West Yorkshire Combined Authority

COVID-19 Fortnightly Insights Report

Research & Intelligence
20th August 2021

Executive Summary – Economic Impact

- The number of vacancies for jobs in West Yorkshire posted online during week ending 14 August increased strongly by 12% compared with the previous week, based on a 4-week moving average. The majority of occupations saw double-digit percentage increases in job postings in week ending 14 August.

- The proportion of businesses seeing reduced turnover has continued to decline slightly in late July, to 28.5% from 29% a fortnight earlier. However, some sectors still report more challenging conditions, particularly the other service and arts & entertainment sectors, where more than half of businesses continue to report lower than normal turnover.

- There were 334 business liquidations in West Yorkshire up to the week ending August 10th, based on a four week moving average, according to data from Bureau van Dijk's Fame database. This represents a 24% fall from the previous four-week period and figures are now broadly in line with early 2020, pre-pandemic levels.

- There was little change in levels of activity in West Yorkshire's main town and city centres in the week to August 12th, according to Geolytix's Retail Recovery Index. Huddersfield continues to exceed its pre-pandemic level of activity at 150% of baseline, with the other four main centres between 58% (Halifax) and 69% (Leeds) of their respective baselines.

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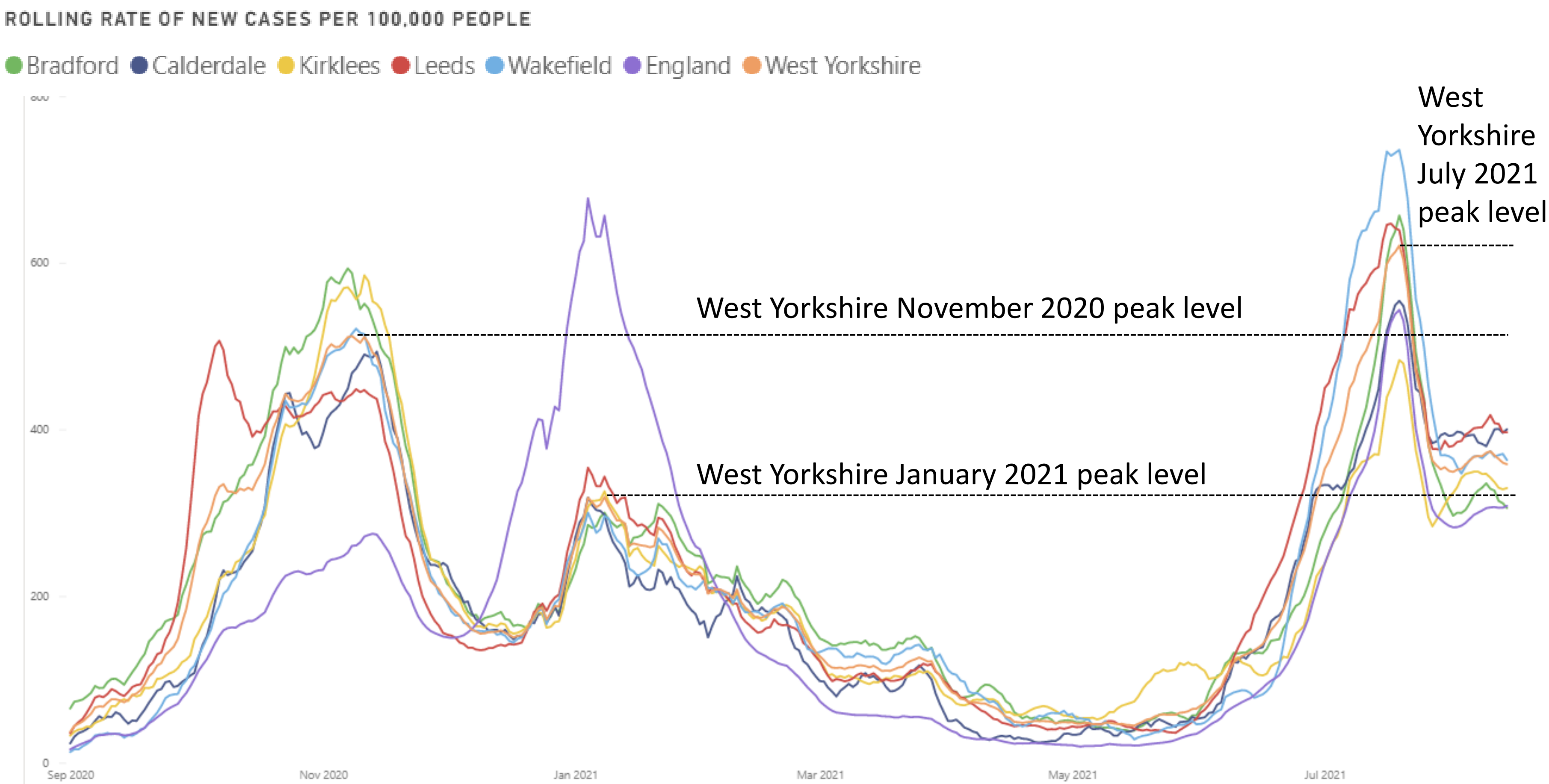
Executive Summary – Transport Impact

