West Yorkshire Combined Authority

COVID-19 Fortnightly Insights Report

Research & Intelligence

6th August 2021

Executive Summary – Economic Impact

- The number of vacancies for jobs in West Yorkshire posted online during week ending 31 July fell slightly by 4% compared with the previous week, based on a 4-week moving average (national average decline: -7%).

- Four of the five West Yorkshire local authorities saw small changes in their vacancy counts in the current week, ranging from 1% growth in Kirklees to 3% decline in Wakefield.

- 88.1% of businesses were trading in the fortnight to July 25th, according to the ONS Business Insights and Conditions Survey (BICS). This is down from the previous high of 89% a fortnight earlier. Furlough use is continuing to fall, down to 4.9% from 6.1%. The return to work appears to have stalled prior to the final easing of restrictions, with the proportion in their usual workplace unchanged at 65%.

- While the Arts, entertainment & recreation sector currently has the highest proportion on furlough at 15.8%. The proportion on furlough across most other sectors have not changed a great deal over the course of the year. Transports & Storage sector currently has the second highest proportion on furlough dropping from 17% in February to 10% in July.

- There were 409 business liquidations in West Yorkshire up to the week ending 27th July, based on a four week moving average. Representing a downward trend from the previous recent peak of 432 on the week ending 13th July.

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Executive Summary – Transport Impact

- Weekday bus use appears to have declined in recent weeks, both locally and nationally, following the final easing of restrictions and start of the school summer holiday. Weekend recovery remains consistently stronger than weekdays. Nationally, weekday bus use relative to baseline has dipped lower than rail for the first time since the pandemic started.

- 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. Usage among other cohorts remains relatively stable.

- Rail use has increased in recent weeks, based on data from Network Rail on footfall through Leeds Station. Weekday footfall was around 47% of pre-pandemic levels in the week to 2nd August, almost matching the recent peak of 48% in early June. As with bus, weekend use remains stronger than weekday, and these peaks are increasing.

- Data on MCard use through rail gates suggests a recent decline, likely driven by seasonal factors.

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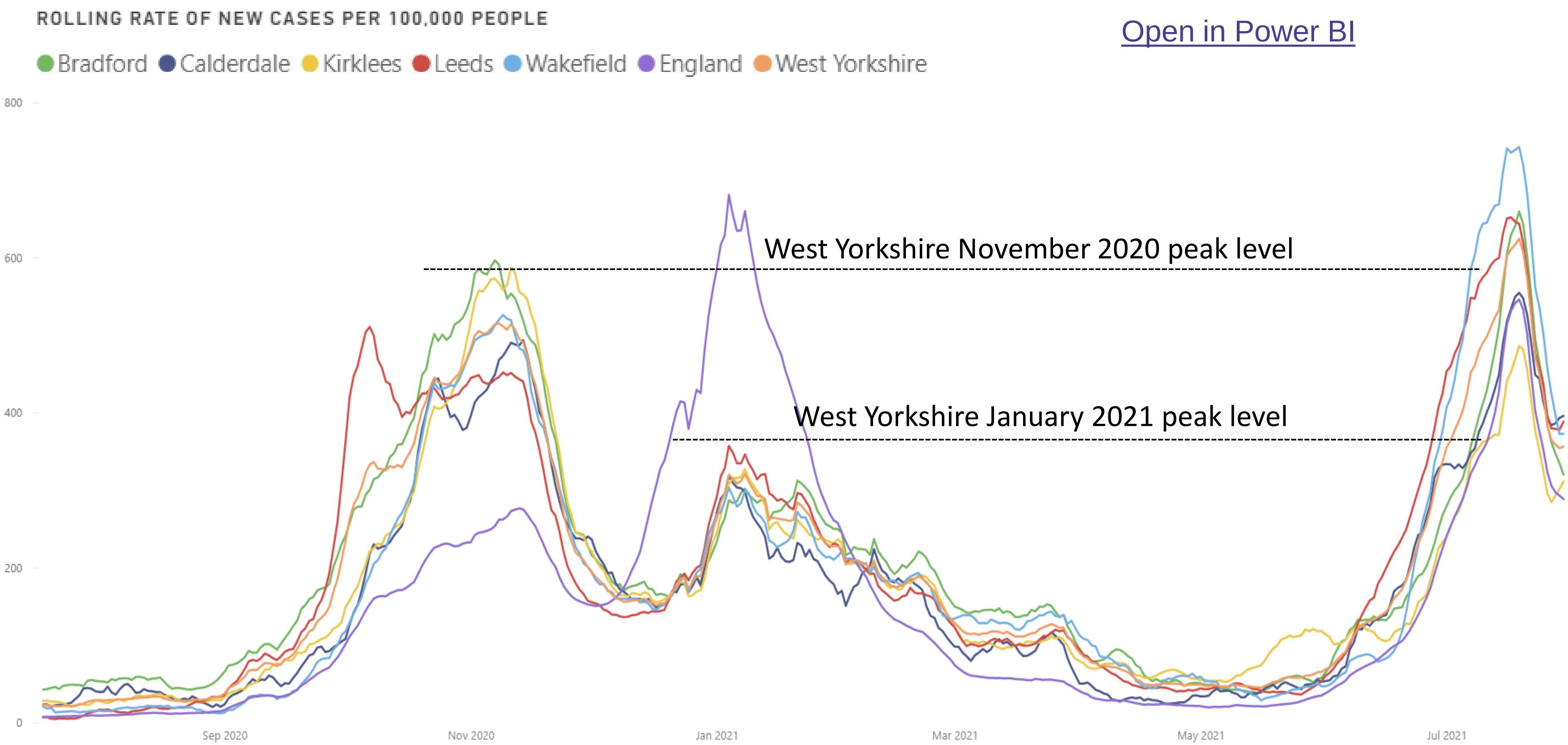
Virus prevalence – West Yorkshire trend



As of the 30th July 2021, the 7-day moving average **West Yorkshire COVD-19 rate was 356. cases per 100k,** 24% lower than the previous week. In the same period, the England 7-day moving average is 288.1 per 100k which is 28% lower than the previous week. Both Bradford and Wakefield have seen a rapid drop in care rates per 100k population, both dropping 35% to 319.6 and 372.4 respectively.

