

COVID-19 Fortnightly Insights Report

Research & Intelligence
11th June 2021



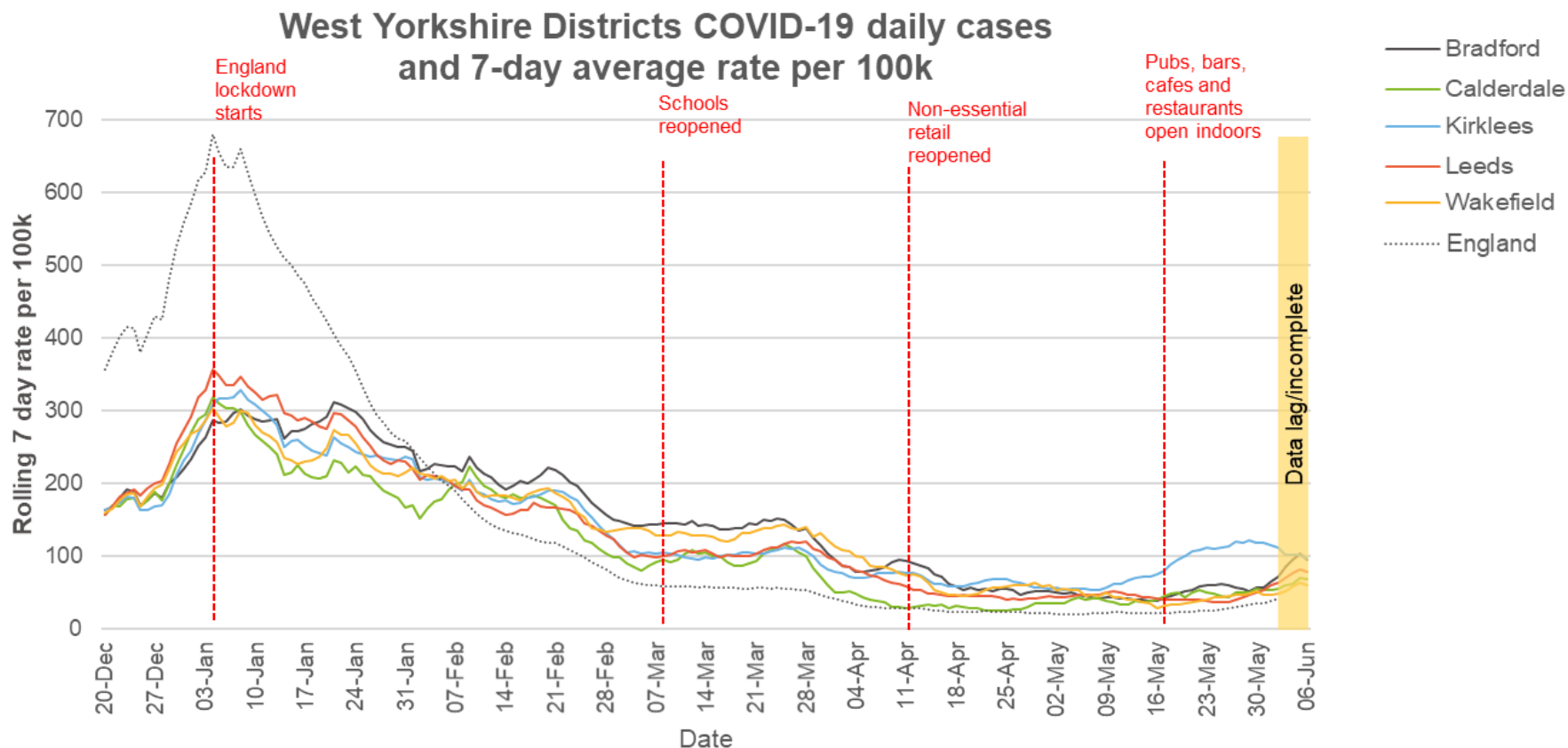
Executive Summary – social and economic

- More of the economy has reopened as restrictions have eased. The ONS Business Insights and Conditions Survey suggests in West Yorkshire in early May:
 - 84% of businesses were trading (up from 70% in January)
 - 10% of workers were on furlough (down from 17%)
 - And 60% were in their usual workplace (up from 47%)
- On all of these measures, activity is now similar to early October (i.e. just before tiers and further lockdowns began).
- More recent national data suggests further improvement on these data points as restrictions eased further in mid-May, with more businesses reopening and furlough use continuing to fall, down to 8%.
- Activity continues to increase in many of West Yorkshire's town and city centres, with Bradford, Halifax and Wakefield seeing increases in the week to June 3rd. Activity remains below pre-pandemic levels in most of these areas, but is notably higher in Huddersfield.
- The posting of online vacancies remains robust and although activity has stabilised recently, vacancies advertised online are around 9% above pre-pandemic levels.
- The picture in terms of business liquidations also remains stable and below early 2020 levels.

Executive Summary – transport

- Locally, rail proxy data for footfall in Leeds Station suggests an upturn in activity in recent weeks, with weekday use now around 50% of pre-pandemic levels. Weekend use continues to be stronger than weekday.
- Local bus use has seen similar weekend spikes to rail but recent weekday usage has been affected by half term holidays. This drove falls in under 19 passengers and a much smaller fall in adult ticket sales, though use by disabled and senior cohorts continued to increase steadily.
- Bus ticket data from operators emphasises that weekend recovery has been stronger than weekday, with patronage at 70-80% of March 2020 levels at various times throughout the weekends. This compares to around 50% in the traditional weekday AM and PM peaks.
- These patterns reflect the national picture, where DfT data suggests that recent motor vehicle use has exceeded pre-pandemic baselines, with rail at around 50% of baseline and bus at 60%.

Virus prevalence – West Yorkshire trend











As of the 2nd June 2021, the 7-day moving average **West Yorkshire COVID-19 rate was 71.0 cases per 100k, a 23% increase compared to the previous week** (57.6 per 100k). In the same period, the rate in Yorkshire and the Humber increased by 18% to 43.8 per 100k, and rates overall in England increased by 48% to 40.6 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.

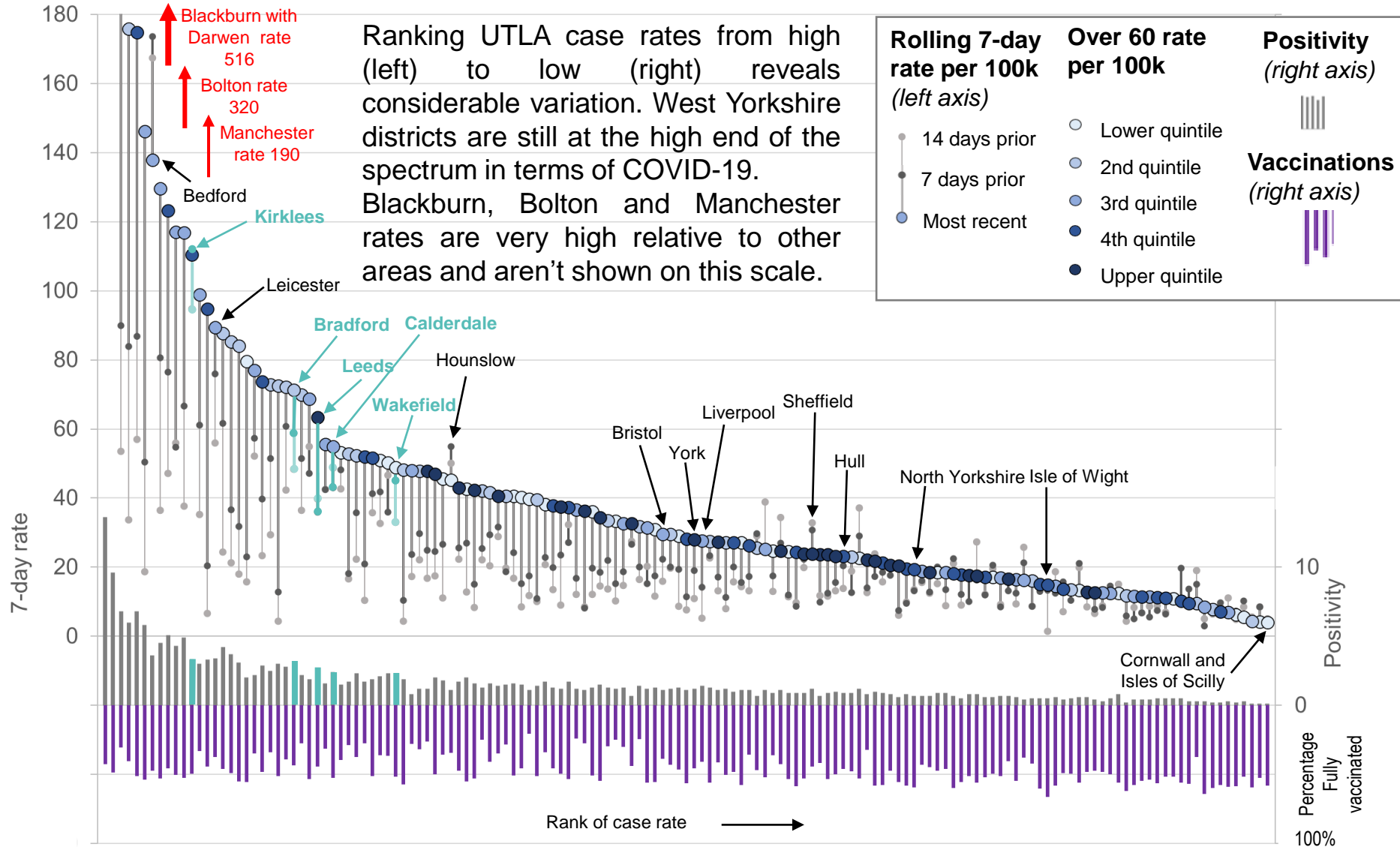
Virus prevalence – West Yorkshire

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 5 days are excluded from the calculations of rates and moving averages.

