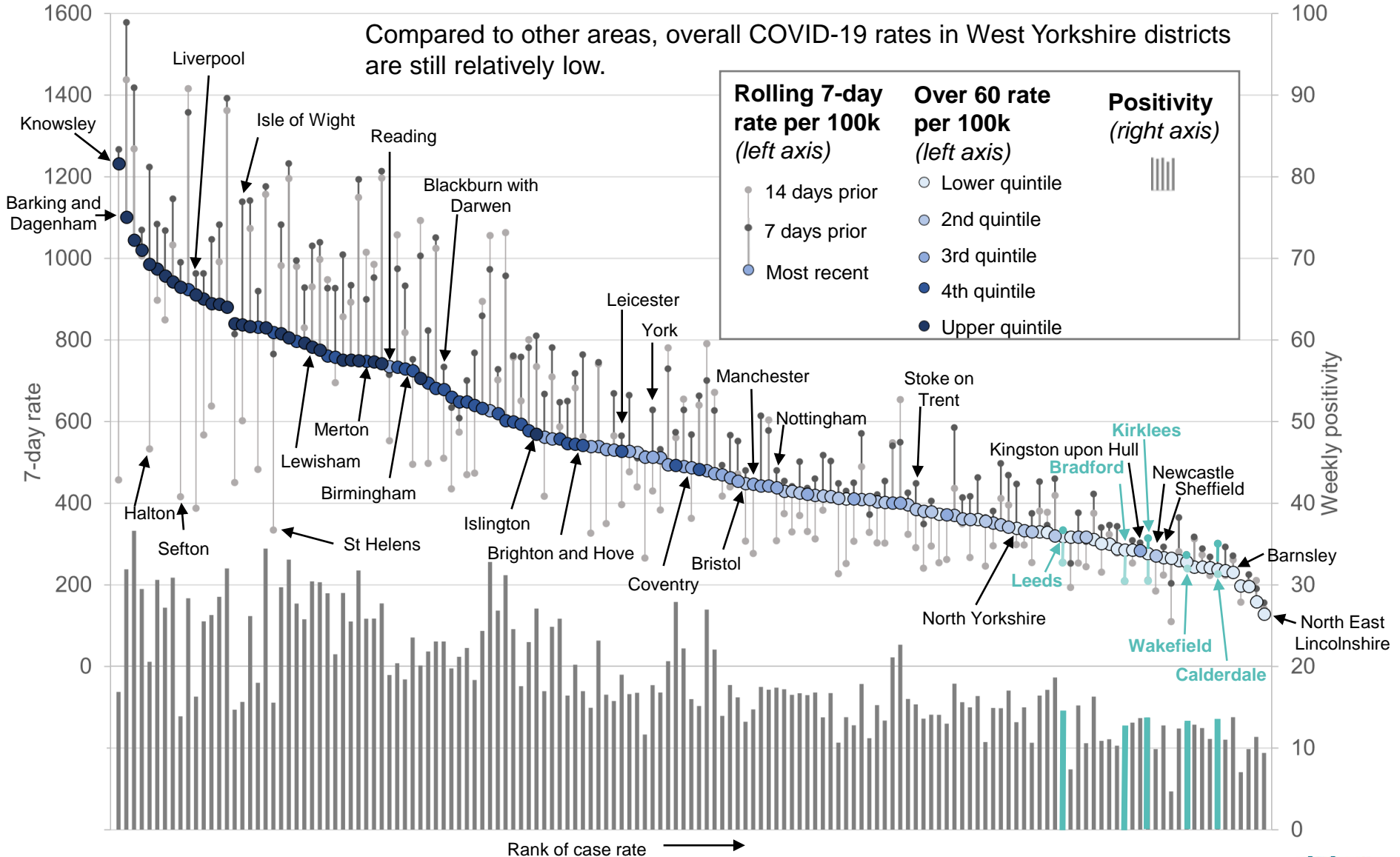
Infection rates appear to have fallen from their peak both nationally and in the MCAs analysed here according to the latest PHE data up to 16<sup>th</sup> January. Places that have the highest rates have seen the sharpest falls in absolute terms in recent days, most notably Liverpool City Region, though the falls seem to have become less pronounced in some areas in recent days. Declines so far have been relatively modest in West Yorkshire, Sheffield City Region and North of Tyne, though these areas all have infection rates below those seen in early November, and below the national average.



Source: HMG / PHE Coronavirus in the UK data

# COVID-19 Rates for Upper Tier Local Authorities

7-day average COVID-19 rate per 100k population, change compared to the previous week, over 60 rate & positivity

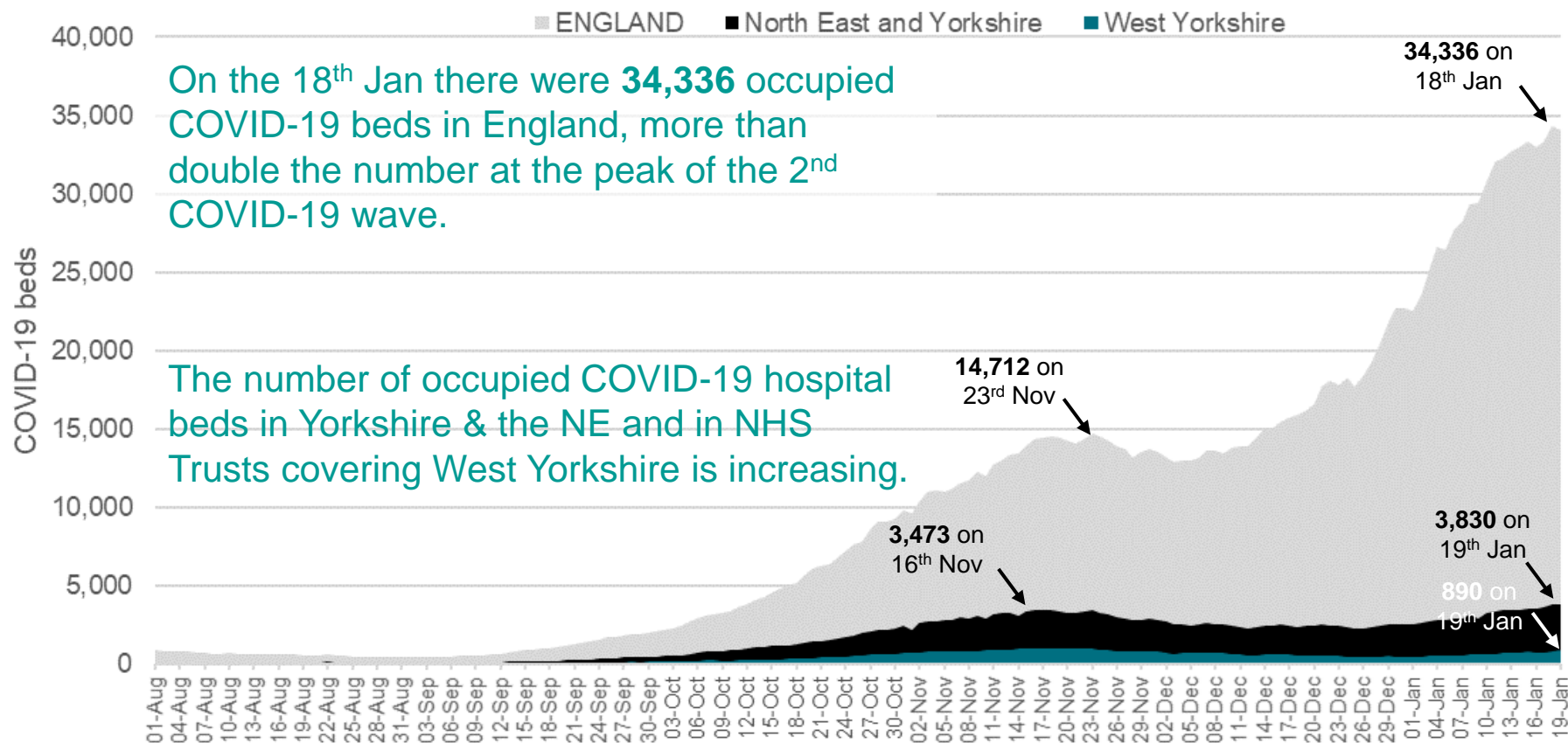


Blue points show latest COVID-19 case rate per 100k across UTLAs as of the 13<sup>th</sup> December (left Y-axis). Vertical bars connected to these points denote rate last week (dark grey) and the week before (light grey). Point colour denotes the COVID-19 rate per 100k in the over 60s. Grey bars at the bottom denote positivity (%) up to the 30<sup>th</sup> Dec (right Y-axis).



# There are currently more than twice as many hospital beds occupied by COVID-19 patients in England than there were in during the 2<sup>nd</sup> COVID-19 wave

Total hospital beds occupied by COVID-19 patients - England and Yorkshire & NE region



Source: NHS England -The number of hospital beds containing confirmed COVID-19 patients. NHS Trust level data is updated weekly and National/Regional data is updated daily . Note NHS trusts overlap areas outside of West Yorkshire. They include Bradford Teaching Hospitals, Airedale, Leeds and York Partnership, Leeds Teaching Hospitals, Calderdale and Huddersfield, Mid Yorkshire and South West Yorkshire Partnership.

