

COVID-19 Fortnightly Insights Report

Research & Intelligence
25th June 2021

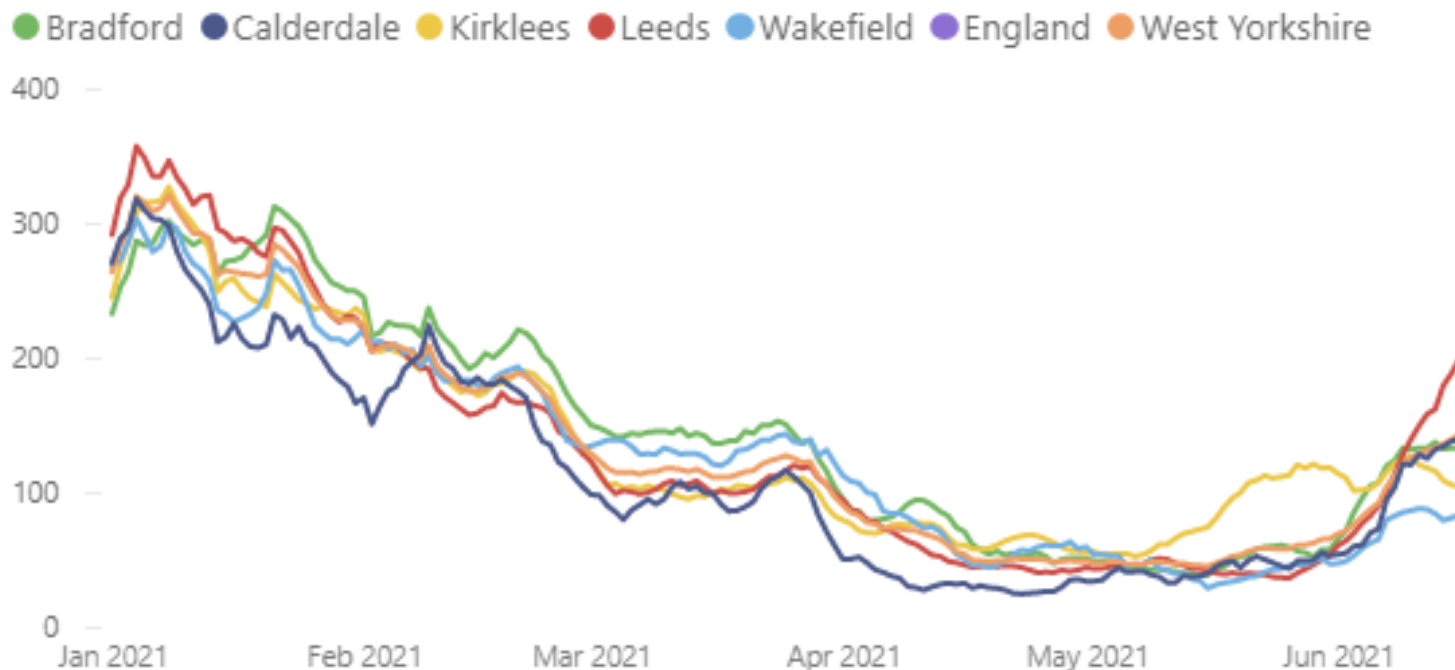


Executive Summary

- Economic activity continued to increase through to early June, with many headline indicators on the ONS Business Impacts and Conditions Survey (BICS) at their most positive since the survey began early in the pandemic.
- The BICS suggests that furlough use is at its lowest level since the scheme began (6.5%), and more people are in their usual workplace than at any point since before the first lockdown (62%). The proportion of businesses actively trading has apparently plateaued at 87%, however.
- Activity in West Yorkshire's main town and city centres seemingly peaked at the start of June, before falling slightly in the subsequent weeks to June 17th. Almost all places tracked have seen levels of activity above summer 2020 levels at some point in recent weeks.
- This is reflected in transport data, which consistently shows a plateauing in activity in recent weeks. Bus usage remains at or just above 60% of pre-pandemic levels with little recent change, and proxy rail data is at around 48% of early 2020, with a slight fall of late. Weekend recovery still appears to be stronger than weekend.
- Online job postings dropped slightly in the week to June 19th, a pattern replicated across West Yorkshire local authorities and nationally, but are still higher than pre-pandemic.
- Business liquidations remain stable in West Yorkshire with very little change in recent weeks, and levels below early 2020.

Virus prevalence – West Yorkshire trend

Rolling rate of new cases per 100,000 people



As of the 16th June 2021, the 7-day moving average **West Yorkshire COVID-19 rate was 142.8 cases per 100k, an 18% increase compared to the previous week** (120.9 per 100k). In the same period, the rate in Yorkshire and the Humber increased by 27% to 94.6 per 100k, and rates overall in England increased by 34% to 89.9 per 100k.

Source: 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.

West Yorkshire COVID-19 Dashboard

Case rate data up to:
16/06/2021

District	UTLA rank	Current case rate per 100,000 population	Percentage change in rate from last week	Number of new cases in the last 7 days	Total number of cases to date	Total number of cases per 100,000 population	Total number of deaths to date	Crude death rate per 100,000 population
Bradford	25	132.3	→ 0	714	52721	9767	1085	201
Calderdale	24	139.0	↑ 15	294	15730	7439	310	147
Kirklees	48	104.1	↓ -16	458	37356	8494	810	184
Leeds	16	198.8	↑ 56	1577	68084	8584	1333	168
Wakefield	62	82.7	↓ -2	288	27308	7840	770	221
West Yorkshire		142.8	↑ 18	3331	201199	8672	4308	186
England		89.9	↑ 34	50599	4044830	7186	112562	200

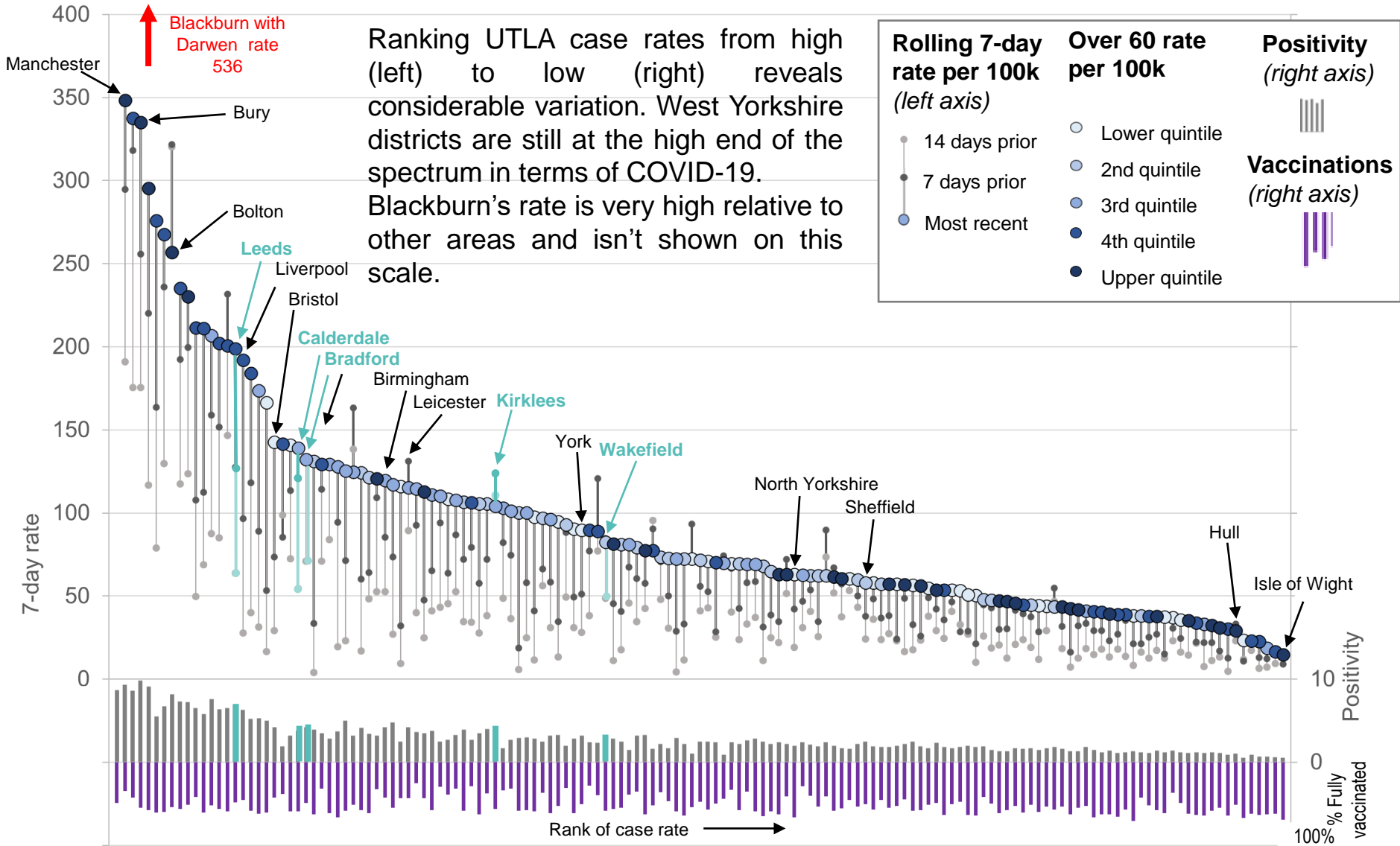
Cases: Number of people with a positive COVID-19 virus test (either lab-reported or rapid lateral flow test), reported by the specimen date