Area	Total cases per 100k people (27 May – 2 June)	Total cases per 100k people (20 – 26 May)	Absolute Difference	% Weekly Change
	Most recent data week	Previous week		
Bradford	71.1	58.7	12.4 	21%
Calderdale	54.9	43.0	11.8 	27%
Kirklees	110.5	112.1	-1.6 	-1%
Leeds	63.2	35.9	27.2 	76%
Wakefield	48.5	45.1	3.4 	8%
West Yorkshire	71.0	57.6	13.4 	23%
Yorkshire & the Humber	43.8	37	6.8 	18%
England	40.6	27.4	13.2 	48%

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

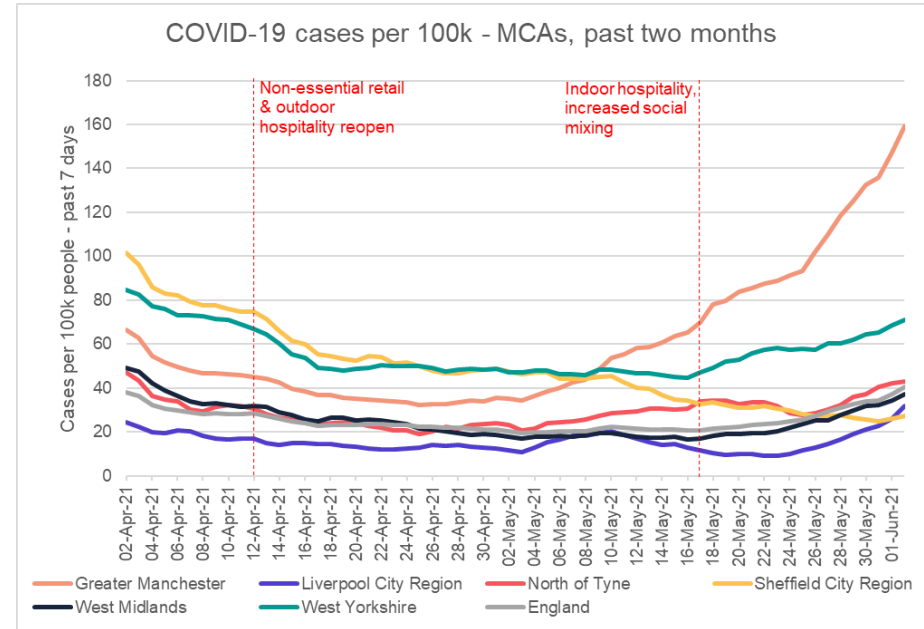
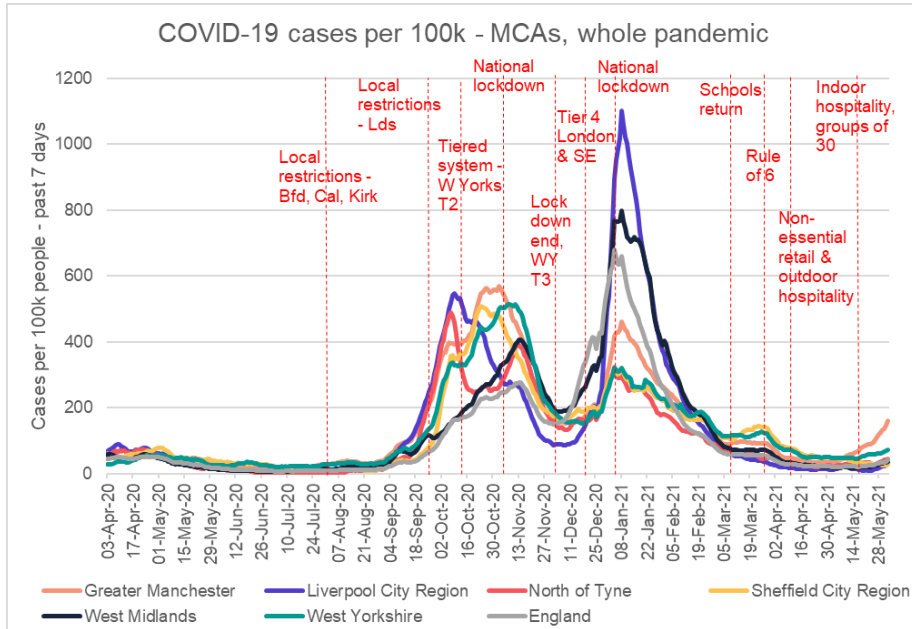


Blue points show latest COVID-19 case rate per 100k across UTLAs as of the 2nd June May (left Y-axis). Vertical bars connected to these points denote rate last week (dark grey) and the week before (light grey). Point colour denotes the COVID-19 rate per 100k in the over 60s. Grey bars at the bottom denote positivity (%) up to the 2nd June (right Y-axis). Purple bars at the bottom denote the percentage of adults who are fully vaccinated up to 6th June (right axis). Interactive, alternative version here: [COVID-19 West Yorkshire Dashboard - Power BI](#)

Cases increasing in most MCAs

All Mayoral Combined Authority areas tracked here saw case rates increase in the week to June 2nd. In percentage terms this increase was highest in Liverpool City Region (up 143% on a week earlier), but this reflects that area's low starting case rate, and the 31.6 cases per 100k there remains below the average for England (40.6).

Sheffield City Region was the only area to see cases fall (down 1%) and now has the lowest rate per 100k (27.2). West Yorkshire saw the 2nd lowest percentage increase (up 23.5%), but has the 2nd highest rate overall (75.3 per 100k), behind only Greater Manchester (173.5 per 100k, up 56%).

