

COVID-19 Fortnightly Insights Report

Research & Intelligence
30th April 2021



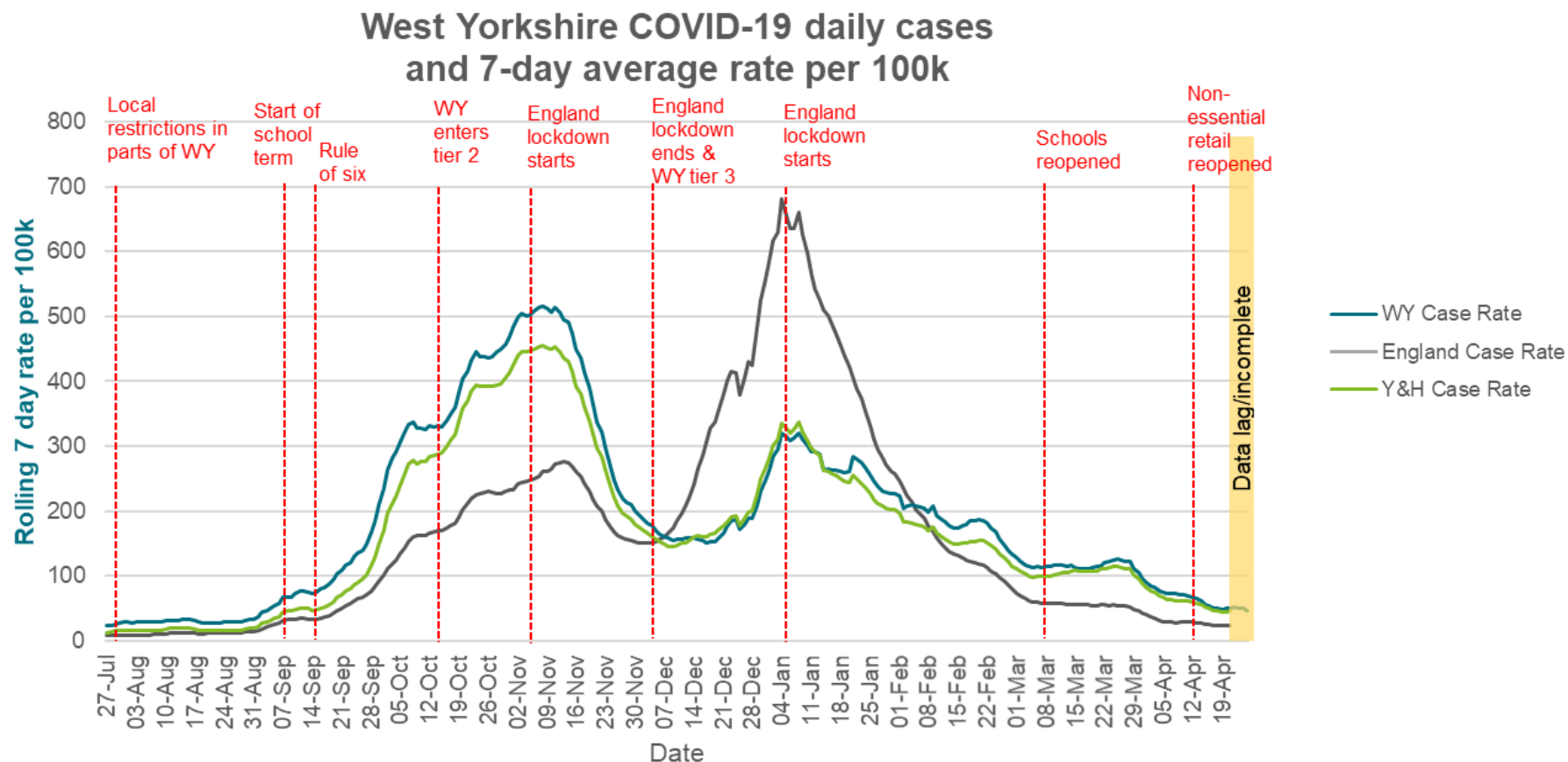
Executive Summary – social and economic

- As restrictions have begun to ease, there are signs of increasing business activity. ONS survey data suggests the proportion of **businesses currently trading has increased** to 78%. This remains lower than before Christmas, but more businesses anticipate reopening in the next two weeks.
- There are **tentative signs of increasing turnover** for some businesses, **though many more still report falls** on this measure.
- **Business liquidations have fallen from recent peaks** after a backlog of activity at Companies House apparently cleared, and weekly totals are now at a comparable level to autumn 2020.
- As the economy reopens, almost **50% of people are now in their usual workplace** nationally, and **furlough use has decreased slightly** in recent weeks, from 18.5% to 17%.
- However, there was a **small fall in people on the payroll in March**, and a concurrent **slight increase in people claiming out of work benefits**.
- **Online vacancy postings have also dropped slightly** though remain close to pre-pandemic levels.

Executive Summary – transport

- **Levels of activity on the transport network have increased markedly** following the reopening of retail and hospitality on April 12th. National data suggests a stronger recovery in public modes than motor vehicles in recent weeks, though the latter remains closer to its pre-pandemic level overall.
- Local data on bus and rail shows similar trends, with strong increases since early April and both showing **levels of activity similar to in summer 2020**. For rail, Network Rail data on **Leeds Station footfall suggests it is around a third of its baseline**.
- For bus, MCard usage was at just over 50% of pre-pandemic levels, and operator ticket machine data was around 62% of baseline. The increase in bus use by adult, disabled, and senior cohorts all showed the biggest increase in any weekday period since restrictions began, and **overall ticket machine data suggests the highest level of use since the start of the pandemic**.
- In the two weeks following the reopening of non-essential shops footfall in Leeds City Centre has risen to 80% of the weekly average footfall recorded in the equivalent dates in 2019. This is the **highest level of footfall recorded since the first lockdown began**.

Virus prevalence – West Yorkshire trend



As of the 21st April 2021, the 7-day moving average **West Yorkshire COVID-19 rate was 50.6 cases per 100k, a 17% decrease compared to the previous week** (from 61.1 per 100k). In the same period, the rate in Yorkshire and the Humber fell by 16% to 46.2 per 100k, and rates overall in England fell by 8% to 24.8 per 100k. For the latest data please see the [West Yorkshire COVID-19 dashboard](#).

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.