Deaths: Total number of people who had a positive test result for COVID-19 and died within 28 days of the first positive test, reported by the date of death

Crude death rate: total deaths per population. This does not take account of variation caused by different population age structures

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

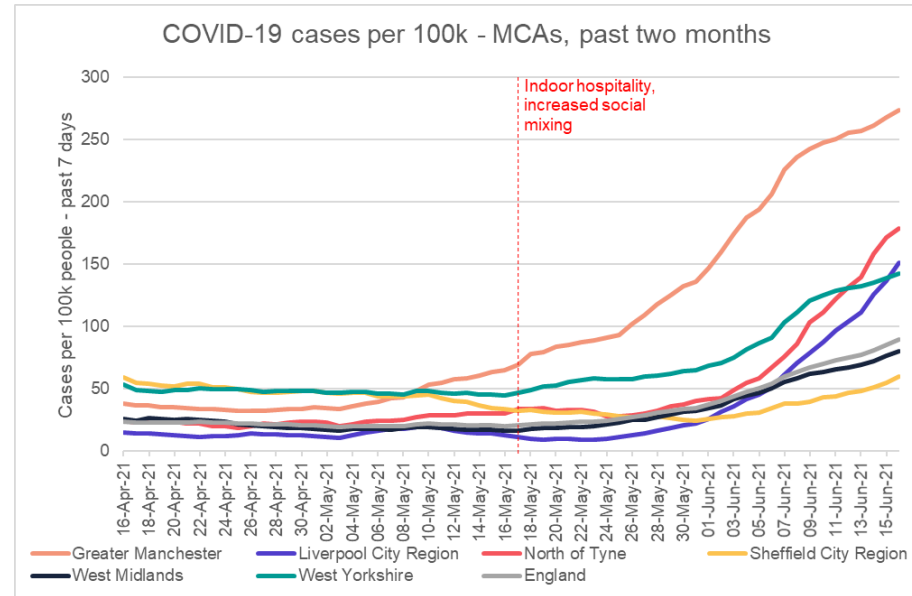
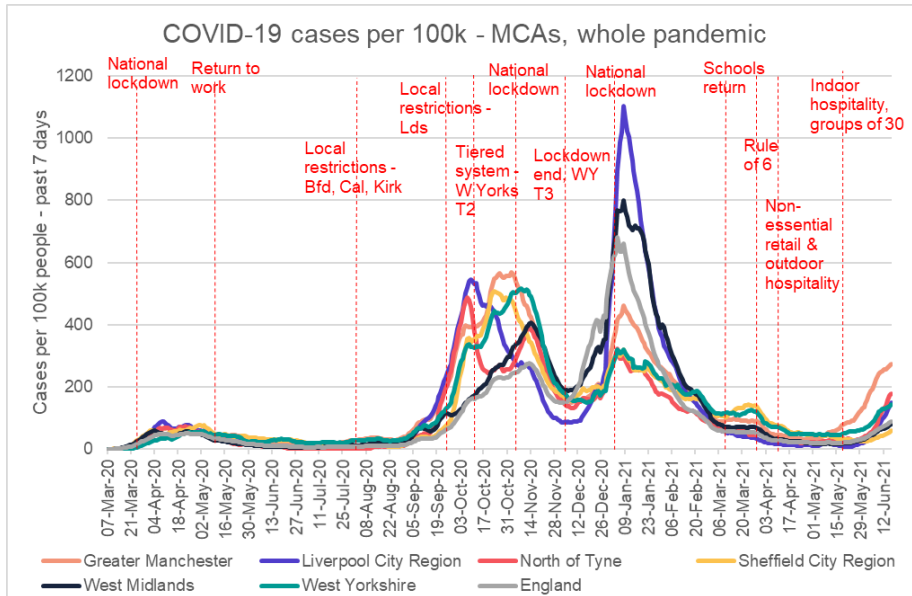


Blue points show latest COVID-19 case rate per 100k across UTLAs as of the 16th June May (left Y-axis). Vertical bars connected to these points denote rate last week (dark grey) and the week before (light grey). Point colour denotes the COVID-19 rate per 100k in the over 60s. Grey bars at the bottom denote positivity (%) up to the 16th June (right Y-axis). Purple bars at the bottom denote the percentage of adults who are fully vaccinated up to 20th June (right axis). Interactive, alternative version here: [COVID-19 West Yorkshire Dashboard - Power BI](#)

Cases increasing across MCAs

All Mayoral Combined Authority areas tracked here saw case rates increase in the week to June 16th. Although Greater Manchester continues to have the highest rate overall (274 per 100k), it has seen the lowest percentage increase over the past week (12.6%). West Yorkshire's increase was second lowest at 18.1%, with West Midlands also seeing cases increase slower than England as a whole (33.8%). Liverpool City Region has seen the fastest increase in the past seven days with cases up 92%.

Along with Greater Manchester, Liverpool City Region (151 per 100k) and North of Tyne (179) have higher rates than West Yorkshire (143), though rates in Sheffield City Region and West Midlands remain below the England level (90 per 100k).