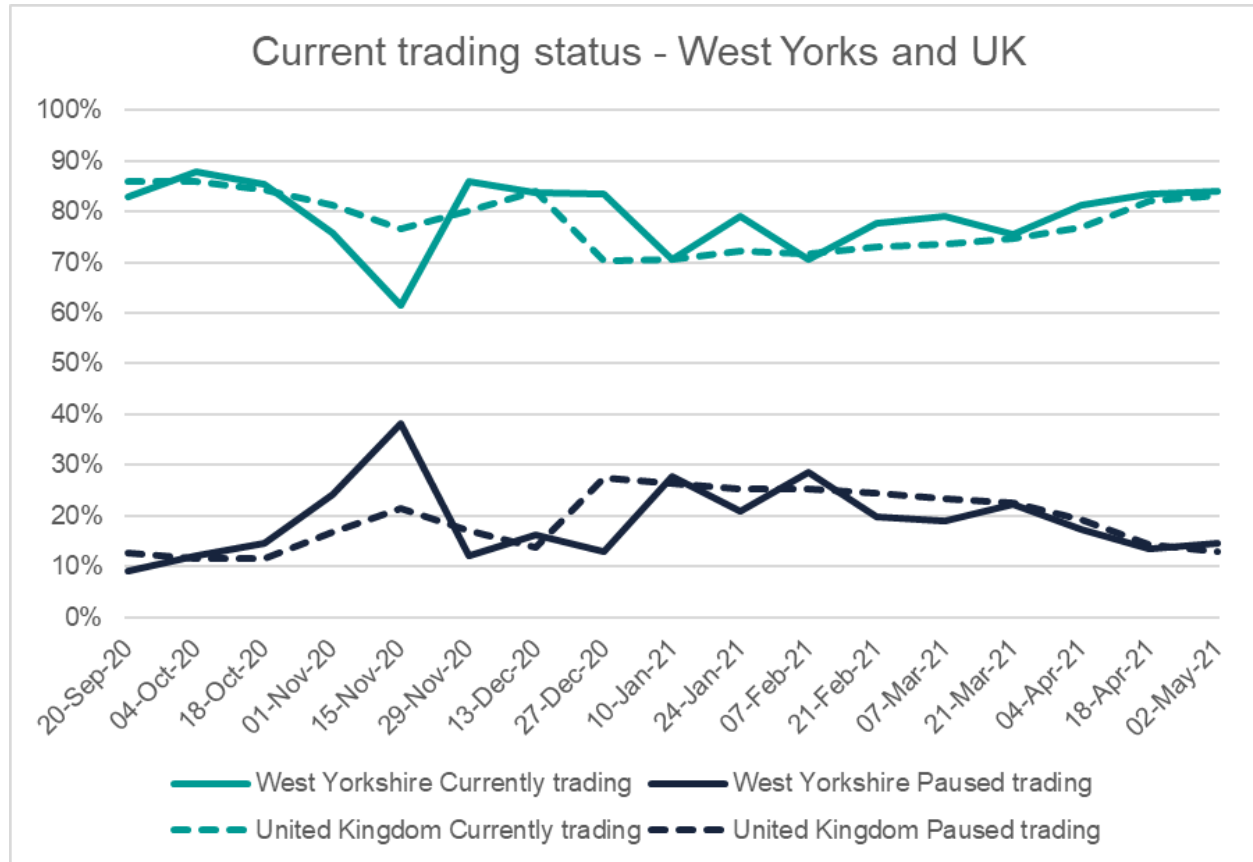


Economic Insights



West Yorkshire reopening matches pace with UK

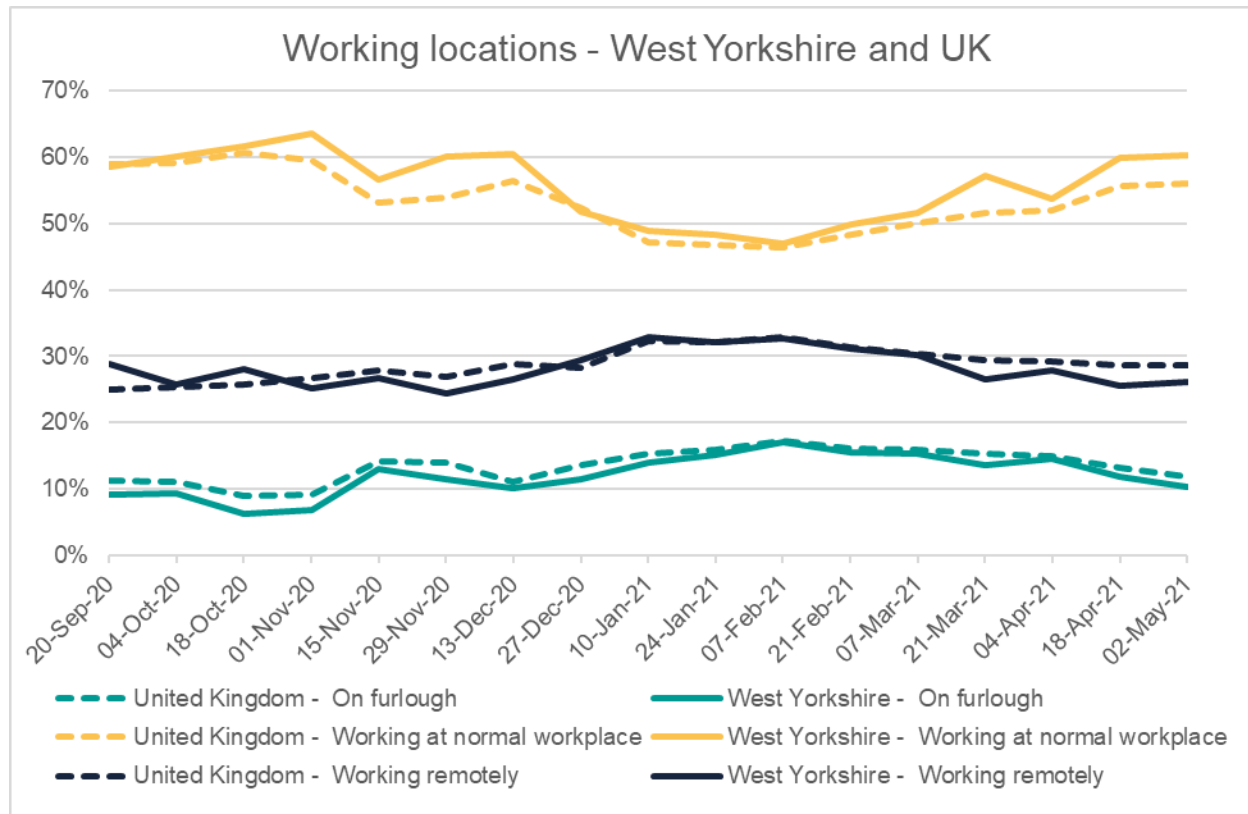
84% of West Yorkshire businesses were open and trading in early May, according to the ONS Business Insights and Conditions Survey. This is in line with the 83% seen nationally and represents an increase locally from around 70% in January and February.



*Source: ONS Business Insights and Conditions Survey. Local data is based on single site companies which account for 98% of all businesses, and approximately half of total UK turnover and employment. UK data is also based on single site businesses for comparison, so may differ from other national data.

West Yorkshire return to work is slightly outpacing the UK

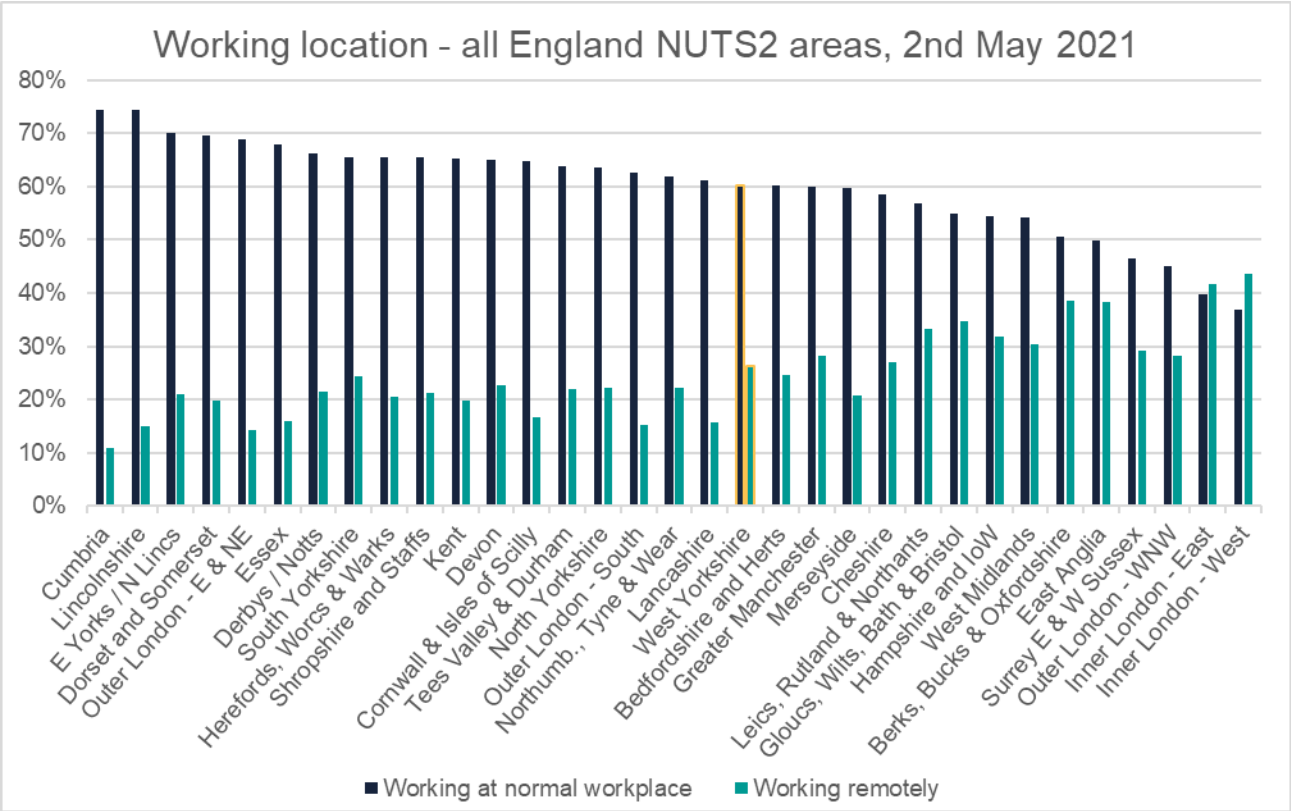
The proportion of people working in their usual place has risen to 60% in early May, up from 47% in February, back to a level last seen in December. Whilst the February low on this metric was similar to the UK level, the return to usual workplaces has been slightly faster in West Yorkshire, with 56% of workers back in their usual workplace nationally in early May. West Yorkshire is however similar to other comparable areas on this measure (see next slide).



*Source: ONS Business Insights and Conditions Survey. Local data is based on single site companies which account for 98% of all businesses, and approximately half of total UK turnover and employment. UK data is also based on single site businesses for comparison, so may differ from other national data.

