West Yorkshire Combined Authority

COVID-19 Fortnightly Insights Report

Research & Intelligence

23rd July 2021

Executive Summary – Economic Impact

- The gradual return to more normal economic conditions has continued but the pace of change appears to have slowed prior to the final easing of restrictions on 19th July.

- The latest data from the ONS BICS survey suggests 89% of businesses were open and trading nationally as of early July. That's the highest since ONS began tracking this, but clearly still means around 1 in 10 businesses aren't trading.

- The proportion of people in their usual workplaces has also reached its highest level since the start of the pandemic. West Yorkshire has seen a slightly faster return to usual workplaces in recent months with 69% in usual workplaces and 23% working remotely in West Yorkshire, compared to 65% and 25% nationally, as of late June. The latest national data suggests the return to work may now have levelled off, with little change since early June, pending the latest easing.

- This is supported by local data from the Geolytix Retail Recovery Index, which suggests little change in activity in town and city centres since early June, with most major town and city centres seeing activity between 50% and 60% of pre-pandemic levels, though Huddersfield, Ilkley and Wetherby are above their baseline levels.

- Business liquidations have continued to increase in recent weeks, to 420 per week based on the latest 4 week moving average. This is double the level a month earlier, and higher than the 330 averaged in early 2020 prior to the pandemic.

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Executive Summary – Transport Impact

- Bus use appears to have declined slightly in recent weeks, both locally and nationally, prior to the final easing of restrictions. Weekend use remains higher than on weekdays, though weekend use too has dipped from a peak in early May. Overall, bus patronage is just below 60% of pre-pandemic levels.

- Local data suggests that much of the recent decline has been driven by under 19 and student / under 26 cohorts. Much of that decline can be explained by seasonal variation, though the fall in under 19 use appears more significant than can be explained by seasonality. Usage among other cohorts remains relatively stable.

- Rail use has also declined slightly in recent weeks, based on data from Network Rail on footfall through Leeds Station. Footfall was around 39% of pre-pandemic levels in the week to 19th July, down from a recent peak of 48% in early June. As with bus, weekend use remains stronger than weekday.

- This is supported by data on MCard use through rail gates, which suggests a slight boost following the easing of restrictions in May, followed by a slight non-seasonal decline since.

- July saw weekday footfall in Leeds City Centre fall to 50% of that for comparator dates in 2019, with weekend footfall to 70% of the total. In June weekday and weekend footfall was 78% and 79% of the 2019 totals respectively.

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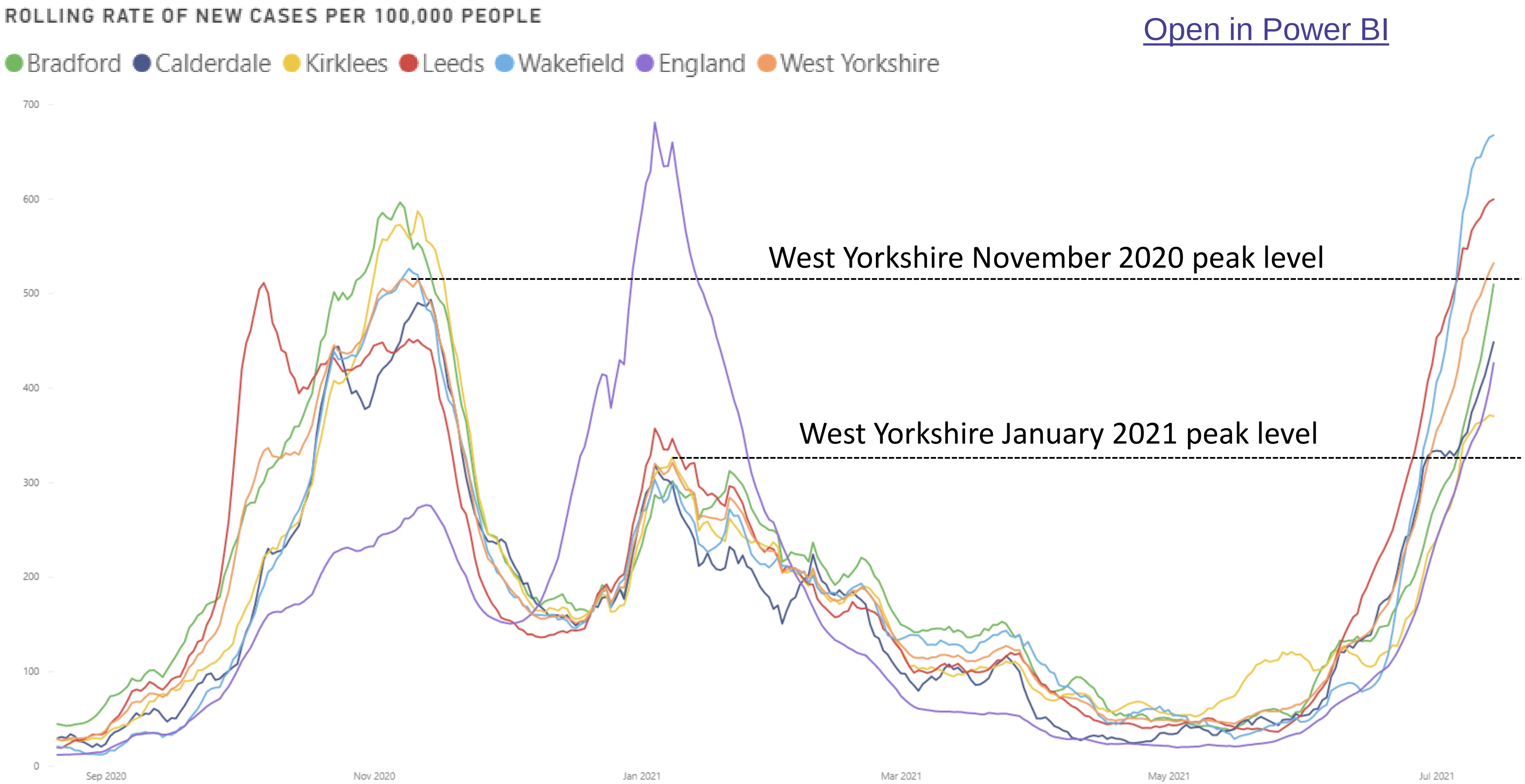
Virus prevalence – West Yorkshire trend



As of the 14th July 2021, the 7-day moving average **West Yorkshire COVD-19 rate was 531.8 cases per 100k,** 66% higher than the January 2021 peak and 3% higher than the November 2020 peak**.** West Yorkshire rates increased by 18% in the last week. In the same period, the rate in Yorkshire & the Humber increased by 28% to 536.5 per 100k and rates in England increased by 33% to 426.1 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.

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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

