

COVID-19 Fortnightly Insights Report

Research & Intelligence
14th May 2021



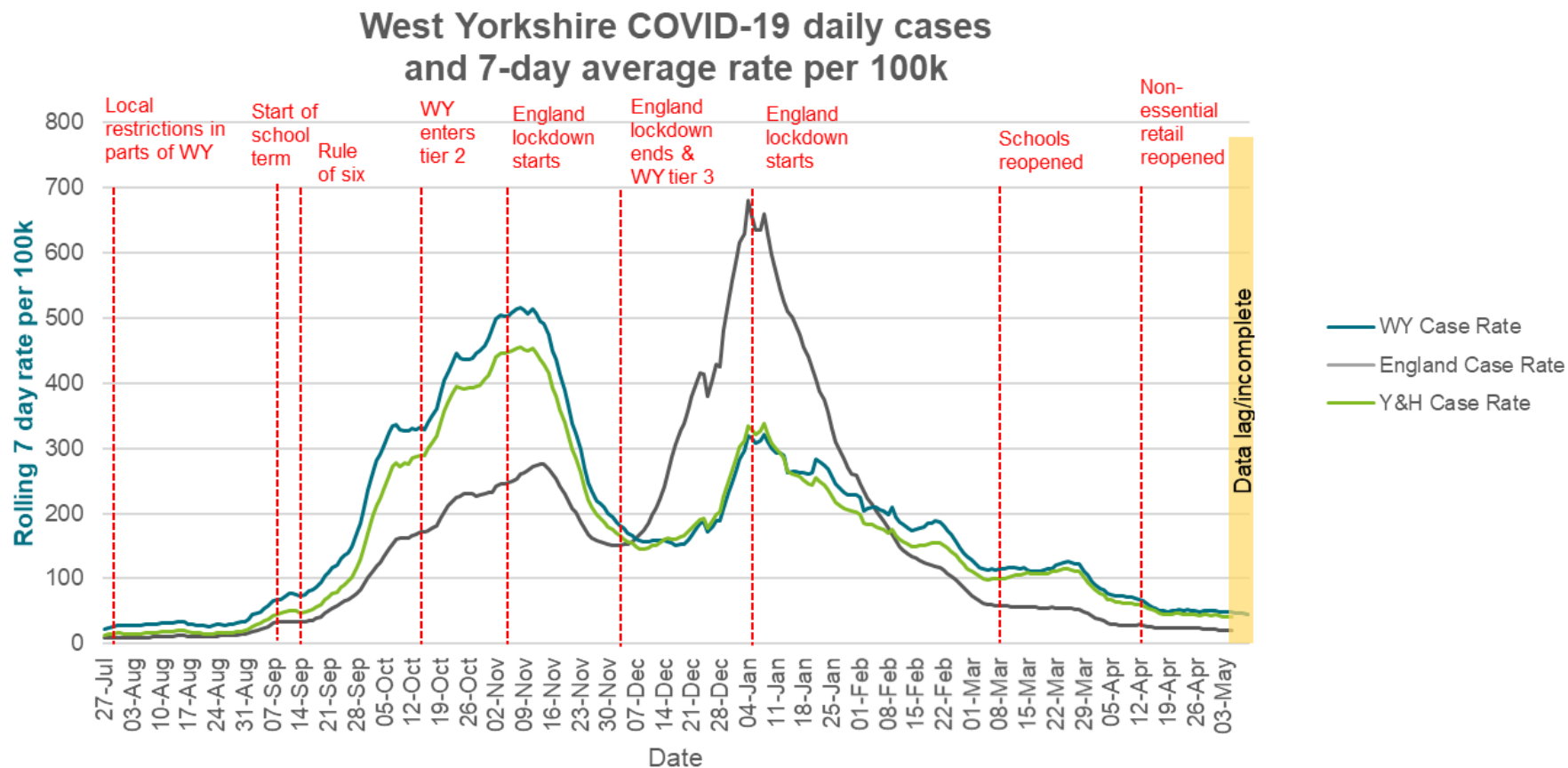
Executive Summary – social and economic

- **Activity in the economy is increasing as the reopening gathers pace**, according to various data sources. ONS survey data suggests that more than 4 in 5 businesses are now open and trading, and 55% of workers are now in their usual workplace – both levels last seen in late December.
- **Furlough use is also decreasing**, with a 10% fall in furloughed jobs in West Yorkshire in March, according to official data from HMRC. ONS survey data suggests this has continued into April, with the proportion of staff furloughed falling from 17% at the start of April to 12.6% at the end of the month.
- **Activity in West Yorkshire’s town and city centres also seems to be increasing**, with Leeds and Bradford seeing notable increases in the latest data to 6th May, but this is yet to be confirmed by other sources.
- **Online vacancy postings continue to rise**, and are now 19% above pre-pandemic levels. This trend is similar across all local authorities and all occupations.
- **Business liquidations have stabilised** at a level below that seen in Q1 2020, and **new business starts are a little above Q1 2020 levels**, according to data on new business bank accounts from Banksearch.

Executive Summary – transport

- National data on activity on the transport network suggests **levels of activity close to summer 2020 levels**. This is true across modes, though bus has seen the strongest recovery of late, compared to summer 2020.
- Overall, **car traffic is close to pre-pandemic levels, with bus and rail 40% and 60% below baseline** respectively.
- Local data suggests a similar pattern. Though direct comparisons are difficult **activity relative to pre-pandemic baselines may be similar or slightly lower in West Yorkshire** than national data suggests – Mcard use is currently just over 50% of baseline, and operator ticket machine data is around 62% of baseline. Footfall through Leeds Station around 33% of pre-pandemic levels.
- The **high levels of walking and running in the first three months of 2021 compared to previous years has decreased in April**. This decrease begins following the reopening of non-essential shops suggesting lower levels of active travel may be driven by those changing circumstances, as people return from furlough, return to their usual workplaces, and/or have a greater range of leisure options.

Virus prevalence – West Yorkshire trend











As of the 5th May 2021, the 7-day moving average **West Yorkshire COVID-19 rate was 49.3 cases per 100k, a very slight decline (1%) compared to the previous week (50.1 per 100k).** In the same period, the rate in Yorkshire and the Humber fell by 7% to 41.5 per 100k, and rates overall in England fell by 9% to 21.4 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.

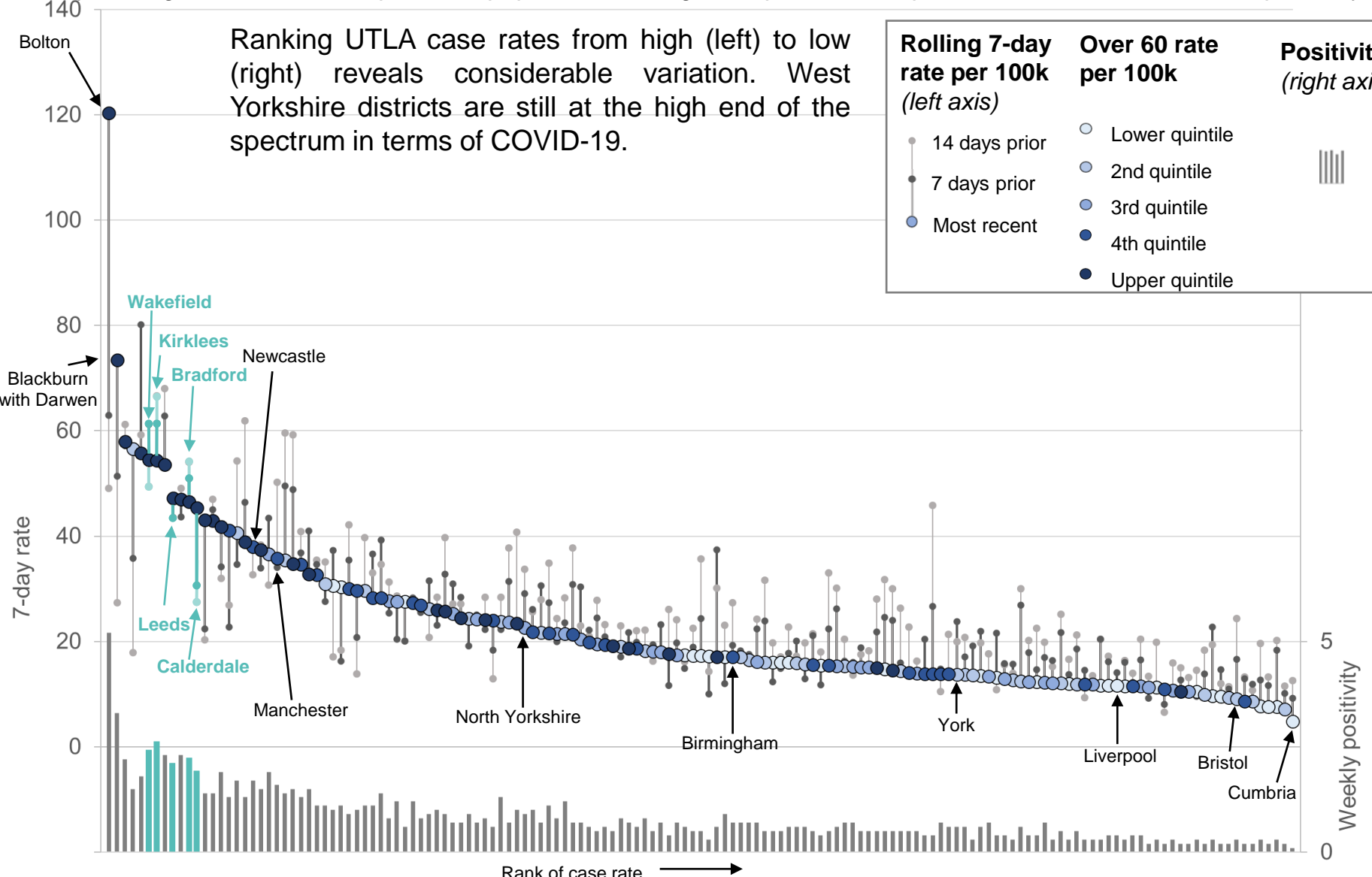
Area	Total cases per 100k people (29 April – 5 May) Most recent data week	Total cases per 100k people (22 – 28 April) Previous week	Absolute Difference	% Weekly Change
Bradford	46.5	50.9	-4.4 	-9%
Calderdale	45.4	30.7	14.7 	48%
Kirklees	54.3	61.4	-7.0 	-11%
Leeds	47.3	43.5	3.8 	9%
Wakefield	54.5	61.2	-6.6 	-11%
West Yorkshire	49.3	50.1	-0.7 	-1%
Yorkshire & the Humber	41.5	44.4	-2.9 	-7%
England	21.4	23.4	-2.0 	-9%