Return to work – NUTS2 areas

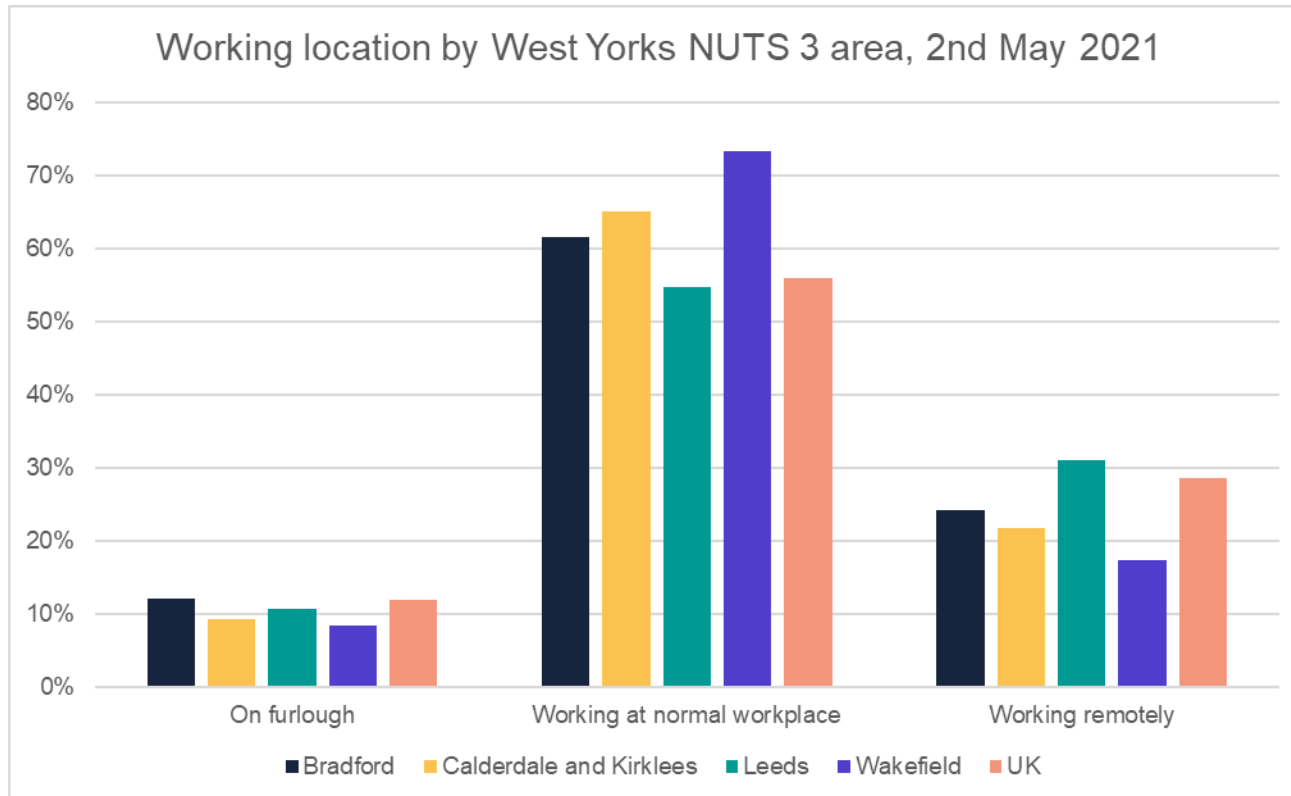
60% of West Yorkshire workers were in their usual workplace in the fortnight to May 2nd, according to the ONS BICS survey. Whilst this is higher than the 56% nationally, it is very similar to comparator areas such as Greater Manchester, Merseyside and Northumberland, Tyne & Wear. It is also lower than areas such as South Yorkshire and Derbyshire / Nottinghamshire (both around 65%).



*Source: ONS Business Insights and Conditions Survey. Local data is based on single site companies which account for 98% of all businesses, and approximately half of total UK turnover and employment. UK data is also based on single site businesses for comparison, so may differ from other national data.

Return to work strongest in Wakefield, but remote working still highest in Leeds

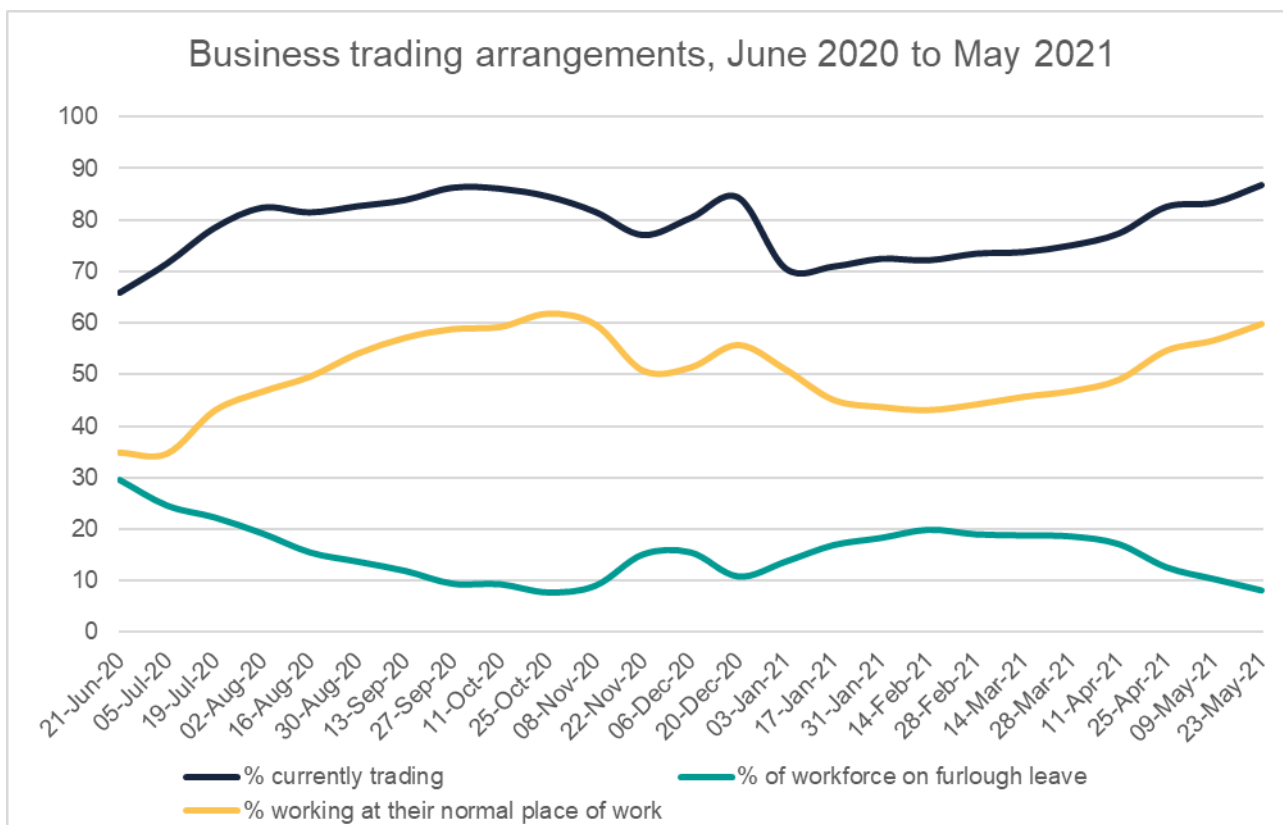
Sample sizes in the BICS survey limit the reliability of analysis at NUTS3 level. However, the latest data for early May suggests levels of furlough use remain similar across West Yorkshire areas at around 10%, although rates are slightly lower in Wakefield. Wakefield also has the highest proportion of workers in their usual workplace at 73%, compared to 55% in Leeds. Bradford and Calderdale and Kirklees have higher proportions of people in the usual workplace than the national average, with remote working generally showing an inverse relationship to those in the usual workplaces.



*Source: ONS Business Insights and Conditions Survey. Local data is based on single site companies which account for 98% of all businesses, and approximately half of total UK turnover and employment. UK data is also based on single site businesses for comparison, so may differ from other national data.

Gradual return to more normal working activity continues

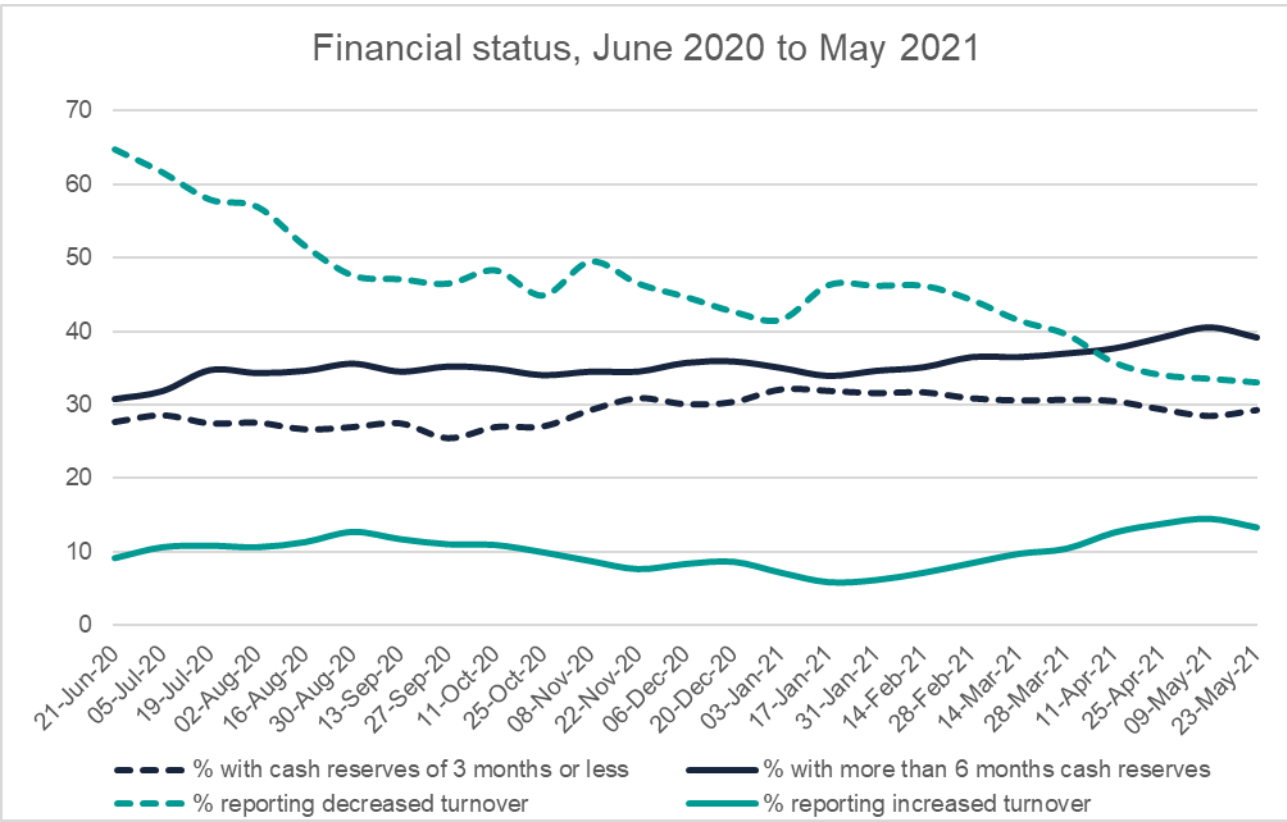
There has been a further increase in businesses open and trading nationally in mid- to late-May, with 87% now trading according to the latest national data from the ONS BICS survey. This is up from 83% a fortnight earlier and reflects increased trading among the hospitality sector as indoor trading recommenced. The proportion in their usual place of work has reached 60%, its highest level since late October, whilst the proportion on furlough has fallen to just over 8%, again similar to late October.