# **Economic Insights**

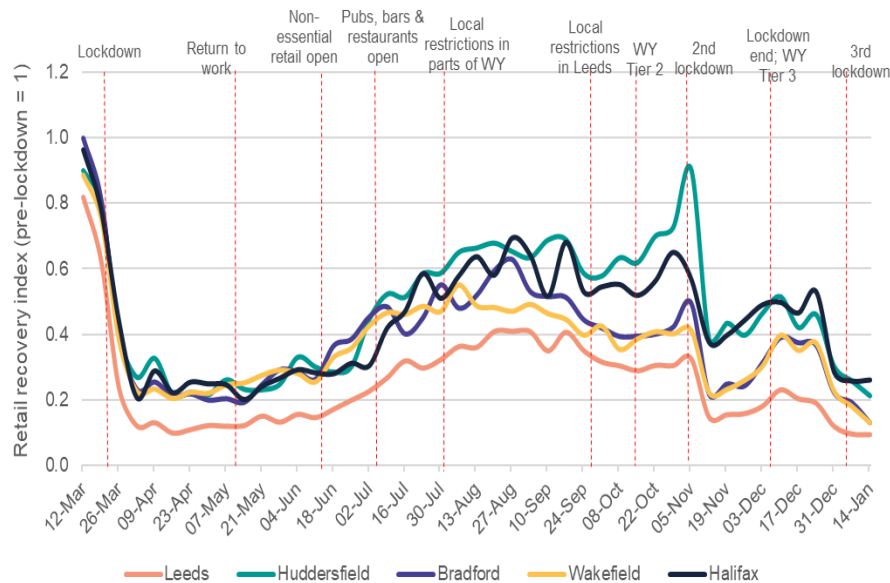


# Further slight fall in town and city centre activity, winter weather may be a factor

Activity in most of West Yorkshire's main urban centres fell slightly further in the week to January 14<sup>th</sup>, according to Geolytix's Retail Recovery Index. However it was largely unchanged in Leeds and Halifax. Leeds (10% of baseline), Bradford and Wakefield (both 13% are presently seeing lower levels of activity than at any point of the pandemic so far, though it should be noted that the latest data period also included a spell of heavy snow in parts of West Yorkshire which will likely suppress activity further during this period.

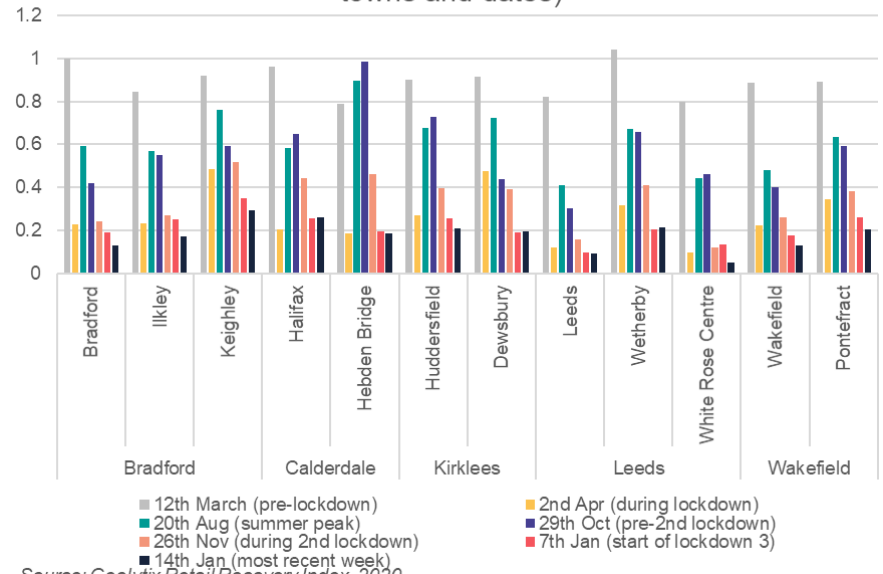
The same patterns are evident in other tracked town centres, with places seeing either slight falls in activity or little change from the previous week.

Retail recovery index - main urban centres



Source: Geolytix Retail Recovery Index, 2020

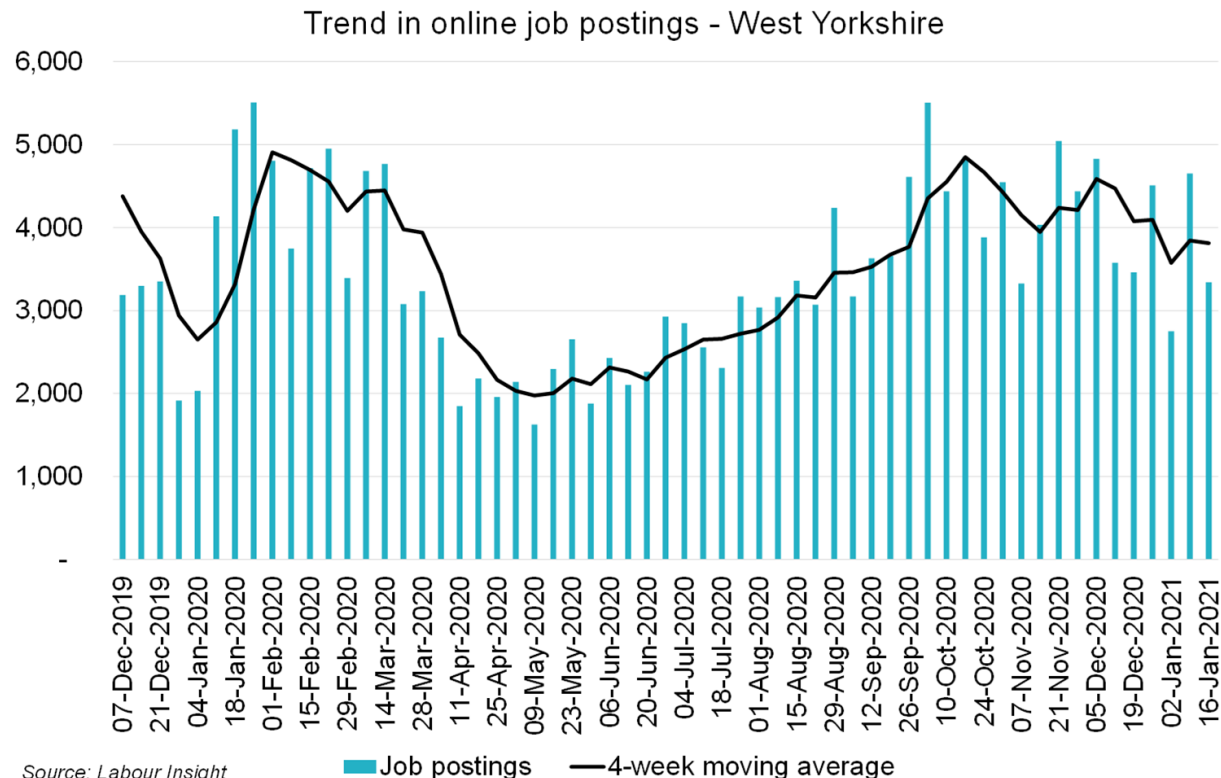
Retail recovery index - West Yorkshire (selected towns and dates)



Source: Geolytix Retail Recovery Index, 2020

# Little change in vacancy count for week ending 16 January

The number of vacancies for jobs in West Yorkshire posted online during week ending 16 January was largely static (-1%) compared with the previous week (based on a 4-week moving average). Nationally, the number of vacancies also decreased by 1%. The weekly vacancy count for West Yorkshire is around 21% below its recent peak in mid-October, which was achieved prior to the imposition of the second lockdown in November, and 14% below its pre-crisis level (week ending March 14). However, the latest count is almost twice the level seen in the depths of the first lockdown in early May. Although vacancies are on a downward trend currently as a result of the third lockdown we have not yet seen a sharp decline like that of late March.