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

30/07/2021

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	44	319.6	-35	1725	65677	12168	1115	207
Calderdale	14	395.4	-12	836	20909	9888	320	151
Kirklees	48	310.8	-17	1367	46183	10501	821	187
Leeds	17	388.2	-18	3079	91623	11552	1364	172
Wakefield	23	372.4	-34	1297	38123	10945	789	227
West Yorkshire		356.0	-24	8304	262515	11314	4409	190
England		288.1	-28	162187	5199102	9237	114209	203

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

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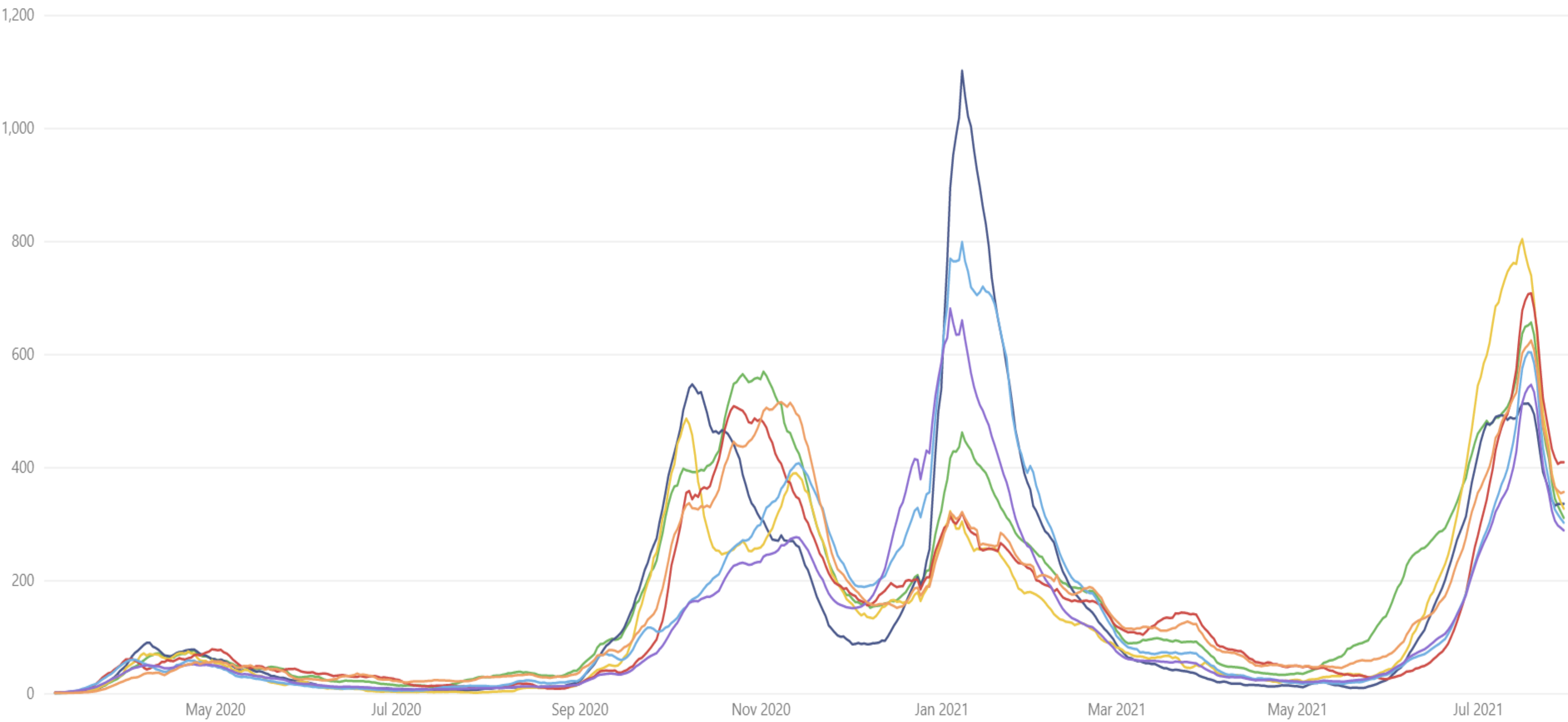
Cases sharply decrease across all MCAs

Across all MCAs there has been a sharp decline in new cases in the week ending 30th July. Now dropping below the January peak. In comparison MCAs, in the week to 30th July, case rated was highest in Sheffield city region at 408.7 per 100k, followed by West Yorkshire (356 per 100k). The West Midlands has the lowest number of cases at 301 per 100k.



Source: HMG / PHE Coronavirus in the UK data

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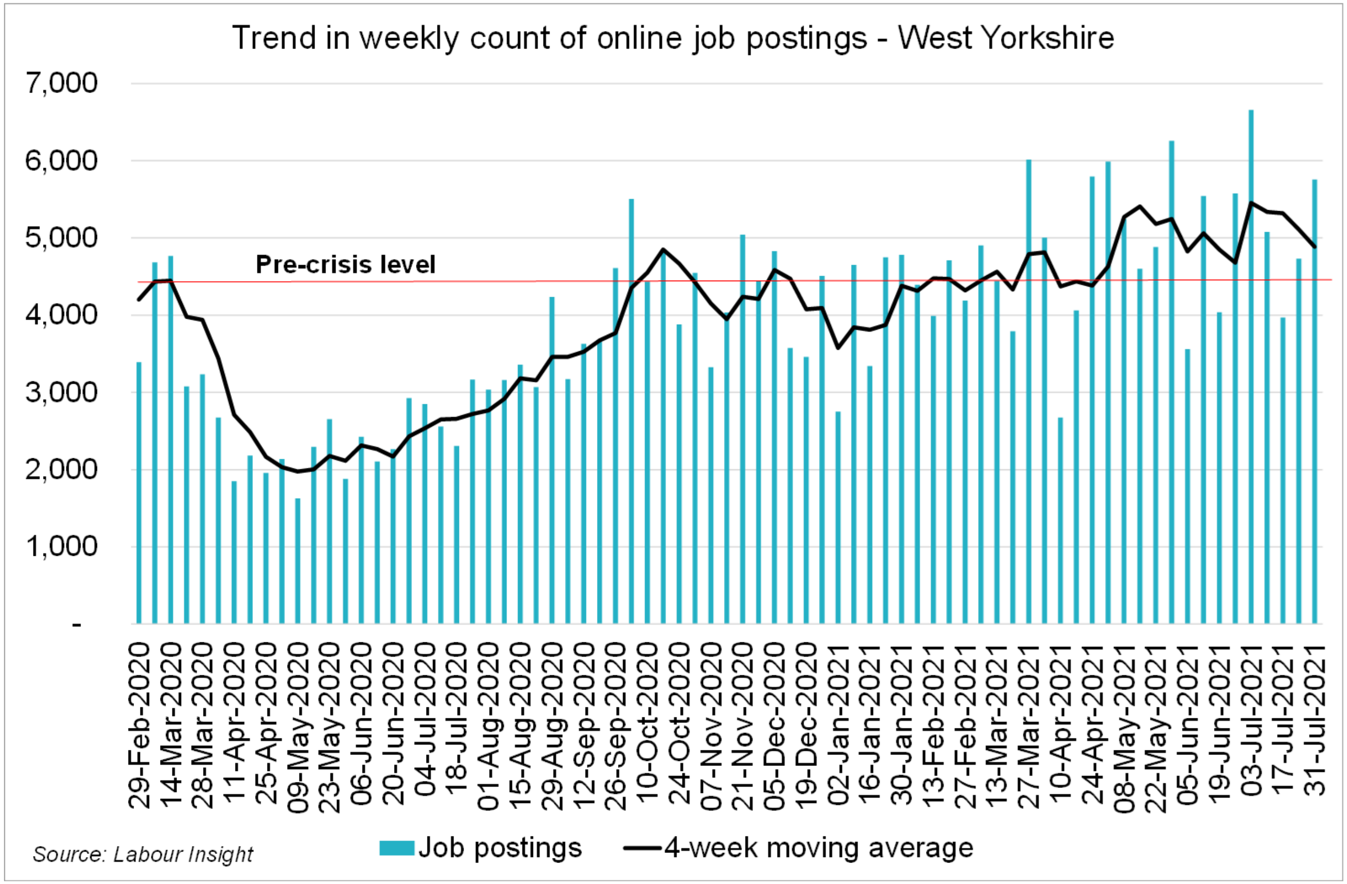
Economic Insights