*Source: ONS Business Insights and Conditions Survey

Recent improvement in businesses' financial position may have stalled

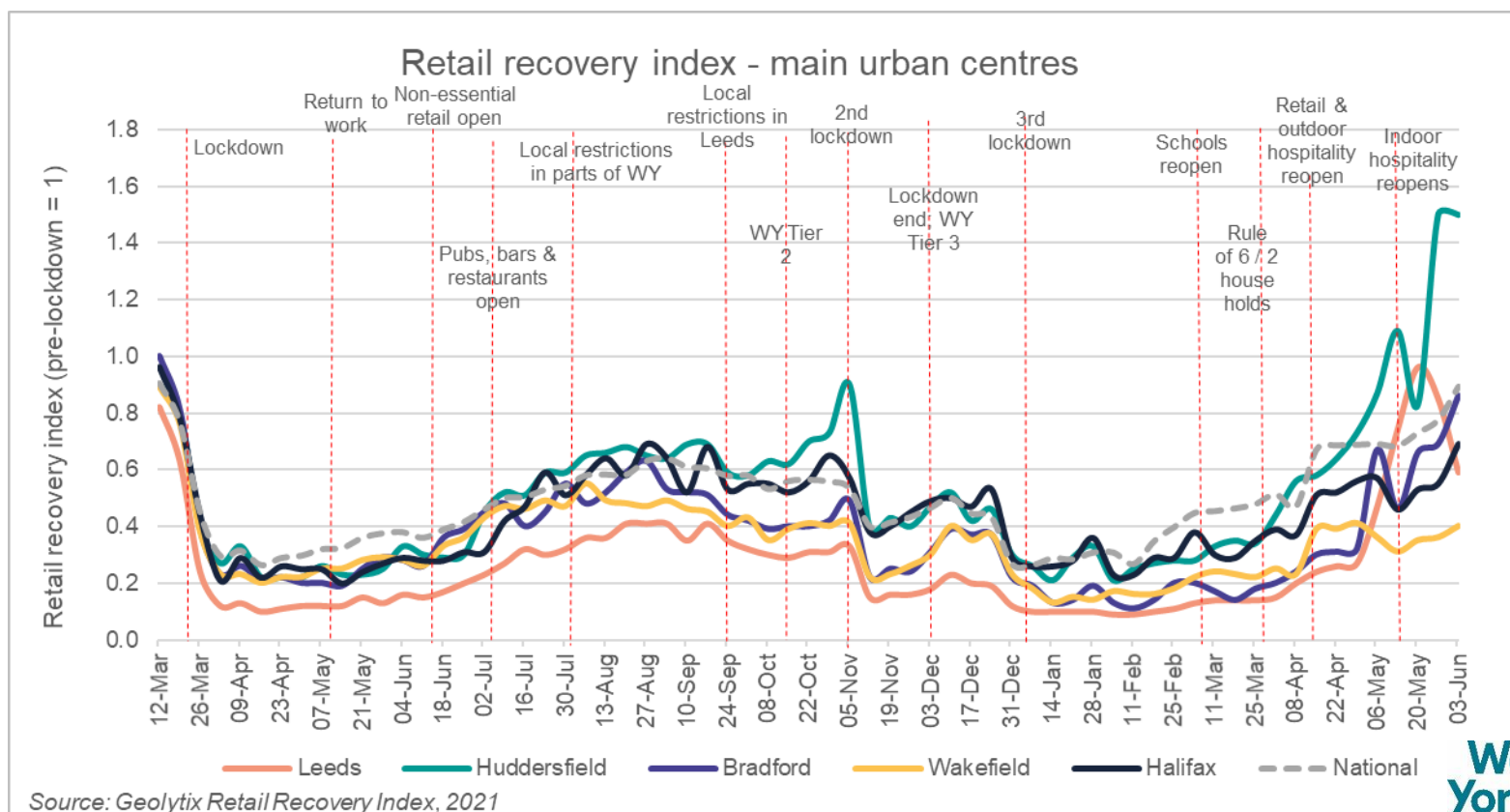
Although more businesses are now actively trading, indicators of their financial health suggest a slight deterioration in late May following a period of improvement. 39% said they had more than six months cash in reserve, down from 40.6% a fortnight earlier, and 13.3% said turnover had increased, down from 14.5%. However, these changes are minimal and the overall position looks healthier than in early 2021.



*Source: ONS Business Insights and Conditions Survey

Mixed picture on town centre activity, but all have seen growth since lockdown eased

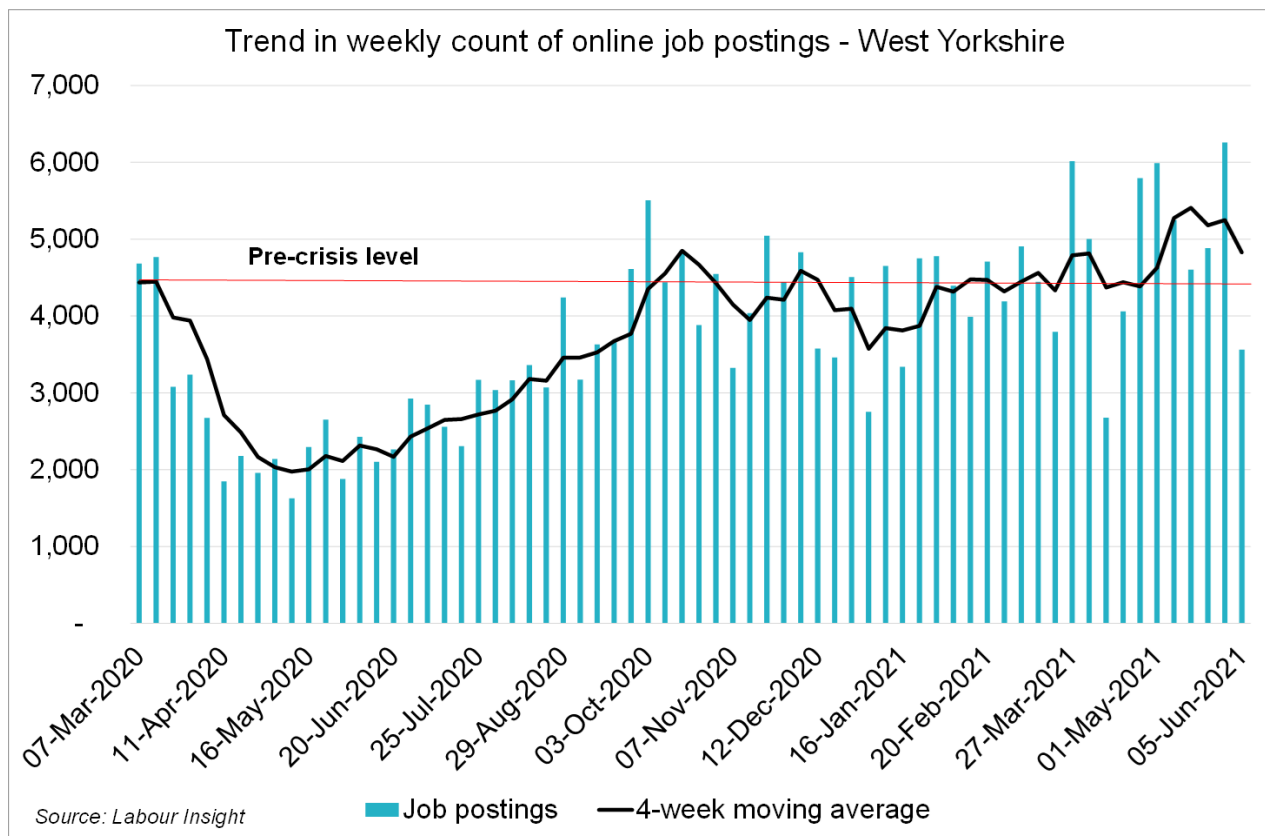
The latest data from Geolytix's retail recovery index presents a mixed picture on activity in West Yorkshire's town and city centres. Bradford, Halifax and Wakefield have seen activity increase in the week to June 3rd, but all remain at or below the national average when compared to their own pre-pandemic baseline. Leeds has seen activity drop in the past two weeks, following a period of strong increases. Huddersfield has seen activity level off, but it still remains 50% above the town's pre-pandemic baseline. Half term is likely to have influenced the latest data.