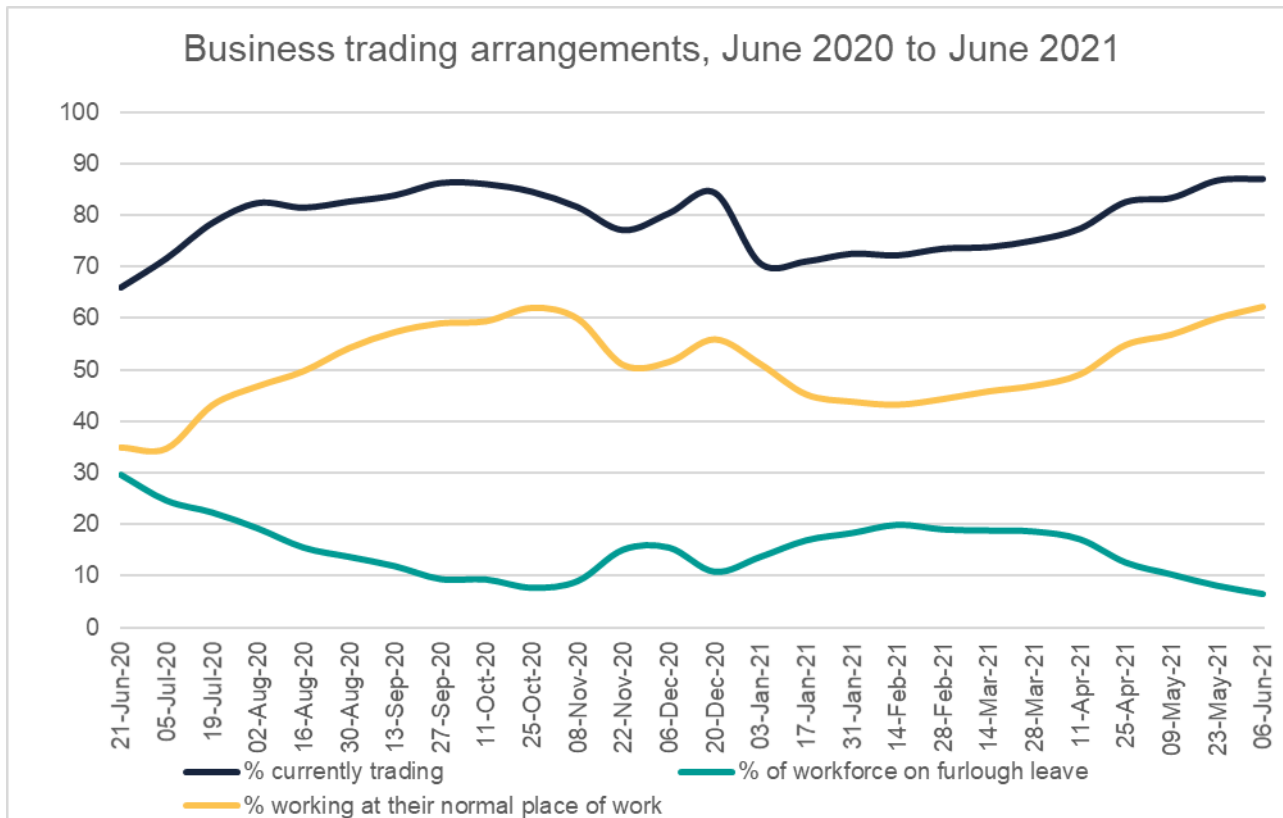


Economic Insights



Economic activity is closer to normal patterns than at any point in the pandemic

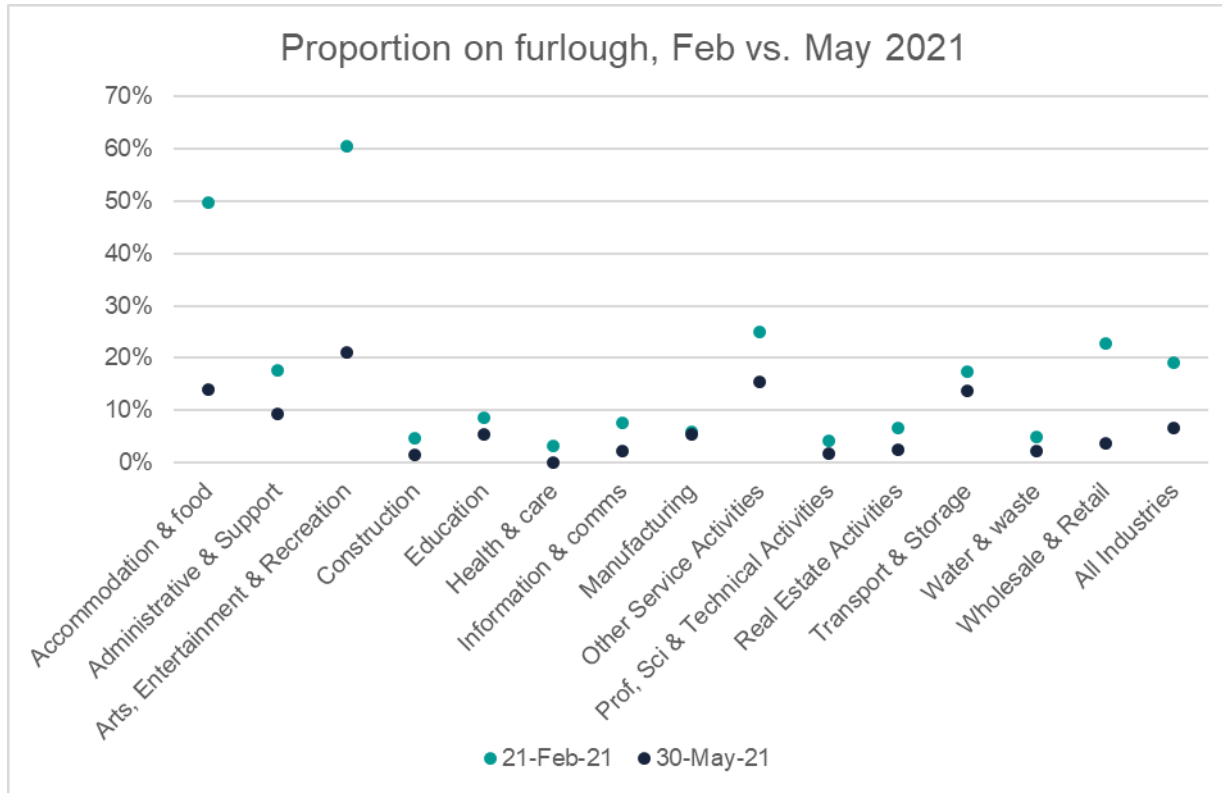
Early June saw a further gradual return towards more normal patterns of economic activity, with furlough use dropping to 6.5% - the lowest level for which comparable data is available – according to the latest ONS Business Insights and Conditions Survey (BICS). Concurrently, the proportion of people in their usual workplace has increased to 62%, up from 60% a fortnight earlier and again the highest point since comparable data began in June. The proportion of businesses currently trading saw little change at 87%.



*Source: ONS Business Insights and Conditions Survey

Economic activity is closer to normal patterns than at any point in the pandemic

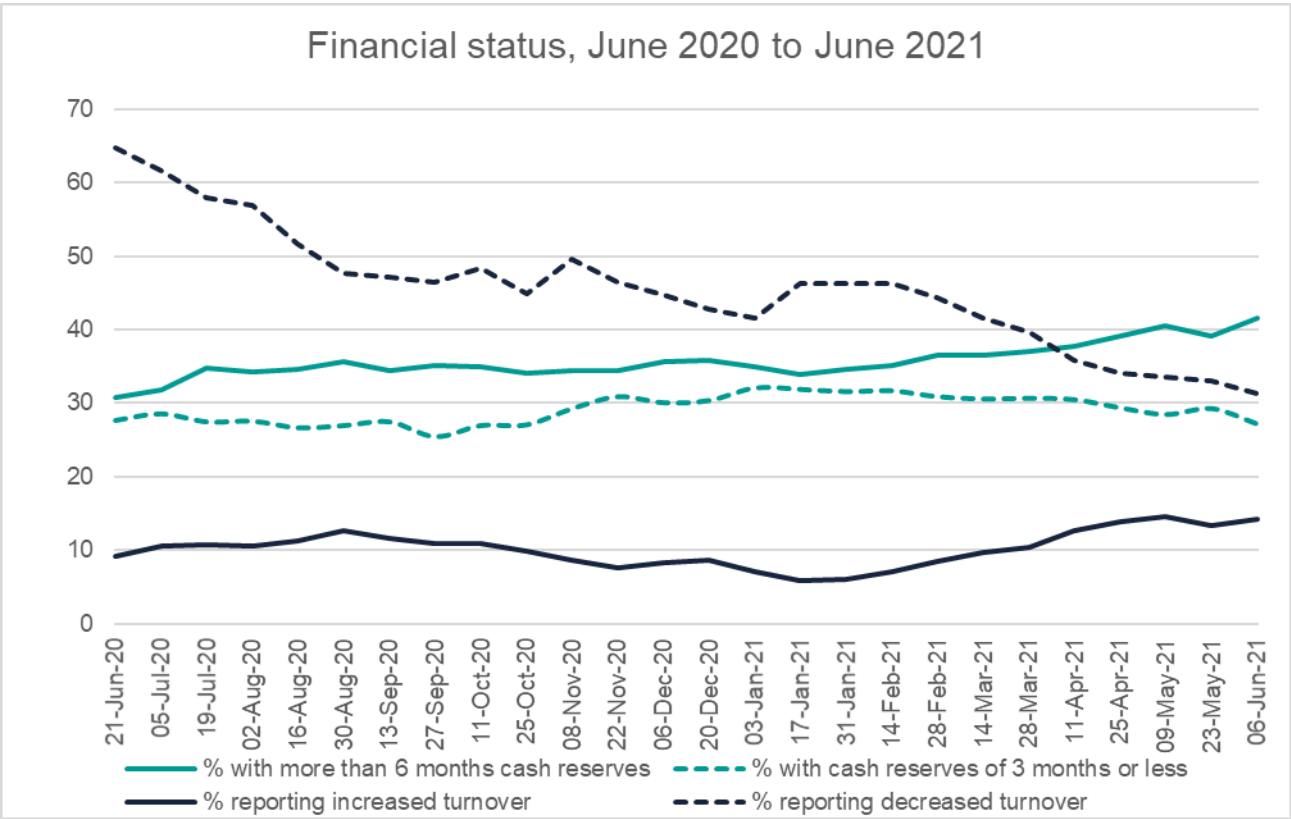
Furlough use has fallen in all sectors since February, with the most substantial falls in sectors that have had consistently higher rates, most notably accommodation and food and the arts & entertainment sector. Both had 50% or more jobs furloughed in February. By the end of May, 21% of jobs were still furloughed in arts & entertainment – a substantial fall, but still higher than all other sectors. The 14% furloughed in accommodation & food was similar to transport & storage and other services.