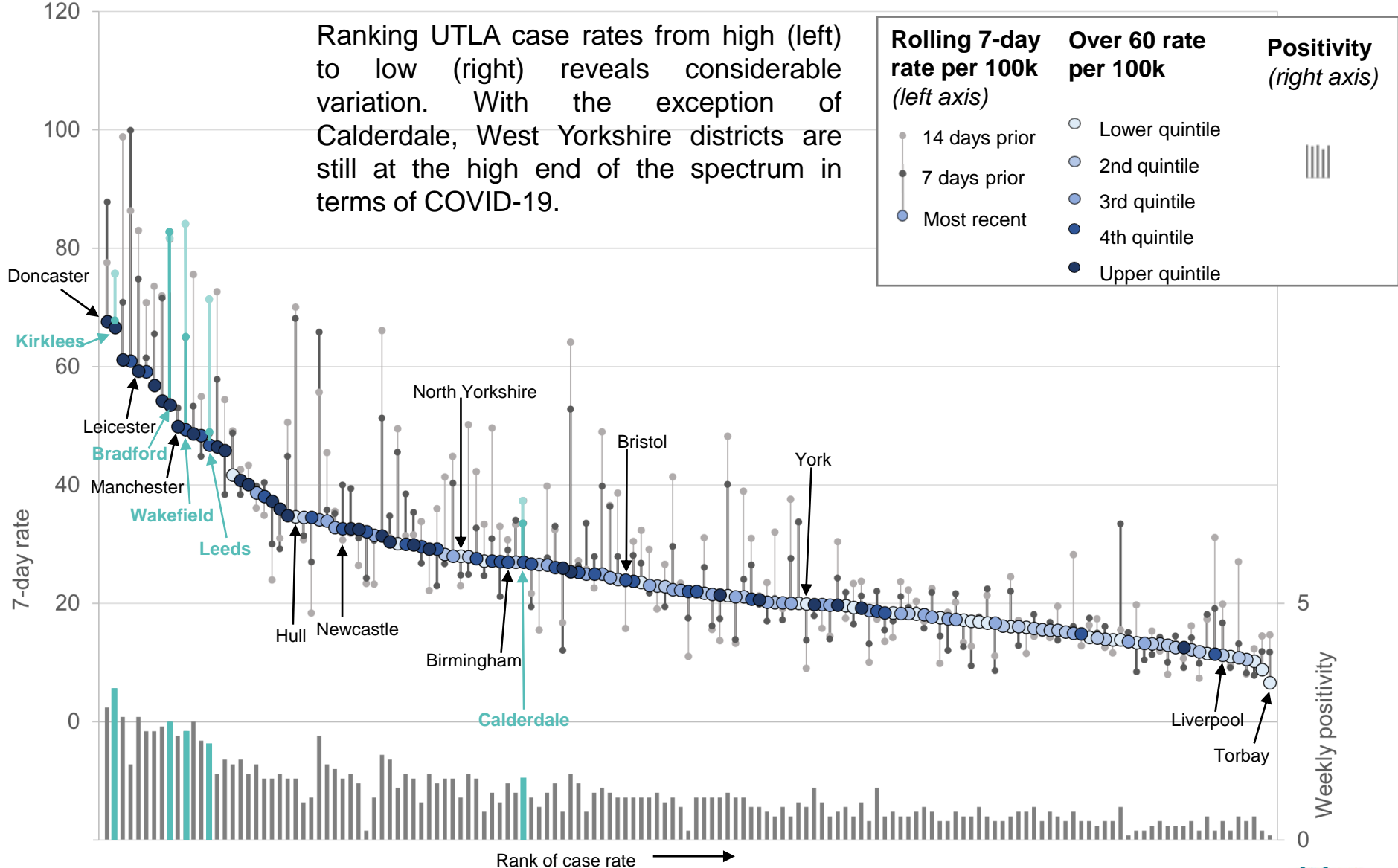
Virus prevalence – West Yorkshire

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 (15 – 21 April) Most recent data week	Total cases per 100k people (8 – 14 April) Previous week	Absolute Difference		% Weekly Change
Bradford	53.5	82.6	-29.1	↓	-35%
Calderdale	27.0	33.6	-6.6	↓	-20%
Kirklees	66.6	67.3	-0.7	=	-1%
Leeds	46.7	48.7	-2.0	↓	-4%
Wakefield	49.1	64.9	-15.8	↓	-24%
West Yorkshire	50.6	61.1	-10.5	↓	-17%
Yorkshire & the Humber	46.2	55.3	-9.1	↓	-16%
England	24.8	27.1	-2.3	↓	-8%

COVID-19 Rates for Upper Tier Local Authorities (UTLAs)

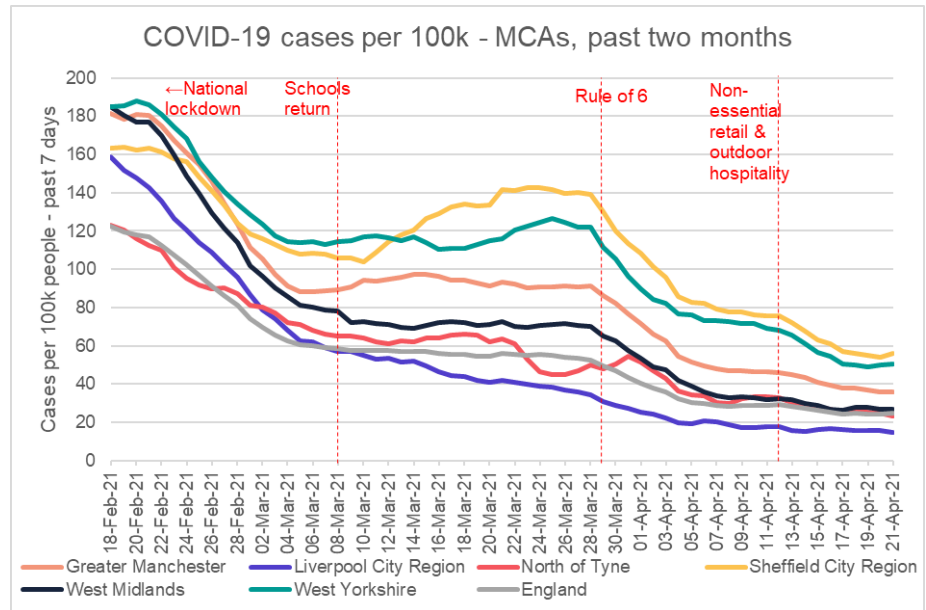
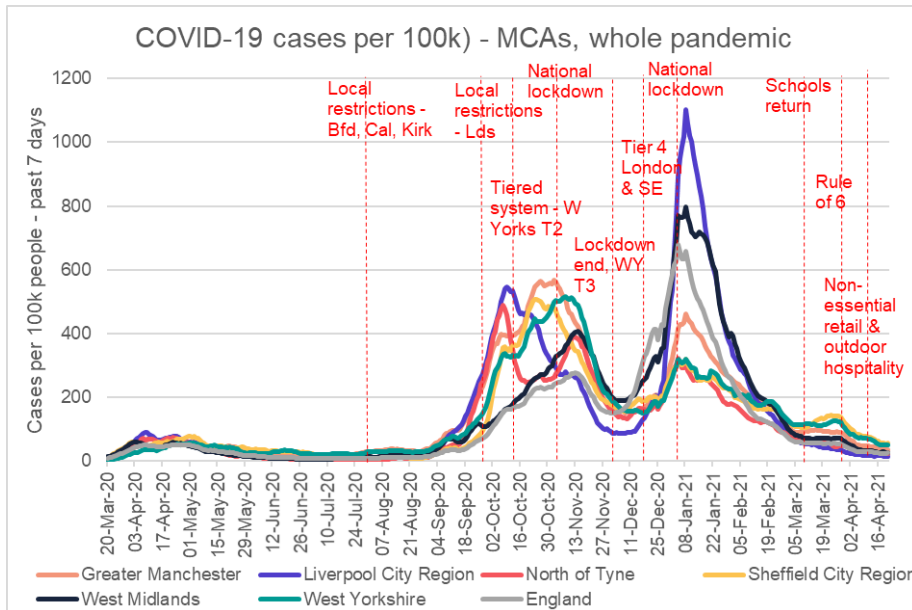
7-day average COVID-19 rate per 100k population, change compared to the previous week, over 60 rate & positivity



Blue points show latest COVID-19 case rate per 100k across UTLAs as of the 21st April (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 21st April (right Y-axis).