Source: Geolytix Retail Recovery Index, 2021

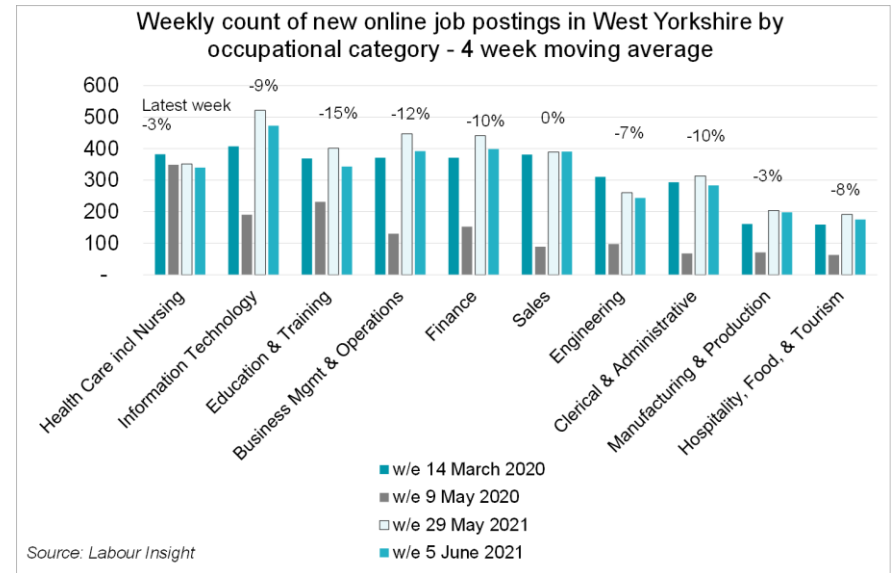
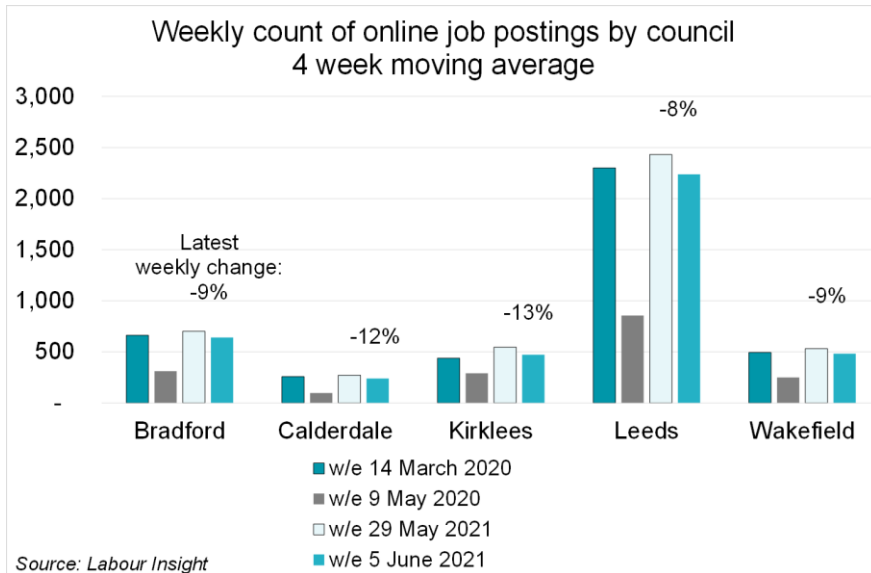
Decline in WY vacancies in latest week but level remains above pre-crisis position

The number of vacancies for jobs in West Yorkshire posted online during week ending 5 June fell by 8% compared with the previous week, based on a 4-week moving average (national average decline: 6%). This follows the highest weekly count since the crisis began in the previous week and may reflect the impact of the bank holiday on employers' recruitment activity. The weekly vacancy count for West Yorkshire is currently 9% above its pre-crisis level (i.e. as compared with week ending March 14 2020).



Fall in vacancies for almost all occupational groups and all local authorities

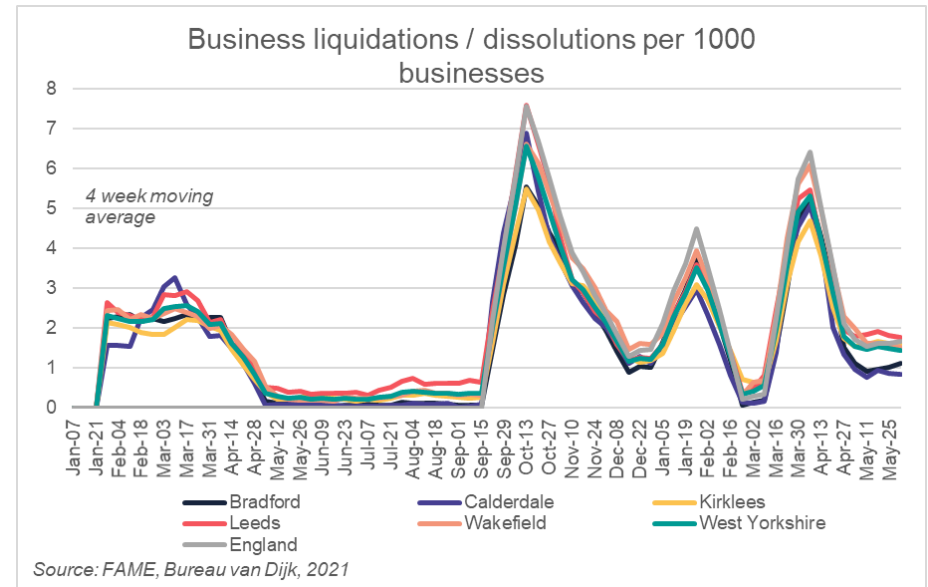
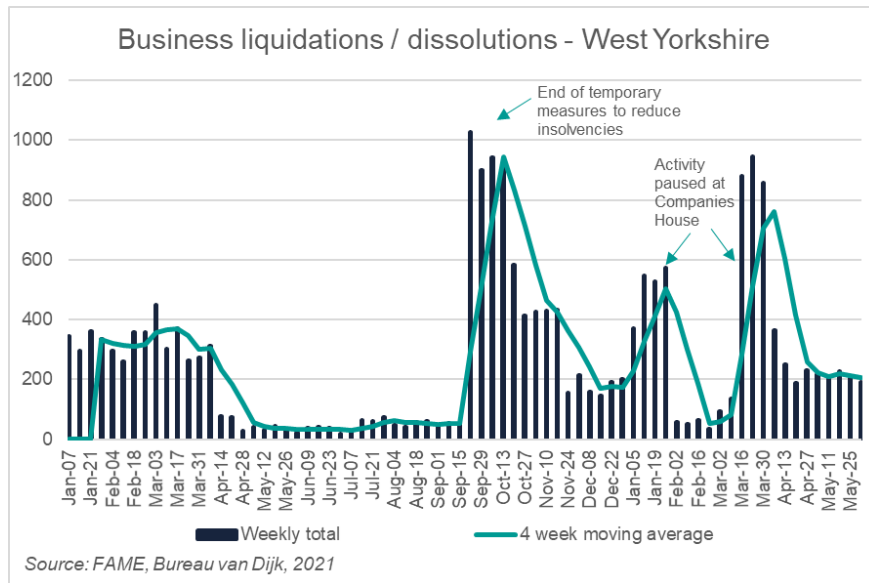
All local authority areas saw a reduction in job postings in the latest week, based on the moving average. As a result, some areas, including Calderdale and Leeds, fell back to below their pre-crisis level.



All occupations, except Sales (which saw no change) recorded a decrease in postings for the latest week, based on a 4-week moving average. Despite this, most occupational groups remain above pre-crisis levels, including Sales and Hospitality, food and tourism, which were heavily impacted by the crisis. Health care, which saw a high level of job postings during much of 2020 has seen a slackening of recruitment activity.

Business liquidations stable across West Yorkshire and constituent areas

Business liquidations in West Yorkshire remain stable, with 190 businesses liquidated in the week to June 1st, based on a four week moving average. This is down from 204 the week previously. The picture is similarly stable across local authority areas, with no area having a higher rate of liquidations than the UK average of 1.7 per 1,000 businesses. Whilst Kirklees and Leeds match that level, it is only half of that in Calderdale (0.8).