- Weekday bus use has declined in recent weeks, both locally and nationally, following the final easing of restrictions and the start of the school summer holiday. Weekend recovery remains consistently stronger than weekdays, and has seen usage levels near 80% of baseline the latest weekend . National rail has experienced a substantial recovery in the last month, with usage levels just below 60% of the baseline.
- Local data suggests that much of the recent decline in smart card uses on buses have 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.
- Local rail use has increased in recent weeks, based on footfall data at Leeds Station. Weekday footfall was around 47% of pre-pandemic levels in the week to 2 August, almost matching the peak of 48% seen in early June. As with bus, weekend use is higher than on weekdays, and these peaks are increasing.
- Data on MCard use through rail gates suggests a recent decline in passengers, likely driven by seasonal factors.
- In July 2021, as cyclists returned to commuting, daily average cycle counts increased by 5% on weekdays, but decreased by 16% on weekends, relative to the same month in 2020.

Virus prevalence – West Yorkshire trend



As of the 14th August 2021, the 7-day moving average **West Yorkshire COVD-19 rate was 358.2 per 100k,** 3% lower than the previous week. In absolute terms there were 8,401 new COVID-19 cases in West Yorkshire in the week to the 14th August. In the same period, the England 7-day moving average case rate increased by 3% to 308.2 per 100k.

Source: HMG / PHE Coronavirus in the UK data. 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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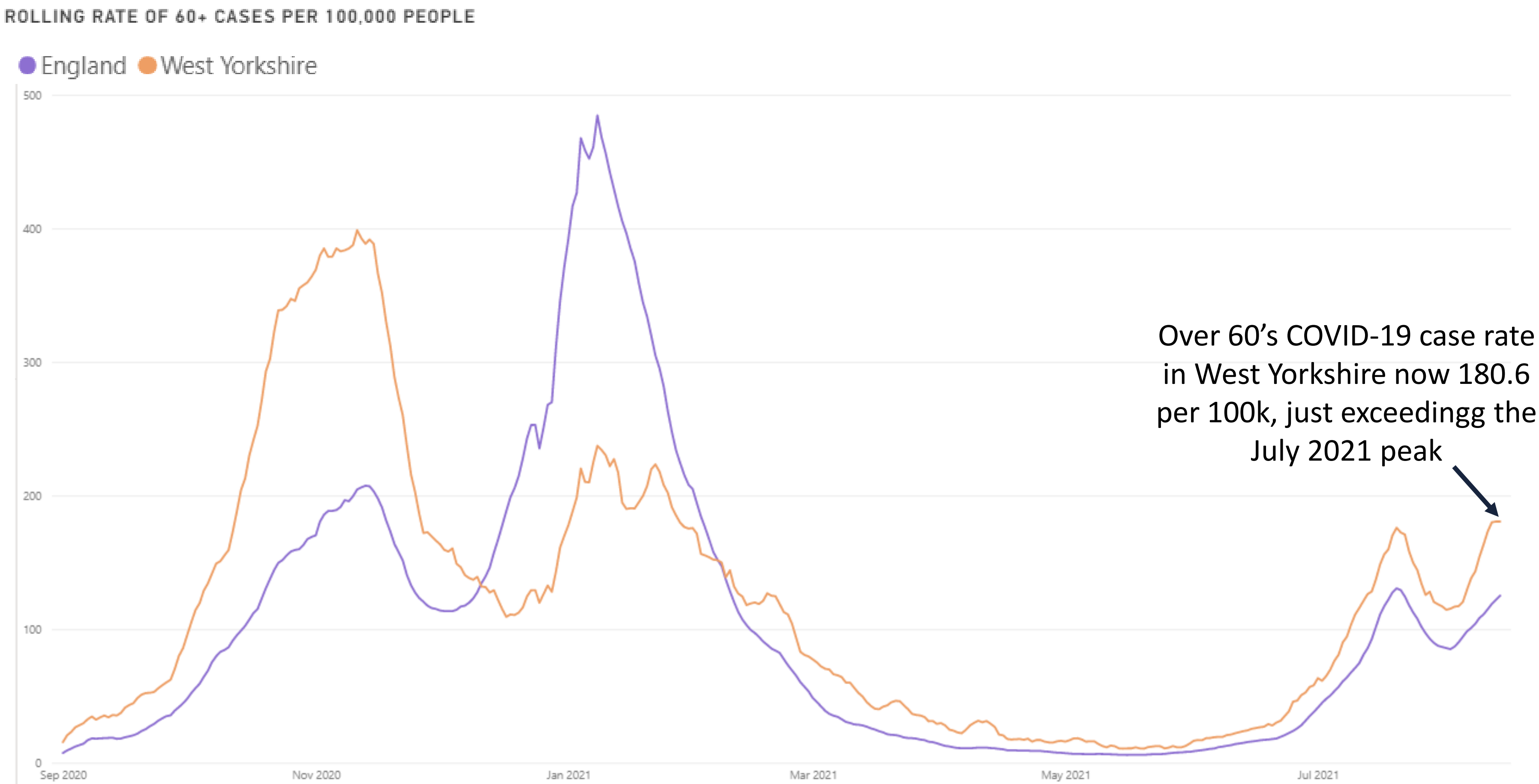
Virus prevalence – over 60s trend