Big rise in vacancy count across West Yorkshire

The number of vacancies for jobs in West Yorkshire posted online during week ending 31 July fell slightly by 4% compared with the previous week, based on a 4-week moving average (national average decline: -7%). In spite of the volatility in weekly figures the moving average has remained above the pre-crisis level for 14 weeks, with around 5,000 vacancies recorded per week.



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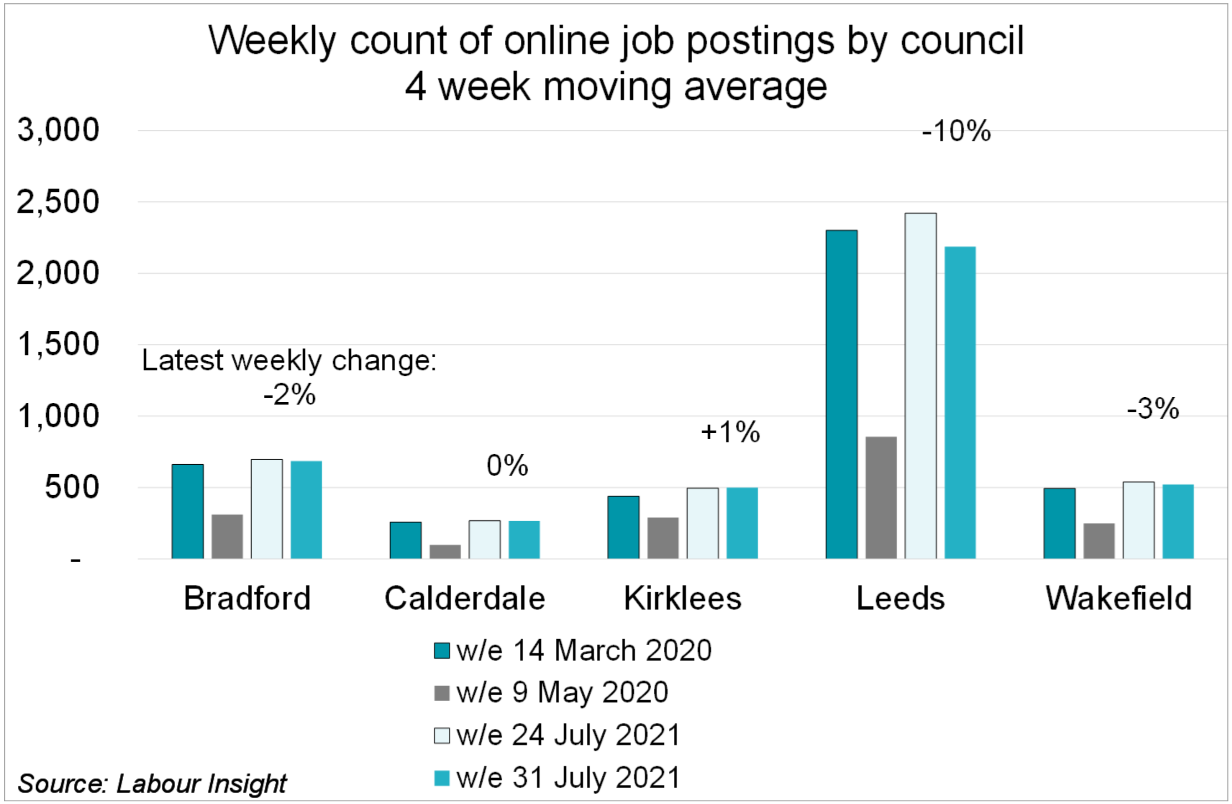
Strong vacancy count increase in Leeds

Four of the five West Yorkshire local authorities saw small changes in their vacancy counts in the current week, ranging from 1% growth in Kirklees to 3% decline in Wakefield. However, Leeds saw a much bigger decline of 10% in the latest week, taking its vacancy count back below its pre-crisis level. In view of the volatility of job posting figures this is likely to be a temporary blip.