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

Ranking UTLA case rates from high (left) to low (right) reveals considerable variation. West Yorkshire districts are still at the high end of the spectrum in terms of COVID-19.

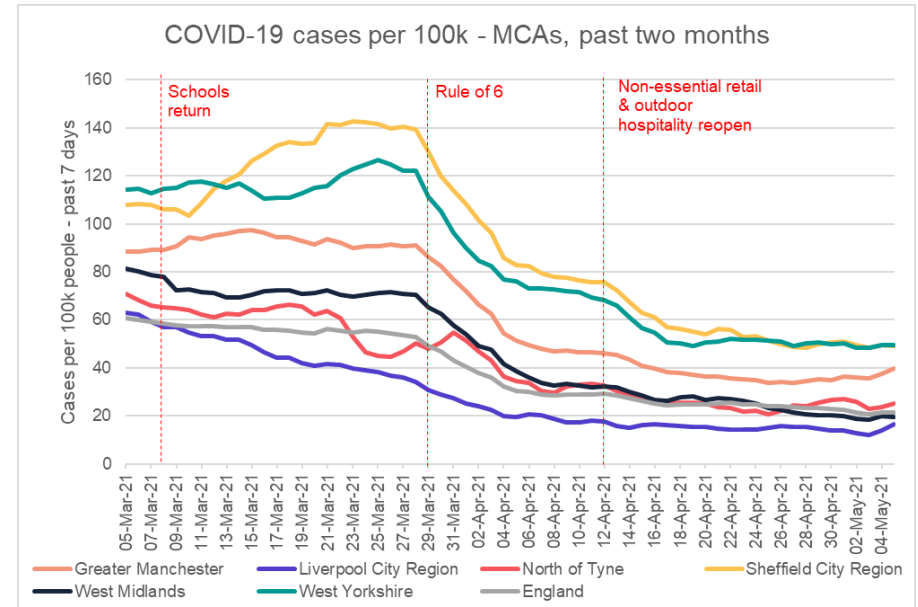
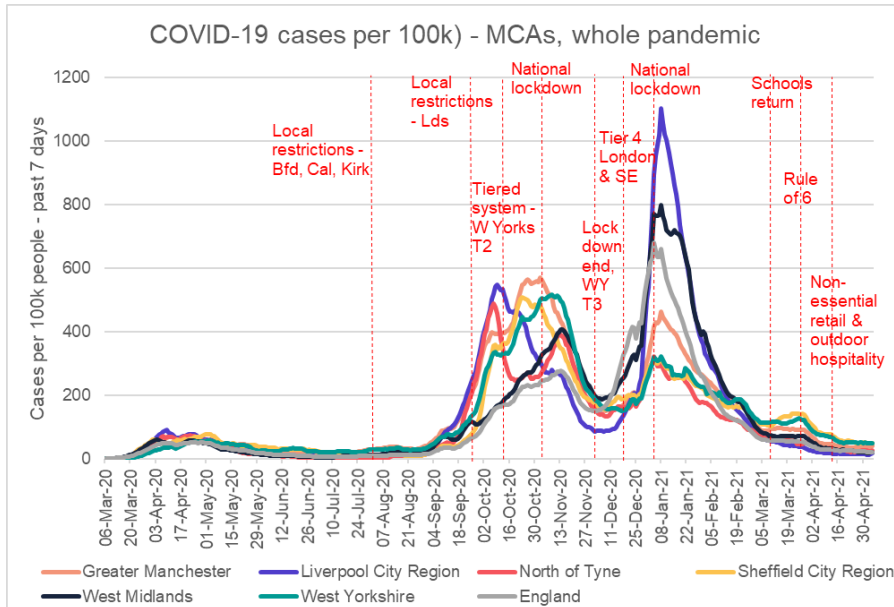
Rolling 7-day rate per 100k (left axis)	Over 60 rate per 100k	Positivity (right axis)
14 days prior	Lower quintile	
7 days prior	2nd quintile	
Most recent	3rd quintile	
	4th quintile	
	Upper quintile	



Blue points show latest COVID-19 case rate per 100k across UTLAs as of the 5th May (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 5th May (right Y-axis).

Slight increases in case rates in some MCAs

Case rates increased in four of the six Mayoral Combined Authority areas tracked here in the week to May 5th – most notably in Greater Manchester (up 15.4% on the previous seven days). Other areas saw smaller increases with the exception of West Yorkshire (-1%) and West Midlands (-5.3%). Liverpool City Region and West Midlands still have rates below the England average of 21.5 cases per 100k people, at 18 per 100k and 20 per 100k respectively. Case rates are still highest in West Yorkshire and South Yorkshire, both at just over 49 cases per 100k people.