Although the overall case rate in West Yorkshire decreased slightly in the week to the 14th August 2021, the over 60s COVID-19 case rate increased by 31% (24% in England). Case rates in the over 60's group in West Yorkshire have now exceeded the July 2021 peak.

Source: HMG / PHE Coronavirus in the UK data. 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: 14/08/2021

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	68	305.6	↓ -6	1657	69395	12801	1130	208
Calderdale	11	400.1	↑ 4	846	22704	10738	326	154
Kirklees	47	329.5	↓ -6	1454	49406	11196	833	189
Leeds	13	396.5	↓ -1	3167	98412	12320	1390	174
Wakefield	30	363.2	↓ -1	1277	40843	11617	803	228
West Yorkshire		358.2	↓ -3	8401	280760	12101	4482	193
England		308.2	↑ 3	174303	5579087	9866	115390	204

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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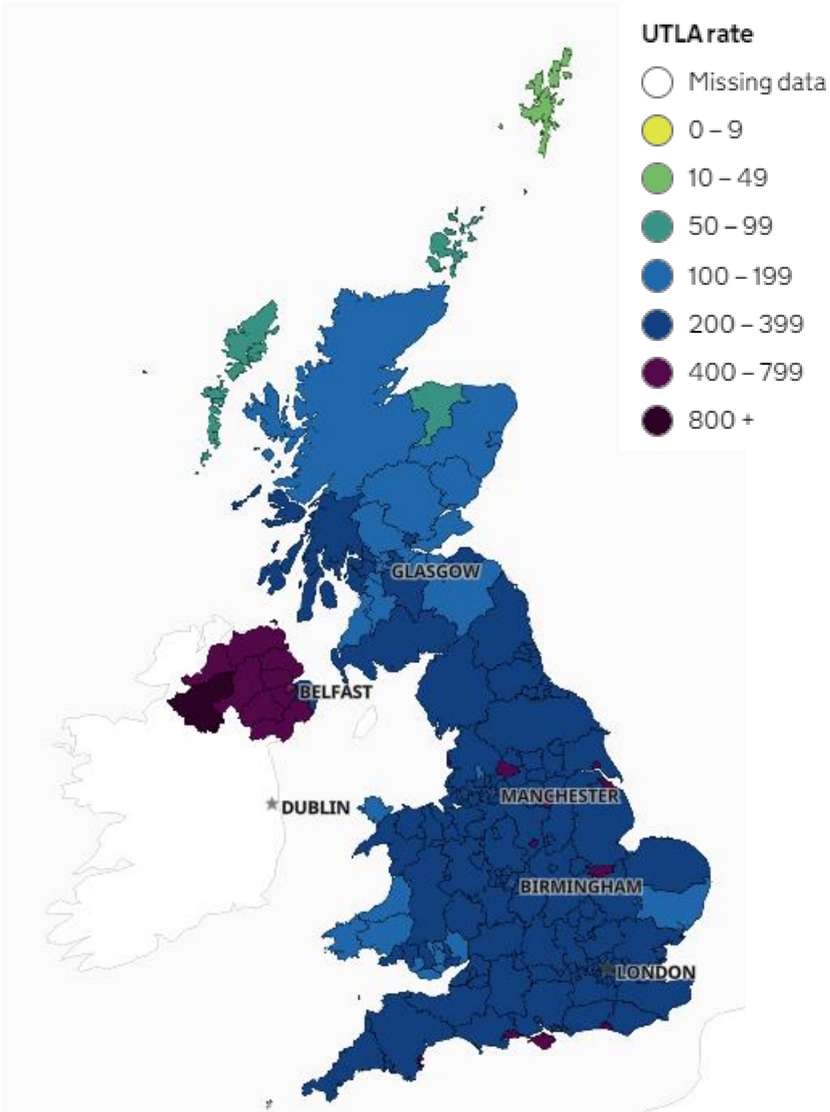
National COVID-19 Rates Map – 7 day rolling rate