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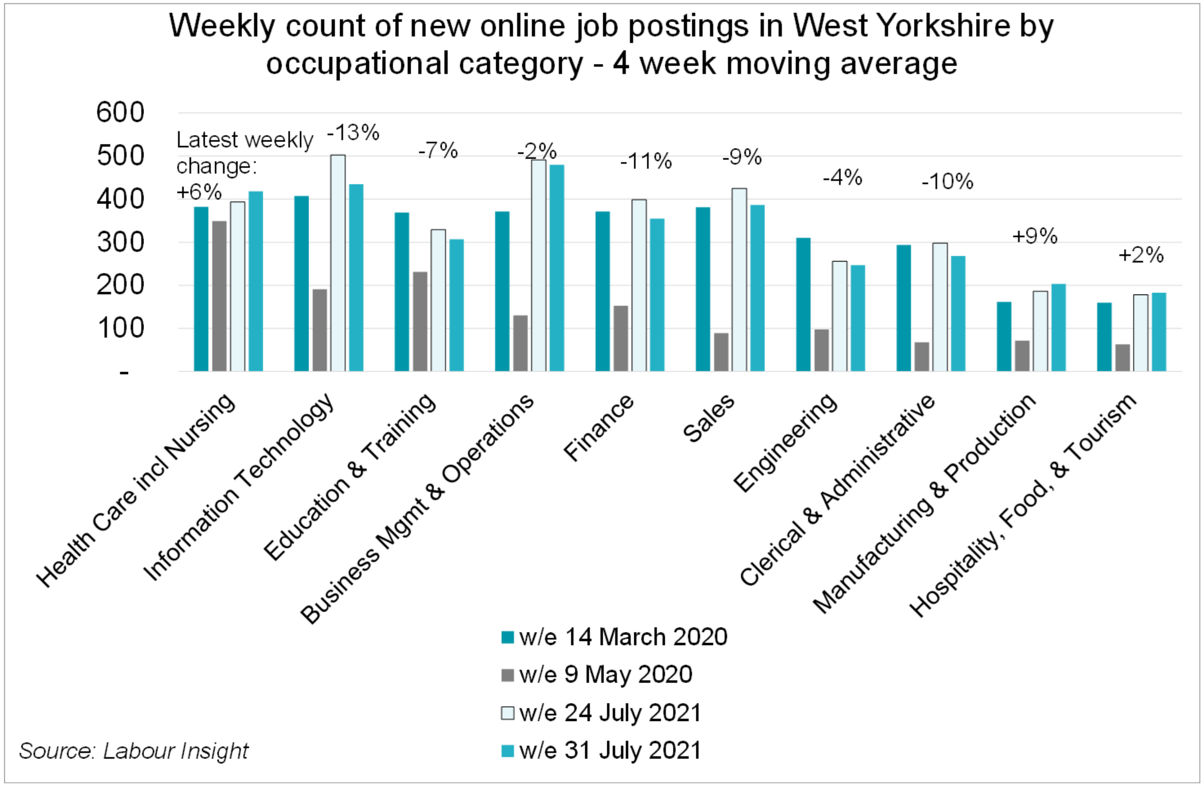
Vacancy count in Healthcare, Manufacturing and Hospitality sector.

The volatile picture seen for local authorities also extends to occupations, with some categories seeing growth, including Health care, Manufacturing and Hospitality, food and tourism while others seeing declines, including Information technology, Finance, Sales and Clerical and administrative. Some categories are currently underperforming relative to their pre-crisis level, including Engineering, Clerical and administrative and Education and training.



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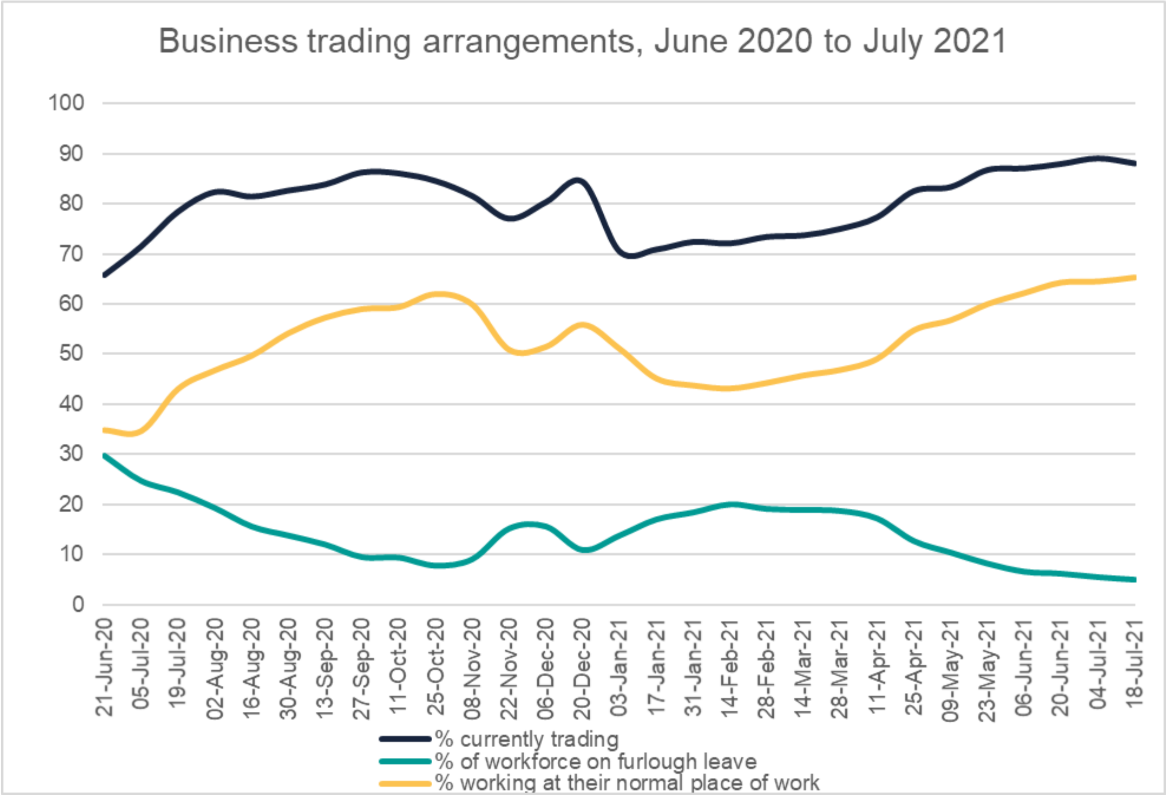
Furlough use continues to fall, but return to work levels off

88.1% of businesses were trading in the fortnight to July 25th, according to the ONS Business Insights and Conditions Survey (BICS). This is down from the previous high of 89% a fortnight earlier. Furlough use is continuing to fall, down to 4.9% from 6.1%. The return to work appears to have stalled prior to the final easing of restrictions, with the proportion in their usual workplace unchanged at 65%.