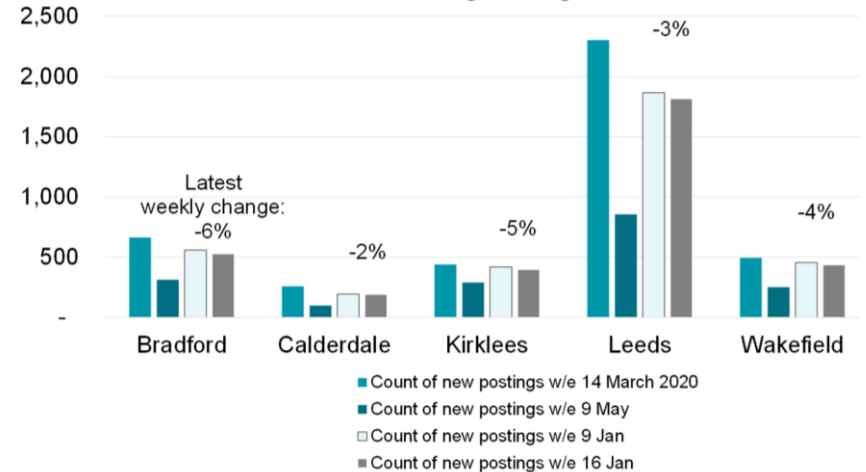
# Decrease in vacancies for all local authorities but with seasonal factors to consider

All local authority areas saw a decrease in postings in the latest week and all are currently below pre-crisis levels, Leeds being 21% lower and Calderdale 27% lower. However, the latest vacancy counts for all local authorities is well above the levels of early May (the lowest point of the first lockdown). (Note: the apparent inconsistency between West Yorkshire latest weekly % change and that of local authorities is due to the fact that not all West Yorkshire postings are assigned to a local authority).

Weekly count of new online job postings in West Yorkshire by occupational category - 4 week moving average



Weekly count of new online job postings by council 4 week moving average

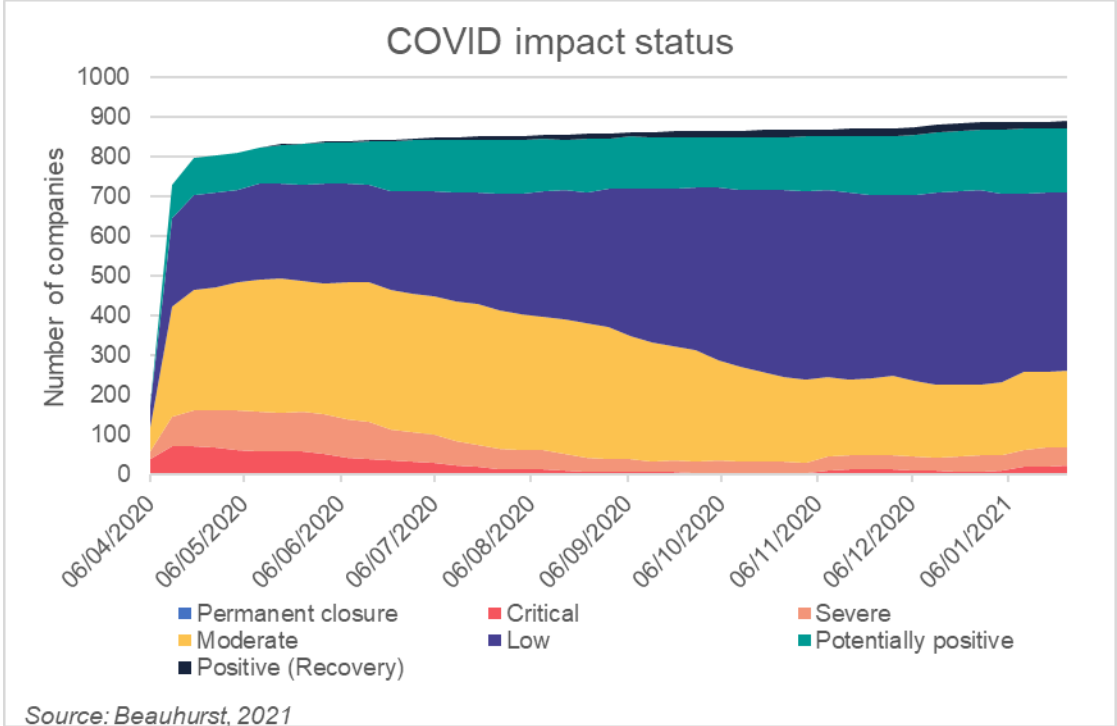


The latest weekly count shows a mixed picture for occupational groups. Information Technology and Engineering occupations saw strong growth compared with the previous week but most categories saw a decline in their vacancy count, most notably Hospitality, food and tourism and Clerical roles. Only Information Technology and Health Care have regained their pre-crisis vacancy levels (week ending 14 March) but all categories are well above their May 9 count, the low point of the first lockdown.

# Increase in businesses facing severe or critical risk at start of new year

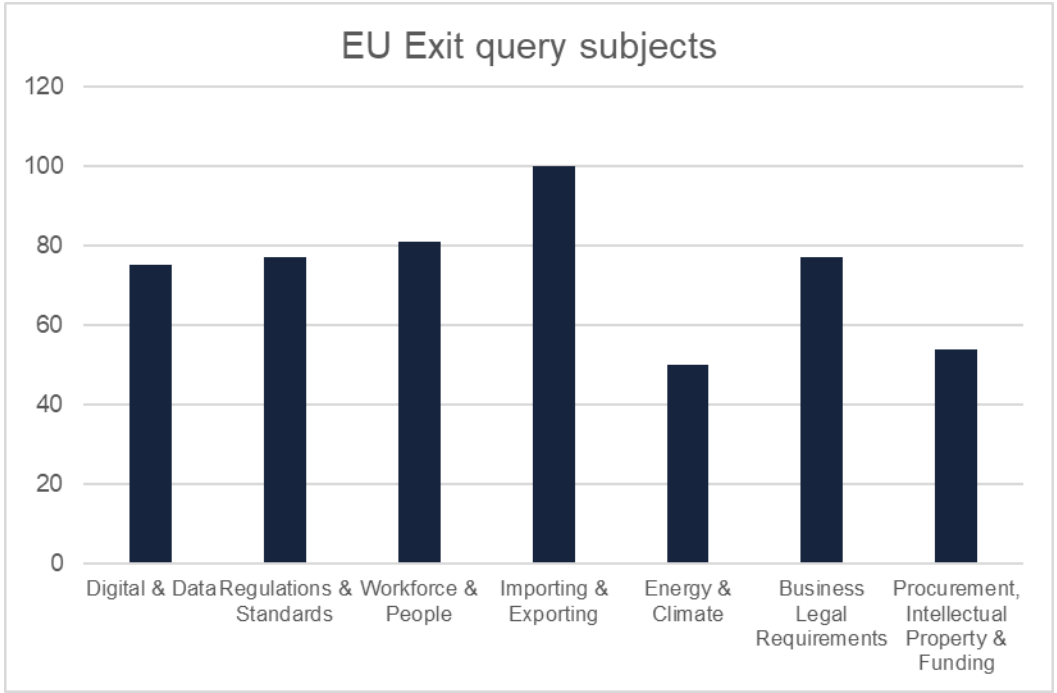
The proportion of West Yorkshire companies tracked by Beauhurst facing a severe or critical risk from COVID-19 has increased from 3.5% at the start of the November lockdown to 7.9% on 25<sup>th</sup> January according to analysis by Beauhurst. The platform tracks 890 companies in West Yorkshire, who have either seen high growth or have attracted investment, so tend to be more digital and service-based than the economy as a whole.

41% of those facing a critical or severe risk are in leisure & entertainment, with a further 18.5% in industrial sectors and around 10% each in retail and business & professional services.



# COVID-19 dominates LEP interactions with business, but EU Exit issues evident

Across business interactions with the LEP and Growth Managers last week, over half (53%) related to COVID-19, whilst 21% related to issues regarding EU Exit. The remaining 25% discussed both COVID-19 and Brexit. As with previous weeks, B2C businesses report very challenging trading conditions through the latest lockdown. Some are looking to invest or expand into new markets to look for new revenue opportunities, but there are reports that EU Exit may delay the realisation of these plans for some as they wait to see what the new trading environment looks like in practice. Some B2B operations also report challenges – for example those providing services to offices such as cleaning and IT services, whose clients are all home working.