The map (left) shows the Upper Tier Local Authority (UTLA) 7–day rolling rate of new cases up to **14th August 2021** (available here).

Regionally rates remain highest in Yorkshire and the Humber (368.3 per 100k), 19.5% higher than the England average.

	Case rate per 100,000 population		Case rate per 100,000 population aged 60 years and over	
Area	7-day moving average	7-day change. %	7-day moving average	7-day change. %
East Midlands	347.9	2.1%	134.1	29.7%
East of England	268.1	1.8%	90.3	18.7%
London	278.6	-1.0%	121.7	5.6%
North East	277.7	-4.3%	134	10.2%
North West	303.6	3.1%	144.3	26.1%
South East	284.2	10.6%	96.9	35.9%
South West	348.2	3.7%	107.6	21.7%
West Midlands	308.2	8.4%	127.4	32.6%
Yorkshire and Humber	368.3	-2.6%	172.7	30.3%
England	308.2	2.7%	123.3	24.0%

Highest Lowest

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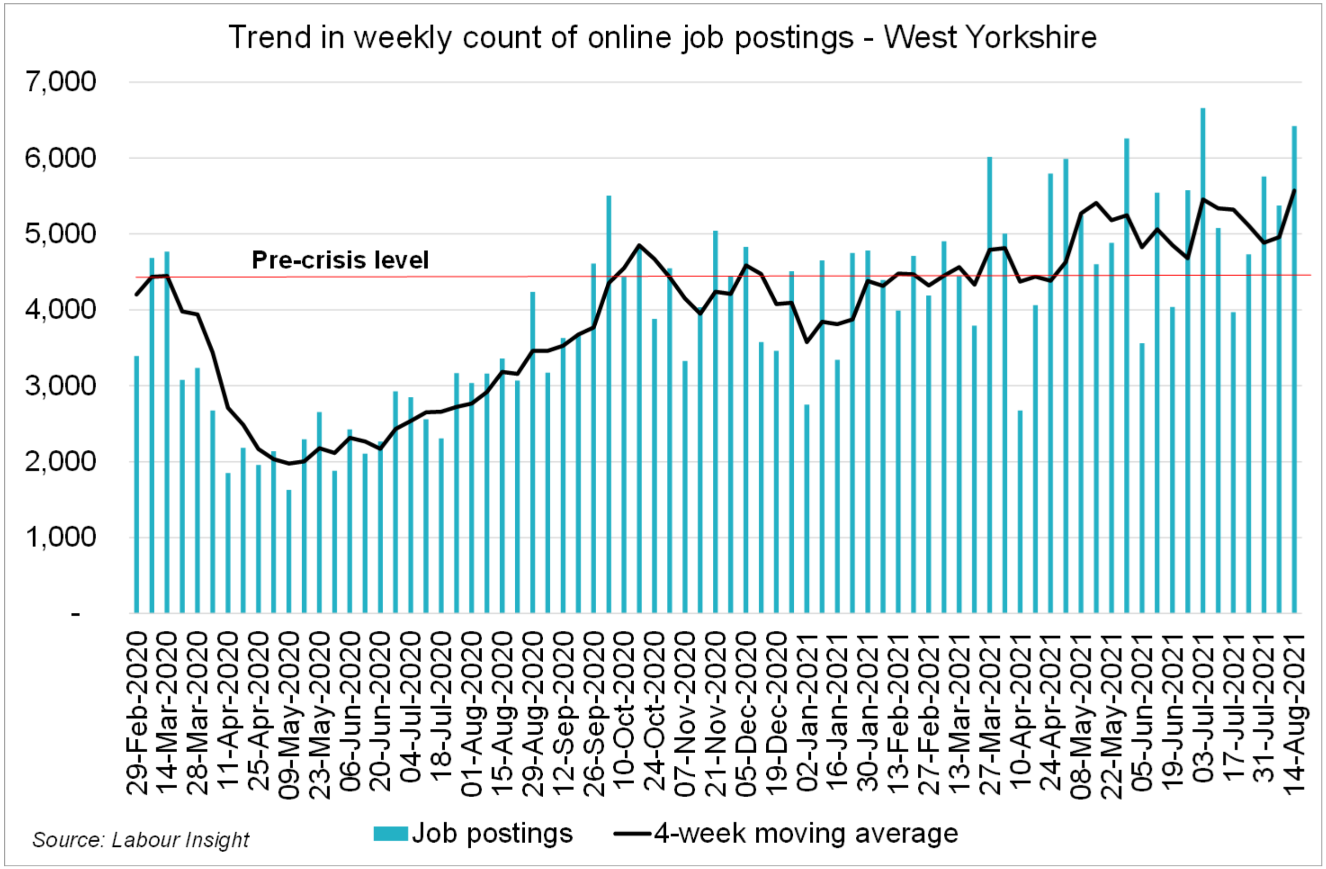
Economic Insights

Continued rise in vacancy count across West Yorkshire

The number of vacancies for jobs in West Yorkshire posted online during week ending 14 August increased strongly by 12% compared with the previous week, based on a 4-week moving average (national average increase 13%). The moving average has now been above the pre-crisis level (March 14 2020) for 16 consecutive weeks.