Rates falling across MCAs, with fall second highest in West Yorkshire

Rates in most MCAs have fallen more quickly than across England as a whole in the week to April 21st. Only North of Tyne (19.5%) has seen a faster fall than West Yorkshire's 17% decline, which is also in line with Greater Manchester and Sheffield City Region. As such, despite falling rates, the rate per 100k people remains higher in the Yorkshire MCAs than elsewhere.

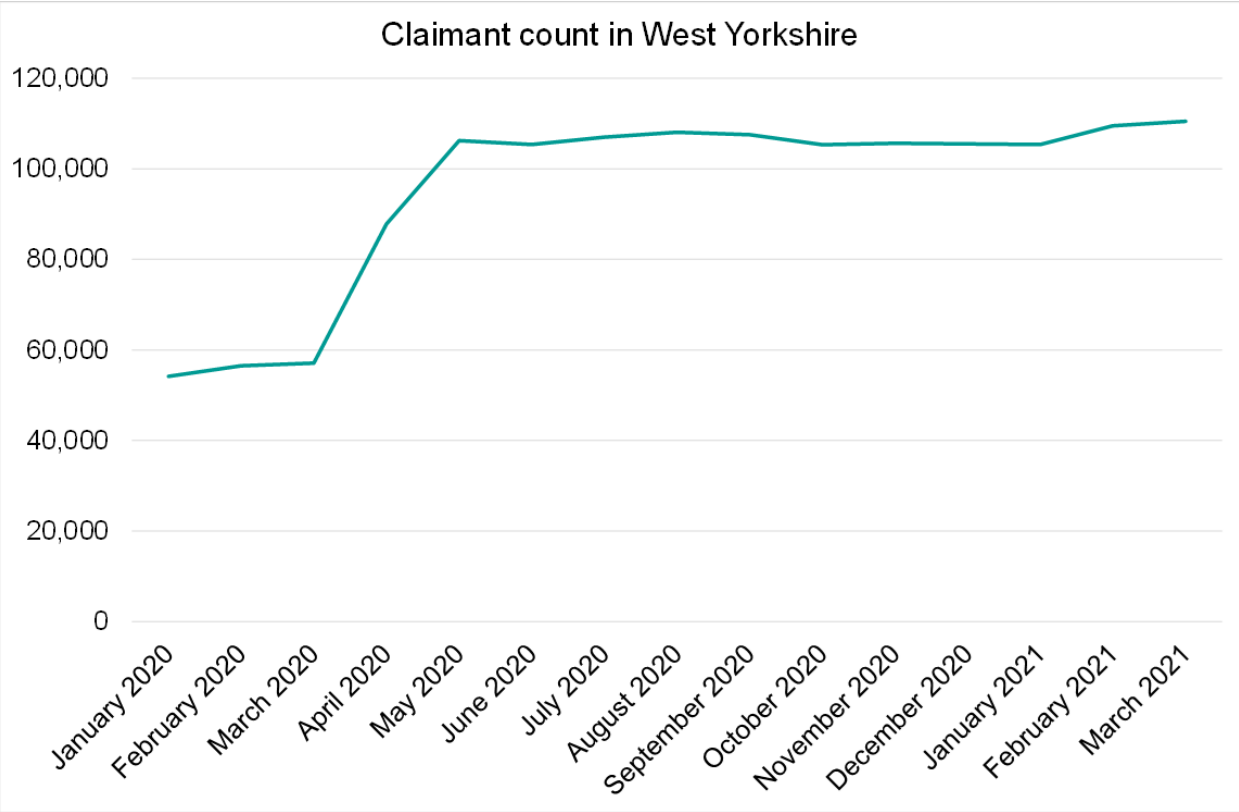


Economic Insights



Small increase in claimant count

There has been a small monthly increase in people claiming out of work benefits in March, both for West Yorkshire and nationally. In West Yorkshire the count increased by 990 (0.9%), following a 4% increase in February. The England average increased by 0.6%. The current West Yorkshire claimant count of 110,505 is 94% higher (+53,420) than its pre-crisis level (in March 2020).



Bradford and Calderdale both recorded larger percentage increases in March 2021 than the West Yorkshire average, at 1.7% (550) and 1.3% (120) respectively. The count increased by 0.8% (295) in Leeds but remained virtually static in Kirklees and Wakefield.

West Yorkshire's claimant rate (claimants as % of working age population) remains at 7.5% compared with the national average of 6.6%. At local authority level current rates range from 6.2% in Wakefield to 9.8% in Bradford.