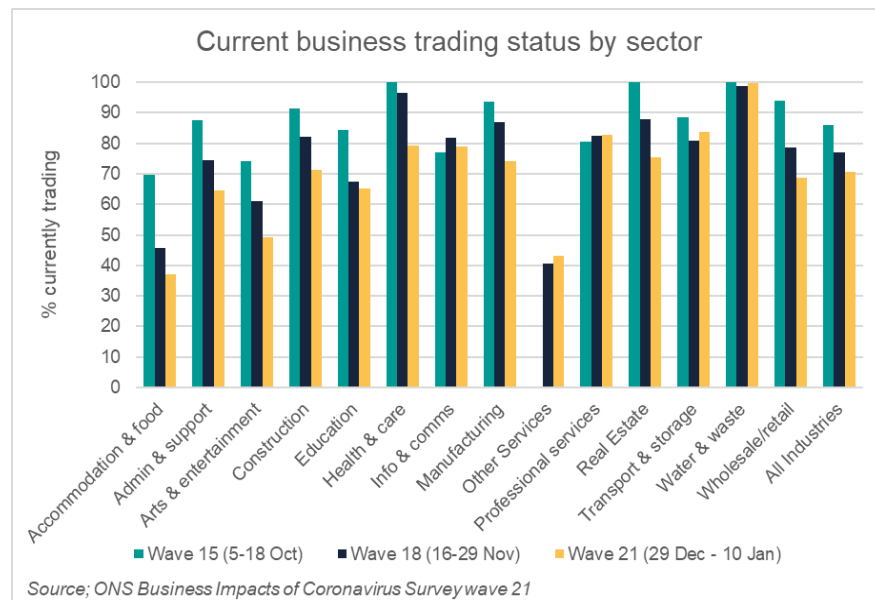
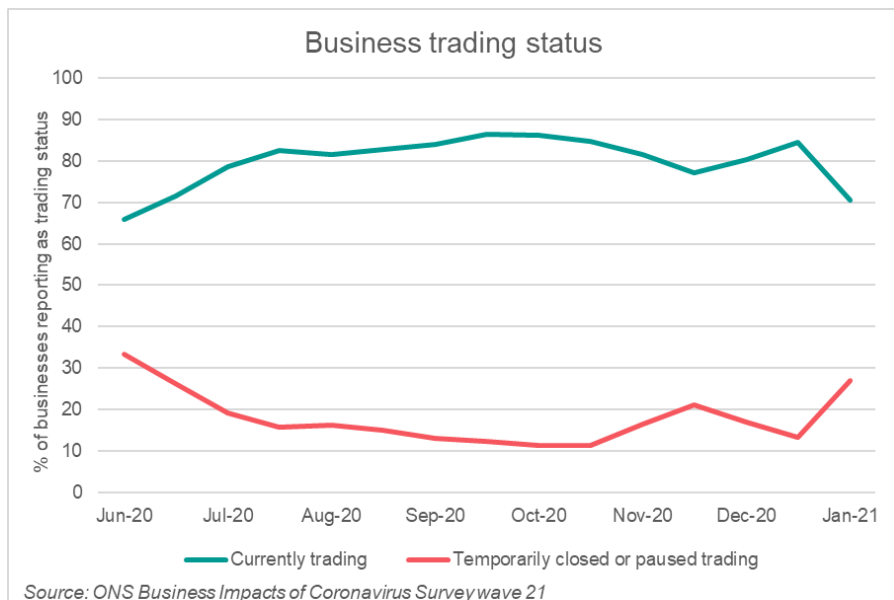




# Temporary business closures reach highest level since June

The proportion of businesses currently trading nationally fell to its lowest level since June in the latest Business Impacts of Coronavirus Survey (BICS) carried out in the fortnight to January 10<sup>th</sup>. 71% of businesses were trading in this period, down from 84% in the fortnight to December 23<sup>rd</sup>. This is the lowest level since the first survey which produced comparable data in 15-28<sup>th</sup> June (66%).

Whilst fewer businesses are open in most sectors when compared to mid-October (prior to the second lockdown), less than half of businesses are open in accommodation & food (37%) other services (43%) and arts & entertainment (49%).

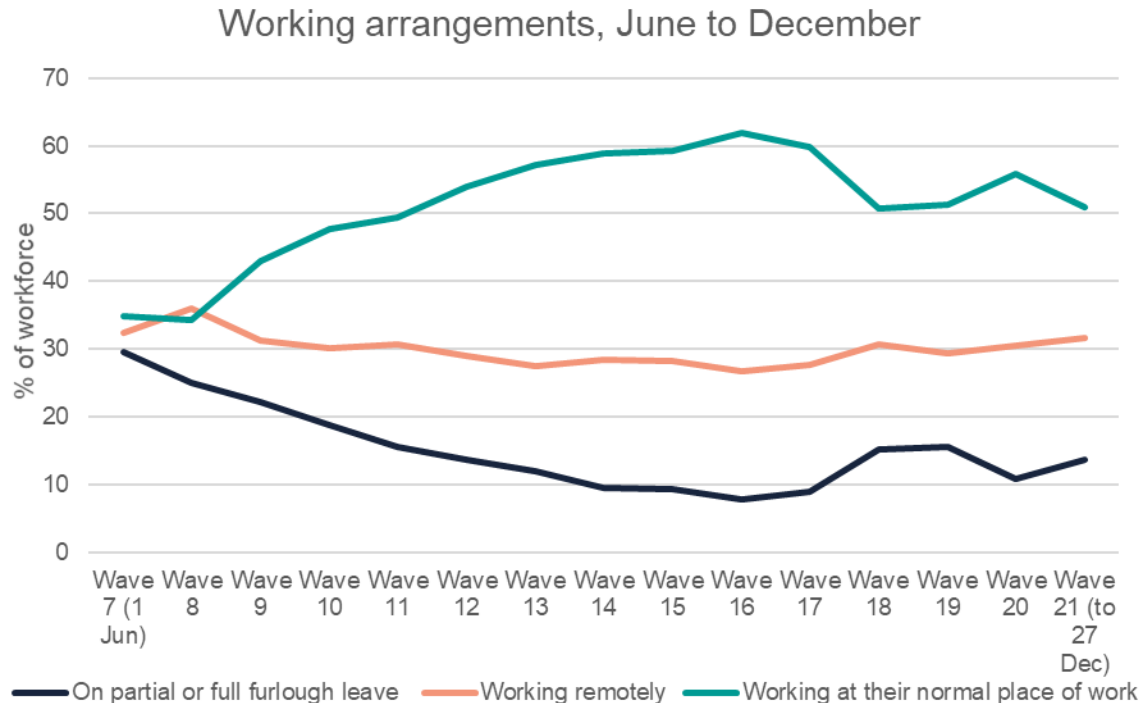


\*Source: ONS Business Impacts of Coronavirus Survey



# Slight increase in furlough use, but still half of summer levels

Peoples' working arrangements remained relatively unchanged in the fortnight to December 27<sup>th</sup> according to BICS. There was a slight increase in furlough use compared to early December, from 11% to 14%. Fewer people were in their usual workplace, down from 56% to 51%, and the proportion working remotely remained relatively steady at 32%. The proportion working remotely has been fairly consistent since June, though furlough use remains well below the 30% summer peak, and people in their usual workplace is much higher than the 35% seen then. Half of all workers are furloughed in the arts & entertainment sector, along with 42% of those in accommodation & food.

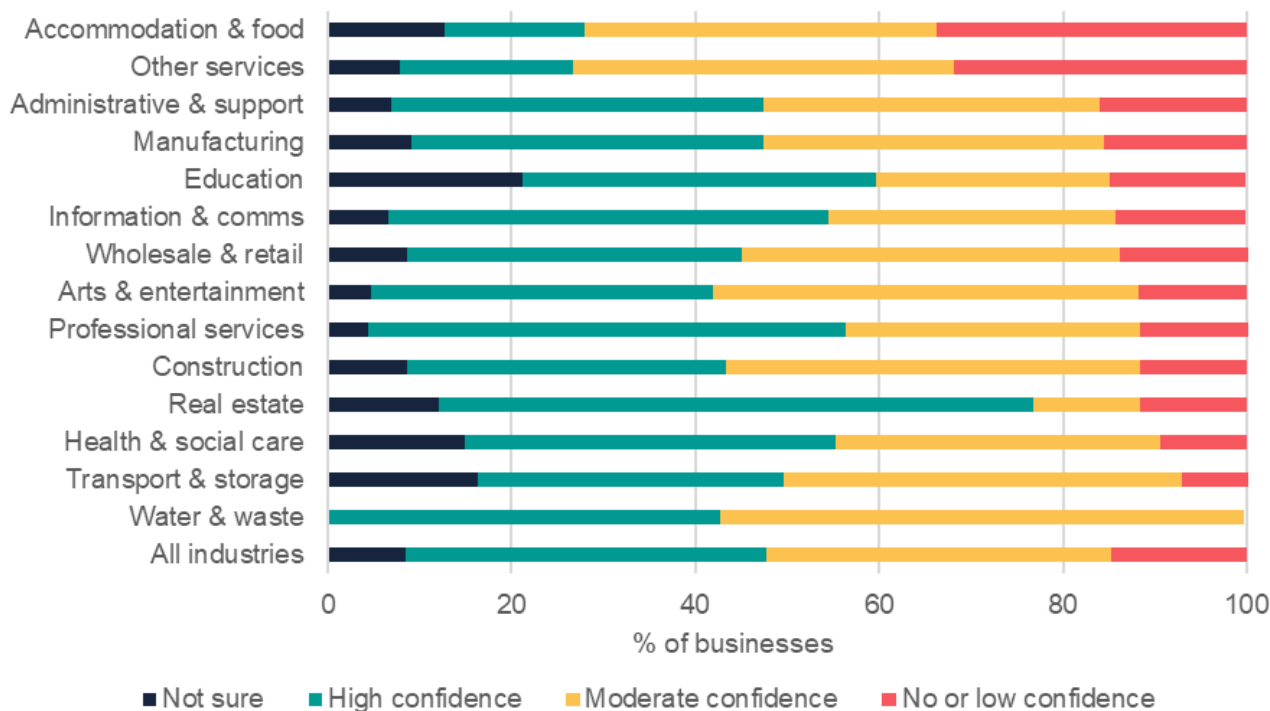


\*Source: ONS Business Impacts of Coronavirus Survey

# A third of businesses in accommodation & food not confident of surviving next 3 months

A third of accommodation & food businesses surveyed nationally have little or no confidence that they will survive the next three months according to the latest ONS BICS survey. This is more than double the 15% across all sectors, whilst concern is also elevated in the other services sector (32% little or no confidence). These sectors were also the most likely to report having less than three months cash reserves at 52% for accommodation & food and 45% for other services. Across all sectors, 32% had less than three months cash reserves, and 35% had more than six months of cash remaining.