*Source: ONS Business Insights and Conditions Survey

Fewer business report challenging financial conditions, but many still face challenges

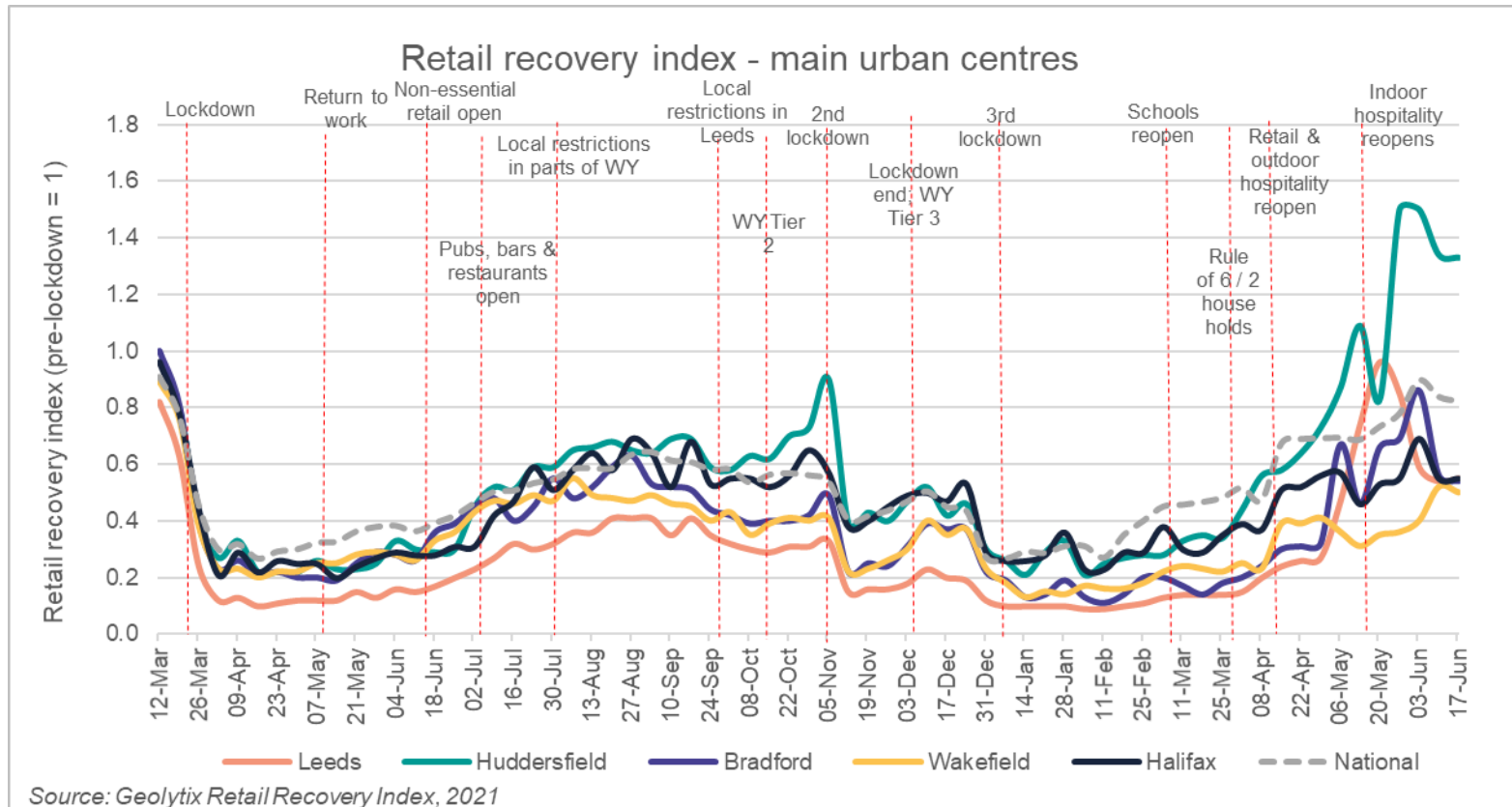
As economic activity has increased, fewer businesses are reporting experiencing indicators of financial distress. 27% said they had 3 months or less of cash in reserve, a level not seen since October 2020. 31% of businesses said they had seen turnover decrease, the lowest level since the start of the pandemic but still far outweighing the 14% reporting increased turnover.



*Source: ONS Business Insights and Conditions Survey

Town and city centre activity levels off

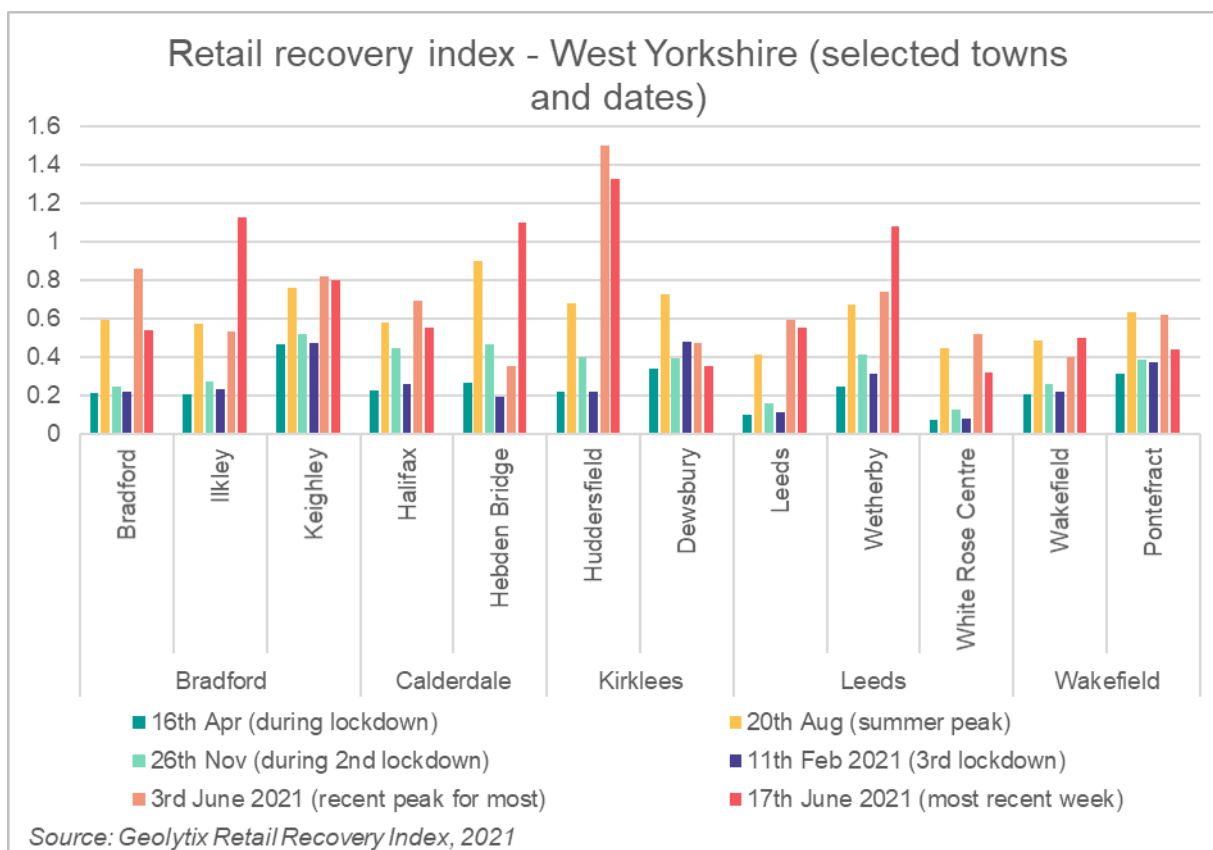
There has been little change in the level of activity in West Yorkshire's five main urban centres in the week to June 17th, according to Geolytix's retail recovery index. In all instances, activity is below the recent peak record in late May / early June, which also reflects national activity. Huddersfield still has activity levels above its pre-pandemic peak, but other places are all between 50 and 55% of their respective baseline.