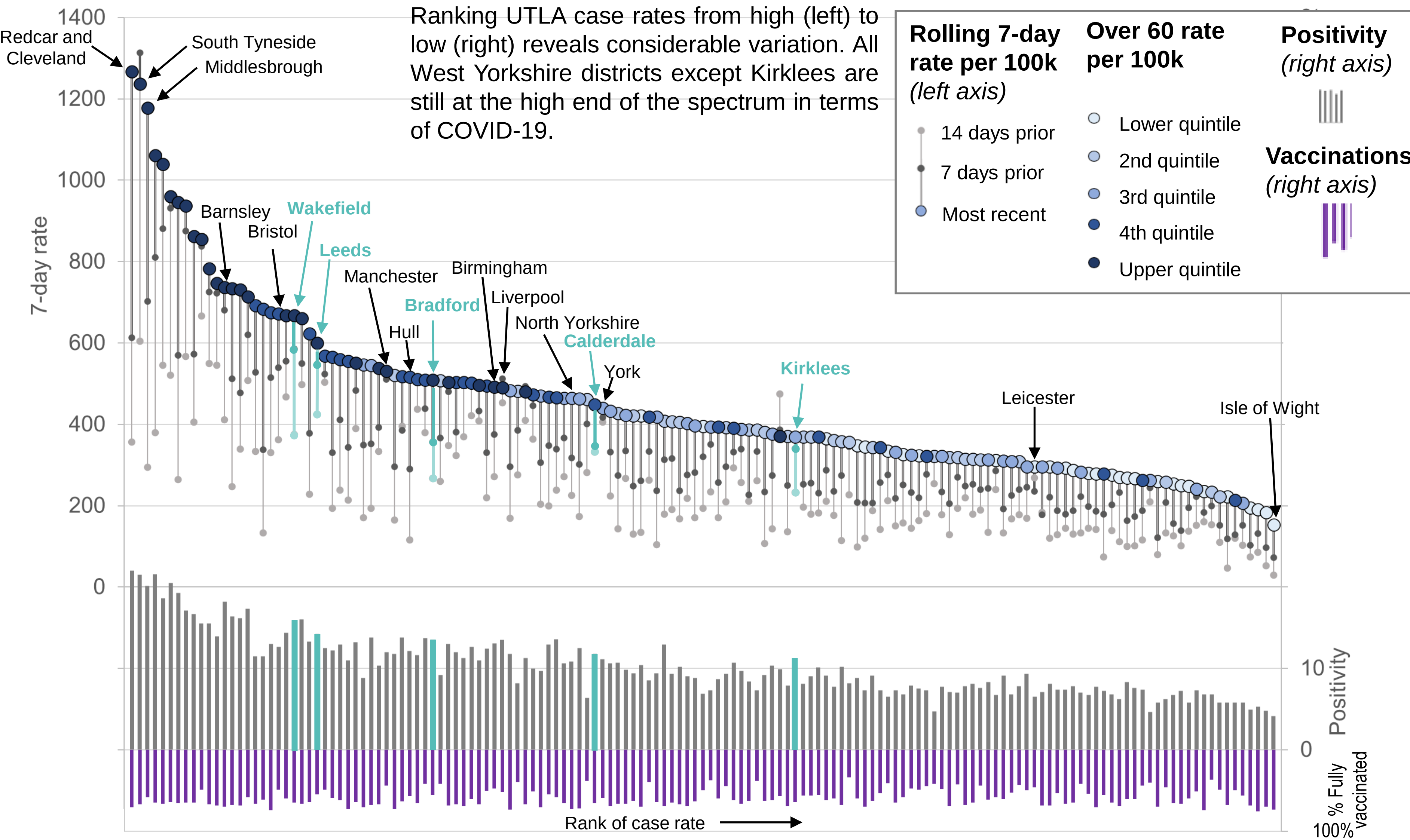
Case rate data up to:
14/07/2021

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	39	509.5	↑ 43	2750	61063	11313	1103	204
Calderdale	59	448.3	↑ 29	948	18917	8946	312	148
Kirklees	85	370.0	↑ 9	1627	42841	9741	814	185
Leeds	25	599.5	↑ 9	4755	84137	10608	1338	169
Wakefield	22	667.2	↑ 14	2324	34607	9936	773	222
West Yorkshire		531.8	↑ 18	12404	241565	10411	4340	187
England		426.1	↑ 33	239820	4769632	8474	113175	201

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 14th July (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 14th July (right Y-axis). Purple bars at the bottom denote the percentage of adults who are fully vaccinated up to 18th July (right axis). Interactive, alternative version here: [COVID-19 West Yorkshire Dashboard - Power BI]

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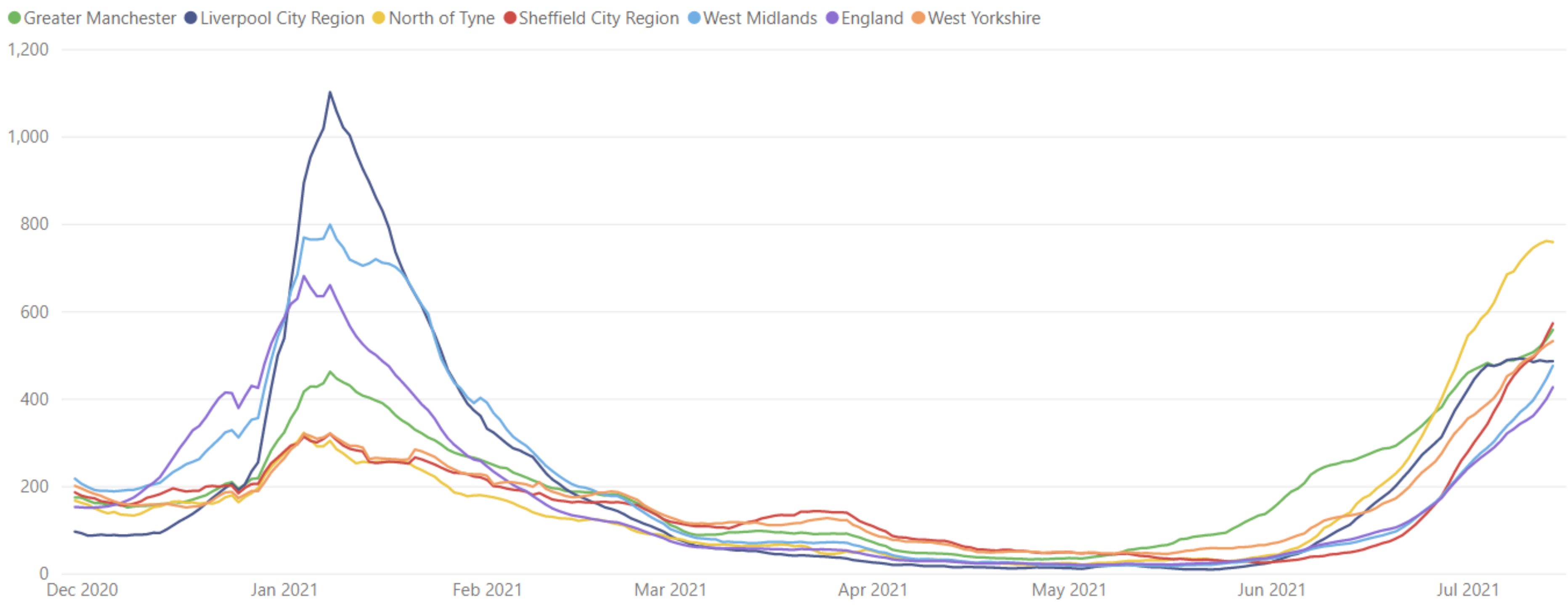
Cases continuing to increase in MCAs

North of Tyne, Greater Manchester, Sheffield City Region and West Yorkshire now have higher case rates than during the January peak. In comparison MCAs, in the week to the 14th July, case rates increased most in West Midlands (by 41%), and case rates are currently highest in North of Tyne (758.4 per 100k), Sheffield City Region (572.3 per 100k) and Greater Manchester (557.3 per 100k). Rates have fallen in Liverpool City Region in the last week.