Confidence in surviving the next three months



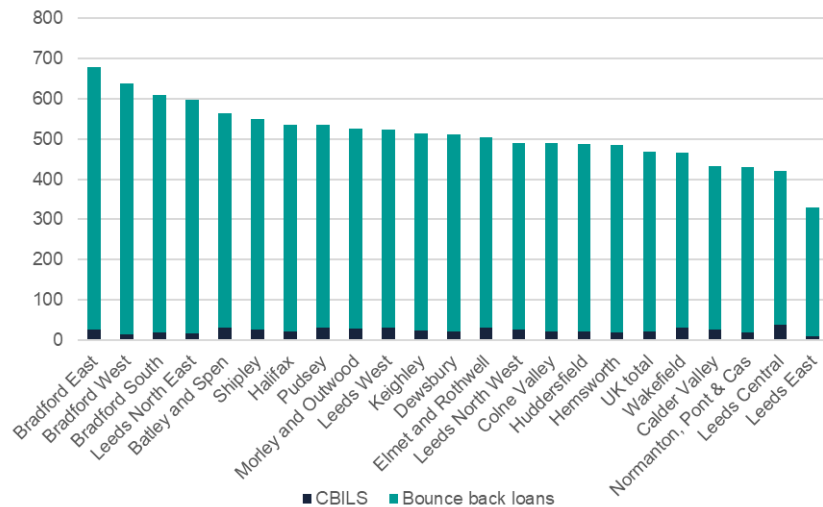
\*Source: ONS Business Impacts of Coronavirus Survey

# Almost £2bn in COVID loans to West Yorkshire businesses

Newly published data from the British Business Bank shows that 47,600 loans have been offered to businesses in West Yorkshire since the start of the pandemic, with a total value of £1.94bn. The Bounce Back Loan of up to £50k for smaller businesses accounts for the vast majority of this – 45,200 loans at £1.375bn. Almost 2,400 larger Coronavirus Business Interruption Loans have been offered with a total value of £561m. This means that half (50.3%) of all businesses in West Yorkshire (based on ONS data) have taken up some form of loan since the start of the pandemic, slightly higher than the 46.8% nationally.

Breaking this down by parliamentary constituency shows that take up has been highest in Bradford constituencies with more than 6 in 10 businesses taking out COVID-related loans in Bradford East, West and South. Leeds North East was also close to this level. In terms of the total value of loans offered, this is highest in Leeds Central reflecting both the size and number of businesses there, with £221m offered so far. Both Bradford West (£116m) and Elmet & Rothwell (£102m) have also seen loan offers exceed £100m.

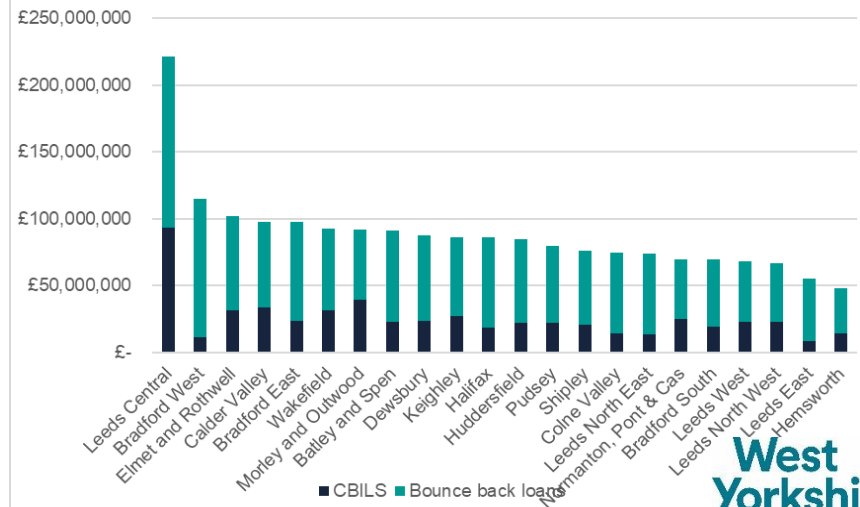
Loans per 1,000 businesses



Source: British Business Bank, January 2020

Source: British Business Bank, January 2020

Total value of loans by parliamentary constituency



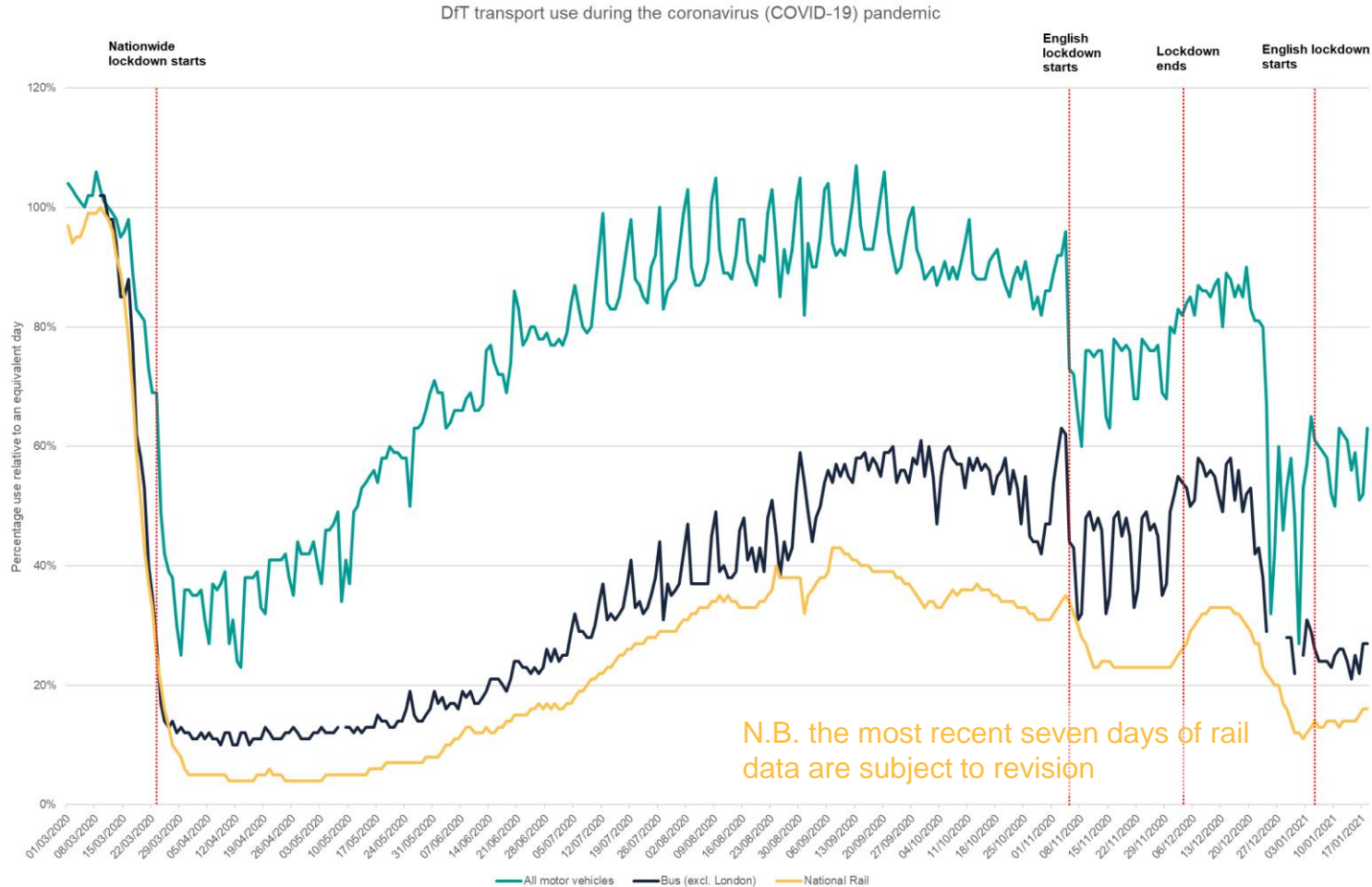
Source: British Business Bank, January 2020