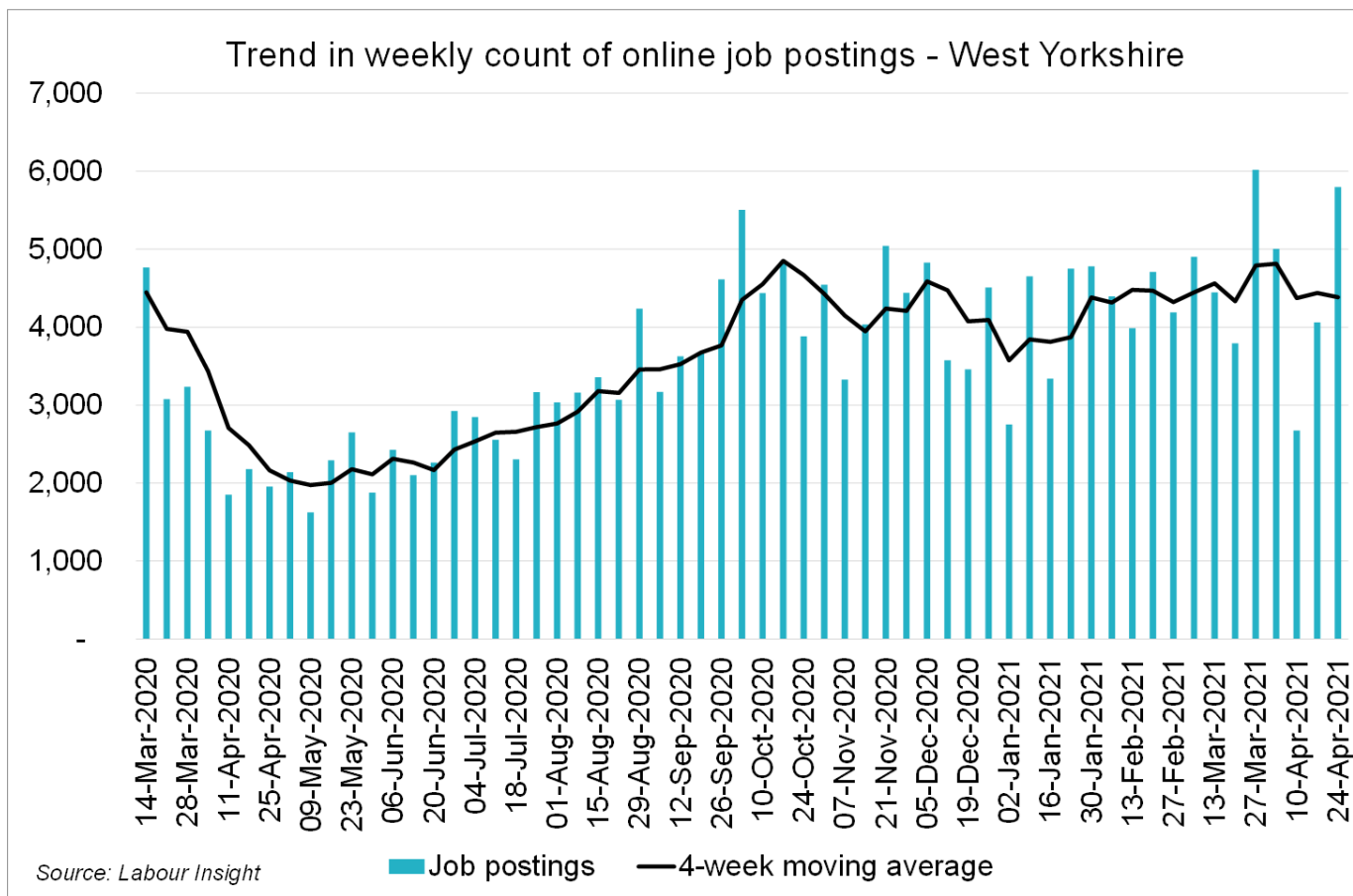
Recovery in number of payrolled employees stalled in March

Data from Pay As You Earn Real Time Information shows a fall of 2,700 in the number of employees in West Yorkshire for March, following the three consecutive months of recovery between December 2020 and February 2021. The number of employees in March 2021 is around 23,000 (2%) below its March 2020 level.



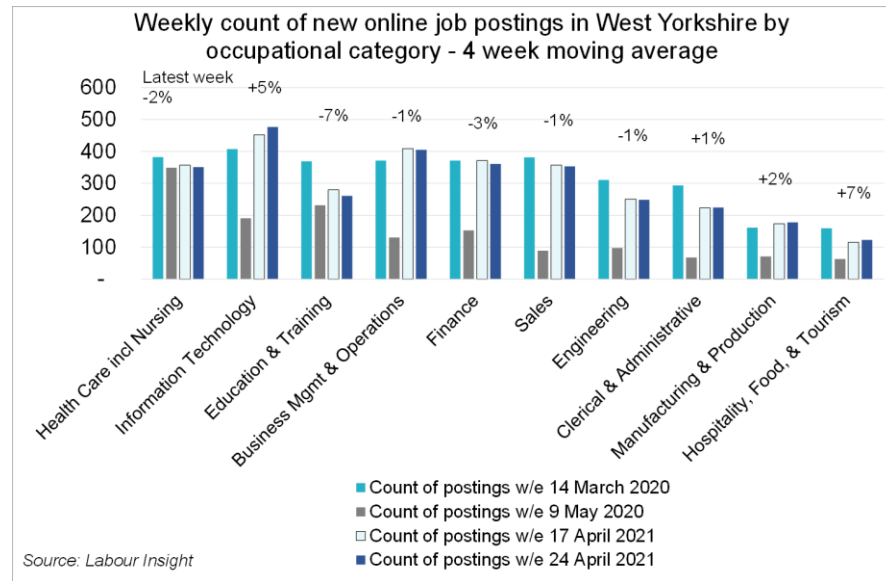
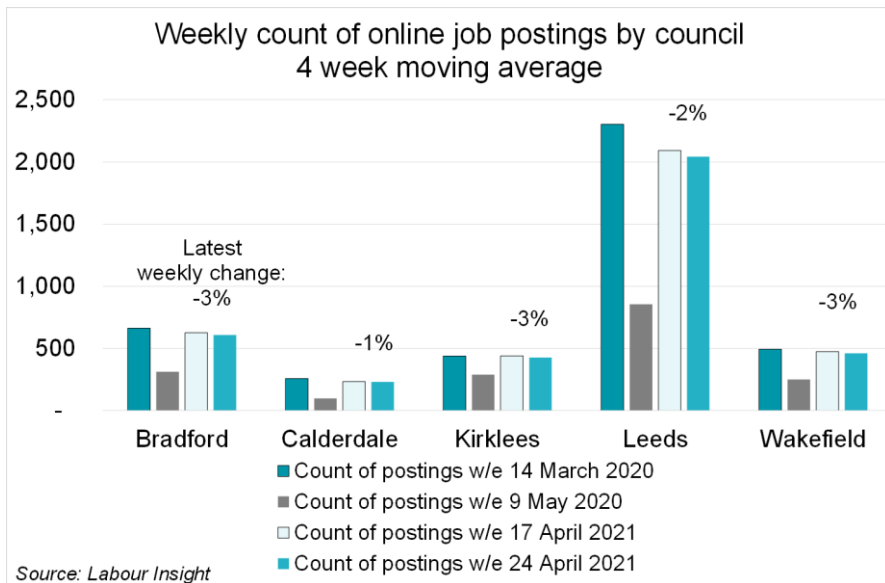
Small decline in vacancy count in latest week

The number of vacancies for jobs in West Yorkshire posted online during week ending 24 April fell by 1% compared with the previous week, based on a 4-week moving average. Looking at the unadjusted raw data there has been a continuation of recent volatility in the weekly count. Nationally, the number of vacancies decreased by 1% in the latest week (based on the moving average). The weekly vacancy count for West Yorkshire is currently 1% below its pre-crisis level (i.e. compared with week ending March 14 2020).