**Source: ONS Business Insights and Conditions Survey*

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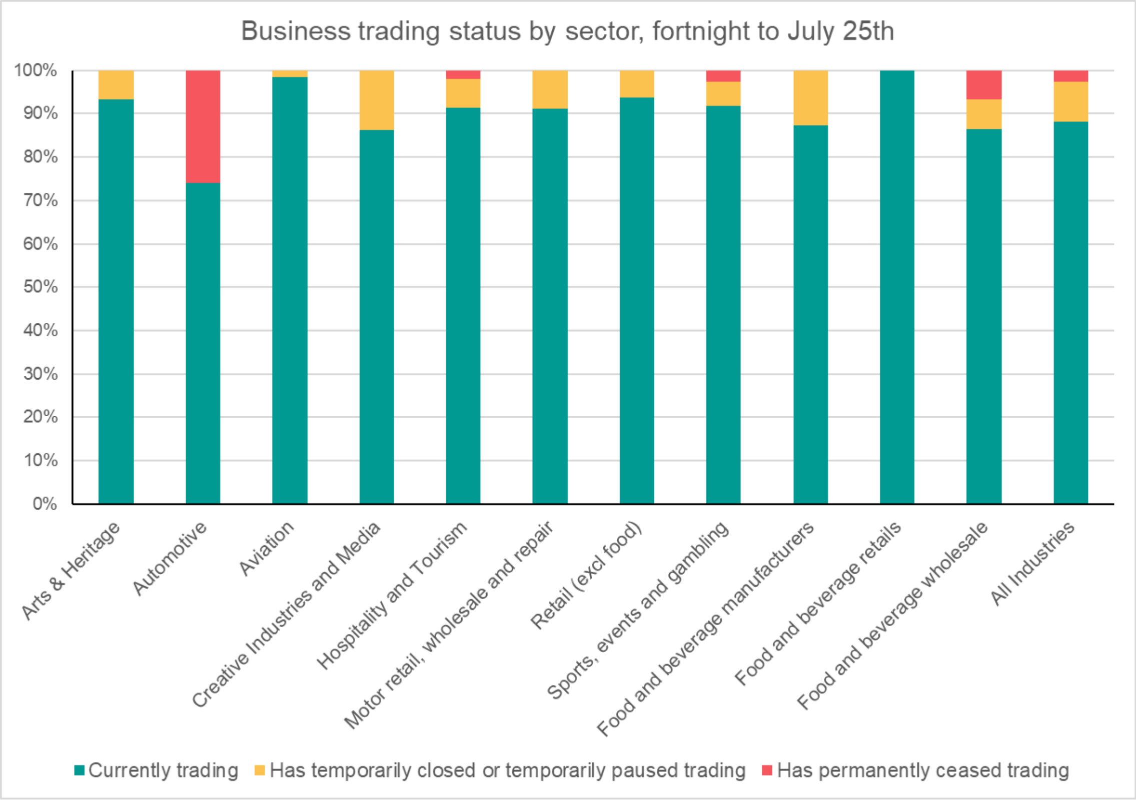
Consumer facing sectors no longer more likely to be closed

Sectors which have been most affected by closures during lockdowns have now largely reopened. With 99% of Food & beverage retail companies opened as well as 93% of Arts & Heritage companies. As well as 100% of consumer goods companies are currently trading. Not all sectors have been able to recover so quickly form the pandemic, with 14% of Creative industries and media companies still temporarily closed. The majority of sectors have not seen any permeant business closures in the last fortnight, with the highest percentage of closures being in the automotive sector at 26%, but the second highest being in the food & beverage wholesale at 6%.



Source: ONS Business Insights and Conditions Survey

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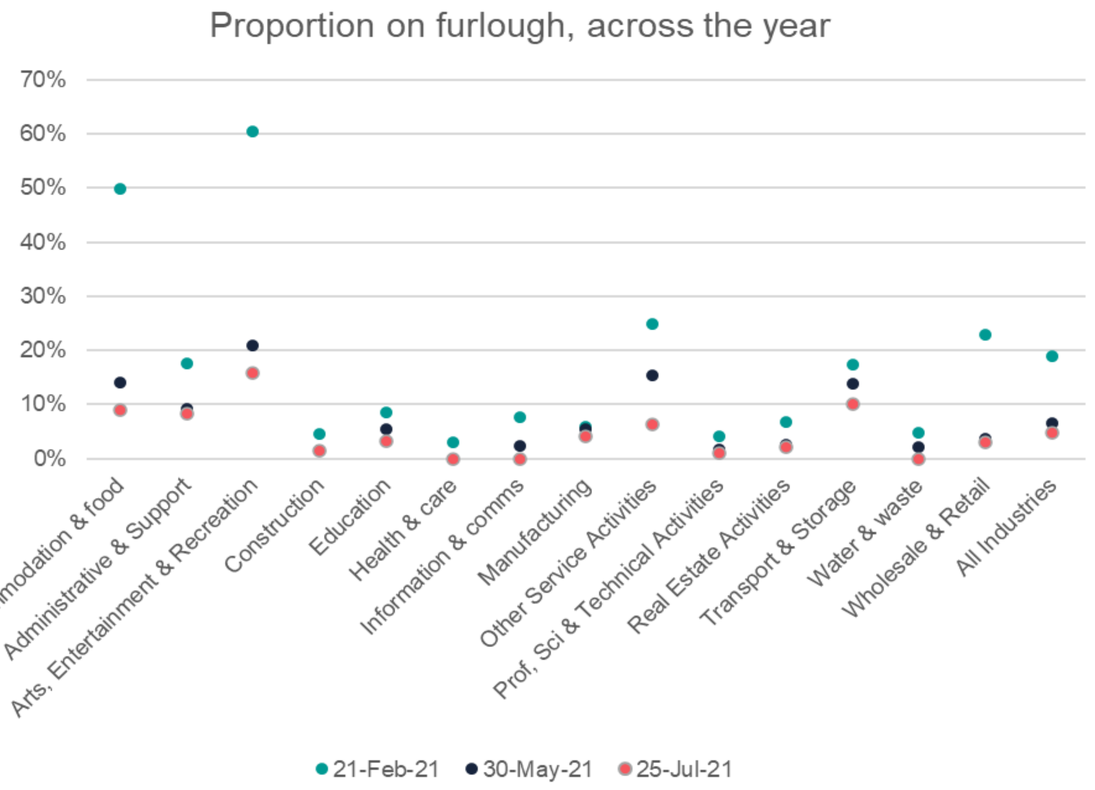
The number of those in furlough continues to drop across all sectors.

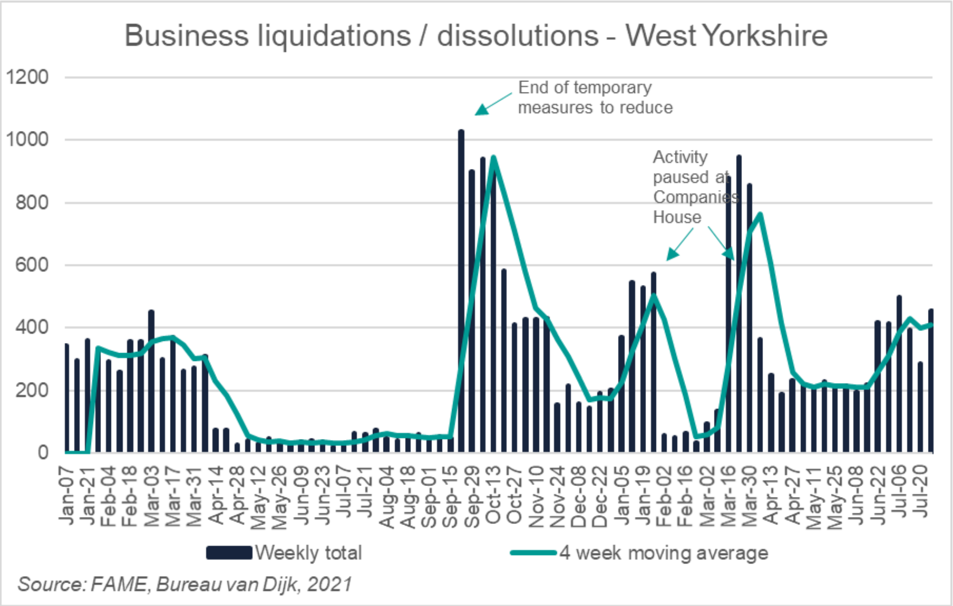
The accommodation & food and the arts, entertainment & recreation sector which have utilised the furlough scheme the most earlier in the year, have seen the use of furlough drop down to be more inline with other sectors. While the Arts, entertainment & recreation sector currently has the highest proportion on furlough at 15.8%. The proportion on furlough across most other sectors have not changed a great deal over the course of the year. Transports & Storage sector currently has the second highest proportion on furlough dropping from 17% in February to 10% in July.