Source: Geolytix Retail Recovery Index, 2021

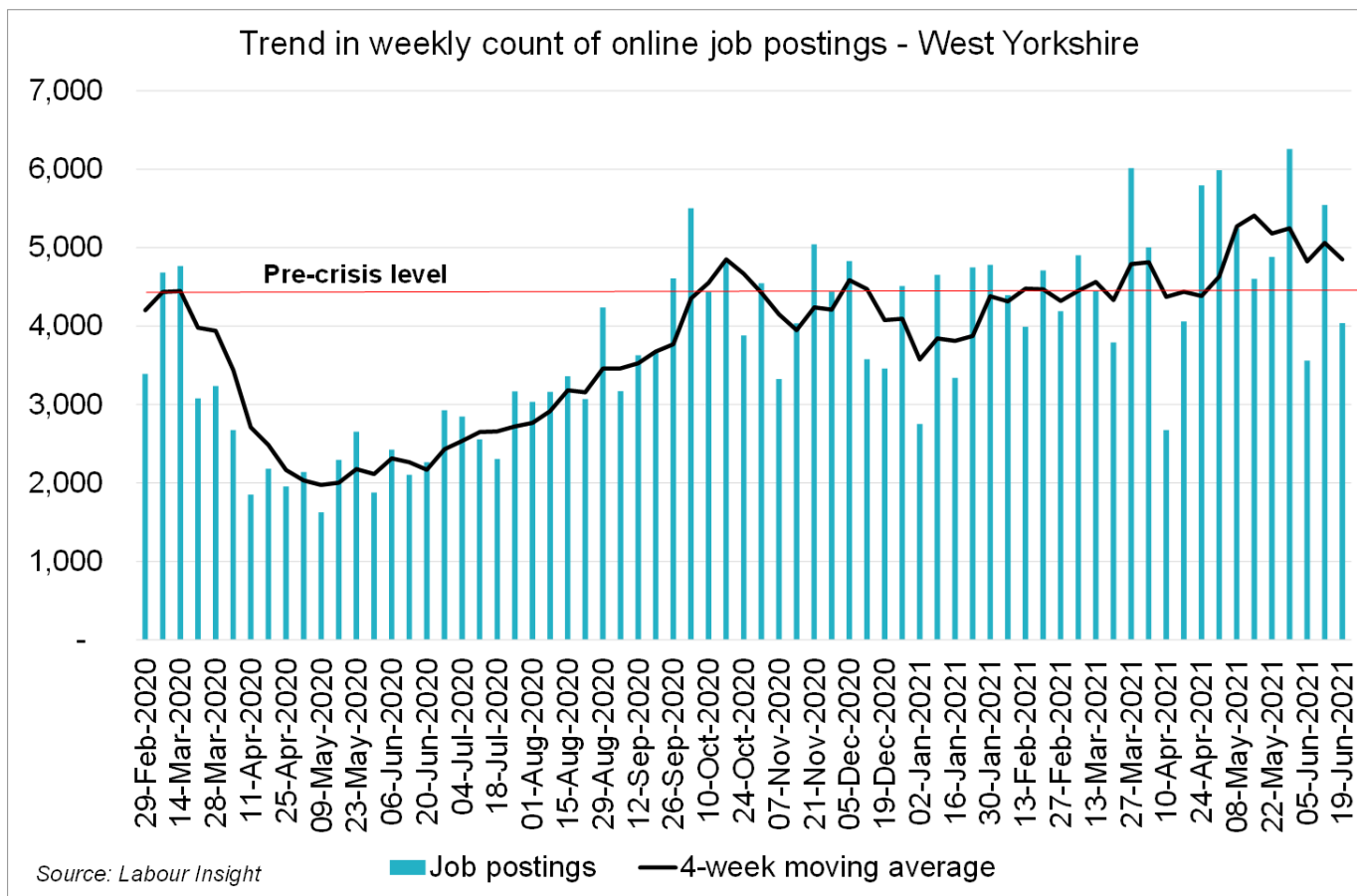
Activity above pre-pandemic peak in some places

The pattern of recovering activity in town and city centres is replicated in smaller centres, with all places tracked here seeing activity at or above summer 2020 levels at some point in June 2021, with the exception of Dewsbury. As well as Huddersfield, three other places exceeded their pre-pandemic baseline in the week to June 17th – Ilkley, Hebden Bridge and Wetherby. Keighley was at a very similar level to its baseline.



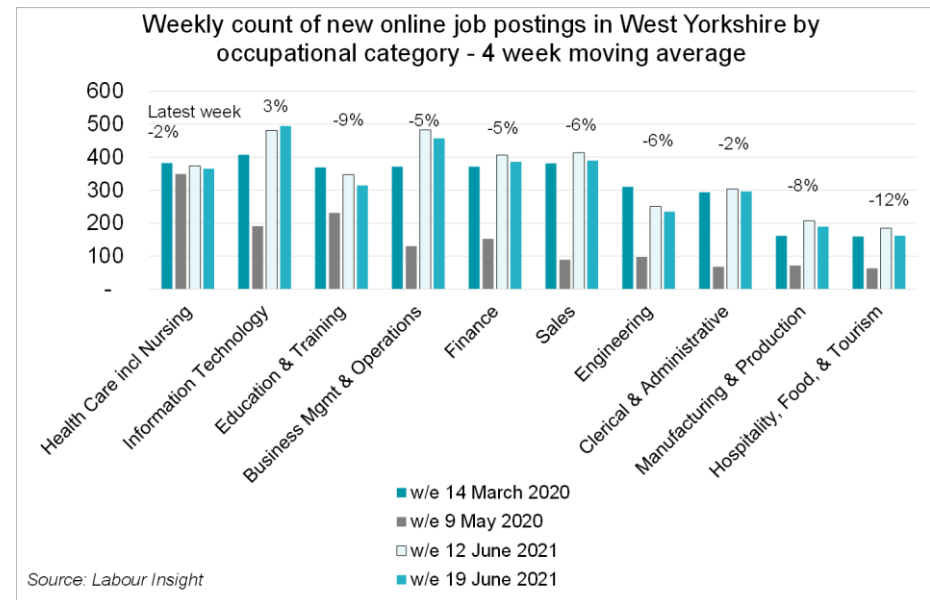
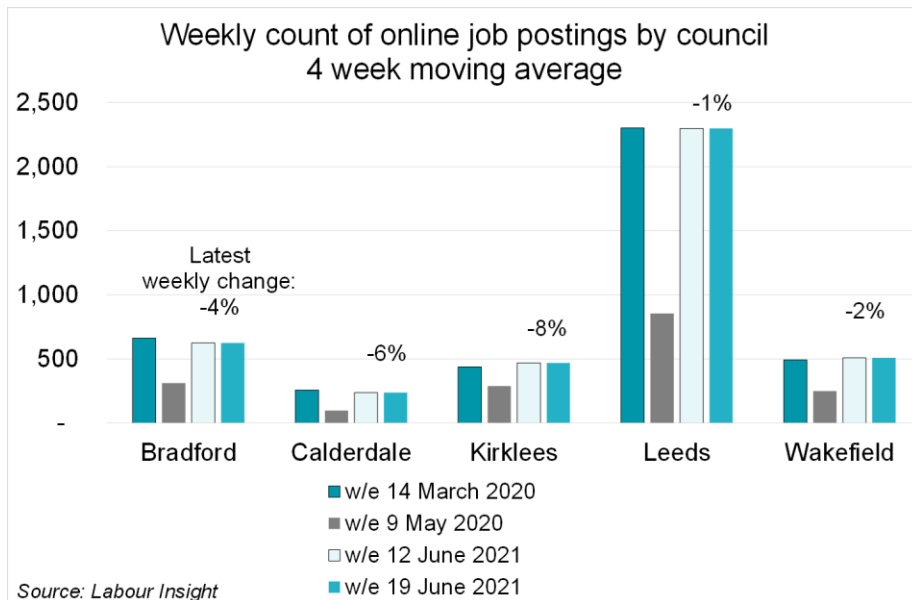
Vacancy count above pre-crisis level for eighth consecutive week

The number of vacancies for jobs in West Yorkshire posted online during week ending 19 June fell by 4% compared with the previous week, based on a 4-week moving average (national average decline: 3%). The moving average has now been above its pre-crisis level (week ending March 14 2020) for eight straight weeks, suggesting a sustained recovery in hiring activity.



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

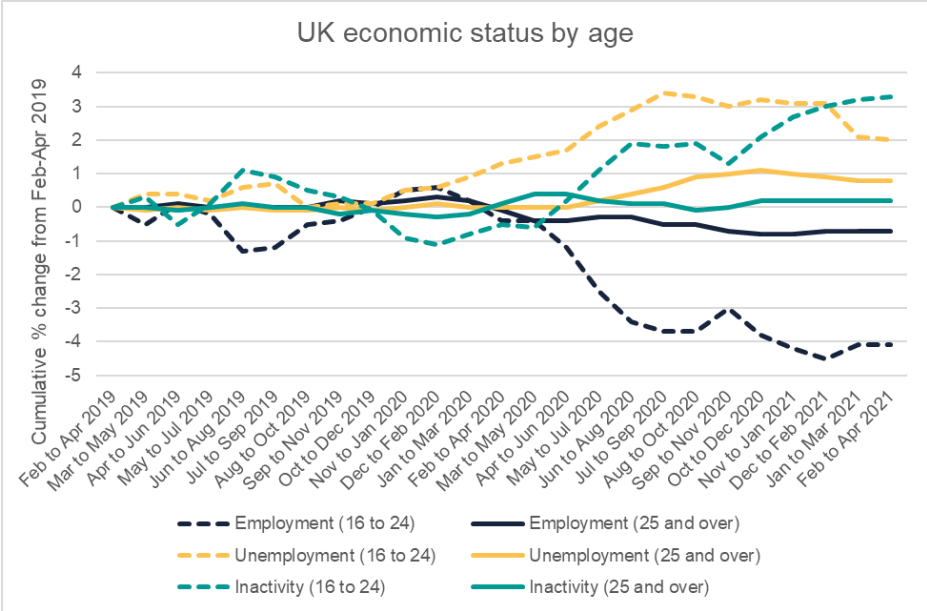
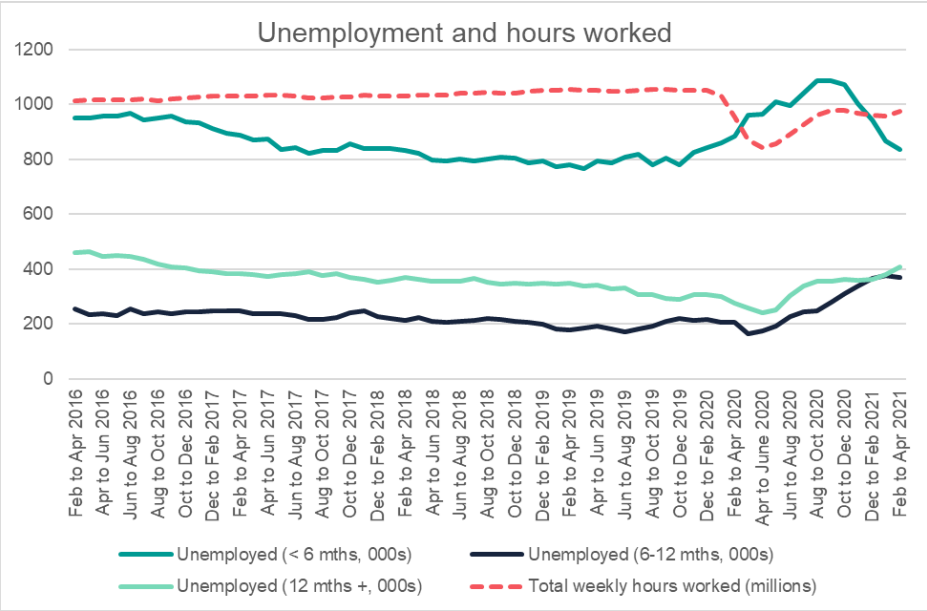
All local authority areas saw a reduction in postings in the latest week, based on the moving average, ranging from a 1% decline in Leeds to a fall of 8% in Kirklees. The latest weekly vacancy counts for Bradford and Calderdale were both slightly below pre-crisis levels.