# Transport Insights



# National travel levels remain higher than in the March 2020 lockdown

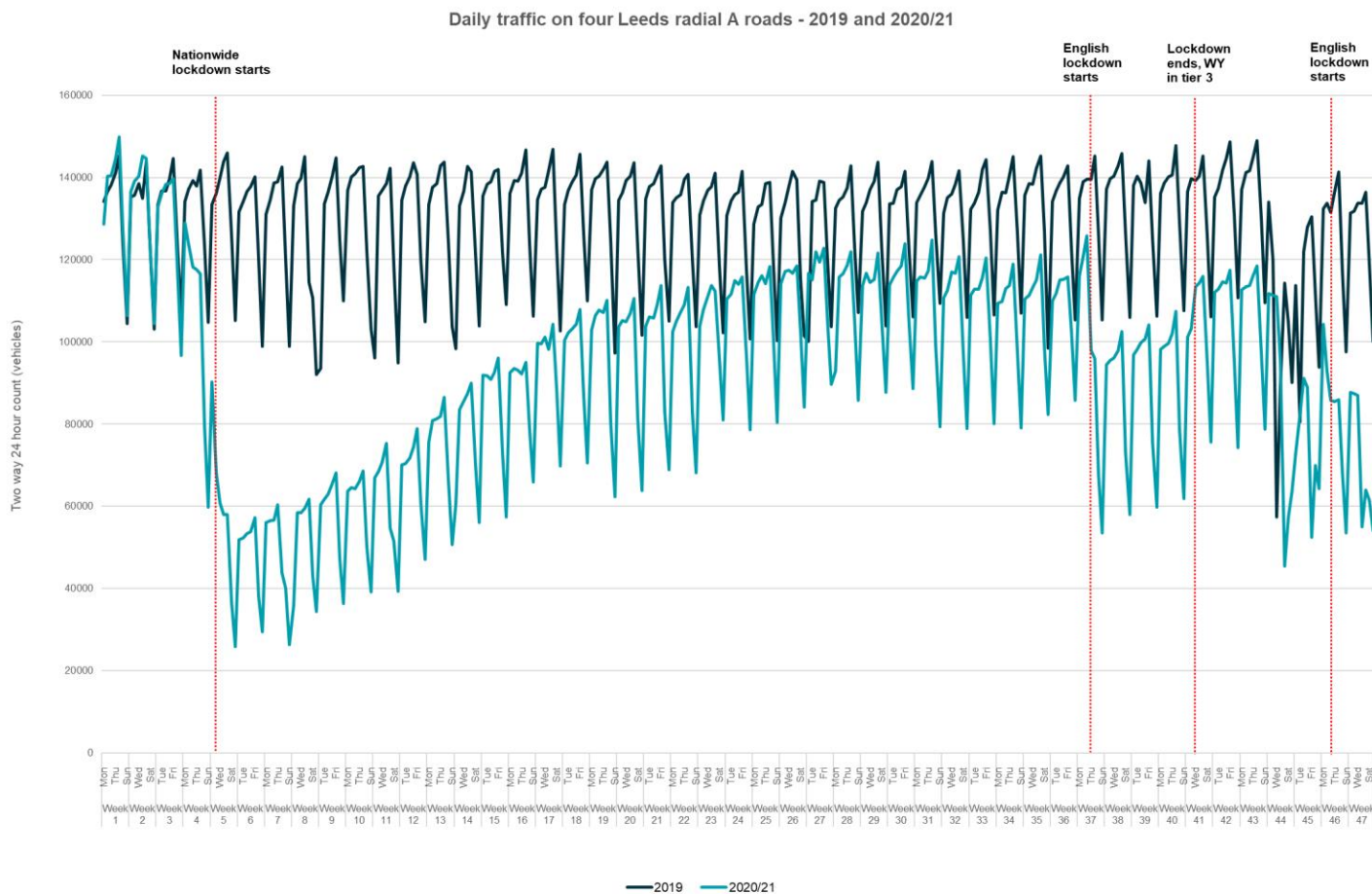
Data for Great Britain shows that, over the first full working week of the latest lockdown (week commencing 11th January 2021), motor vehicle, bus and rail travel remained notably higher than the levels seen in the first full week of the March 2020 lockdown. Similar trends occur locally.



Source: <https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic>

# Leeds traffic levels remain higher than in the March 2020 lockdown

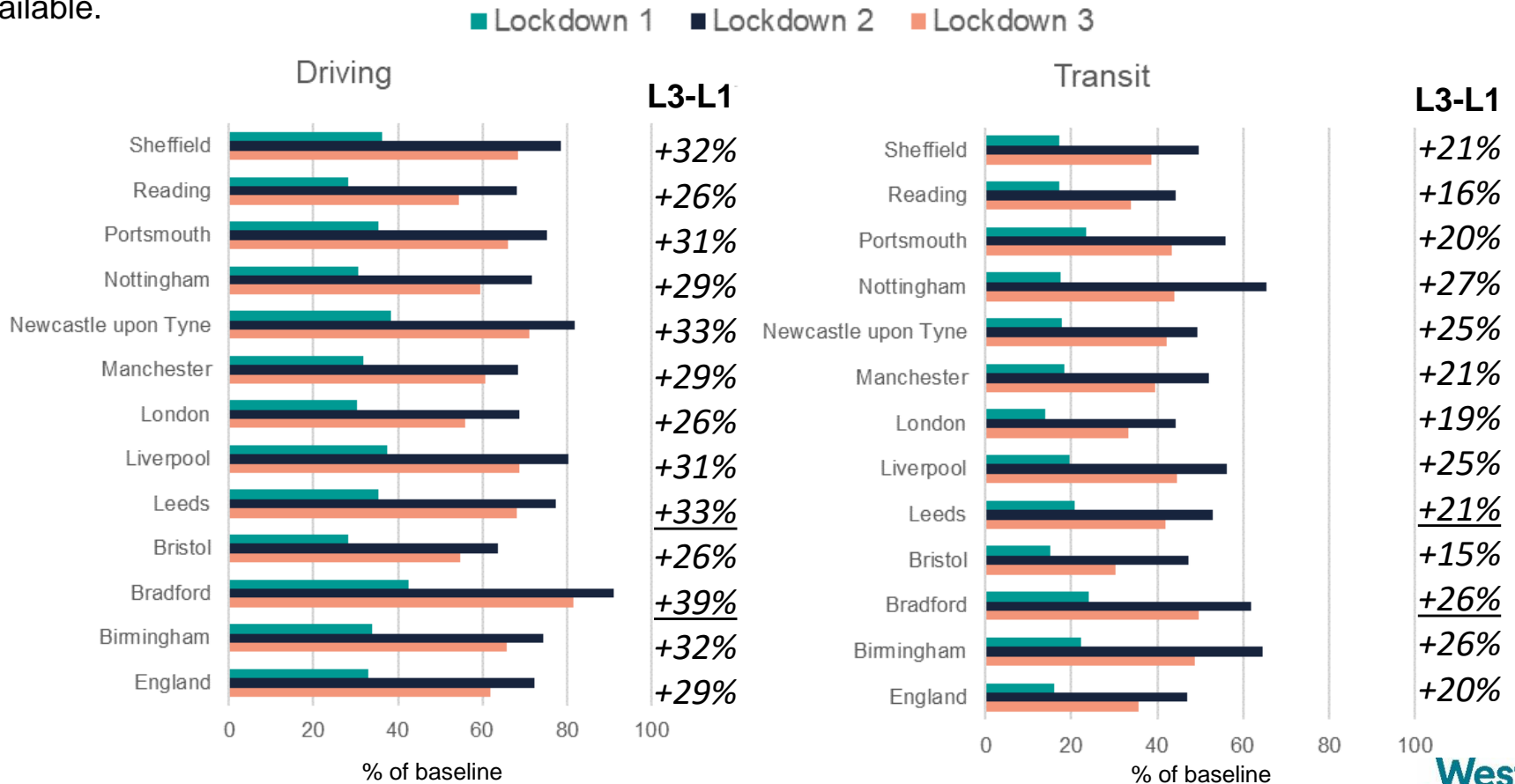
24-hour weekday traffic levels in the week commencing 11<sup>th</sup> January 2021 were up 43% on the first full week of the March 2020 lockdown (week commencing 30<sup>th</sup> March 2020). However, travel was disrupted on 14<sup>th</sup>-15<sup>th</sup> January 2021 due to snow. Excluding these dates from the comparison, Mon-Weds was up 66%. Weekend levels were up 73% against the comparable weekend of the first lockdown.