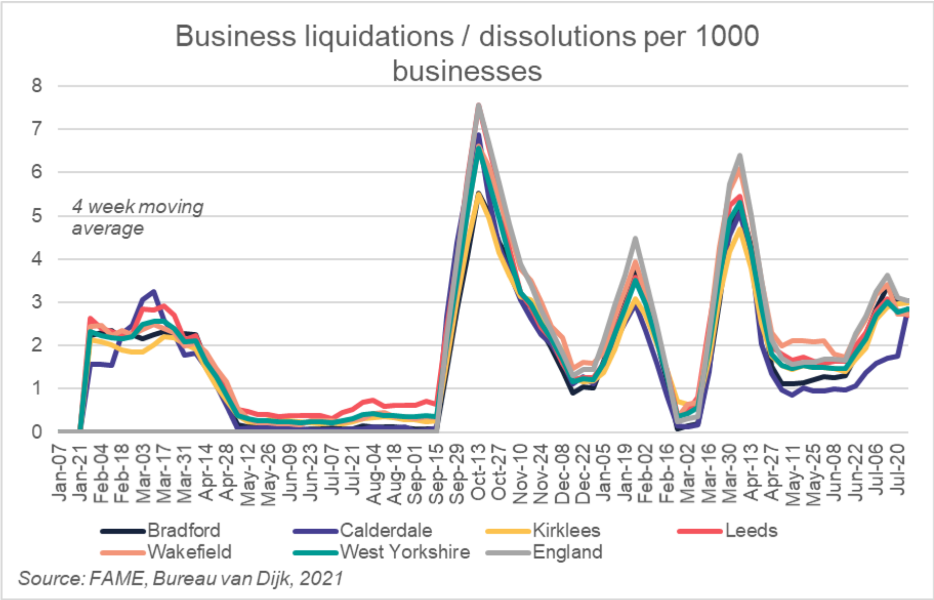


**Source: ONS Business Insights and Conditions Survey*

Business liquidations have plateaued in recent weeks

There were 409 business liquidations in West Yorkshire up to the week ending 27th July, based on a four week moving average, according to data from Bureau van Dijk's Fame database. Representing a downward trend from the previous recent peak of 432 on the week ending 13th July. Nationally liquidations dropped slightly from previous week from 13,631 to 13,250. Liquidations are continuing being 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 62% in Calderdale – other LA in West Yorkshire has had the number of liquidations plateaued.





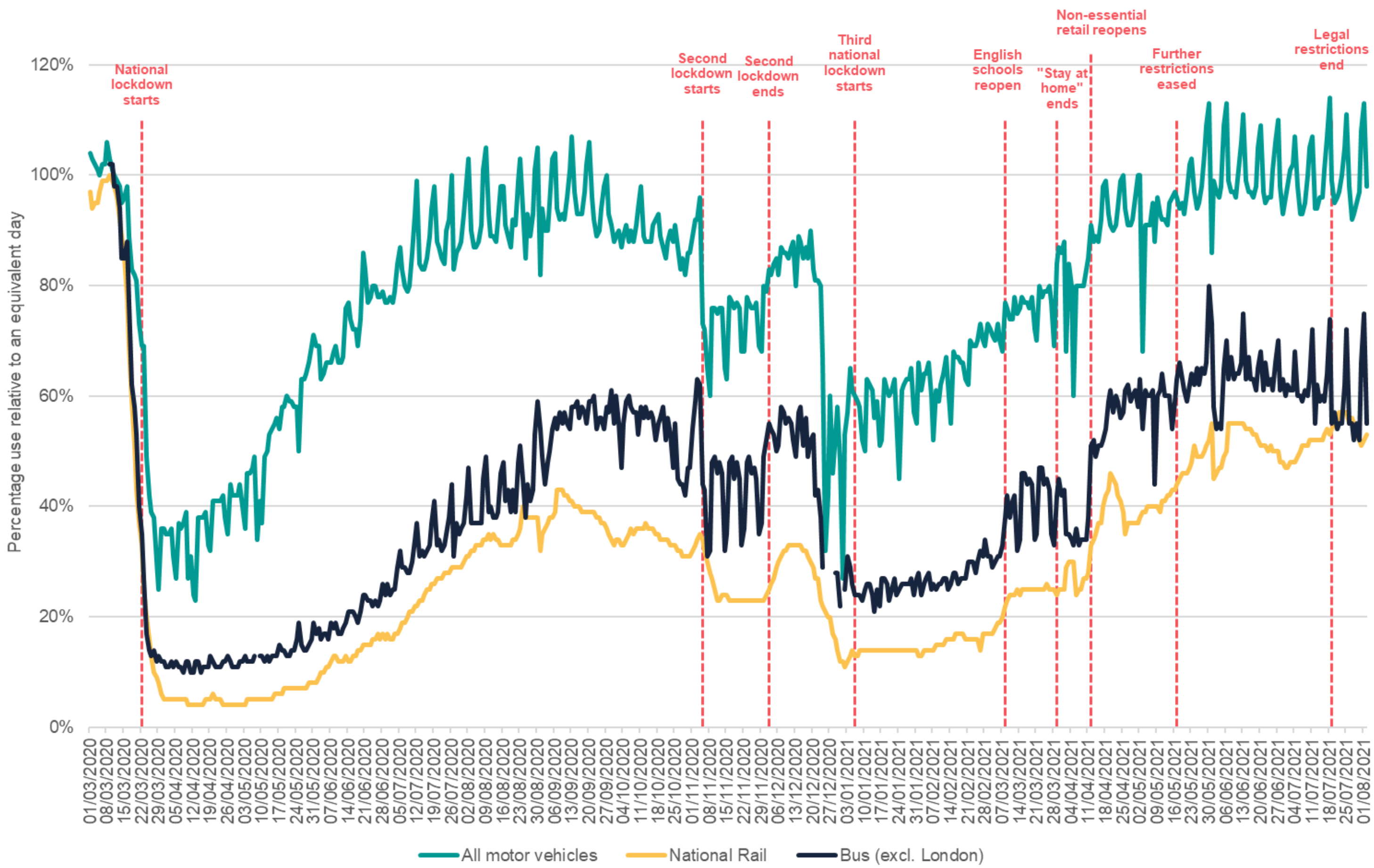
**Source: FAME, Bureau van Dijk, 2021. Analysis based on company registration address, location of activity may differ in some cases*