All occupations, except Information Technology recorded a decrease in postings for the latest week, based on a 4-week moving average. Most categories have returned to their pre-crisis level, except Engineering and Education and Training. The latest weekly count for Health Care was also slightly below the pre-crisis figure but has remained at a consistent level throughout the crisis.

Unemployment falls in April nationally, but labour market conditions challenging for some groups

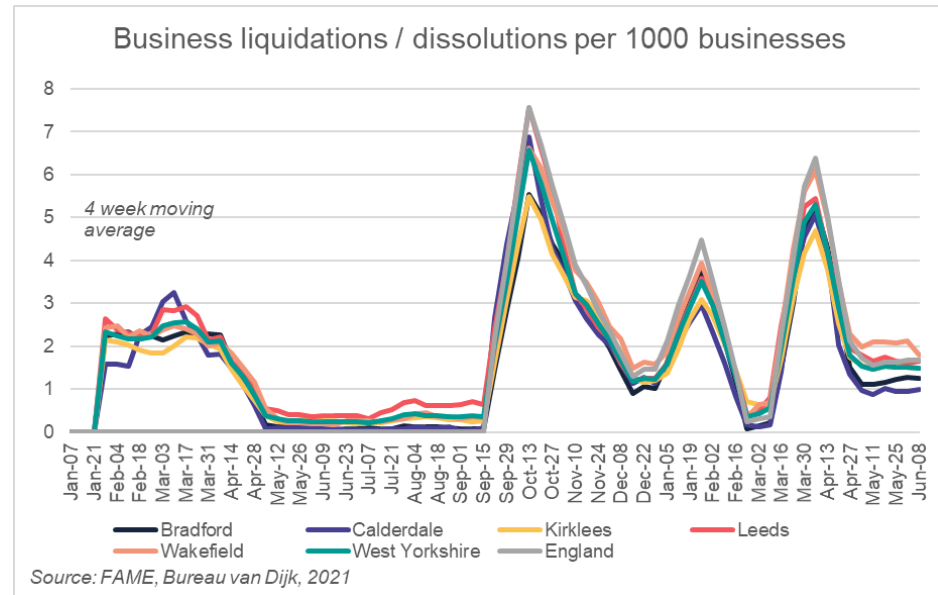
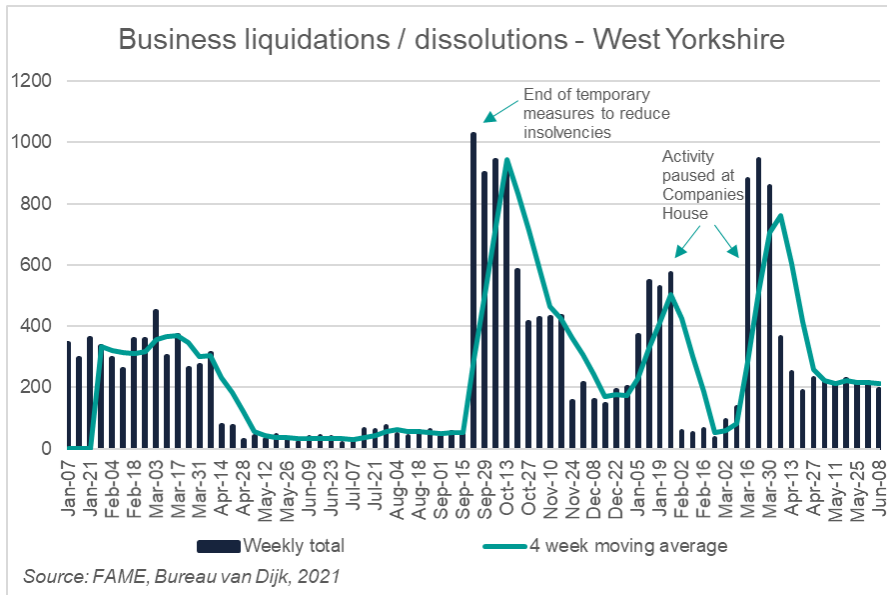
The national unemployment rate fell to 4.7% in the quarter to April, according to ONS. This is down 0.3% on the preceding three months, but remains 0.8% higher than prior to the pandemic. This improvement was driven by a fall in short term unemployment, but the number out of work for 6-12 months increased by 9.3% and those out of work for 12 months or more was up 13.5% compared to the preceding three months.



The total number of hours worked per week has also increased slightly to 975 million, though it remains 77 million hours below the pre-pandemic level. Whilst these measures reflect an overall improvement in the labour market, it remains a more challenging outlook for younger people, with under 25s seeing larger increases than over 25s in unemployment and economic inactivity since 2019.

Business liquidations stable across West Yorkshire and constituent areas

There were 213 business liquidations per week in West Yorkshire up to the week ending 8th June, based on a four week moving average. This is unchanged from the preceding four week period and remains lower than in early 2020. There has been an 8.4% increase in liquidations nationally over this period, reflecting a relatively stable picture overall. The same is true at local authority level. Whilst Wakefield has seen a 14% decrease on the preceding four weeks, Bradford (+12%) and Calderdale (+14%) have seen increases though in all instances activity remains relatively low.



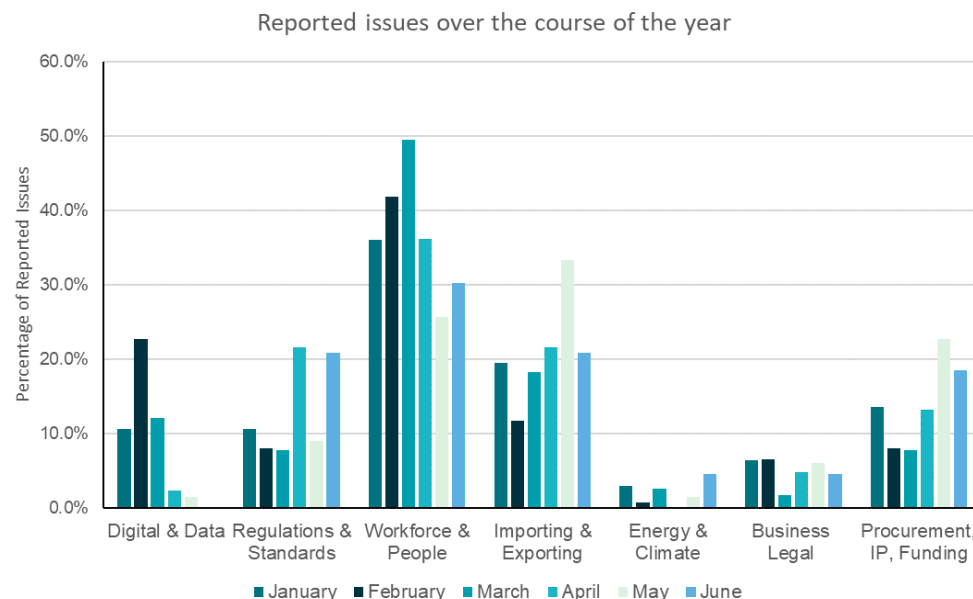
*Source: FAME, Bureau van Dijk, 2021. Analysis based on company registration address, location of activity may differ in some cases

Business have reported strong growth in demand in recent months. While also reporting issues around funding.

In this week's feedback we have heard from two niche business that have had different experiences during the pandemic. One had an uptick in demand from people who had more time and disposable income to spend on discretionary products. While another business-to-business company has had a sharp drop off in revenue as their business model was made directly impossible by the pandemic.