# Apple Mobility Trends – Lockdown Comparison (first two weeks)

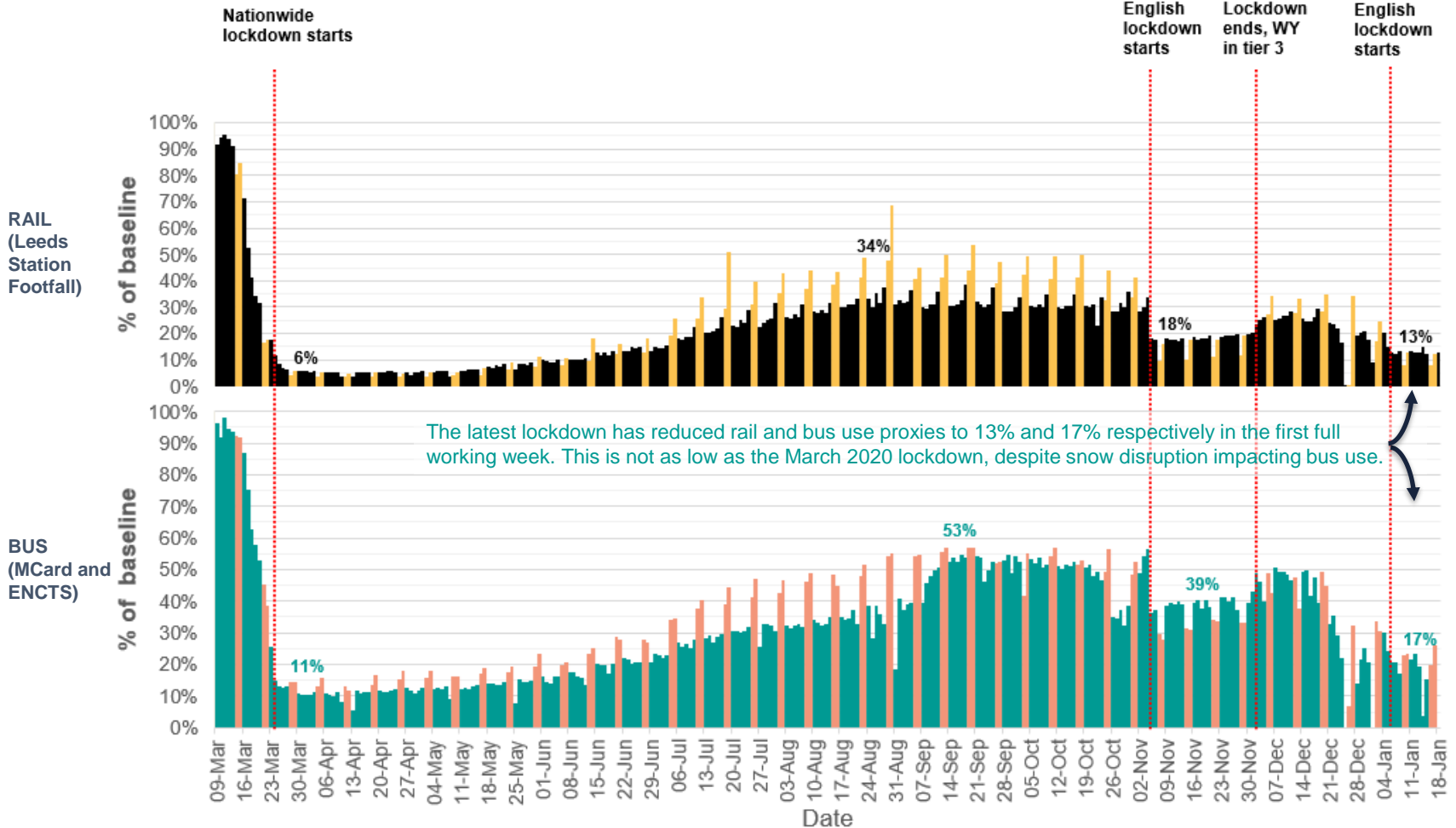
Apple mobility data (requests for directions in Apple Maps for driving and public transport) during the first 2 weeks of each lockdown in a variety of English cities (and England average). Number to the right of each chart indicates the difference between current lockdown and the first lockdown. Notably, both activity levels for driving and transit are considerably higher during lockdown 3 than lockdown one in all cities where data is available.



Source: Apple mobility data. The data shows relative volume of directions requests per country/region or city compared to a baseline volume on January 13th, 2020. Note that data that is sent from users' devices to the Maps service is associated with random, rotating identifiers so Apple doesn't have a profile of individual's movements and searches.

# Local rail and bus proxies remain at higher levels than March lockdown

■ % Rail weekday change compared to baseline  
■ % Rail weekend change compared to baseline  
■ % Bus weekday change compared to baseline  
■ % Bus weekend change compared to baseline



Baseline period is Monday 2nd - Friday 6th March 2020 (weekdays) and 29th Feb -1st March and 6th-7th March (weekends)

Source: Leeds Rail Station Footfall - Network Rail (top) and MCard and English National Concessionary Travel Scheme (ENCTS)

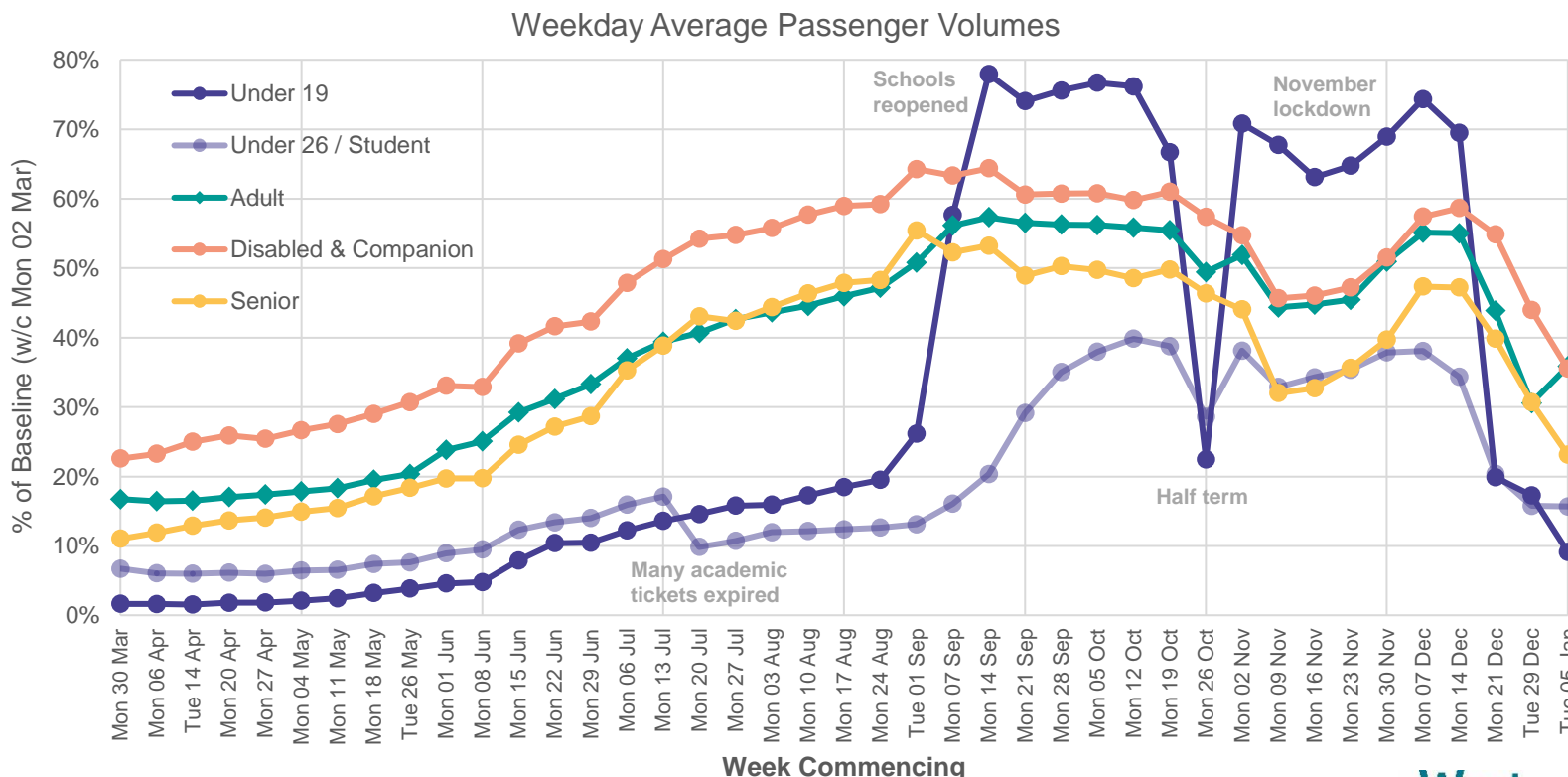


# Bus use at the start of the third lockdown is more similar to levels seen in June than to the start of the first lockdown

Data from bus ticket machines reveals that bus use in each cohort increased towards the end of the 2<sup>nd</sup> lockdown and continued in the run up to Christmas, followed by the expected drop over the Christmas and new year holiday period. Data is for weekdays excluding bank holidays, with ticket types assigned to broad cohorts. Data for 4<sup>th</sup> January has been omitted to show the first four days of the latest lockdown.