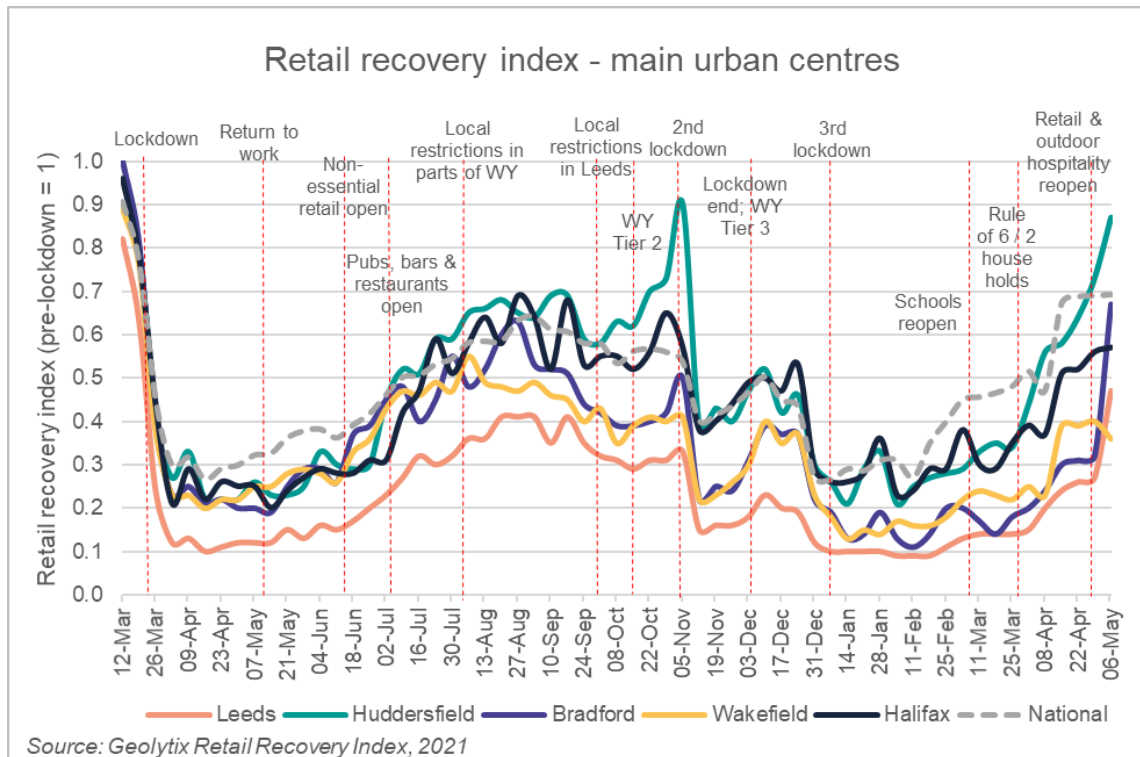


Economic Insights



Sharp increase in activity in some town and city centres, data suggests

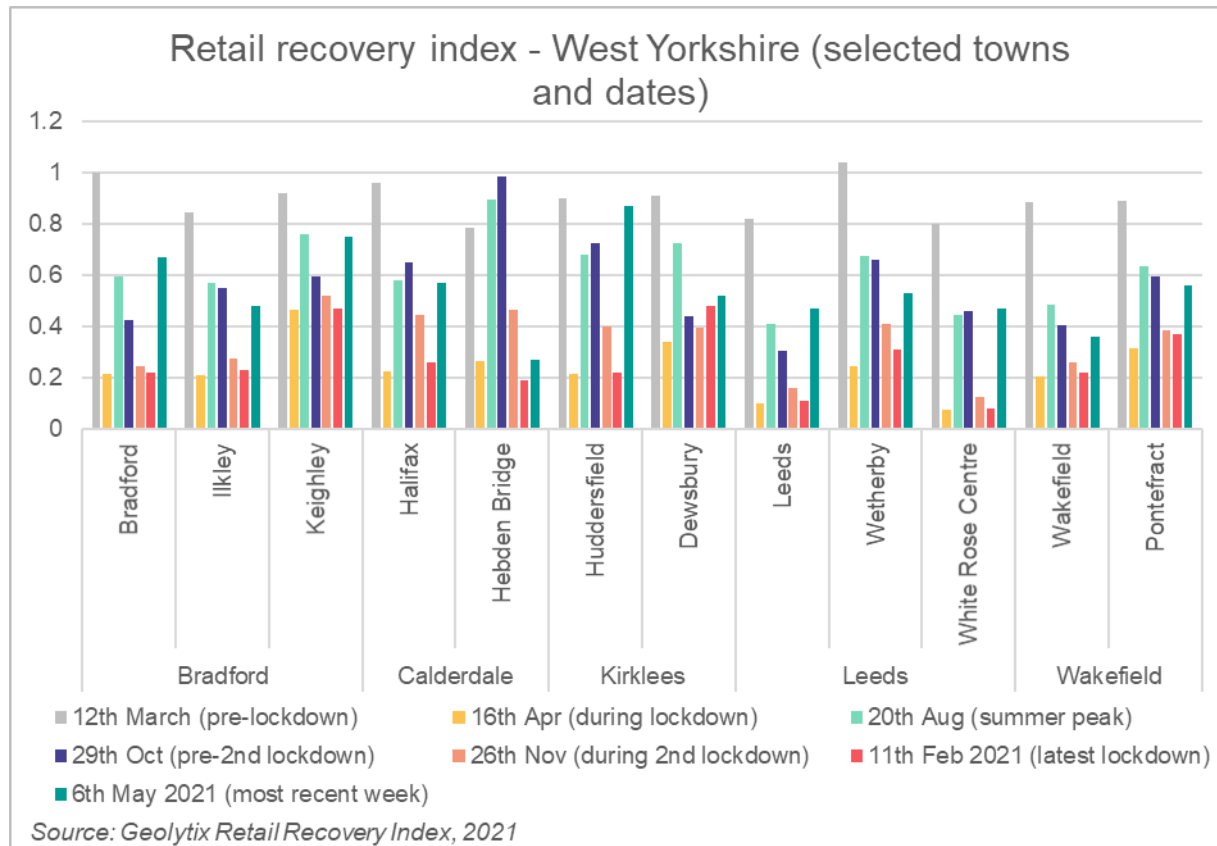
Footfall increased markedly in some of West Yorkshire's main urban centres in the week to 6th May, according to data from Geolytix. This follows a couple of more stable weeks after an initial increase when outdoor hospitality and retail reopened. Leeds and Bradford both saw activity almost double, to 47% and 67% of their pre-pandemic baselines respectively. Huddersfield also saw a small increase and is now at 87% of pre-pandemic levels. Wakefield and Halifax are more stable in the most recent week, according to this data.



It should be noted that although the dates do not align directly, this spike in activity in early May is not yet evident in local transport data, so will be monitored closely for validation in the coming weeks. See the Transport section below for more detail on local activity.

Most town and city centres approaching summer 2020 levels of activity

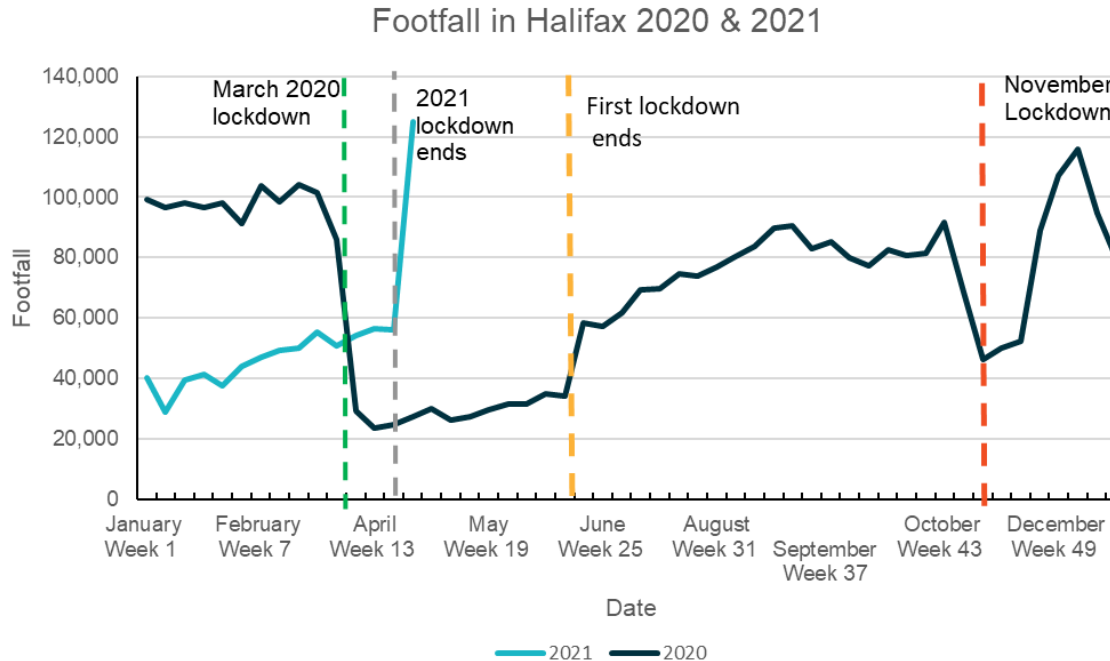
All 12 town and city centres tracked in West Yorkshire either saw increased activity or were largely flat in the week to May 6th, according to Geolytix Retail Recovery Index. In all cases, activity remains below each place's respective pre-pandemic baseline (a score of 1 on the chart below). However, in most instances it is close to the peak seen last summer. There are notable exceptions in Hebden Bridge and Wetherby, where activity since reopening has yet to rebound close to summer 2020 levels.



Large spike in footfall in Halifax as retail reopened

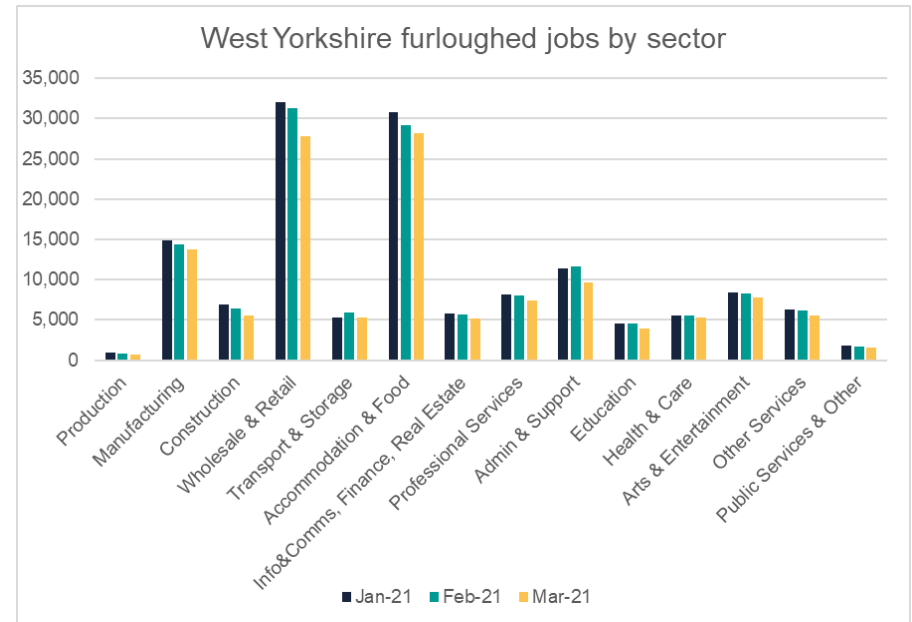
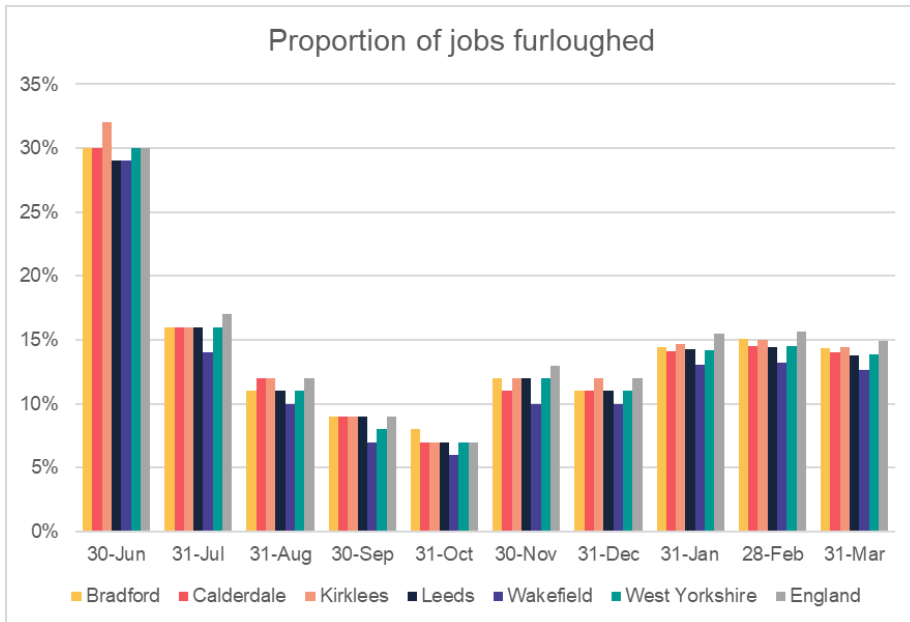
Data from Calderdale Council shows the footfall traffic data through Woolshops shopping centre in Halifax. The data covers the period of all of 2020 and 2021 up until April 18th 2021. This is useful as it shows a snapshot of the data before pandemic and after.