Vacancies decline across local authorities but hospitality, tourism and IT see increases

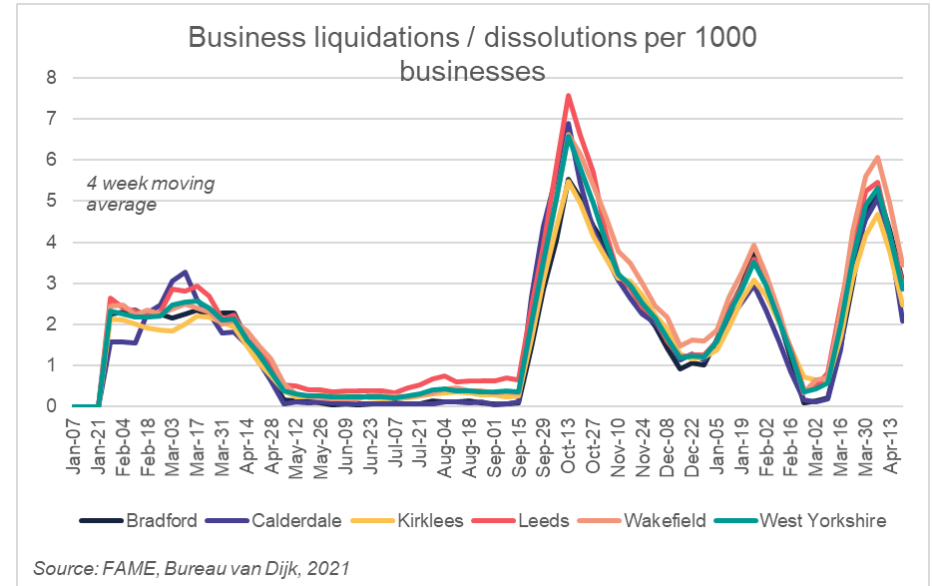
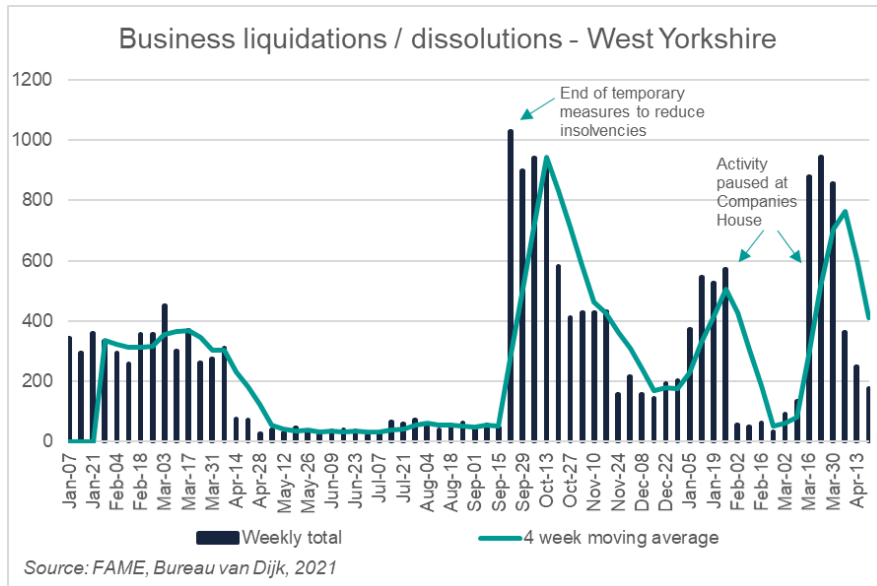
All local authority areas saw declines of between 1% and 3% in postings in the latest week, based on the moving average. Leeds' and Calderdale's latest counts are both 11% below their respective pre-crisis levels.



The majority of occupations recorded small declines in postings for the latest week, based on a 4-week moving average, but several grew, including Hospitality, food and tourism and Information technology. Some categories still have plenty of ground to recover to return to pre-crisis levels of postings including Hospitality, food and tourism, Clerical and administrative, Engineering and Education and training.

Business liquidations fall as backlog clears

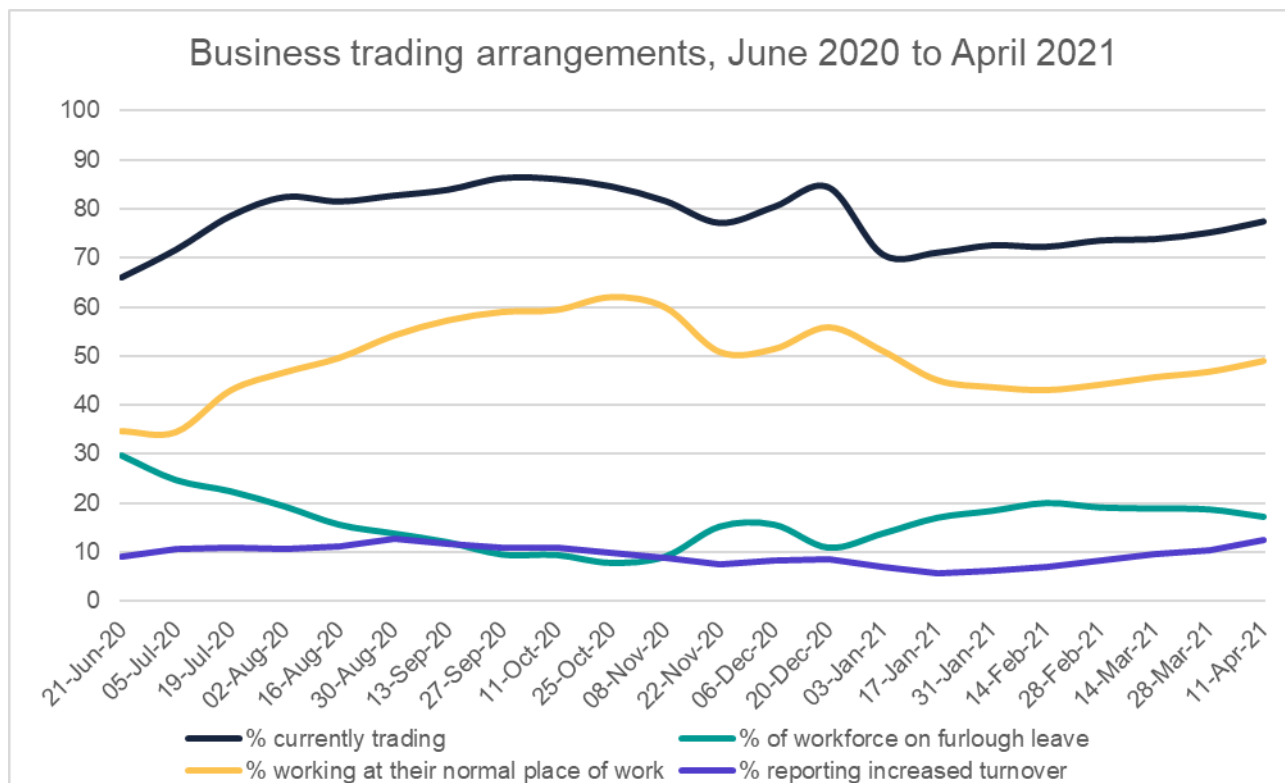
180 businesses were liquidated in West Yorkshire in the week to April 20th, according to data from the FAME business database. This is half the level seen two weeks earlier, and down from a recent peak of 950 in the week to March 23rd. Activity is now at levels last seen in November and December. Processing of liquidations was paused at Companies House between late January and early March, suggesting this created a backlog which has now cleared. There is very little variation between West Yorkshire local authorities, once the size of an area's business base is taken into account.