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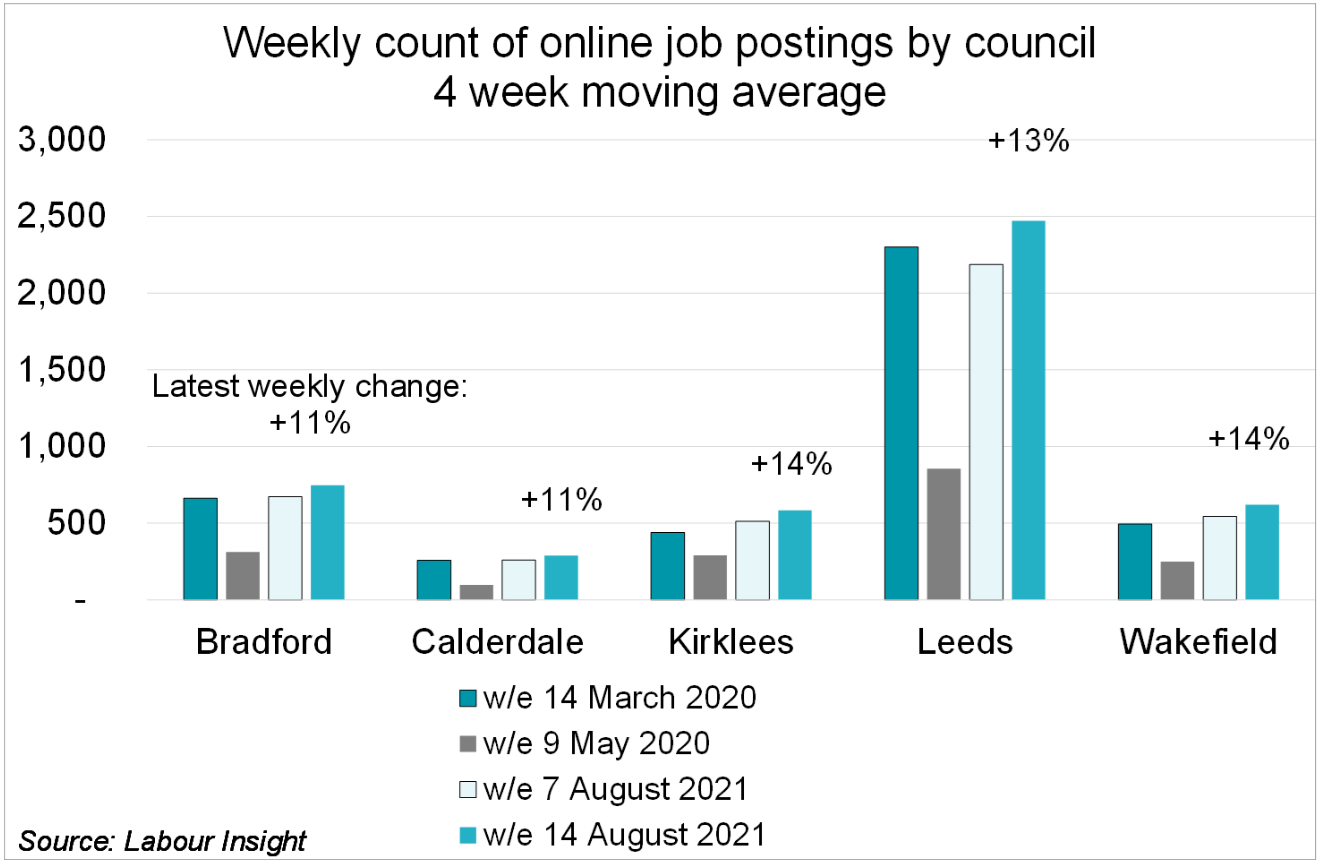