Thousand passengers per weekday before COVID
Adult 221,000
Under 19 101,000
Senior 74,000
Under 26 / Student 34,000
Disabled & Companion 29,000
Miscellaneous 9,000

Data from First, Arriva, Yorkshire Tiger and Transdev

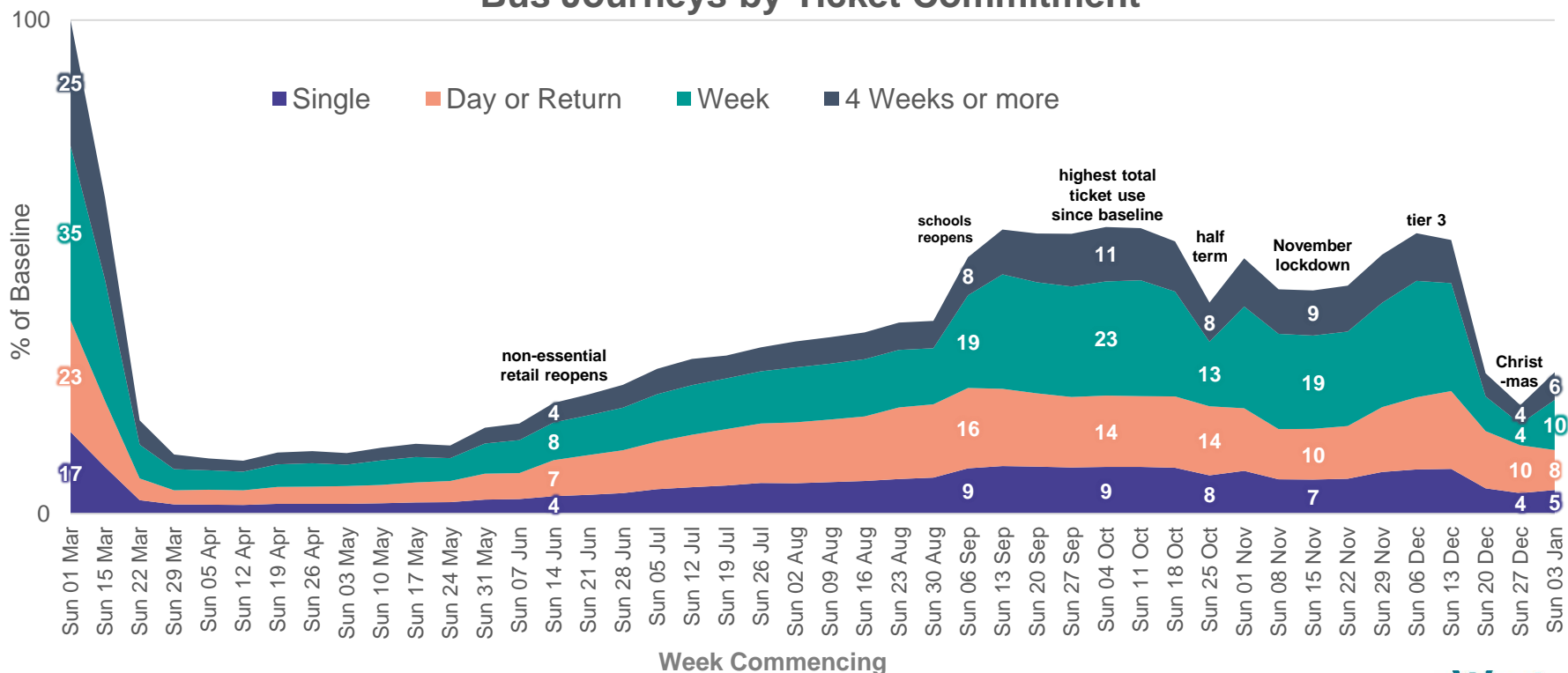


Baseline period is w/c Mon 02 Mar. Source: Bus operators electronic ticket machine data, passenger boarding locations in West Yorkshire. First, Arriva, Yorkshire Tiger and Transdev account for over 90% of bus services in West Yorkshire. Graph shows First and Transdev.

# On the approach to Christmas, the share bus journeys by ticket commitment shifted to shorter duration tickets (as expected)

The use of weekly tickets surged when schools reopened, dipped during half term, and slowly began recovering before the end of lockdown 2. On the approach and during the Christmas/New Year holiday period the share of bus journeys by ticket commitment shifted to shorter duration tickets (daily's or returns), reflecting a typical change in festive travel patterns. The first full week of the new year shows an increase in weekly tickets. It is too soon to see if this is sustained after the latest lockdown started during that week.

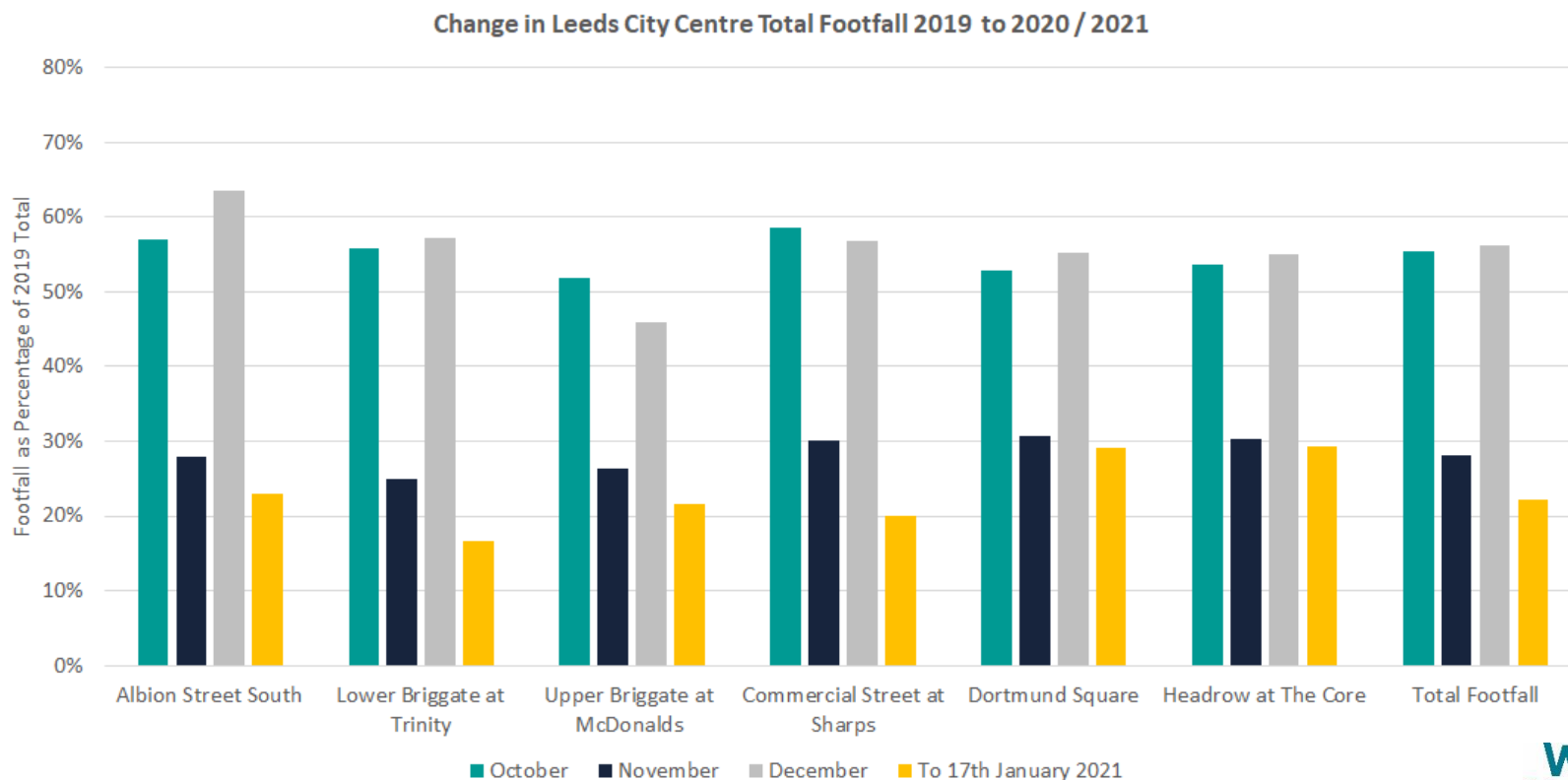
## Bus Journeys by Ticket Commitment



Baseline period is w/c Mon 02 Mar. Source: Bus operators electronic ticket machine data, passenger boarding locations in West Yorkshire. Graph shows First and Transdev.

# Overall December footfall in Leeds comparable to levels in October and latest data reveals recent footfall lower than 2<sup>nd</sup> lockdown

After seeing footfall in Leeds City Centre increase in December following the end of the second lockdown January has seen relative footfall decrease again following the start of the 3<sup>rd</sup> national lockdown on 5th January, with footfall falling to 22% of the total recorded in the equivalent dates in 2019. Interestingly, footfall levels over the last two weeks have been lower than during November (lockdown 2).



# Weekend and weekday cycling throughout December 2020 increased relative to the same period last year

Cycle counters across West Yorkshire generally showed an increase in the average number of daily trips in December 2020 compared to the previous year. The most prominent increases are seen on weekends along the Calder and Hebble Navigation at Calder Hebble (+166%) near Sowerby Bridge and Mytholmroyd (+101%) indicating a continued increase in leisure cycling.

Change in Average Daily Cycle Trips December 2019 / 2020