Rolling Rate of new cases per 100,000 people



Source: HMG / PHE Coronavirus in the UK data

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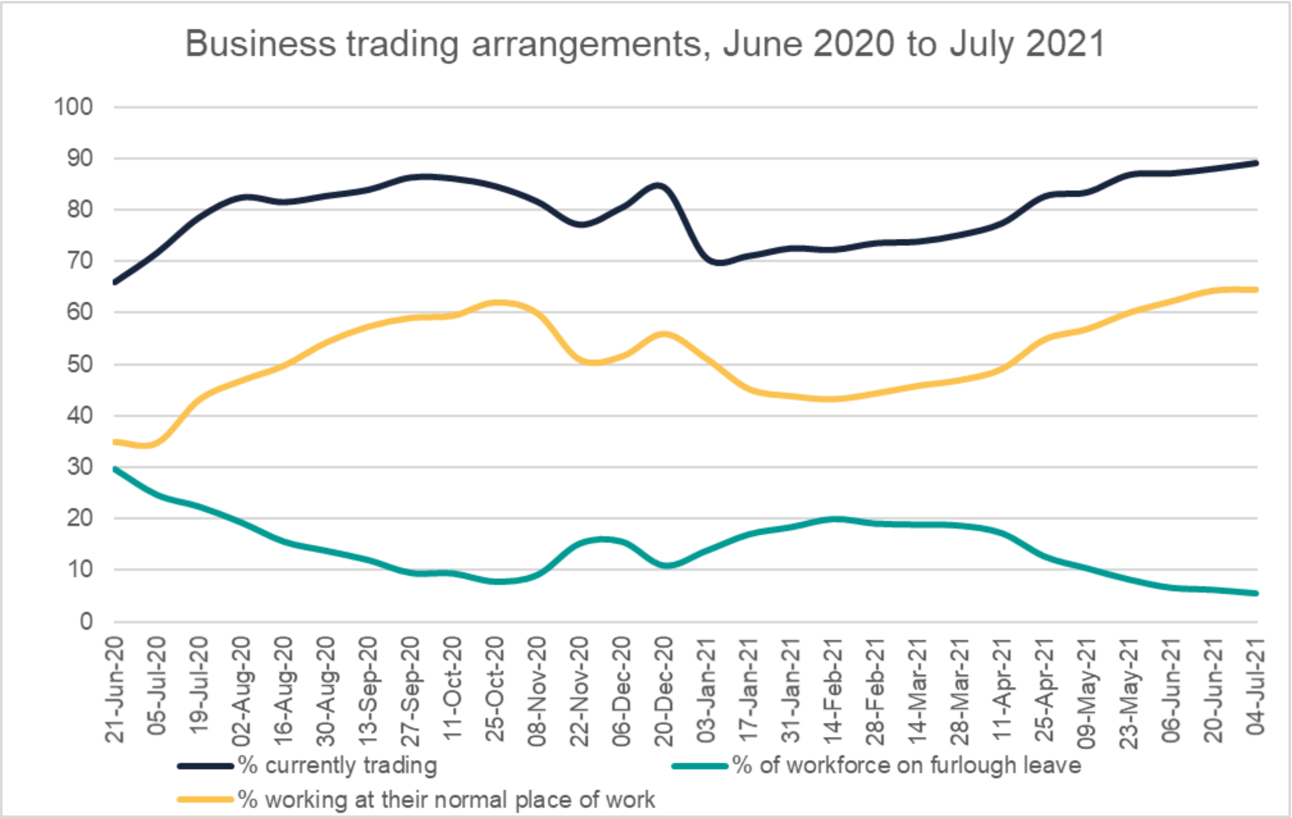
Economic Insights

Furlough use continues to fall, but return to work levels off

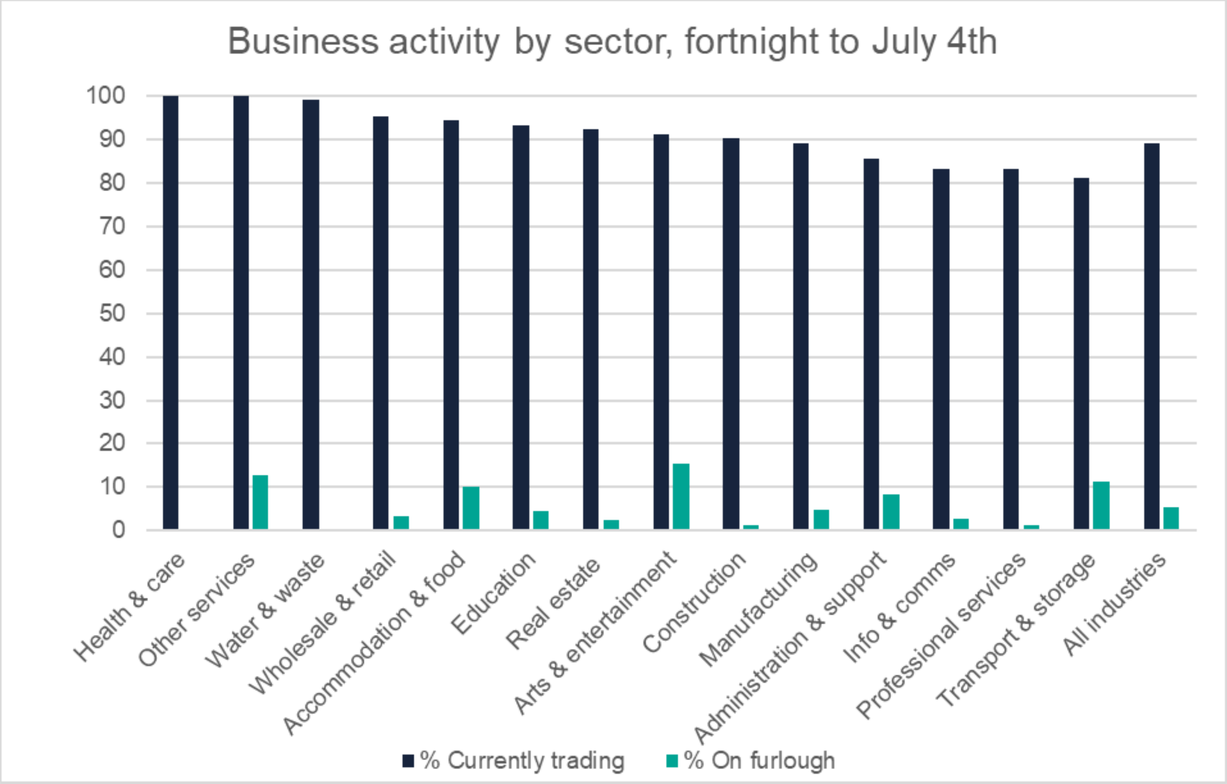
89% of businesses were trading in the fortnight to July 4th, according to the ONS Business Insights and Conditions Survey (BICS). This is up to a new high, from 88% a fortnight earlier. Furlough use is continuing to fall, down to 5.4% from 6.1%, though this will largely cover the period before the employer contributions to furlough changed on July 1st. The return to work appears to have stalled prior to the final easing of restrictions, with the proportion in their usual workplace unchanged at 64%.



**Source: ONS Business Insights and Conditions Survey*

Consumer facing sectors no longer more likely to be closed

Sectors which have been most affected by closures during lockdowns have now largely reopened, with almost all Other Services businesses (which includes personal services such as hairdressers) now open along with 94% of accommodation & food businesses and 91% of those in arts & entertainment. These sectors still have the highest proportion of jobs on furlough, with arts & entertainment highest overall at 15%. However, this is down from 60% in February. Only 81% of businesses are currently trading in transport & storage, along with 83% in professional services and information & communications, according to BICS.