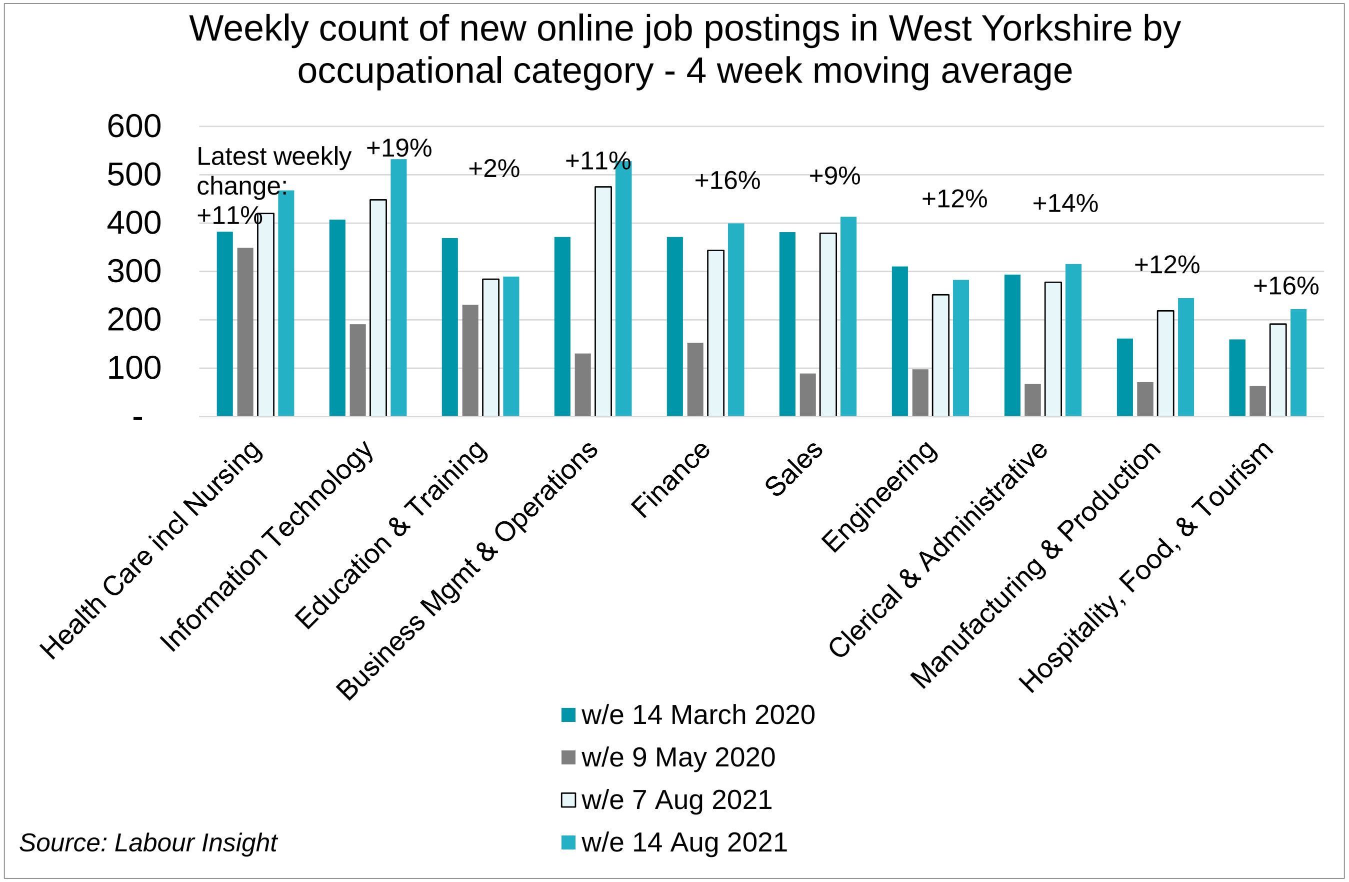
All local authorities shared in strong growth