Transport Insights

Weekend usage peaks seen nationally, rail at the same level as weekday bus

Motor vehicle use has remained mostly stable in recent weeks, with weekday values near baseline levels and weekend peaks. Bus use continues to show weekday declines into the summer holidays, with weekend spikes. Rail use continued an increase through the ending of legal restrictions before declining again, although the most recent seven days of rail data are subject to revision. Similar trends occur locally.

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



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

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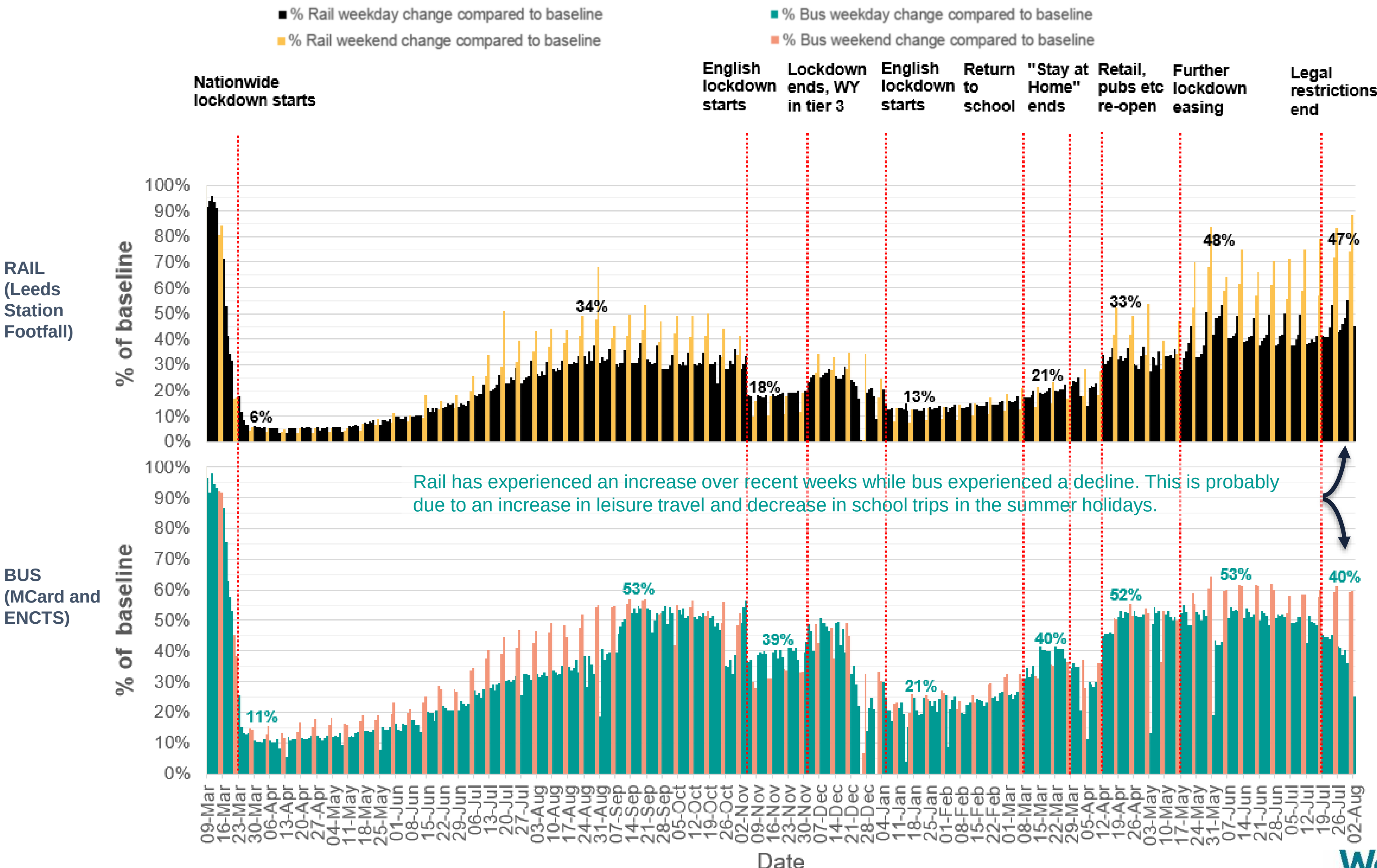
Rail proxy increases while bus proxy decreases into summer holidays



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)