Other businesses have reported similar business trajectories over the last year. A drop of demand during the pandemic period which meant that staff were furloughed, and revenue dropped and in some cases redundancies were made. While in recent months many of these businesses have seen strong growth in demand with a few businesses looking to expand or grow the company to keep up with the increased demand.

Companies are still having issues adjusting to the EU exit, with issues with trading with Northern Ireland and Republic of Ireland. These companies are also having issues getting in contact with the government.



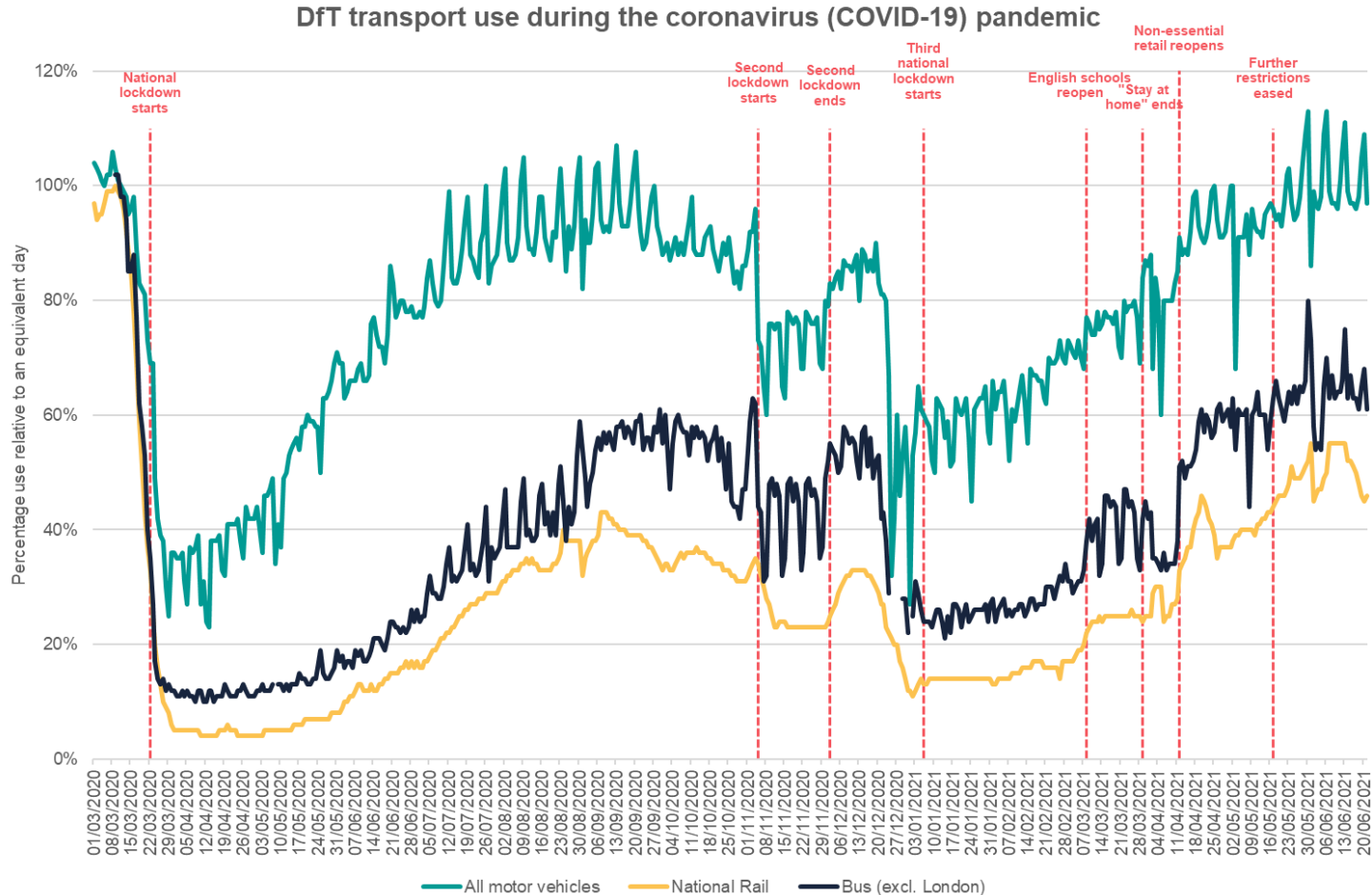
Issues around Workforce & People and Importing & Exporting have remained steadily reported by business. However other issues have raised and fallen in prominence over the same period. At the start of the year issues around digital & data was heavily reported, peaking at 22% off all reported issues in February, before dropping off. While issues around Procurement, IP and funding has risen in prominence in recent months, peaking at 22% in May.

Transport Insights



National transport usage remains mostly stable over recent weeks

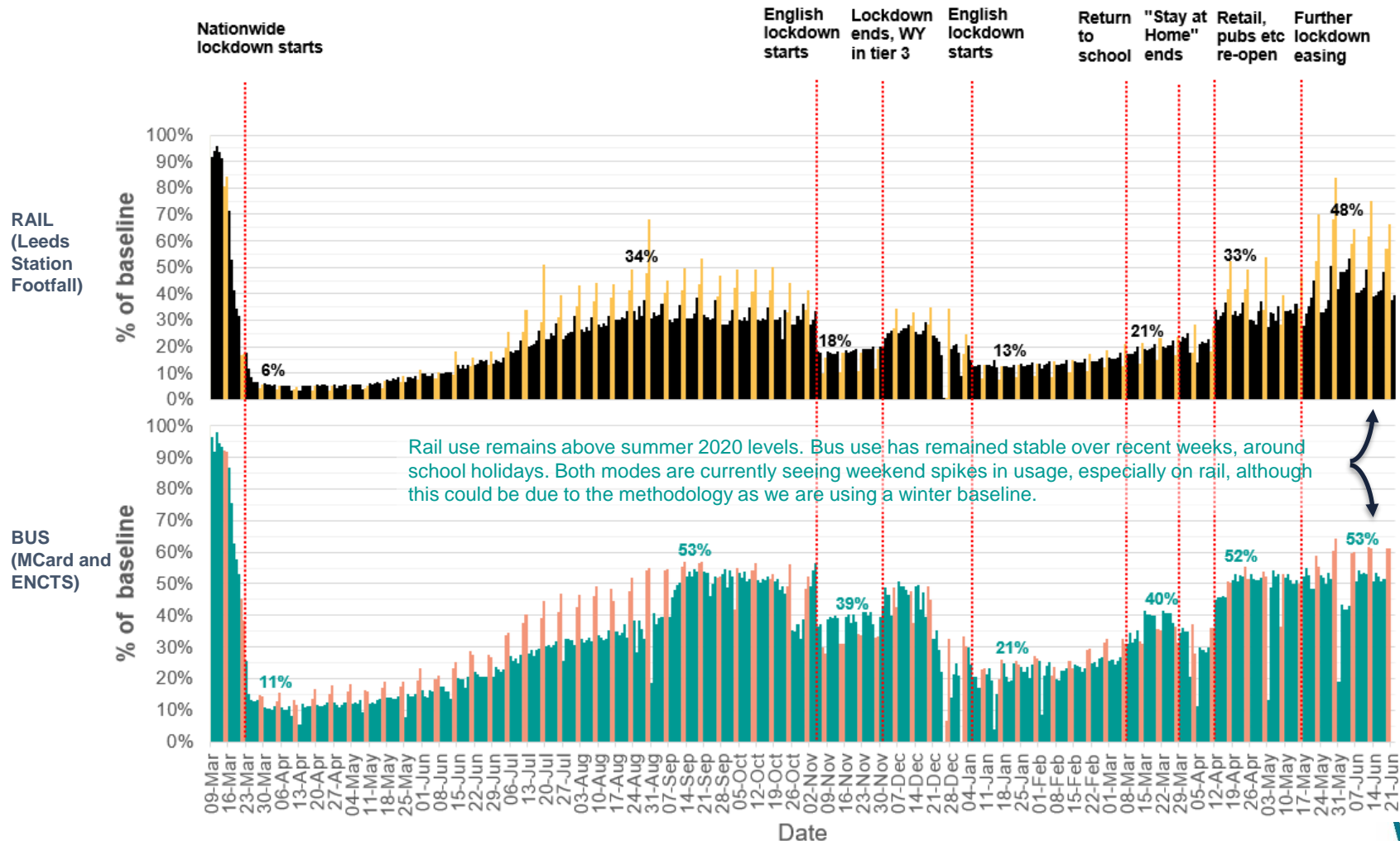
Motor vehicle and bus use over recent weeks has remained stable. Motor vehicle use shows weekday values at close to baseline levels with weekend peaks. Bus use is exceeding 60% of baseline levels. Rail appears to have a recent decline but the most recent week is subject to revision.