Source: ONS Business Insights and Conditions Survey

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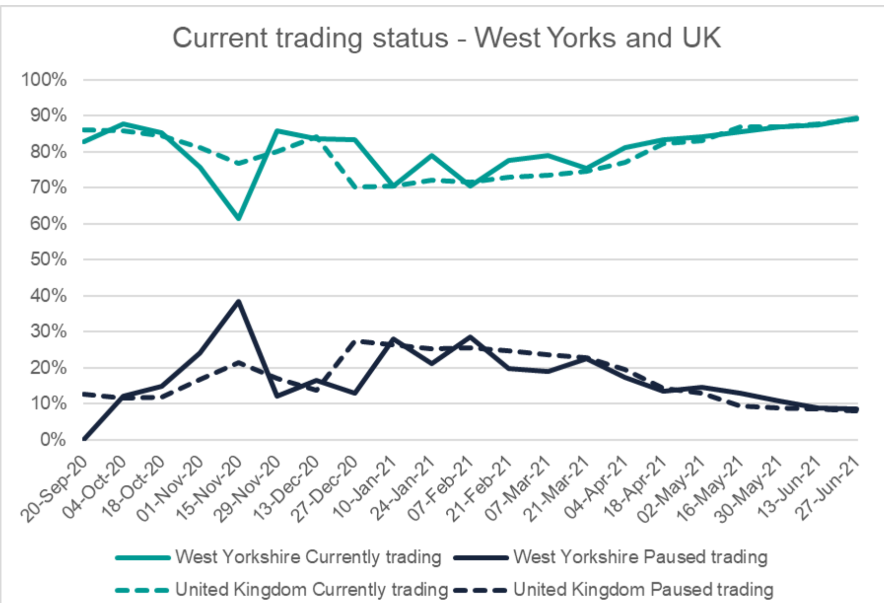
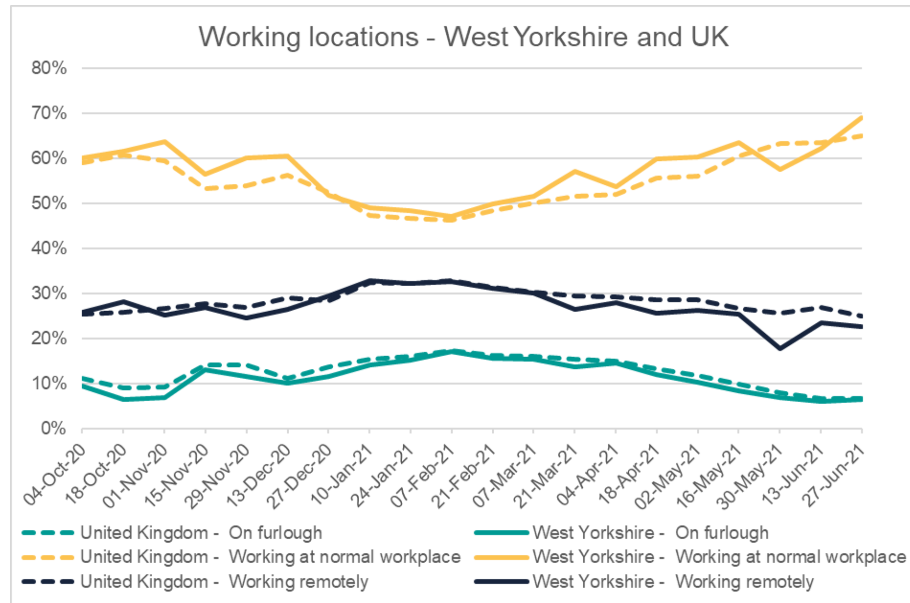
West Yorkshire continues to track the UK recovery, with slightly faster return to work

West Yorkshire continues to closely follow the UK in on key measures of the recovery, according to the BICS. The proportion of businesses currently trading is close to 90% both locally and nationally, and the furlough rate was around 6.5% in both areas in late June. West Yorkshire has seen a slightly faster return to usual workplaces in recent months with 69% in usual workplaces and 23% working remotely in West Yorkshire, compared to 65% and 25% nationally.





**Source: ONS Business Insights and Conditions Survey*

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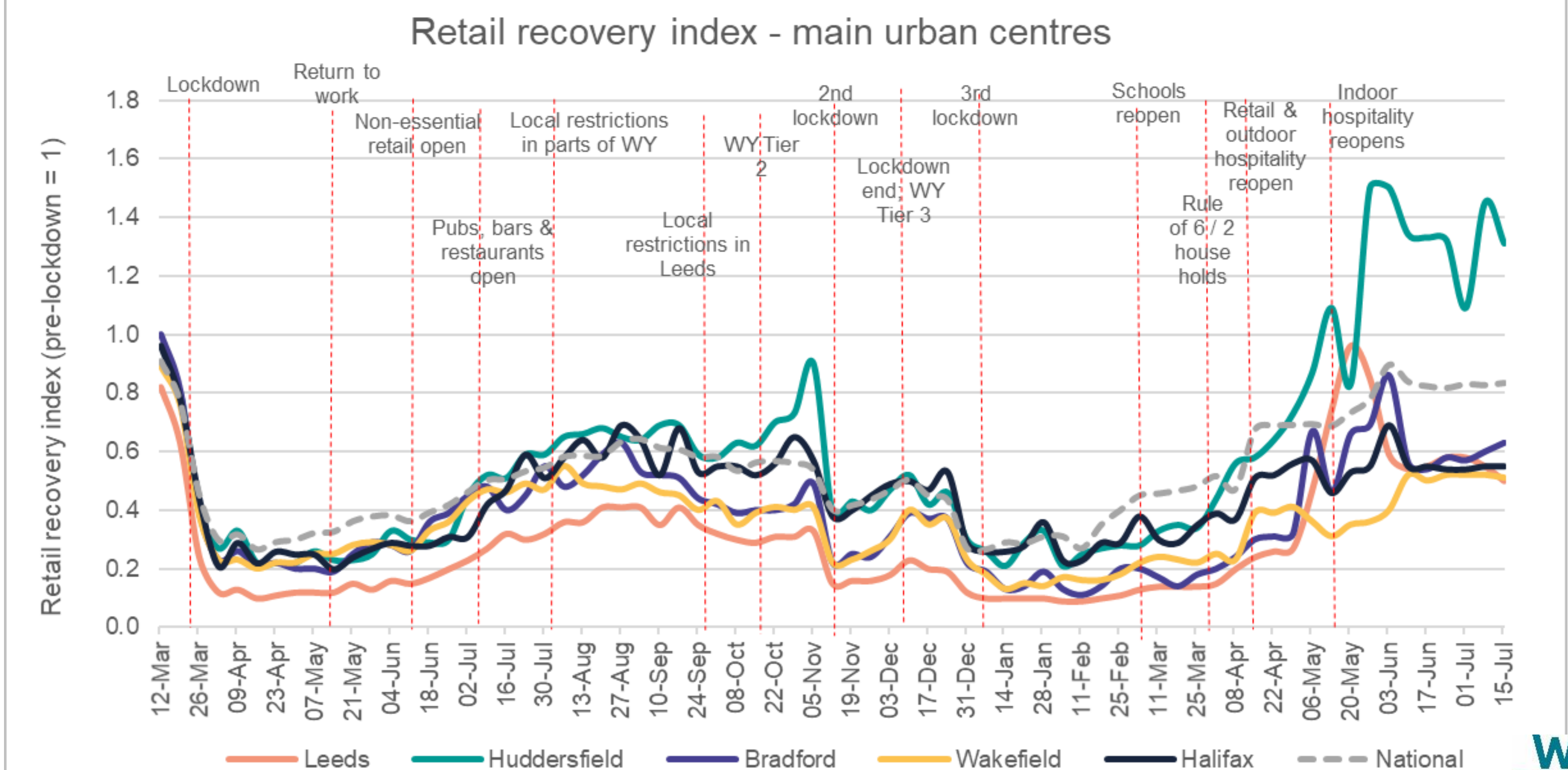
Town and city centre activity stable before final restrictions ease