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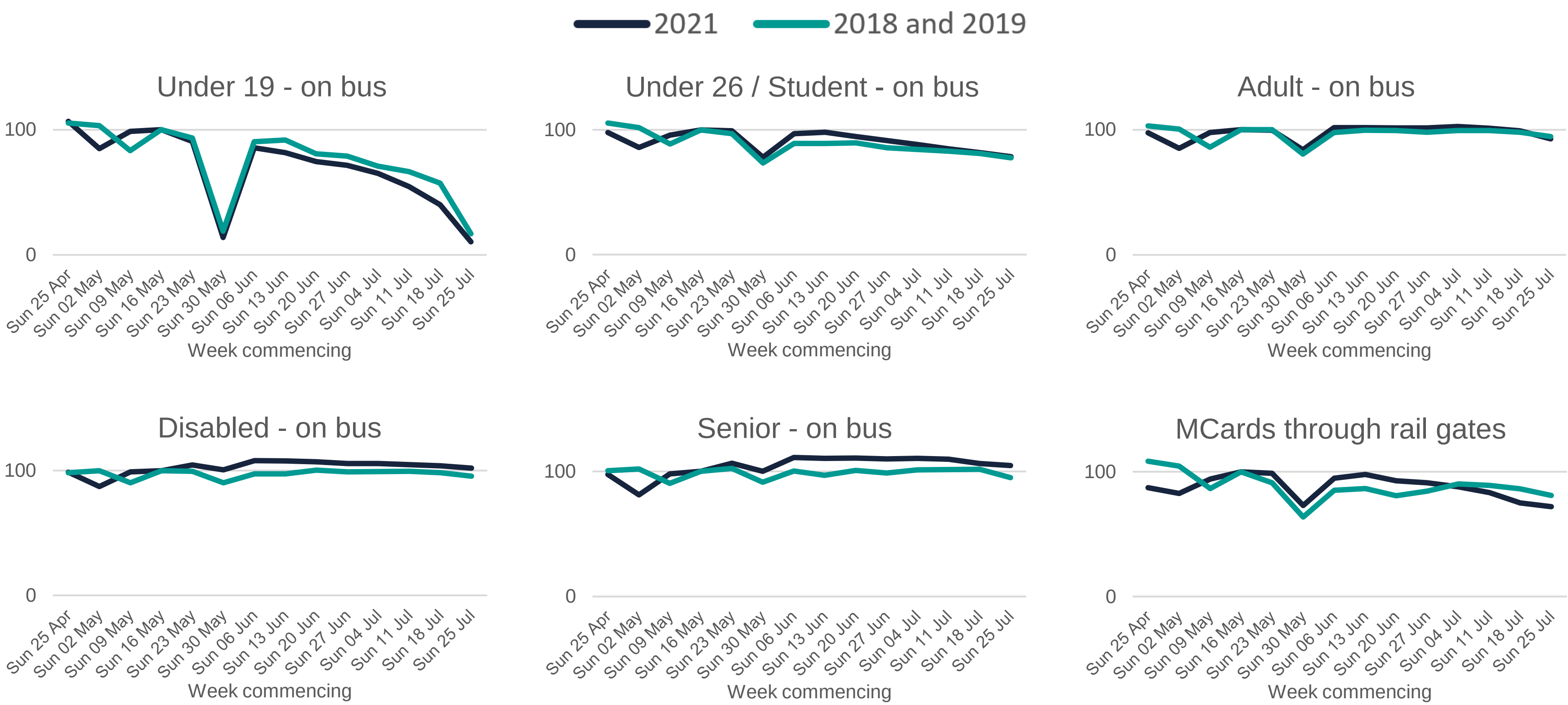
Recent changes in smartcard use on bus appear to be seasonal

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 continues to be largely seasonal. Use by senior and disabled people grew slightly at the beginning of June then shows small fluctuations since. Use of MCards at rail gates suggests a comparative small boost after the easing of restrictions in May, followed by an unseasonal decline though perhaps mirroring seasonality more at the end of July.



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

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Bus use by most cohorts lower than four weeks ago, use by adults relatively stable

Overall weekday use has continued to reduce over recent weeks, dropping to less than 55% of baseline. The week commencing 19 July marked the final easing of social distancing legal restrictions and the final week of school term. The only cohort to show increased use was adults but this was only a recovery to be the same as four weeks ago. The drop in under 19s was a continuation of a clear trend towards the end of term. The drop in Under 26 / Student corresponds with a drop in 2020 when many academic products expired.

Thousand passengers per weekday before COVID

Adult
221,000

Under 19
101,000

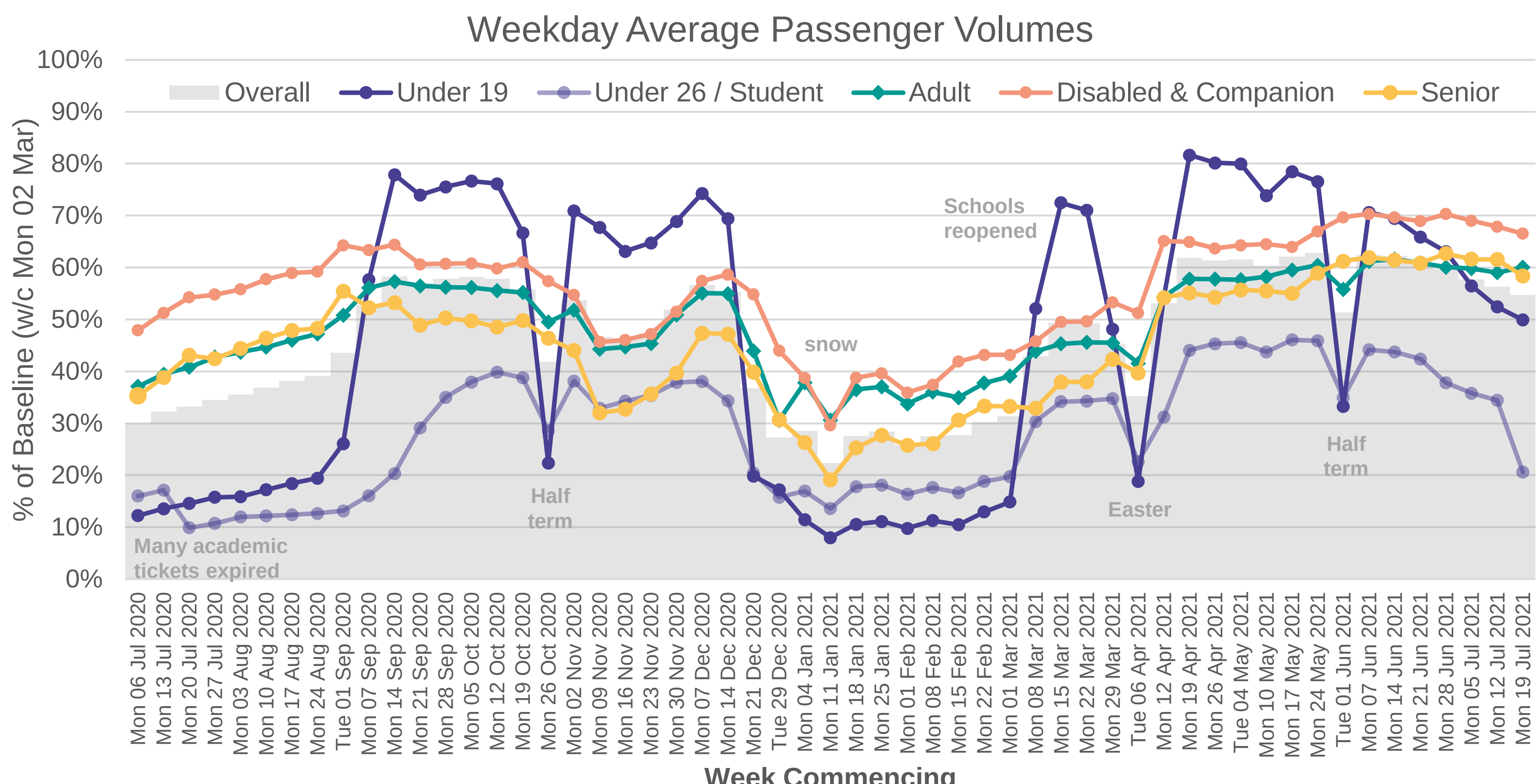
Senior
74,000

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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