Before the pandemic, January & February 2020 Woolshops would get just under 100,000 visitors weekly. Since the first lockdown in March 2020 this dropped significantly to 20,000 to 30,000 visitors weekly. Once the first lockdown was relaxed this recovered slowly over the summer of 2020 but was still well under the pre-pandemic figure of 100,000. The next spike in footfall was just before Christmas where footfall increased to above the per-pandemic figure, before dropping once again in the first few months of 2021. After shops opened in April footfall spiked above 120,000.



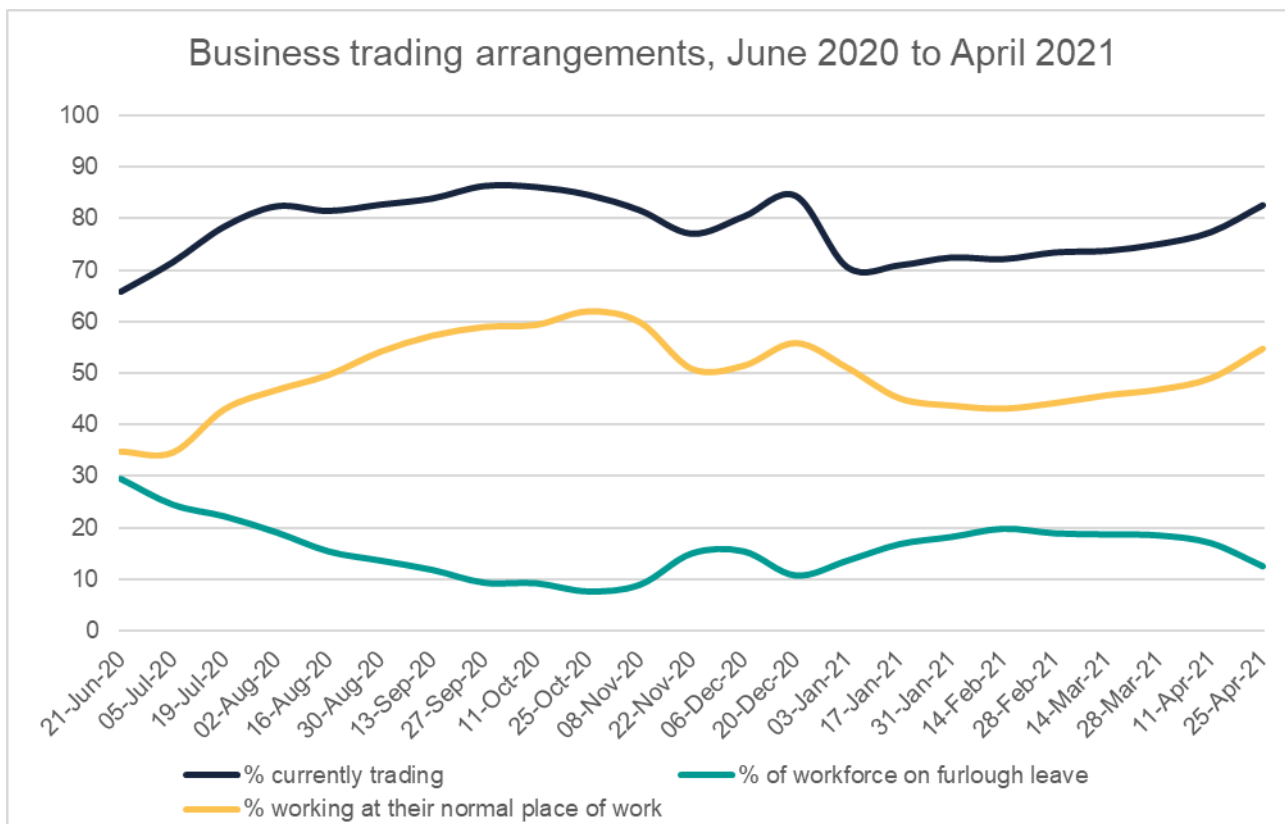
Furlough use declining locally in March

128,000 jobs were furloughed in West Yorkshire at the end of March, according to data from HMRC. This is down 9.7% on February, similar to the 10.4% fall across England. Most local authorities saw similar falls though it was slightly steeper in Wakefield (-10.6%) and lower in Calderdale (7.9%). 14% of jobs were furloughed in West Yorkshire, again largely consistent across local authorities though slightly lower in Wakefield (12.6%). Across West Yorkshire, all sectors saw small falls month on month. The largest decline in absolute terms was in wholesale & retail, though that sector, along with accommodation & food, continues to have the most jobs on furlough.



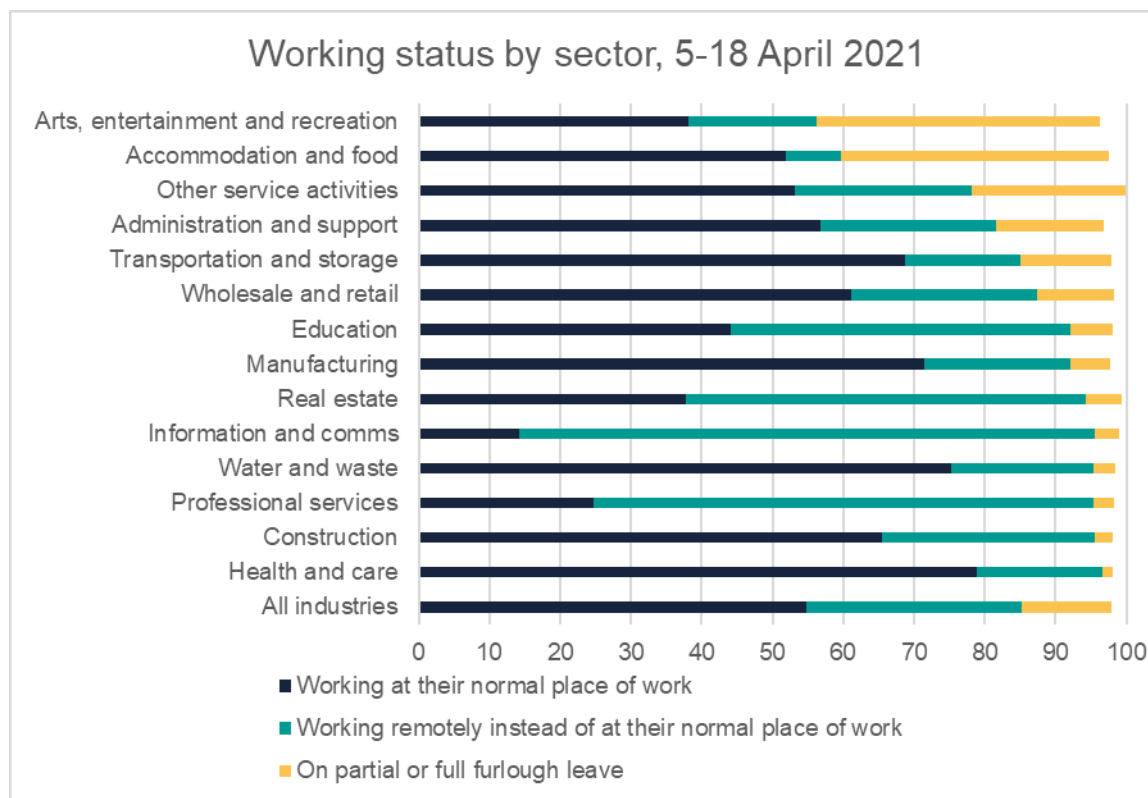
Return to work gathers pace as restrictions ease, ONS survey suggests

82.5% of businesses nationally were trading in late April according to the latest ONS Business Insights and Conditions Survey (BICS), carried out between 19th April and 2nd May. This is the highest level since late December, and up from 77.5% a fortnight earlier. More people are also returning to their usual workplace – now almost 55%, compared to 49% two weeks ago and also now back at late-December levels. Furlough use has also continued to decrease to late 2020 levels, down to 12.6% from 17% earlier in April.