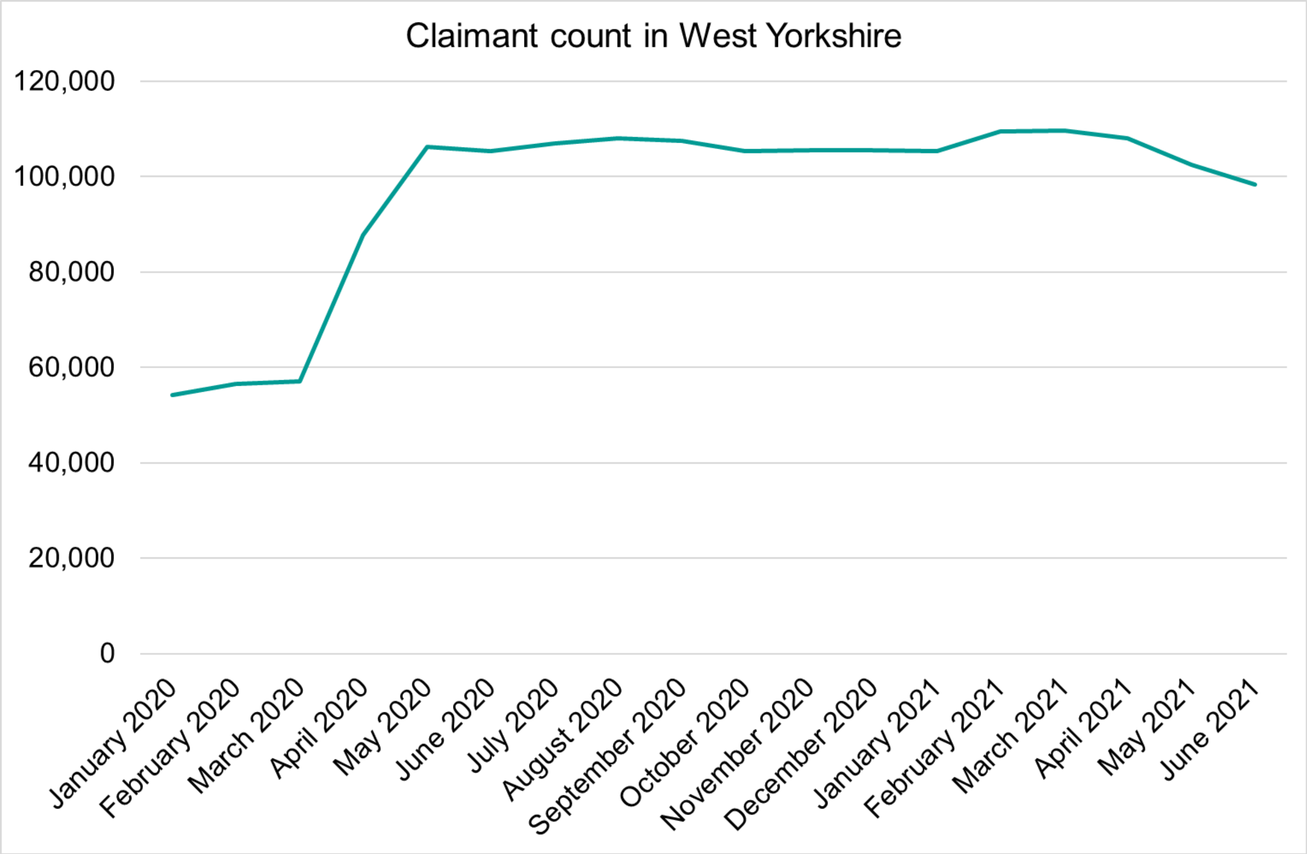
Activity in four of West Yorkshire's five main urban centres has remained relatively stable since its recent peak in early June. In the week to July 15th, just before the final easing of restrictions, activity was between 50% (Leeds) and 63% (Bradford) of each place's respective pre-pandemic baseline in 4 of the 5 centres. The exception was Huddersfield, which has consistently exceeded its pre-pandemic baseline and was 31% above that level in the week to 15th July. Among smaller centres, Ilkley (16%) and Wetherby (21%) were also above their baselines and have been for a number of weeks.



Source: Geolytix Retail Recovery Index, 2021

Out of work benefits claimants continue to decline steadily

The number of people claiming out of work benefits in West Yorkshire fell by 4% in June, to 98,300. There was a 5.6% decline nationally over the same period. The number of claimants in West Yorkshire has now fallen for three consecutive months, but remains 74% higher than in February 2020.



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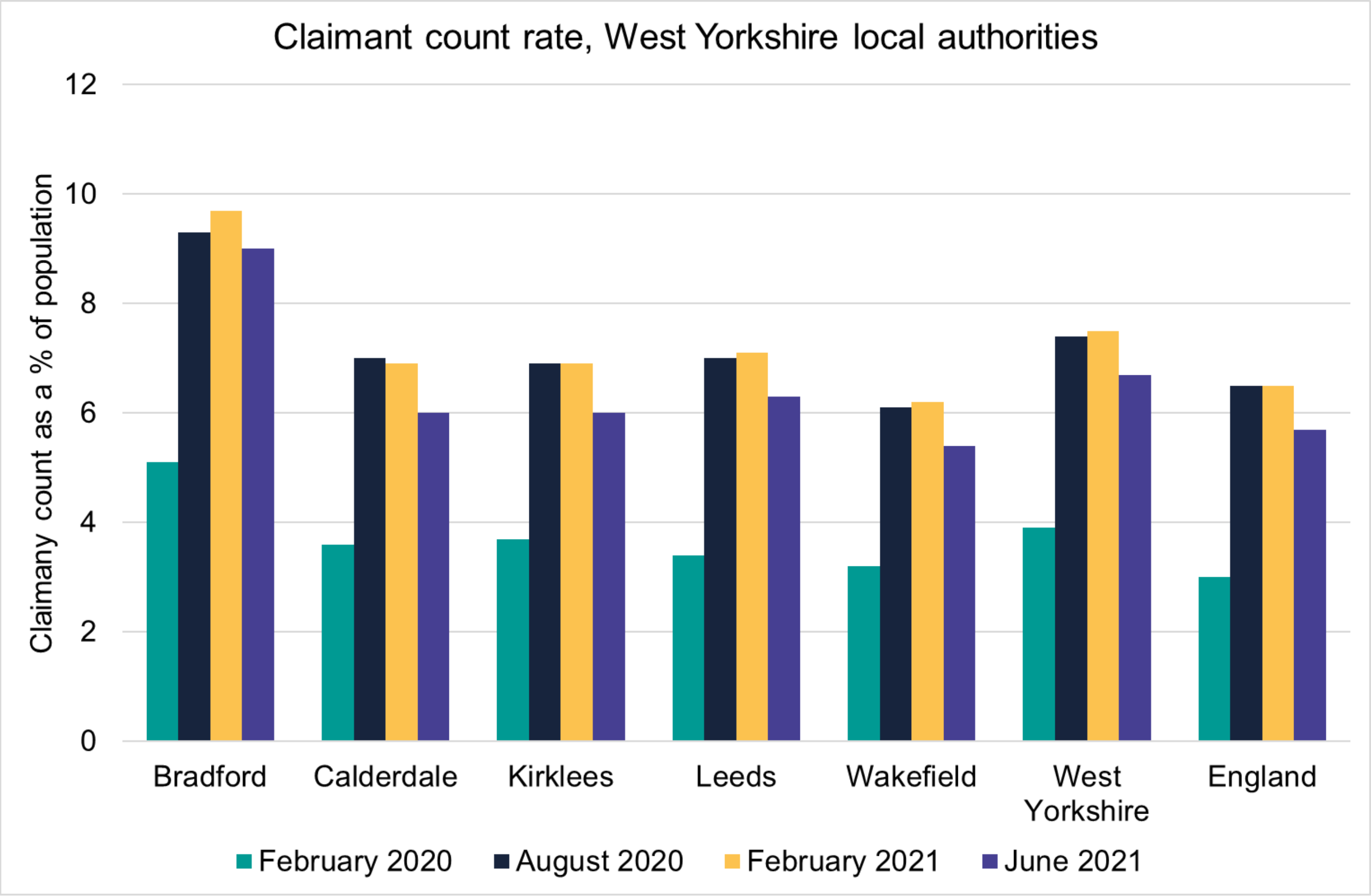
Out of work benefits claimants decline in all WY local authority areas

All local authority areas saw the claimant count fall in June, with falls ranging from 2.1% in Bradford to 5.3% in Wakefield. Wakefield is the only area where the claimant count rate is below the England average of 5.7%, at 5.4%. It is highest in Bradford at 9%, with other local authorities all at or close to 6%.