*Source: FAME, Bureau van Dijk, 2021. Analysis based on company registration address, location of activity may differ in some cases

More businesses reopening and furlough use falling as consumer sectors restart

More businesses reported reopening as retail and hospitality activity restarted on April 12th, according to the ONS Business Insights and Conditions Survey (BICS). 77.5% said they were trading as of April 18th, up from 75% a fortnight earlier. This is still below the 84% seen just before Christmas, but with a further 8.7% of businesses expecting to reopen in the coming fortnight this figure could soon be surpassed. The proportion in their usual workplace is also rising again and is now close to 50%, whilst furlough use has decreased from 18.5% to 17% over the past fortnight. The proportion of businesses reporting increased turnover is also increasing, but remains low at 12.6%.

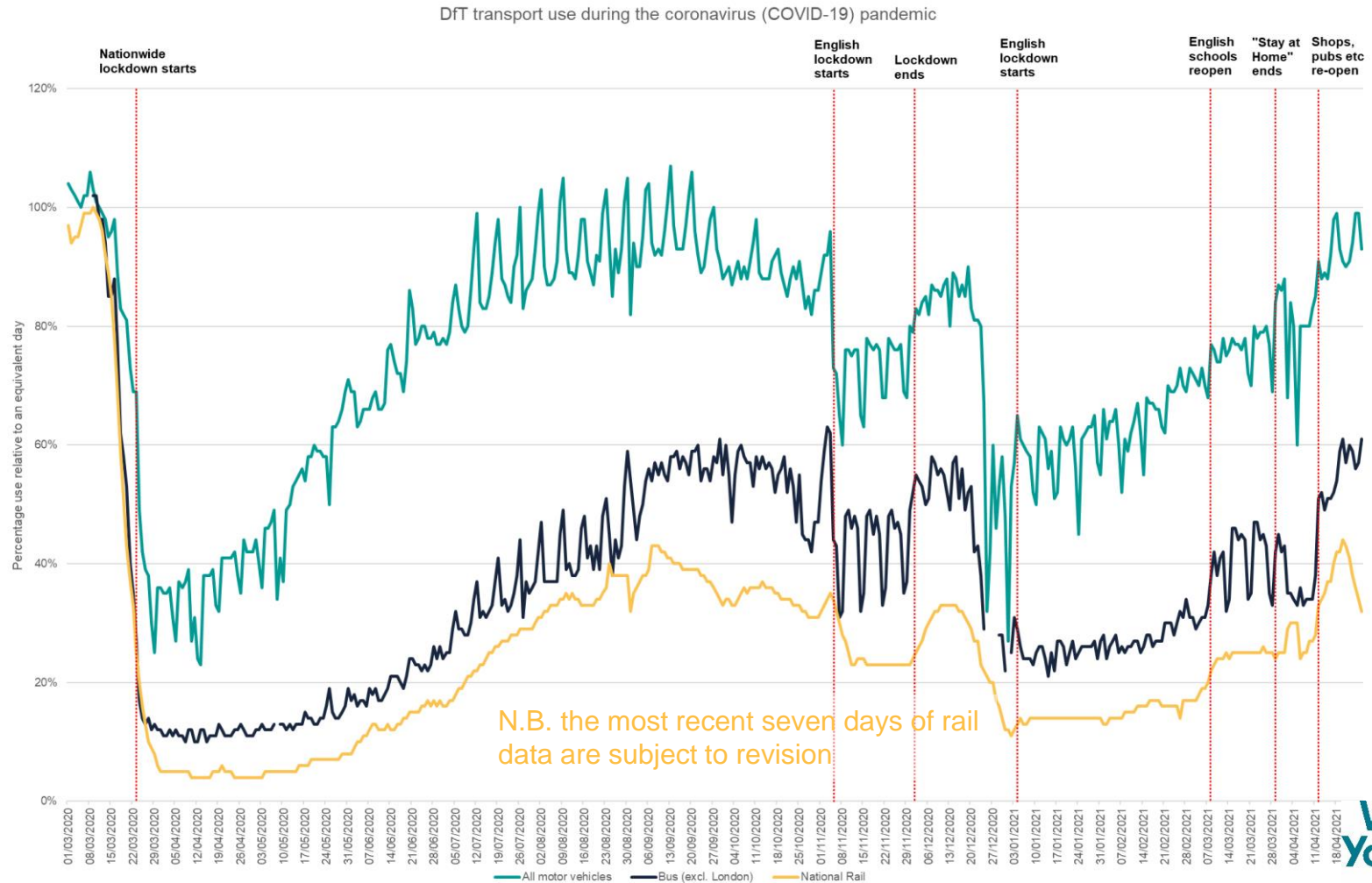


Transport Insights



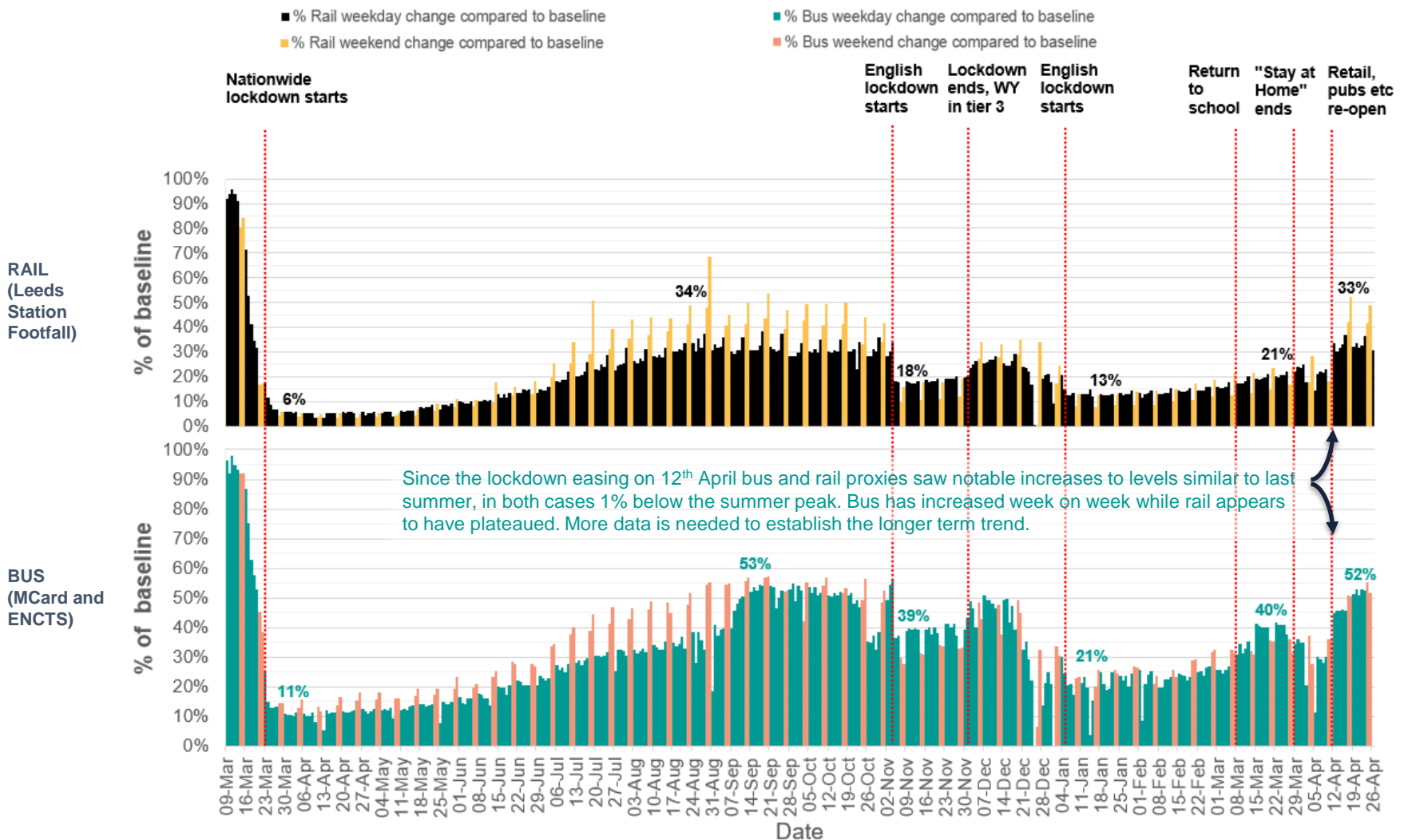
National travel use returns to summer 2020 levels following lockdown easing