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

Local bus and rail proxies remain mostly stable over recent weeks

■ % 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)

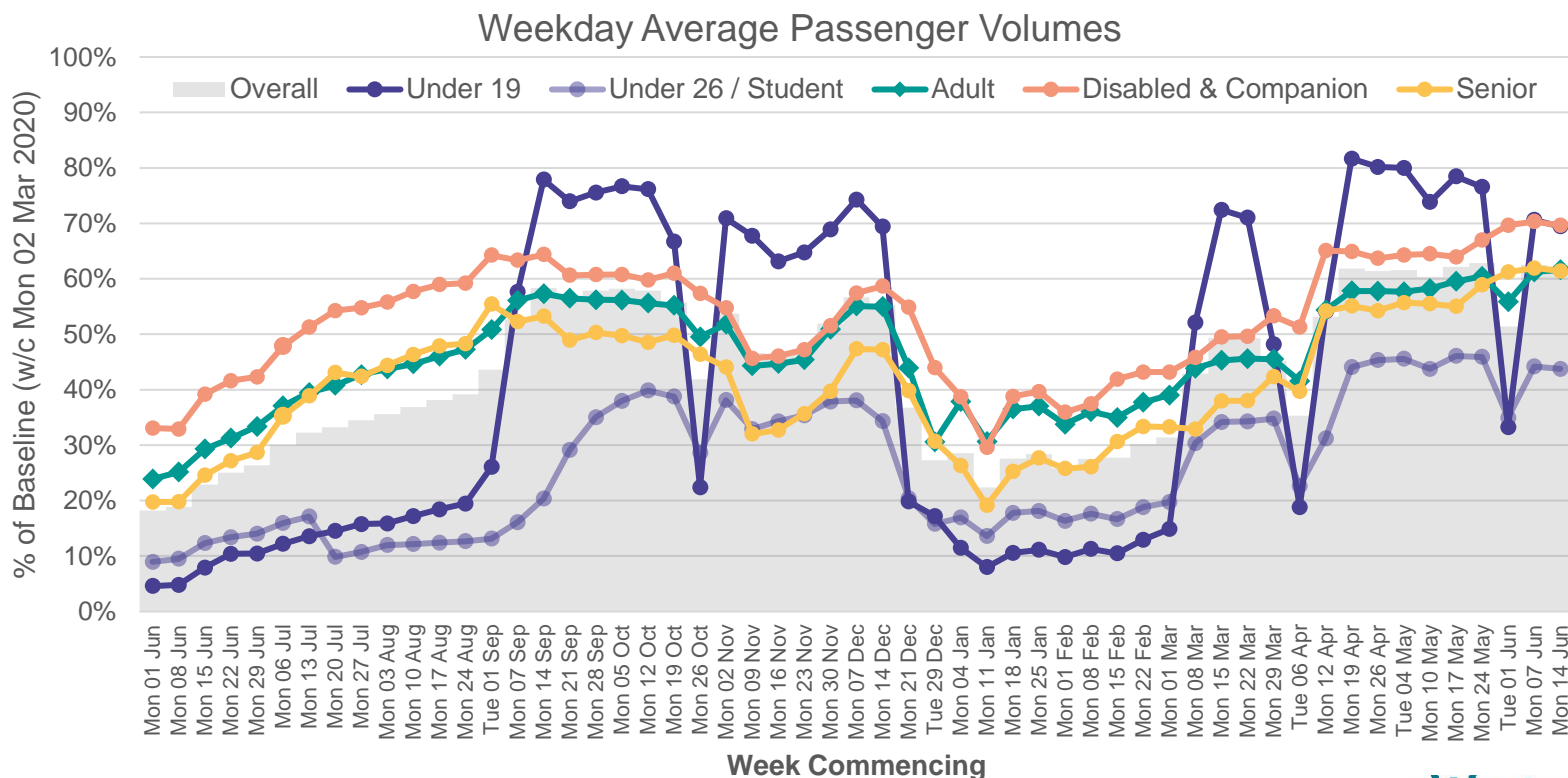
Source: Leeds Rail Station Footfall - Network Rail (top) and MCard and English National Concessionary Travel Scheme (ENCTS)

Bus use overall remains stable but the mix by cohort continues to change

Overall weekday use has remained around 60% to 63% of baseline for the last 8 school weeks. Usage by the under 19 cohort has reduced. There appear to be two explanations: some schools have still instigated study leave despite there being no exams ([theguardian.com/education/2021/jun/03](https://www.theguardian.com/education/2021/jun/03)) and government data from indicates that West Yorkshire school attendance reduced during May (explore-education-statistics.service.gov.uk). Increased usage by the adult, senior, and disabled cohorts has kept the overall usage steady.

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

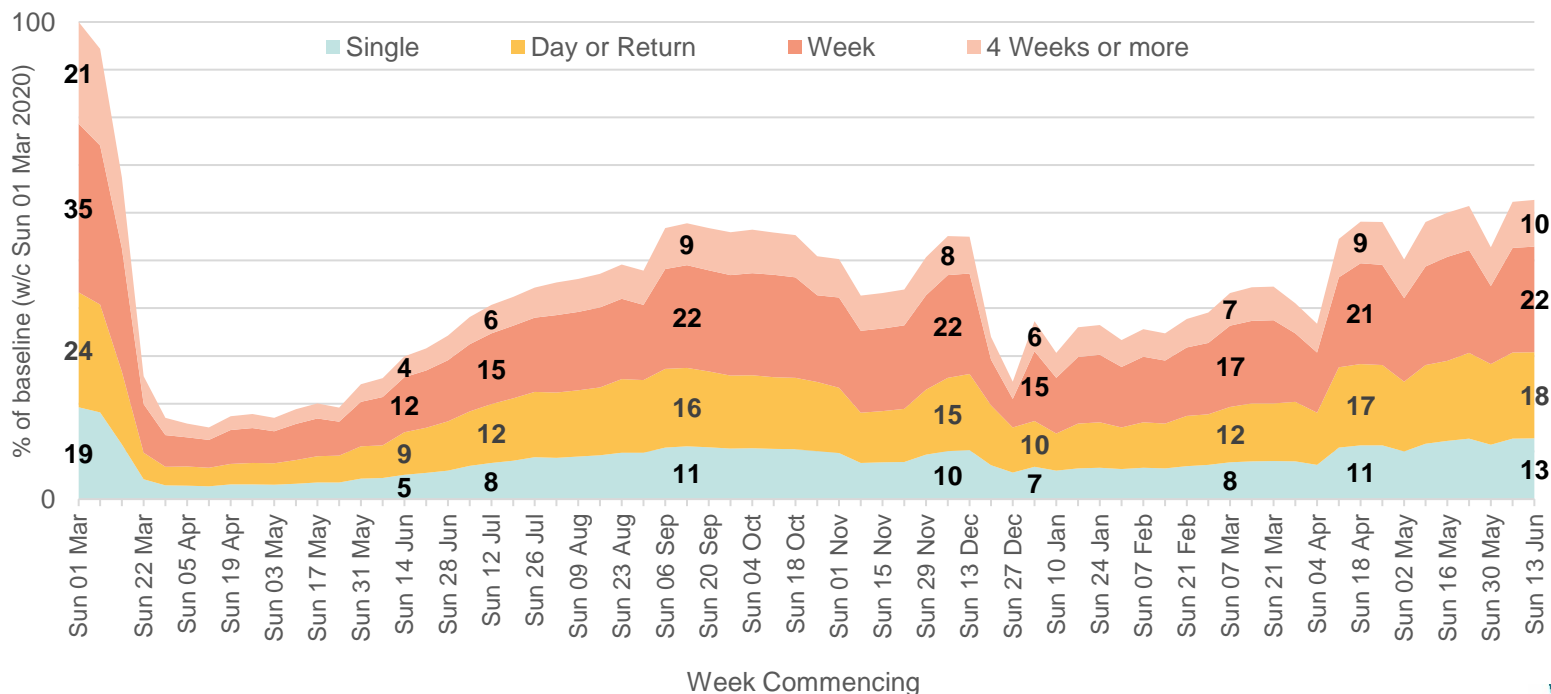


Baseline period is w/c Mon 02 Mar. Source: Bus operators electronic ticket machine data, passenger boarding locations in West Yorkshire. First, Arriva, Yorkshire Tiger and Transdev account for over 90% of bus services in West Yorkshire. Graph shows First and Transdev data. Data is for weekdays excluding bank holidays, with ticket types assigned to broad cohorts.

Adult ticket strongest usage recovery is for day or return fares

During periods of recovery the use of day or return tickets has shown the strongest recovery and the use of tickets valid for 4 weeks or more has shown the weakest recovery. Recovery of single journey and weekly tickets have been closest to the recovery overall. In the current period of recovery the use of weekly tickets is similar to late September / early October and the period just before Christmas whereas the use of single journey, day or return and 4 weeks or more tickets have edged higher. That said, weekly tickets accounted for the highest proportion of journeys in both the baseline and in the most recent data.

Ticket Commitment by Adult Fare Paying Passengers



Source: Graph shows First and Transdev data. Data is for whole weeks, for tickets assigned broadly to the adult cohort.