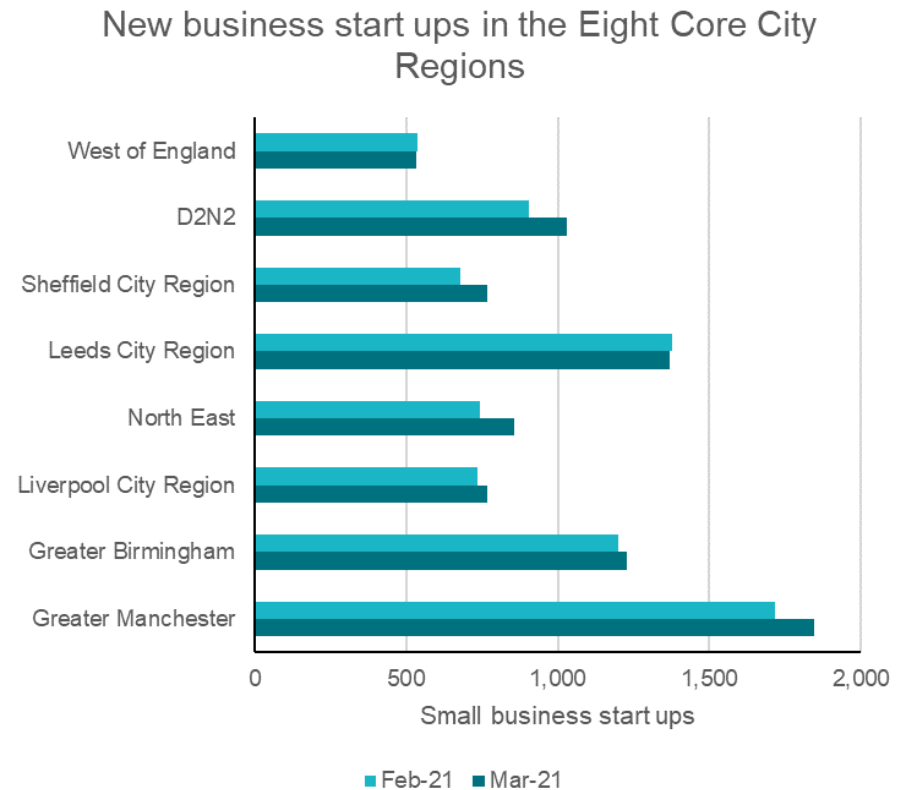


*Source: FAME, Bureau van Dijk, 2021. Analysis based on company registration address, location of activity may differ in some cases

New business starts ups have remained steady in the Leeds City Region in March 2021

Leeds City Region has the second highest number of new business starts among core city LEP areas, with 1,371 new small business starts in March 2021. Out of the eight core city regions the Greater Manchester had the highest number of new small business start ups with 1,846. The Leeds City Region activity has remained fairly steady so far in 2021 whilst being a 8% increase from March 2020.

Leeds City Region has a start up rate of 7.07 new start ups per 10,000 of the population which is one of the lowest out of the 8 core city regions. Greater Manchester has the highest with 10.24 new starts per 10,000 people.

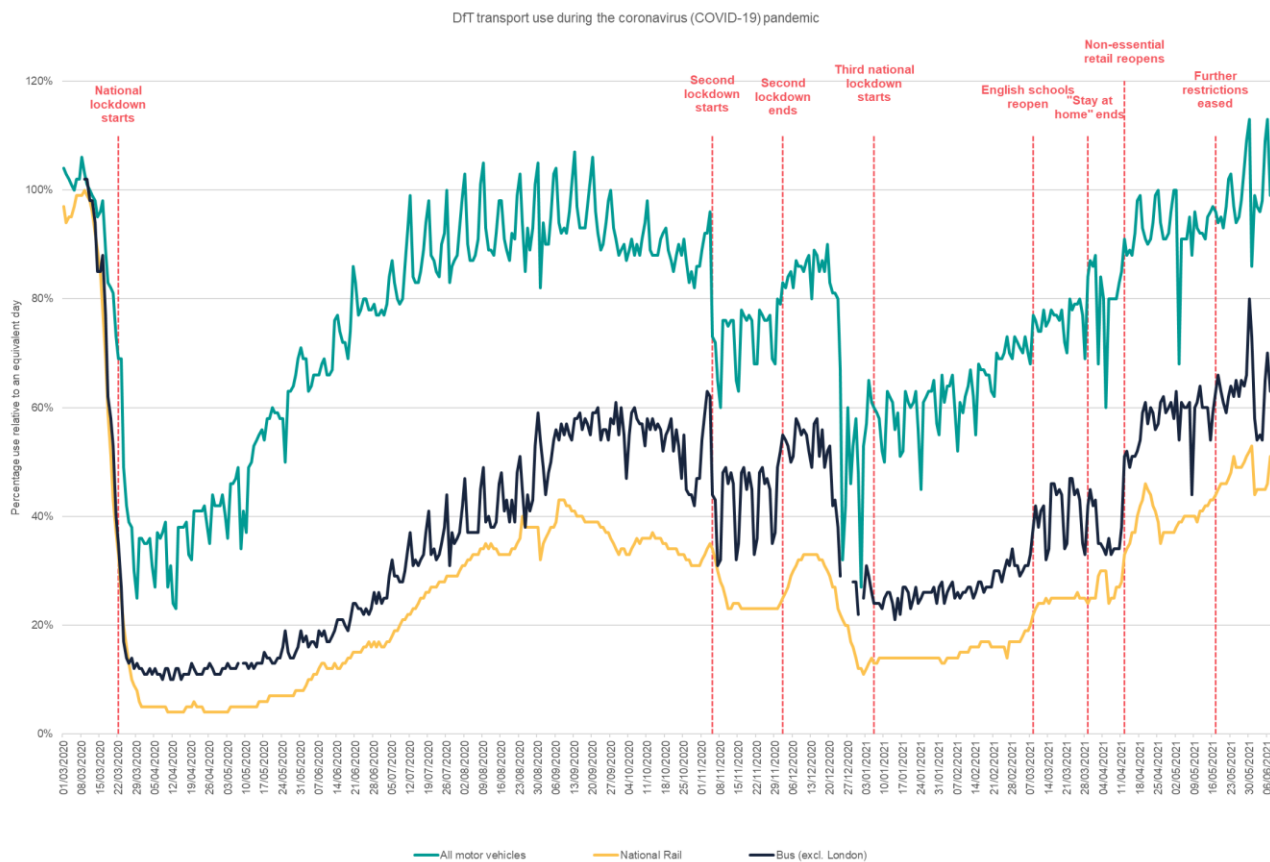


Transport Insights



Transport usage is exceeding summer 2020 levels, with strong weekend peaks recently

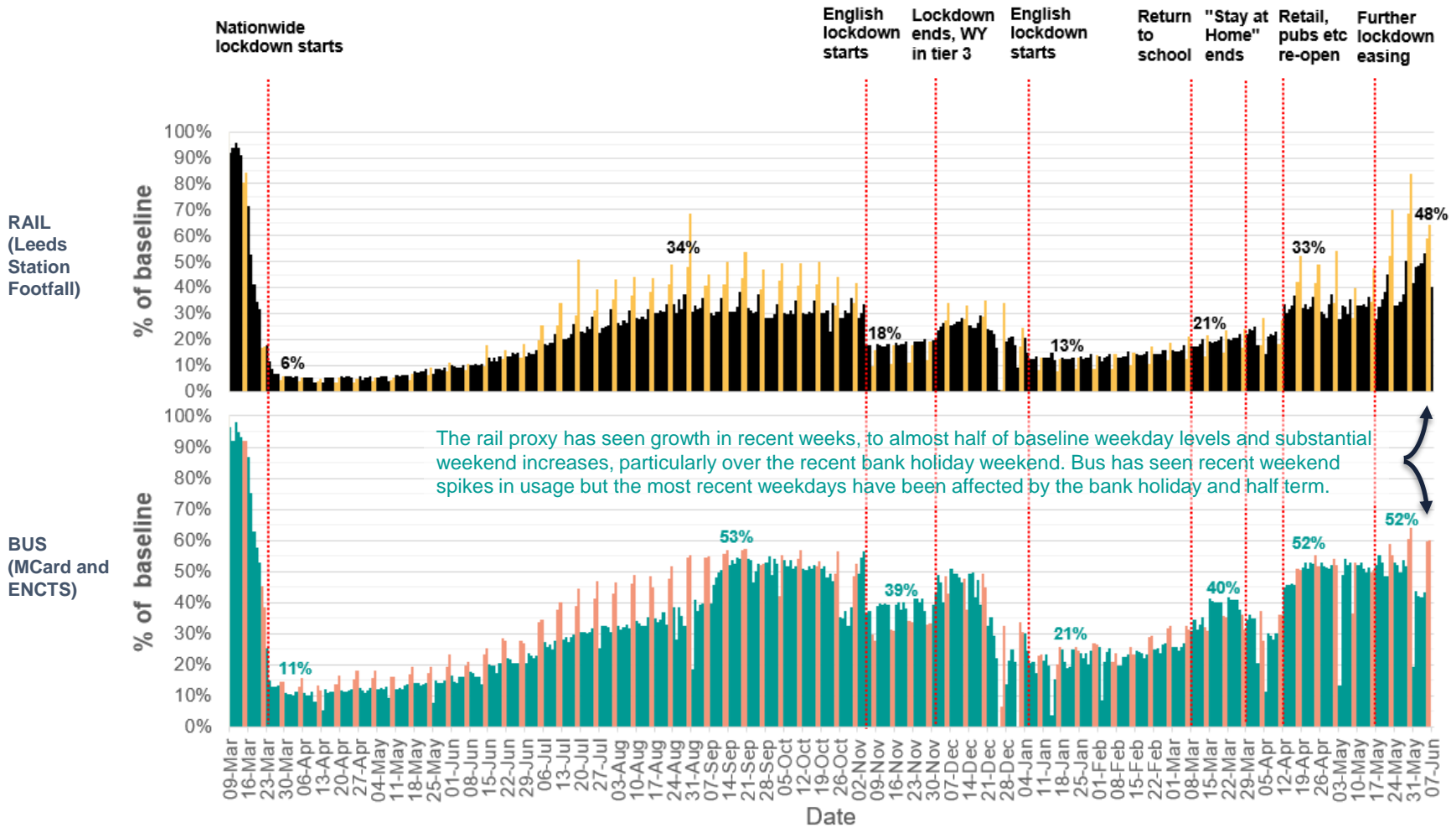
Travel in Great Britain has exceeded summer 2020 levels following the lifting of restrictions in April. Motor vehicle use over recent weekends has exceeded baseline levels while weekdays are around baseline. Public transport use remains relatively low, with weekday rail reaching around half of baseline levels and bus over 60%, before a decline in the most recent full week due to school holidays. Recent weekends have seen strong public transport increases relative to baseline.