Data for Great Britain shows that travel usage returned to similar levels seen in summer 2020 relatively quickly following the 12th April lockdown easing. Bus appears to have made the strongest recovery, followed by motor vehicles and rail (subject to the usual revisions). Similar trends occur locally.



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

Local bus and rail proxies almost reached their summer 2020 weekday peaks



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

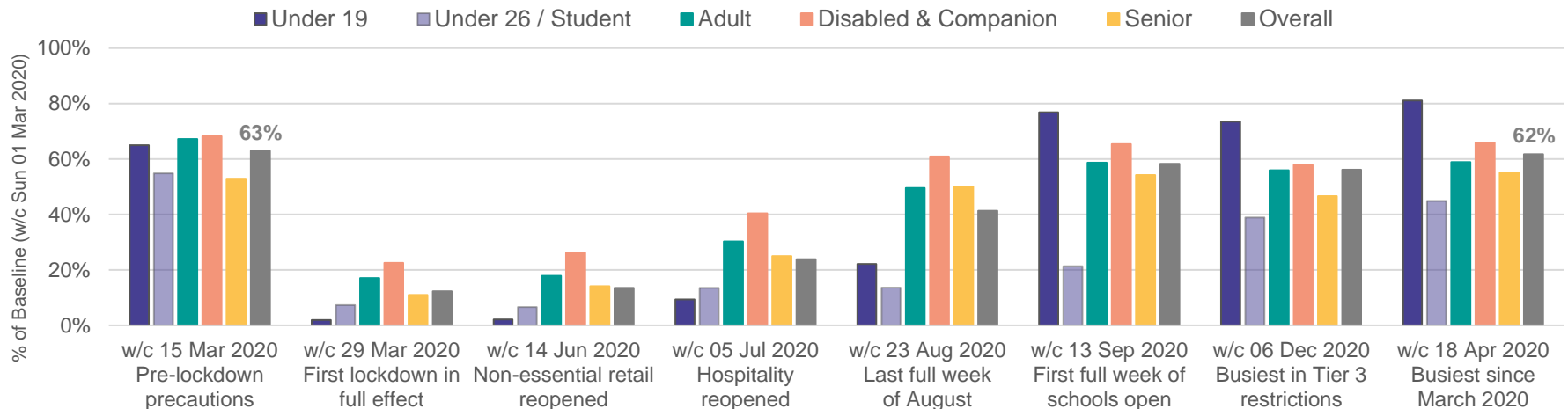
Source: Leeds Rail Station Footfall - Network Rail (top) and MCard and English National Concessionary Travel Scheme (ENCTS)

Buses were at their busiest for over a year in the week commencing 18 April

Ticket machine data from First and Transdev indicates that the latest week had the highest bus use since the week commencing 15th March 2020. Overall use on these operators was 62% of baseline in the latest week compared with 63% in the previous busiest week which was the week commencing 15th March 2020.

Use by adults, disabled & companion, and senior cohorts in the latest week were very similar to the week commencing 13th September while use by the under 19 cohort was 81% of baseline compared with 77% and use by the under 26 / student cohort was 45% of baseline compared with 21%.

Passenger Volumes for Selected Weeks (Sunday to Saturday)