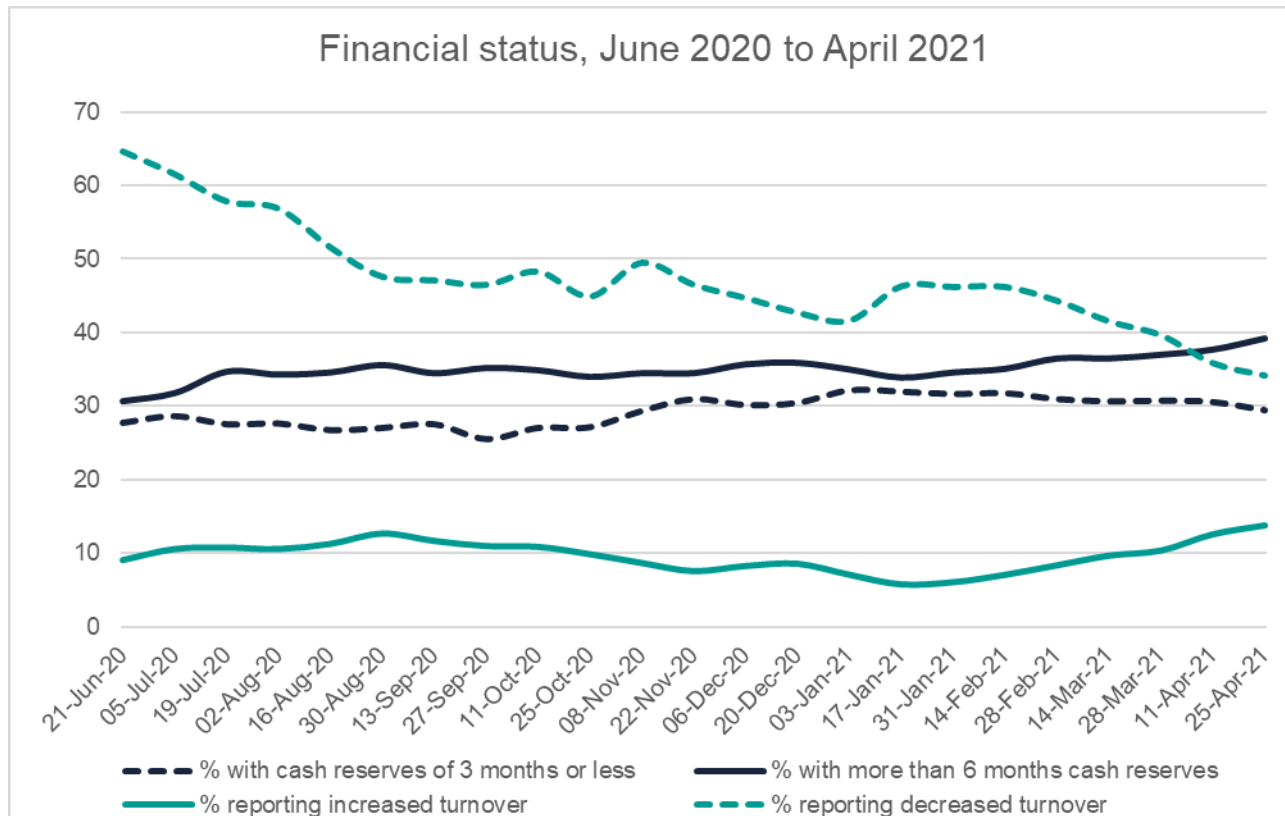
Still significant variation in working arrangements by sector

There remain substantial variations in working location and furlough use by sector nationally, according to the latest ONS BICS survey. The arts & entertainment (40%) and accommodation & food (38%) sectors still have around 2 in 5 workers on furlough, though these have fallen by 13 and 7 percentage points respectively compared to a fortnight earlier. 70% of workers in professional and technical services, and 80% in information and communications, continue to work from home.



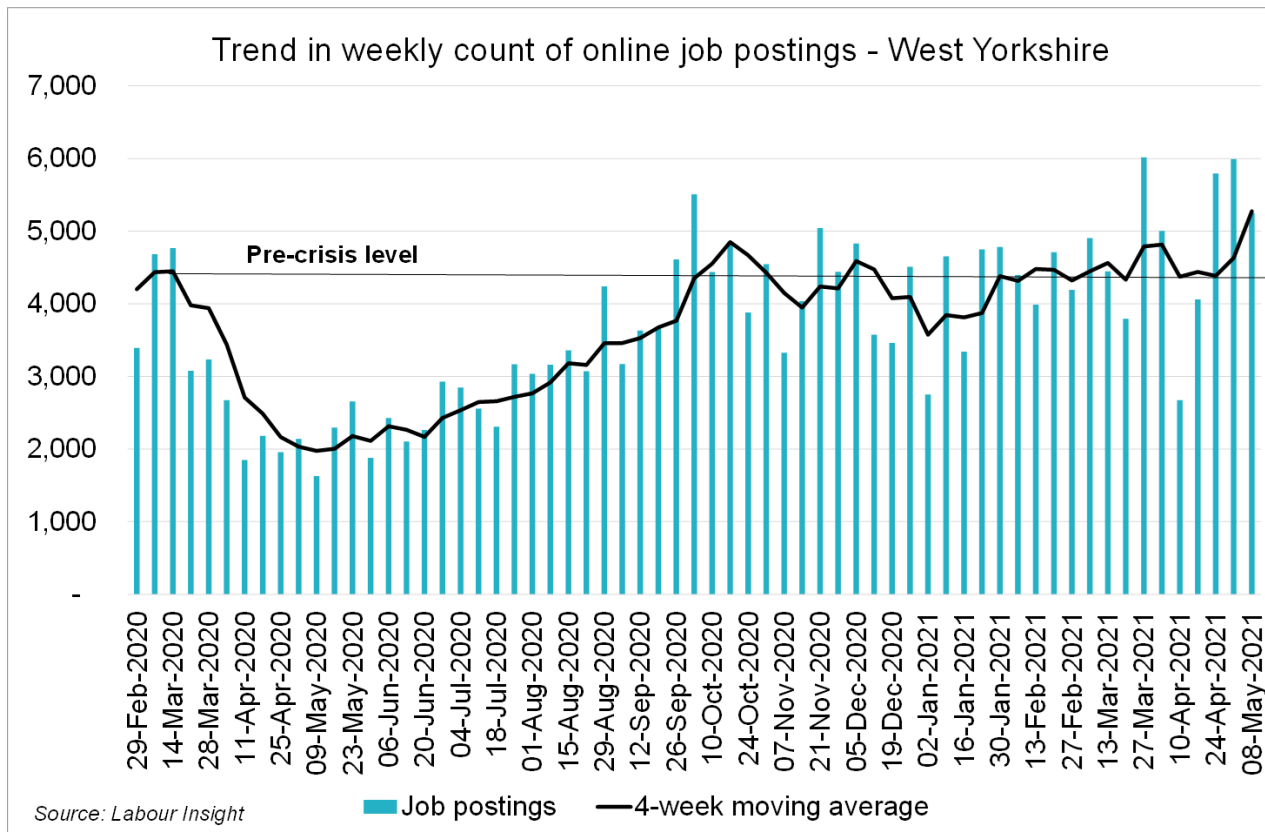
Businesses' financial positions improving as activity increases

More businesses nationally reported improved financial positions in late April as restrictions continued to ease, according to the BICS. The proportion of businesses reporting improved turnover increased to 14%, and although this remains substantially below the proportion reporting decreasing turnover (34%) the gap is narrowing. Alongside this, the proportion with less than three months cash in reserve (29.5%) is decreasing whilst the proportion with more than six months of cash (39%) is increasing.