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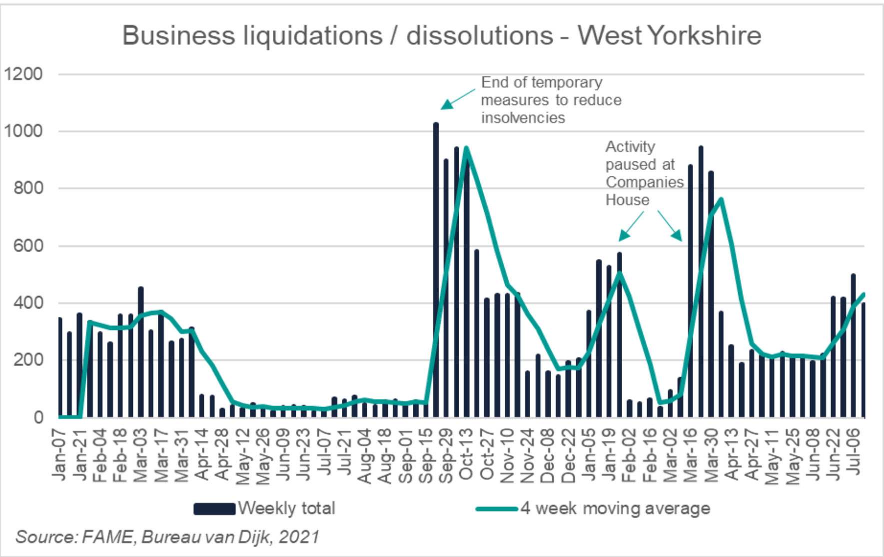
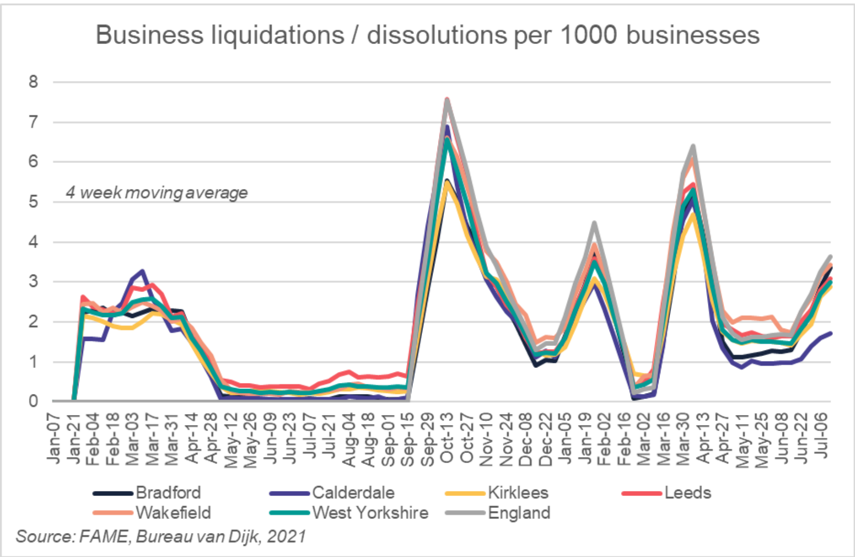
Business liquidations increasing, and above early 2020 levels

There were 432 business liquidations in West Yorkshire up to the week ending 13th July, based on a four week moving average, according to data from Bureau van Dijk's Fame database. This is more than double the 210 seen in the preceding four week period. Nationally liquidations increased by 120% over the same period. Liquidations are now higher than in early 2020 prior to the pandemic, when they averaged 328 in West Yorkshire. At local authority level, the latest four week moving average is up 159% in Bradford – the fastest increase among LAs, with Calderdale seeing the lowest increase at 77%.





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

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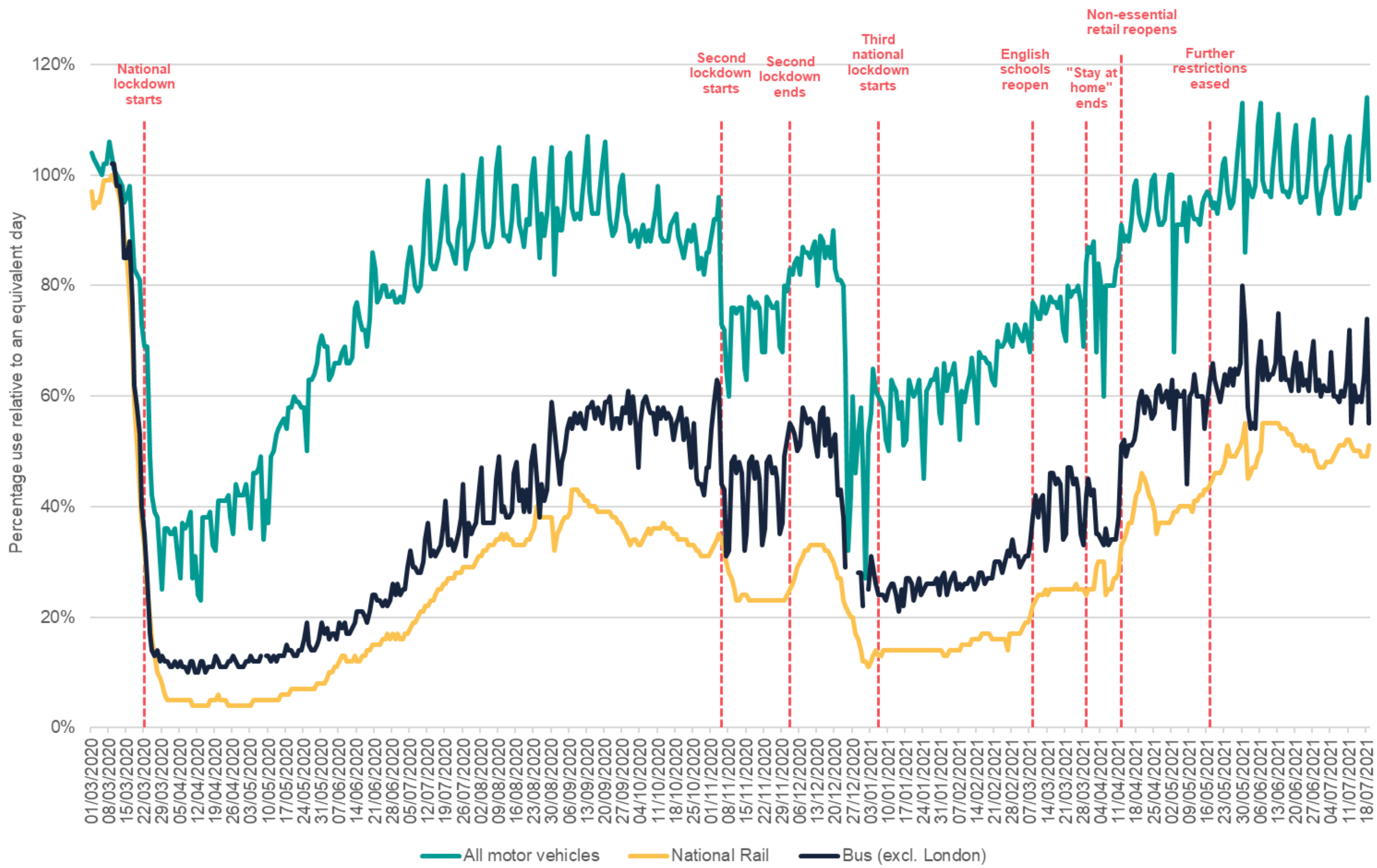
Transport Insights

Nationally, public transport use declines slightly over recent weeks

Motor vehicle use has remained mostly stable in recent weeks, with weekday values near baseline levels. After several weeks of decrease, weekend car usage saw a maximum in the weekend of the 17th July, probably influenced by the high temperatures and dry weather. Bus use shows a slight decline, with usage just above 60% of baseline on weekdays, whereas weekday rail use has not recovered the levels seen at the end of May and is currently 50% of the baseline.