Source: First and Transdev ticket machine data

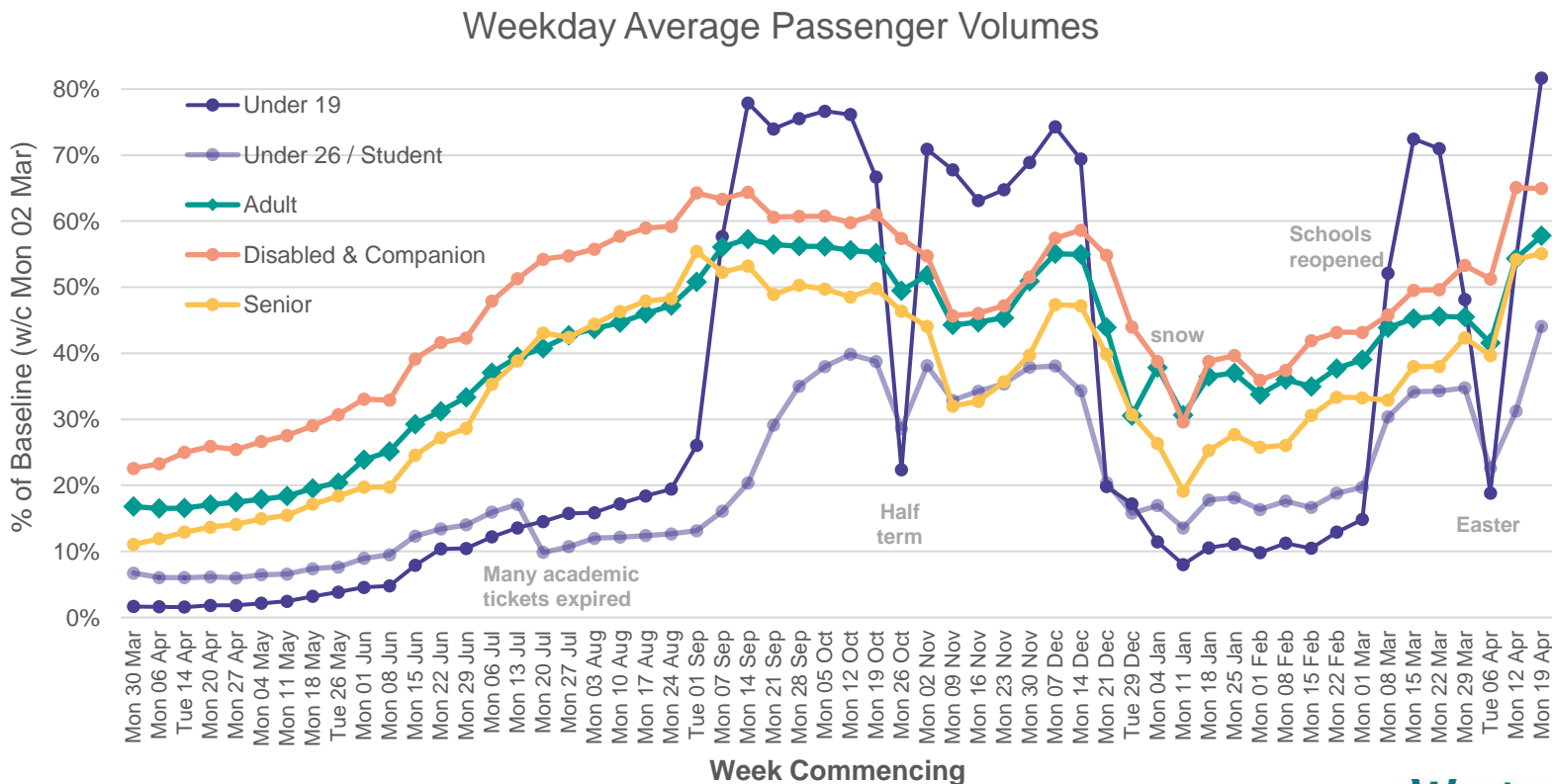
Baseline period is w/c Sun 01 Mar. Source: Bus operators electronic ticket machine data, passenger boarding locations in West Yorkshire. Graph shows First and Transdev data. Data is for whole weeks, with ticket types assigned to broad cohorts.

Bus use increased with non-essential retail & outdoor hospitality opening

The week commencing 12th April showed large increase in all cohorts as non-essential retail and outdoor hospitality re-opened and some schools returned after their Easter holidays. The increase in use by adult, disabled, and senior cohorts all showed the biggest increase in any weekday period since the government first started advising people to reduce non-essential travel. Use by younger cohorts was initially dampened as it was still the Easter holidays for some institutions.

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

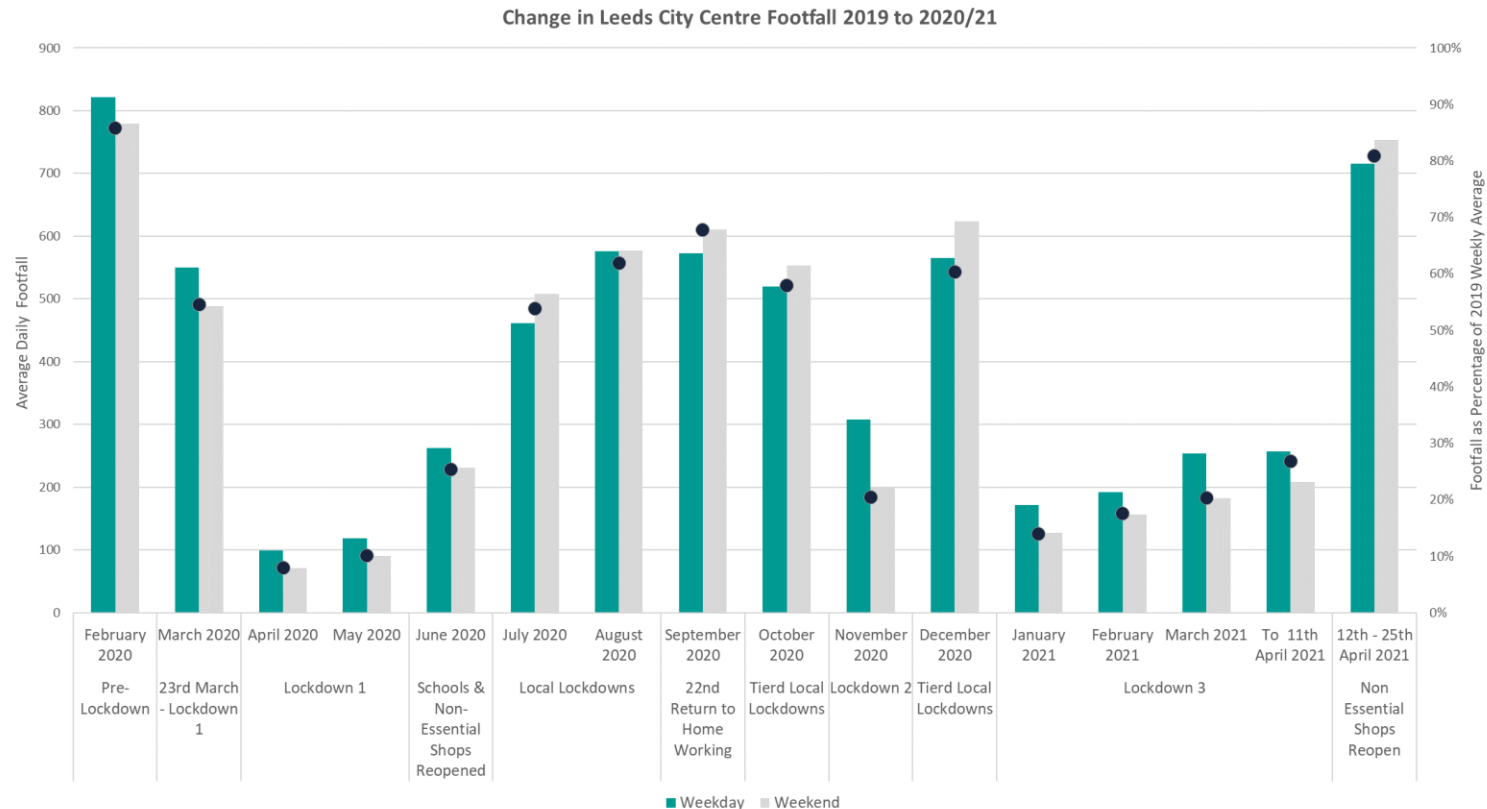
Data from First, Arriva, Yorkshire Tiger and Transdev



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 data. Data is for weekdays excluding bank holidays, with ticket types assigned to broad cohorts.

Footfall raises to highest post-COVID level as non-essential shops reopen.

Average daily footfall in Leeds City Centre has gradually increased on weekdays and weekends as 2021 has progressed and lockdown restrictions have eased. Footfall has jumped following the reopening of non-essential shops from Monday 12th April, raising to 81% of the average weekly footfall on the equivalent dates in 2019, the highest levels since the first lockdown.



Source: Leeds City Council