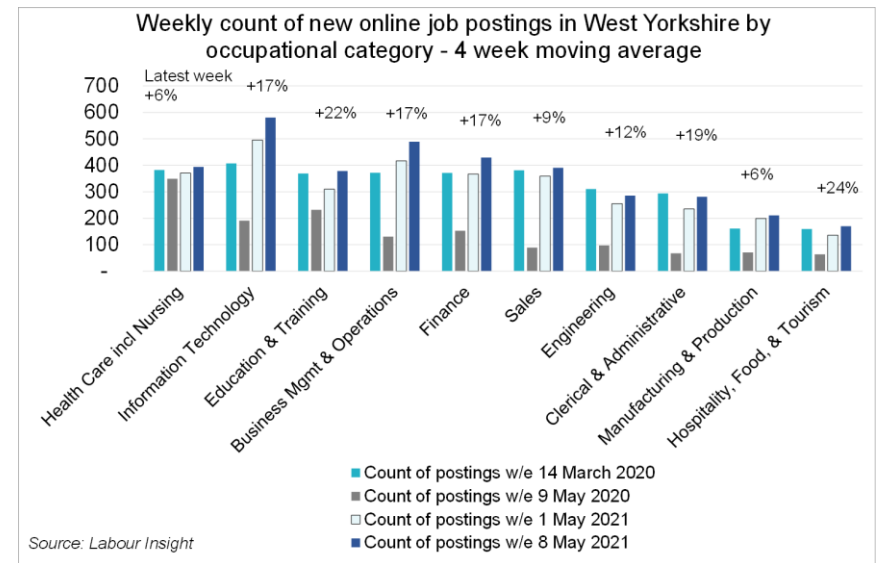
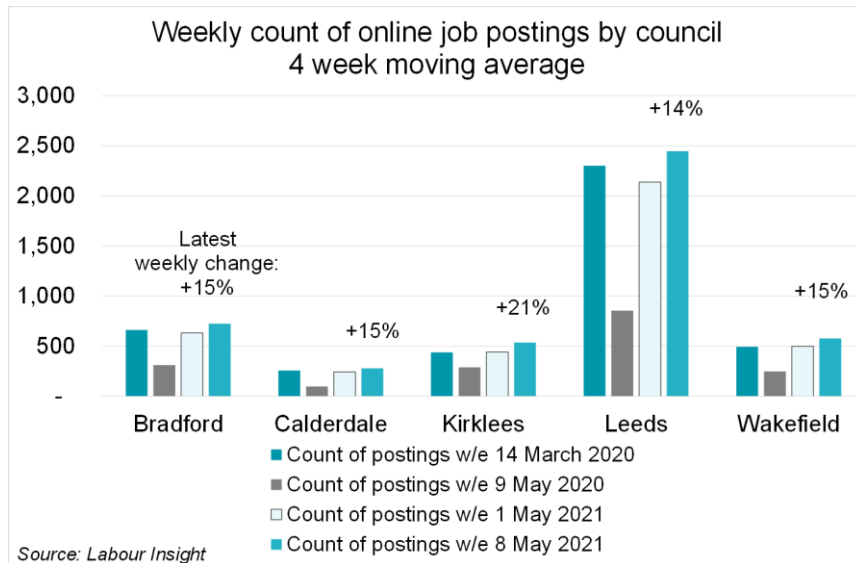
Vacancy count remains strong

The number of vacancies for jobs in West Yorkshire posted online during week ending 8 May grew by 14% compared with the previous week, based on a 4-week moving average (national average increase: 11%). The weekly vacancy count for West Yorkshire is currently 19% above its pre-crisis level (i.e. compared with week ending March 14 2020).



Leeds exceeds its pre-crisis vacancy level for the first time

All local authority areas saw double-digit percentage increases in postings in the latest week, based on the moving average. All local authorities exceeded their pre-crisis level of postings this week – for the first time, in the case of Leeds..

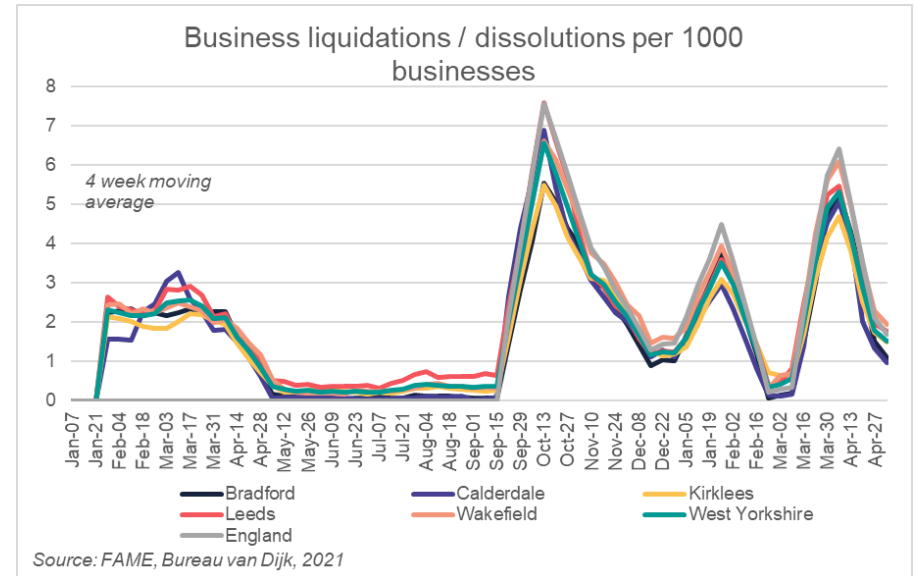
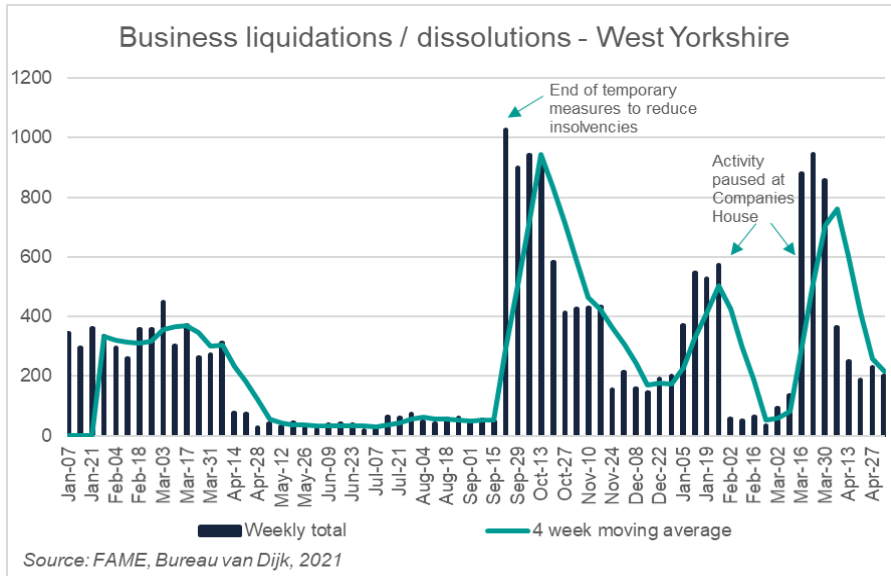


All occupations recorded growth in postings for the latest week, based on a 4-week moving average, mostly in double-digits in percentage terms. All occupations exceeded their pre-crisis level (March 14 2020) this week, except for Engineering and Clerical and administrative.

Business liquidations stabilise

200 businesses were dissolved / liquidated in West Yorkshire in the week to May 4th, according to data from Bureau van Dijk's Fame business database. This reflects a recent stabilisation in activity and is in line with the four week moving average of 220. This is lower than the 328 liquidations per week averaged prior to the pandemic in Q1 2020.

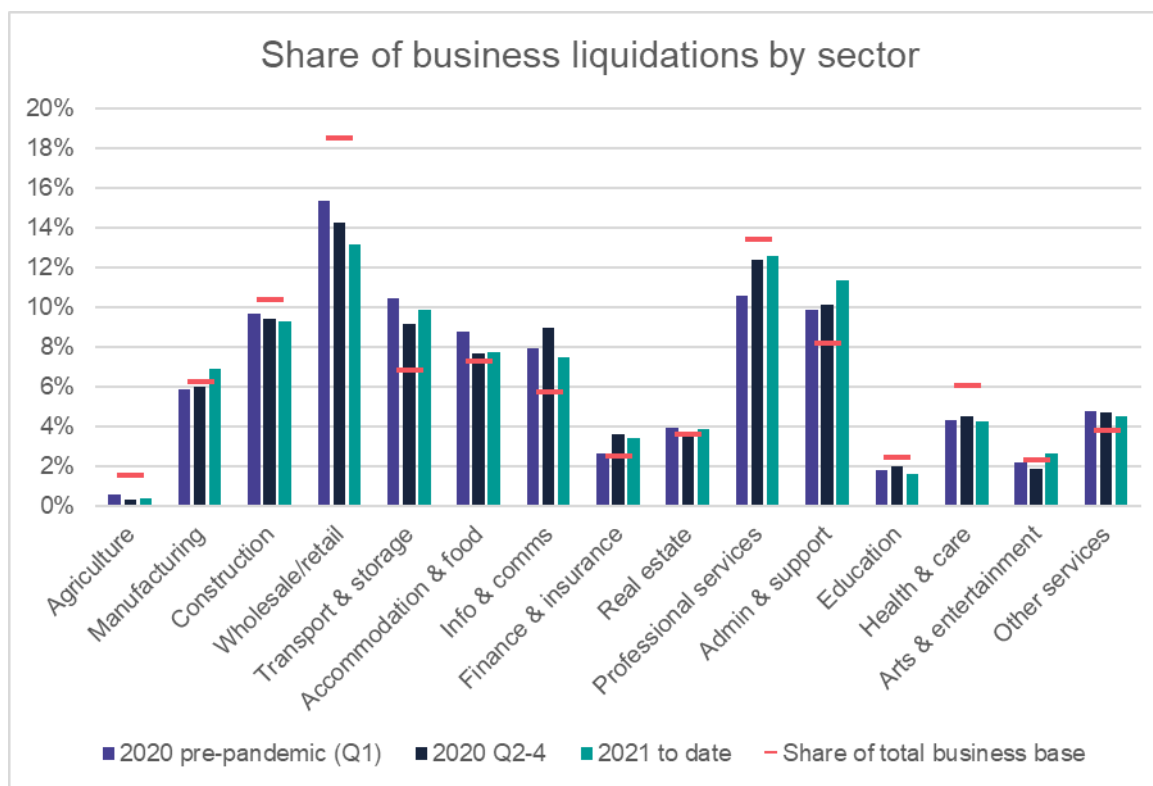
There were 1.4 liquidations per 1,000 businesses in the week to May 4th which is in line with the UK average. Whilst the trend is similar across local authorities, Bradford and Calderdale have slightly lower rates (0.8 per 1,000), whilst the rate is slightly higher in Leeds (1.8 per 1,000).