DfT transport use during the coronavirus (COVID-19) pandemic



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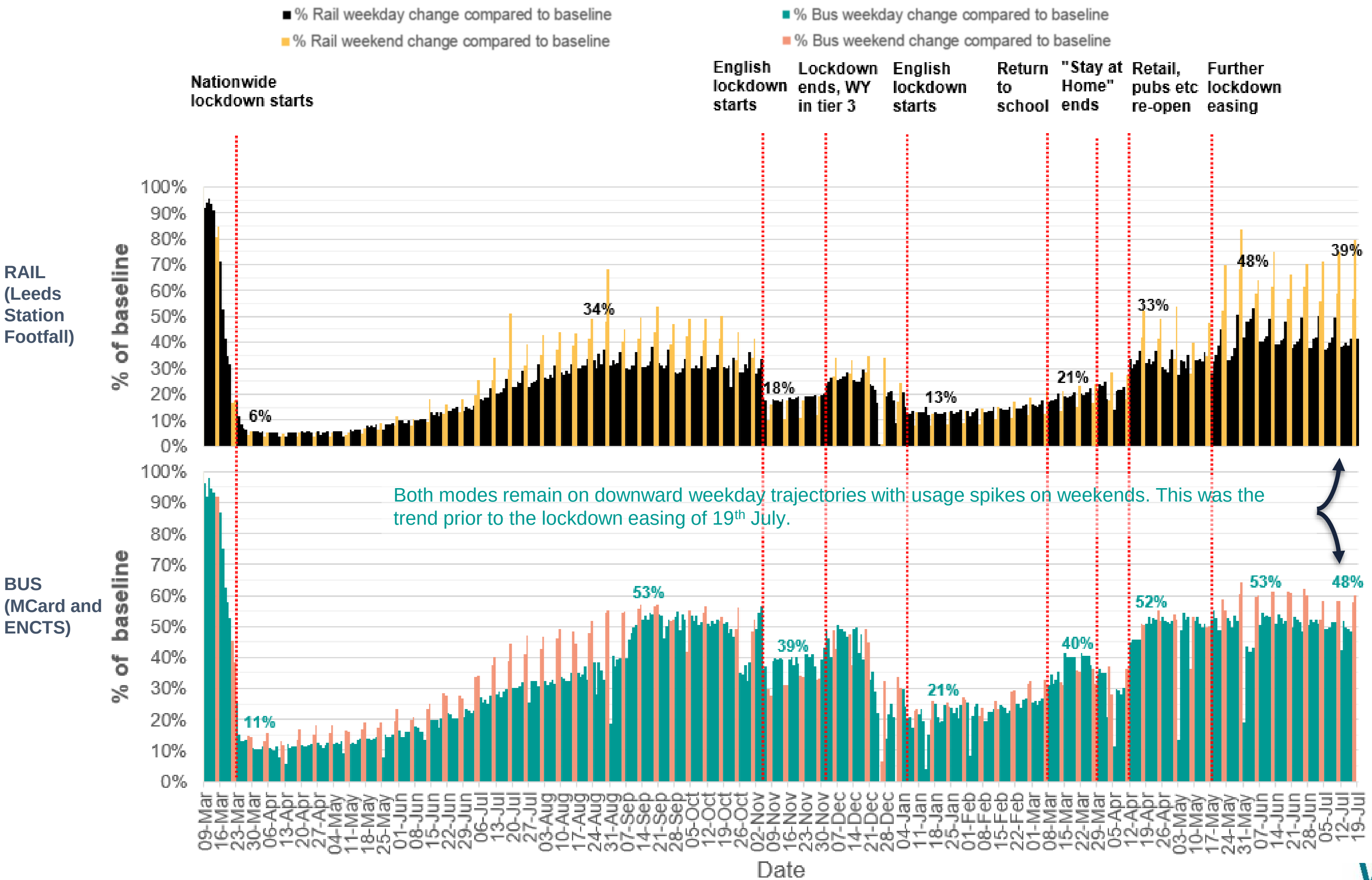
Local bus and rail proxies continue weekday decline before lockdown easing

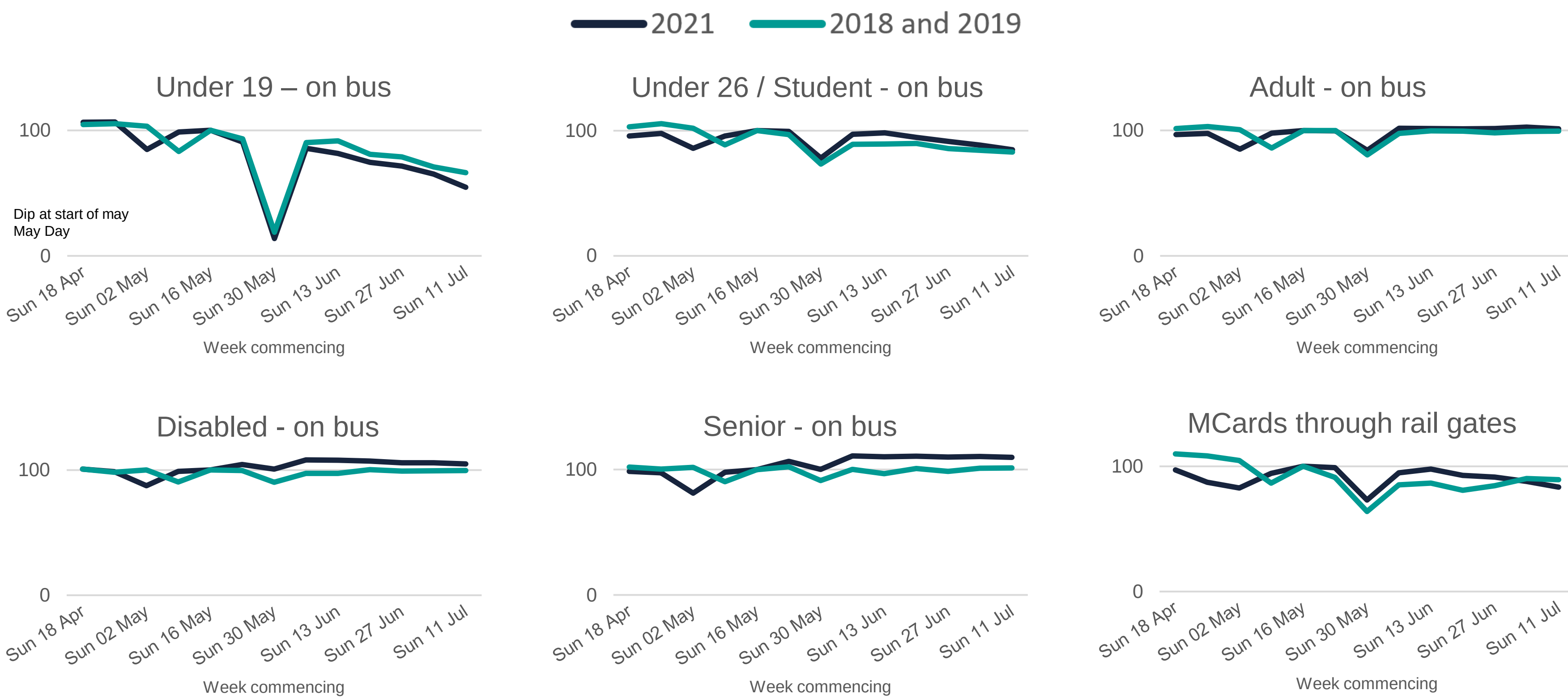


Baseline period is Monday 2nd - Friday 6th March 2020 (weekdays) and 29th Feb -1st March and 6th-7th March (weekends)

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

Recent changes in smartcard use on bus appear to be seasonal

A comparison of data from 2021 with an average of 2018 and 2019 shows that the reduction in use by the under 19 and under 26 / student cohorts appears largely seasonal though the drop in use by under 19s appears to be slightly more than can be explained by seasonality alone. Use by senior and disabled people grew slightly at the beginning of June. Use of MCards at rail gates suggests a comparative small boost after the easing of restrictions in May, followed by an unseasonal decline in recent weeks.



Source: Nero records of smart card ticket use on buses and at gated rail stations. Data for school easter holidays excluded. Aligned on Spring Bank Holiday week. Indexed on mid-May. Dips at start of May reflect May Day bank holiday Monday

Bus use by young people reducing, use by other cohorts remain fairly stable

Overall weekday use reduced over recent weeks, dropping to less than 60% of baseline. The reduction is mainly down to the under 19 cohort and partly down to the under 26 / student cohort while the adult, disabled, and senior cohorts have remained relatively stable. The reduction in use by the younger cohorts could partly be seasonal, a theory backed up by smartcard data from 2018 and 2019.