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

Rail shows substantial growth, bus shows weekend growth around half term decline

■ % 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)

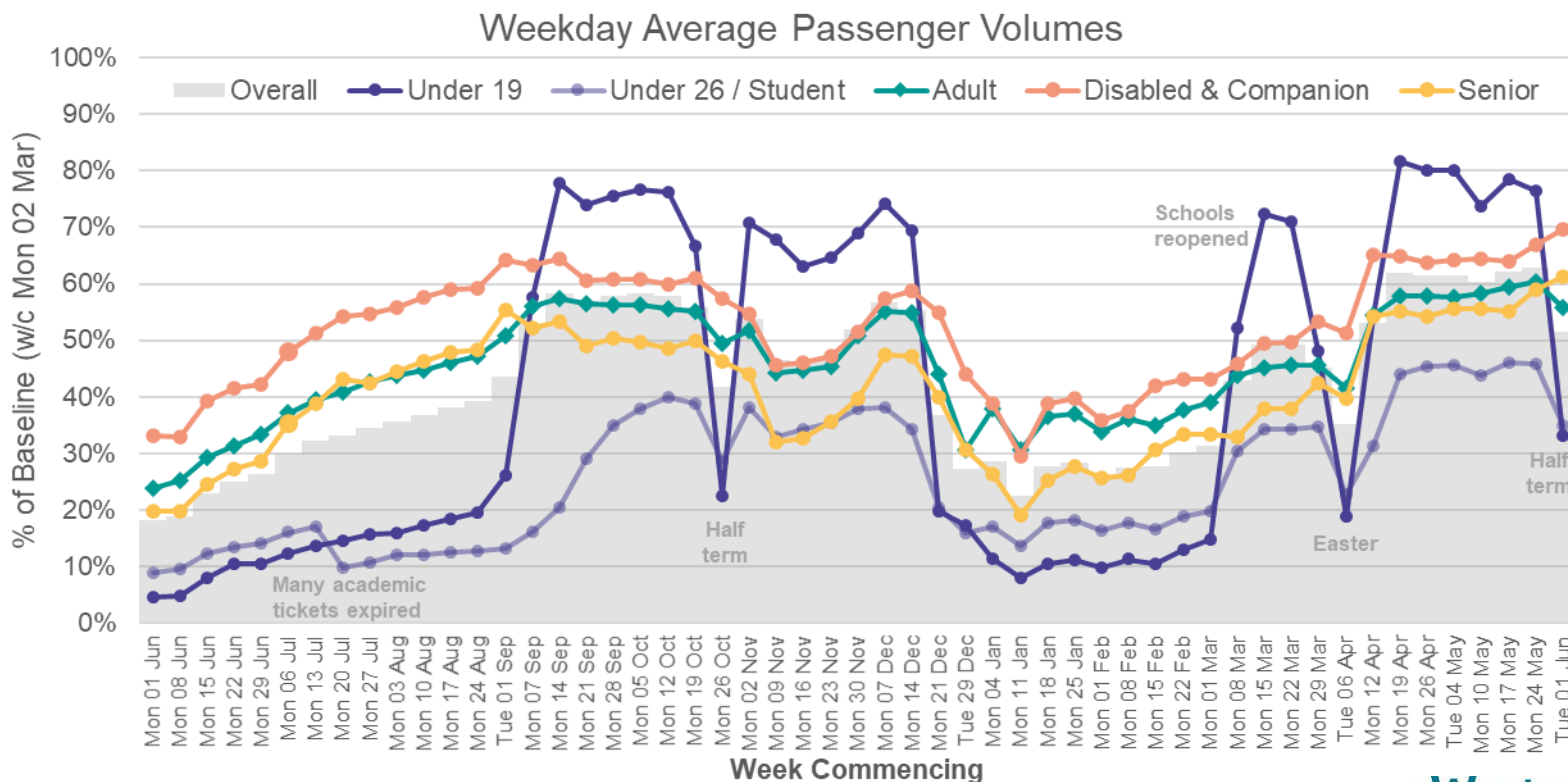
Source: Leeds Rail Station Footfall - Network Rail (top) and MCard and English National Concessionary Travel Scheme (ENCTS)

Bus use remains fairly stable, with slight growth in adult usage up to Spring Bank

Overall weekday use reached nearly 63% of baseline in the week commencing 24th May. The adult, disabled, and senior cohorts all reached new highest use since the start of lockdown. This increase was offset by a small decrease in under 19s. Overall it was the sixth successive week of at least 60% of baseline use on weekdays, before the dip for Spring Bank half-term. Ticket machine data covering all ticket types continues to show stronger recovery than Nero data covering a sub-set of ticket types and purchases.

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

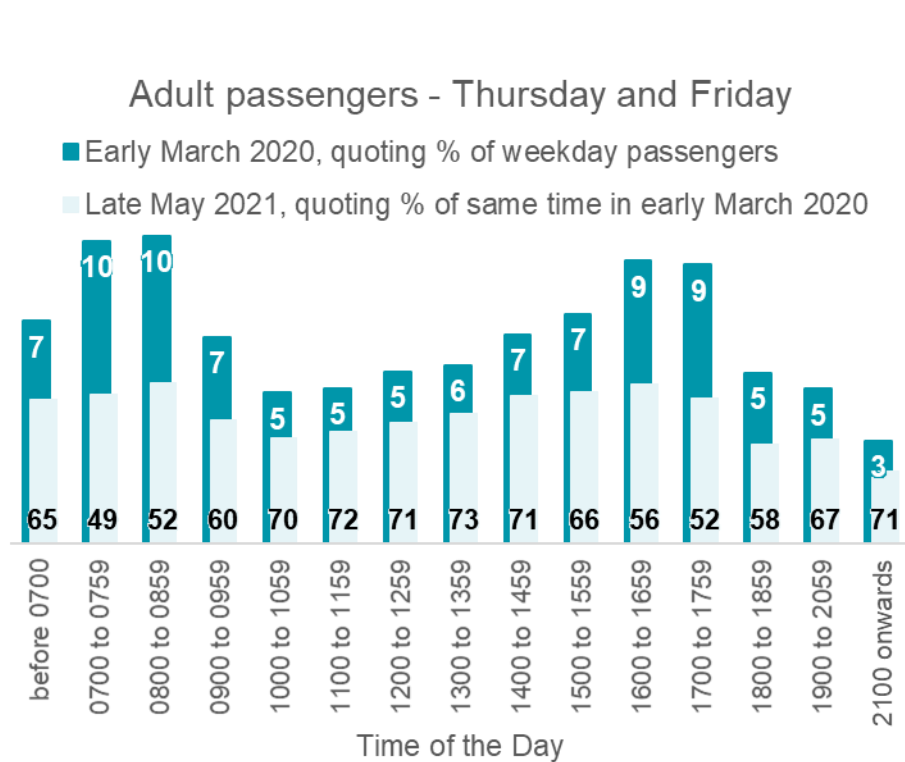
Data from First, Arriva, Yorkshire Tiger and Transdev



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.

Adult bus use strongest recovery at weekends, weakest in morning peak

A snapshot of data indicates that bus use overall by adults has recovered more strongly on weekends than weekdays. The weakest recovery is showing in the morning peak, with the hour 0700 to 0759 reaching just 49% of the baseline. On the baseline days that hour accounted for about 10% of weekday patronage. It is plausible that early morning and late evening recovery on weekends is partly seasonal with more hours of daylight.



Source: Sample of bus passenger boardings, the first Thursday, Friday, Saturday and Sunday in March 2020 compared with the last Thursday, Friday, Saturday and Sunday in May 2021.