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

Business administration and manufacturing sectors see increased share of liquidations

Analysis of business liquidations by sector shows an increase in the share of liquidations in the manufacturing and business administration sectors so far in 2021, compared to last year. The business administration sector was also over-represented in 2020 in terms of its share of liquidations compared to its share of businesses, both prior to and during the pandemic. The transport & storage and information & communications sectors also remain over represented, but there are relatively few liquidations in wholesale and retail, compared to its share of the business base.



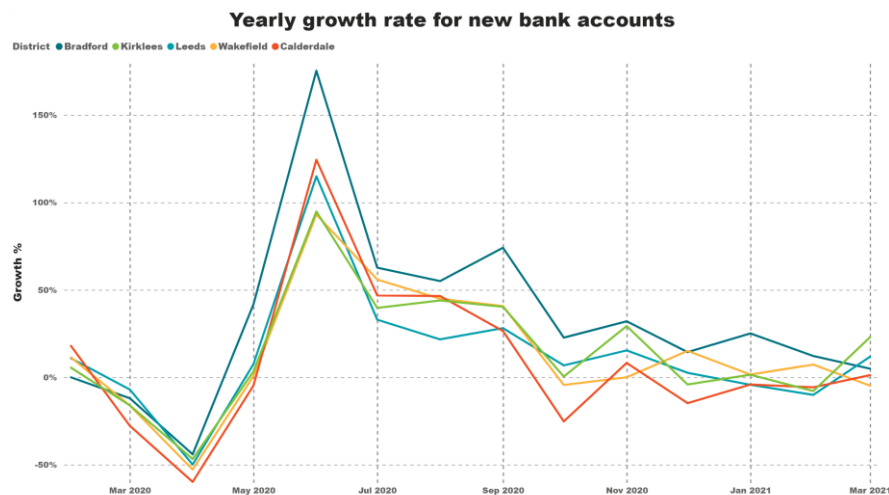
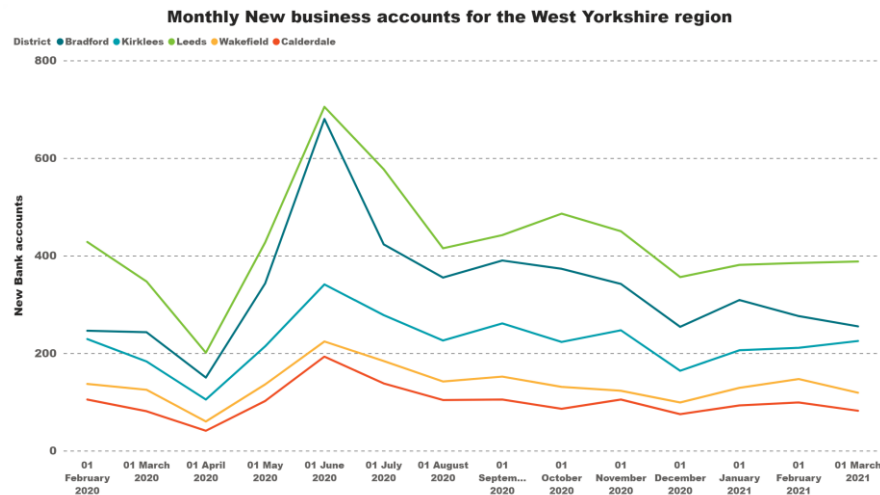
*Source: FAME, Bureau van Dijk, 2021. Analysis based on company registration address, location of activity may differ in some cases

New business bank accounts across Leeds City Region has grown by 8.5% since last March

Across the Leeds City Region the number of new business bank accounts opened in March was 1,371, this is 8.5% more than March 2020.

Across West Yorkshire the number of new business accounts opened in March was 1,069, down slightly on February but largely unchanged compared to March 2020. When compared to March 2020 most districts have seen fairly small growth. Except Leeds and Kirklees which had a growth of 12% and 23% respectively.

Across the first quarter of 2021, the 3,300 new business accounts opened in West Yorkshire is up 3.4% on 2020 and in line with 2019 levels. Bradford's new accounts were 14% up on Q1 2020, though Leeds and Calderdale saw small falls.