Thousand passengers per weekday before COVID

Adult
221,000

Under 19
101,000

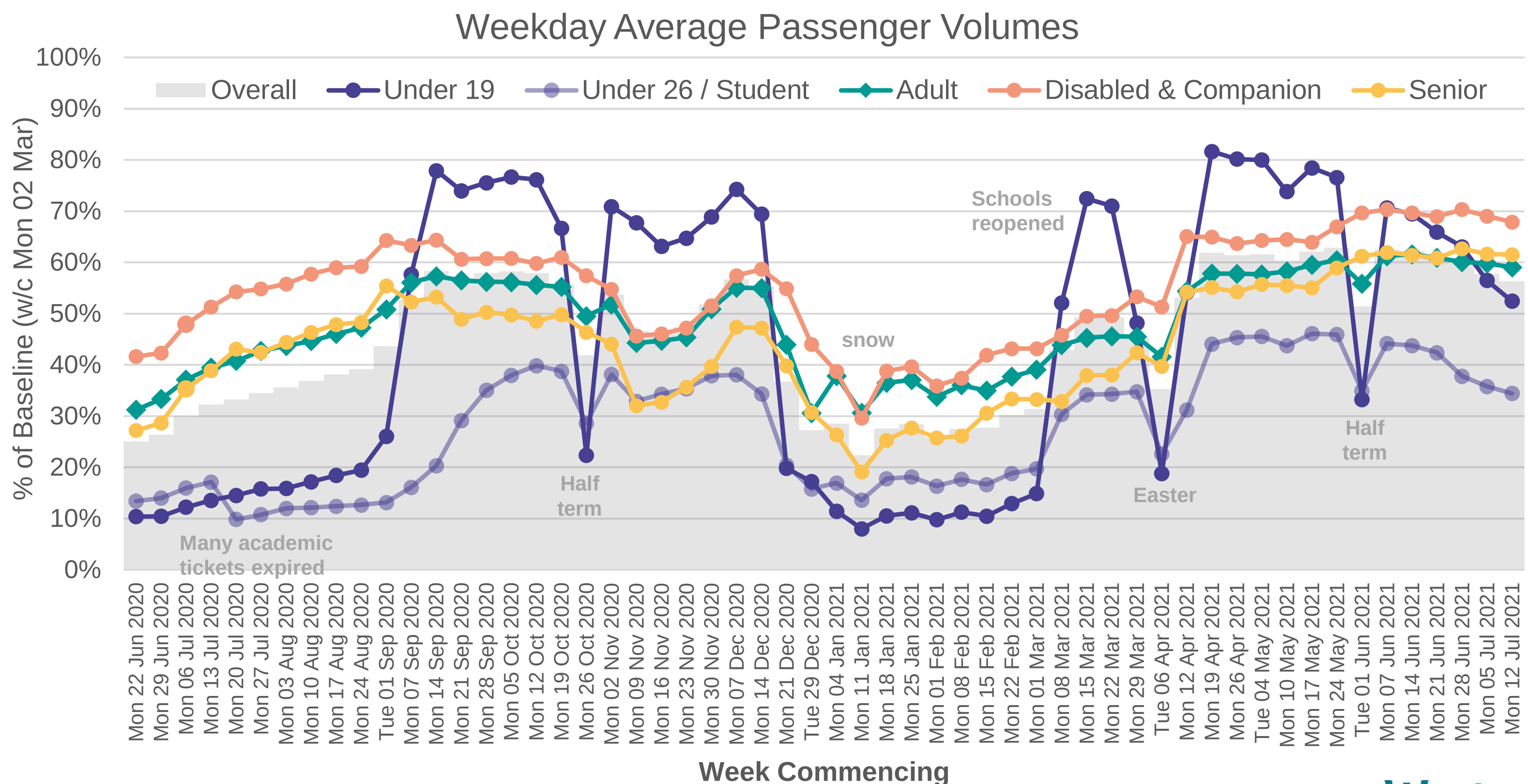
Senior
74,000

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.

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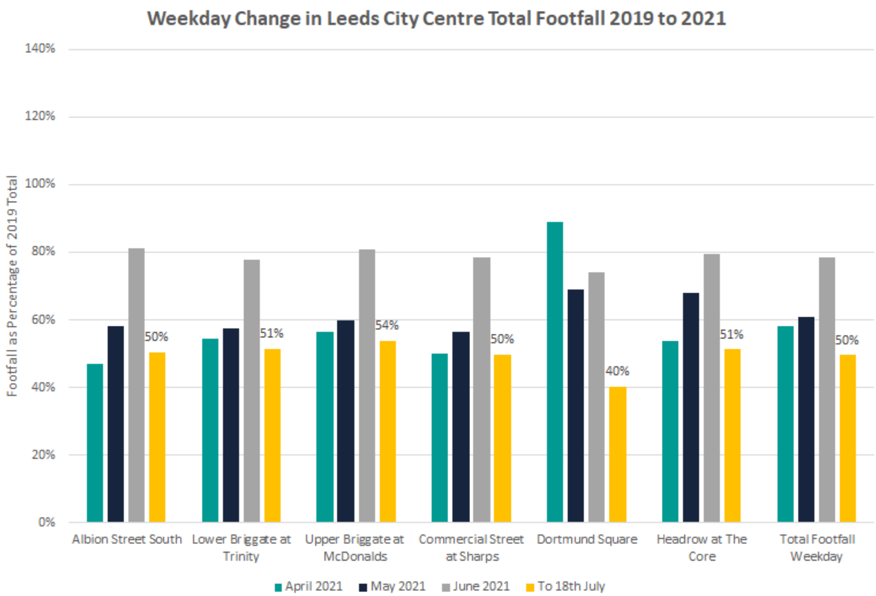
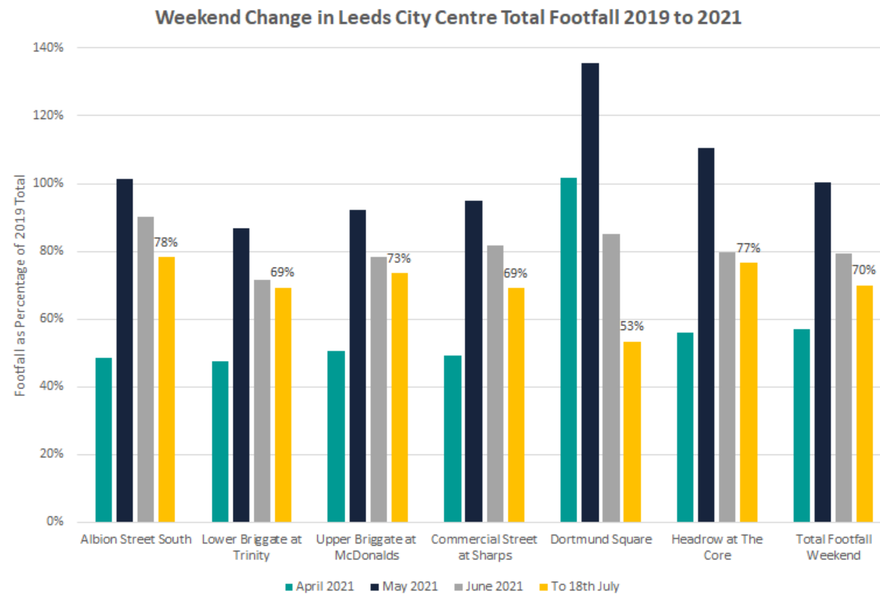
Decreasing weekday and weekend footfall in Leeds City Centre

After easing restrictions resulted in increased Leeds City Centre footfall during May and June, with total weekend footfall returning to 2019 levels in May, July has seen a decrease at all sites. This is most pronounced on weekdays with comparative footfall only 50% of the total recorded for comparative dates in July 2019, a decrease from the June where footfall comparative footfall reached a new high of 78% of that in 2019.

Weekend footfall has decreased slightly from 79% of the 2019 total in June to 70% in July.





Source: Leeds City Council

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