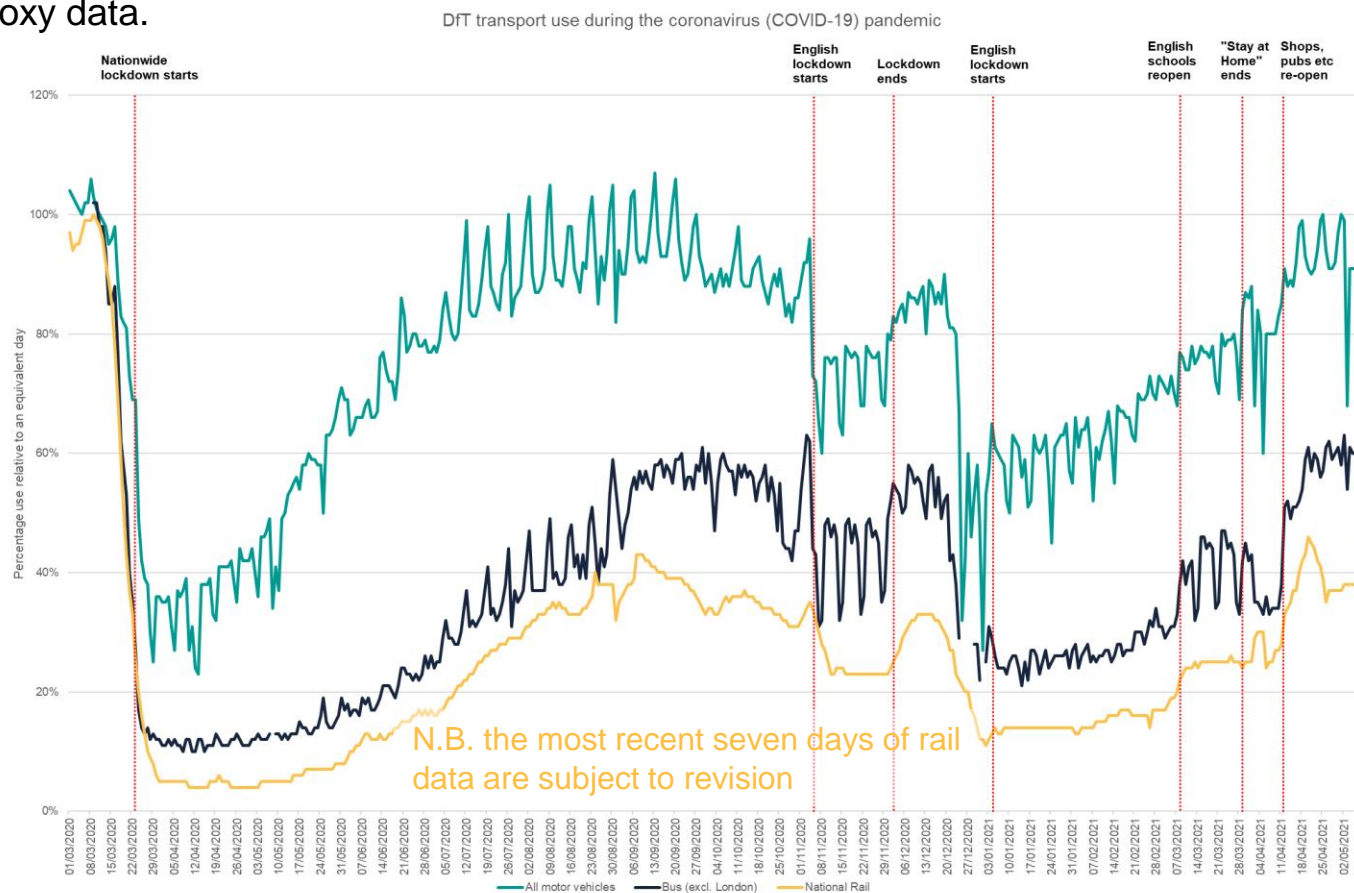


Transport Insights



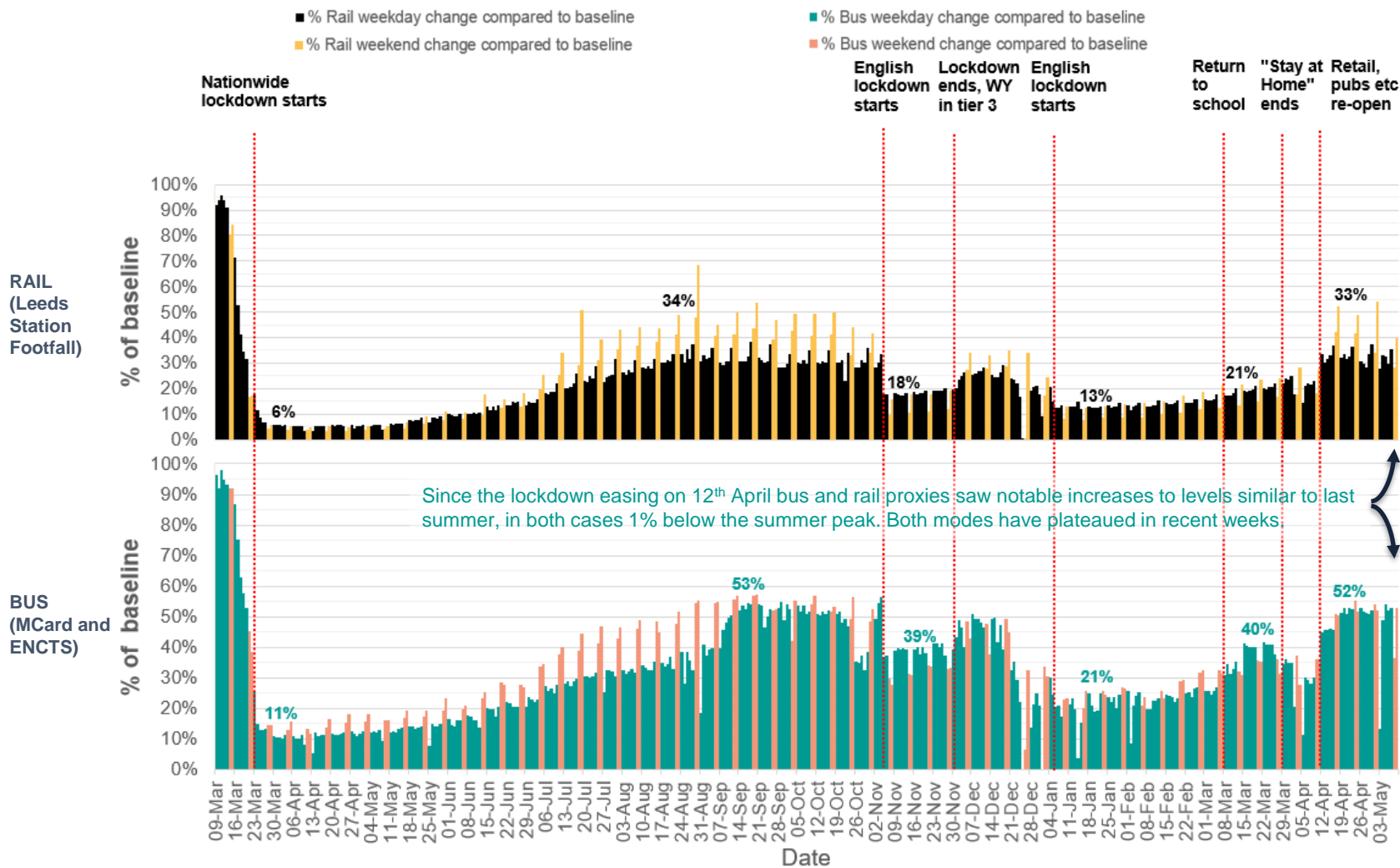
National travel use remains at summer 2020 levels following April lockdown easing

Data for Great Britain shows that travel usage returned to similar levels seen in summer 2020 following the 12th April lockdown easing. Bus appears to have made the strongest recovery relative to summer 2020, but remains around 40% below baseline levels. Motor vehicle use is around baseline on weekends but remaining about 10% lower on weekdays. Rail saw an initial surge but has settled around 60% lower than baseline. Local data suggests lower travel activity than the national trend, but this may be due to incompatibility and the use of proxy data.



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

Local bus and rail proxies show stabilised weekday travel over recent weeks



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)

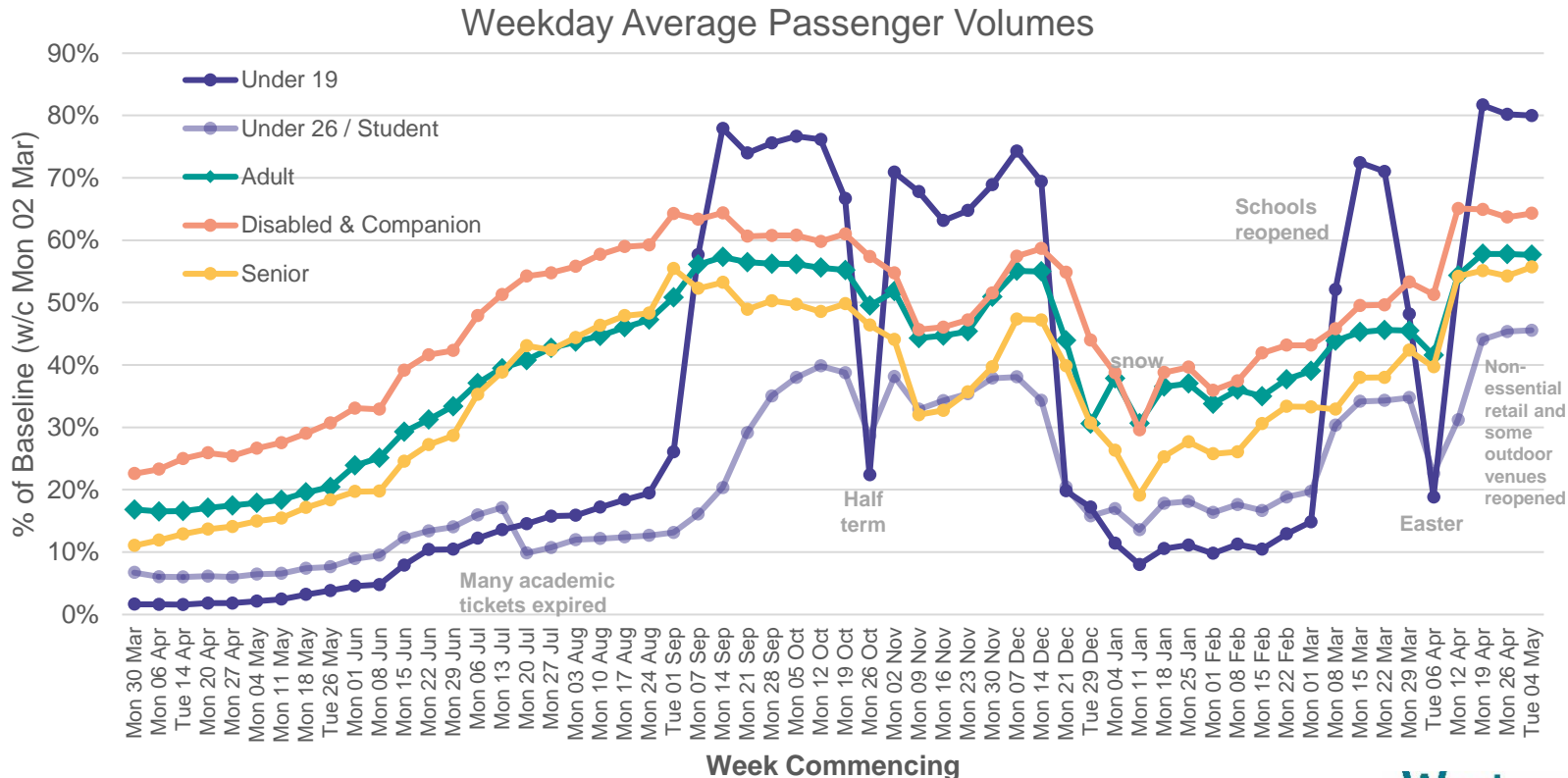
Bus use increased with non-essential retail & outdoor hospitality opening

The weeks commencing 19th April, 26th April, and 4th May have shown fairly consistent levels of weekday usage by cohort and around 62% of baseline overall.

Further data (not graphed) shows that use on May Day bank holiday was similar to that on the Sunday, 62% of the Sunday baseline. Saturday 8th May had suppressed use in comparison with the previous three Saturdays (44% of baseline instead of around 60%).

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.