All five West Yorkshire local authorities registered strong weekly growth in their count of job postings during week ending 14 August.



Significant increases across most occupations

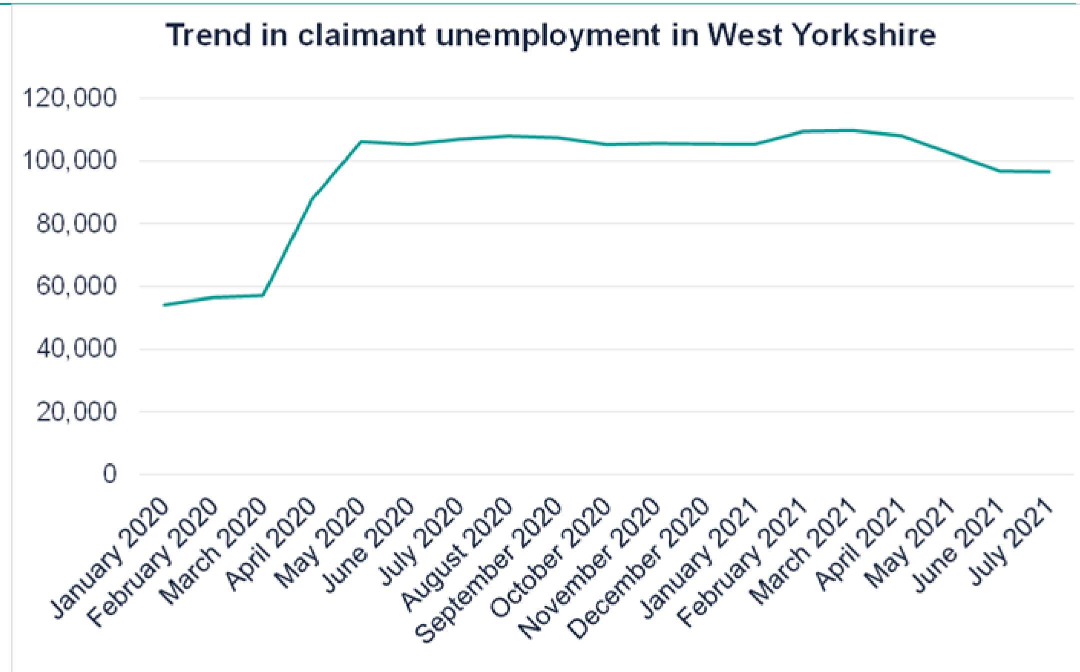
The majority of occupations saw double-digit percentage increases in job postings in week ending 14 August. The biggest increases were for Information technology, Finance, Hospitality, food and tourism, and Clerical and administrative. Engineering and Education and training are the only occupational categories with fewer vacancies in the latest week than in the pre-crisis period.



Claimant count flat after three consecutive months of decline

The latest claimant count figures show that the number of people claiming out-of-work benefits in West Yorkshire remained effectively unchanged between June and July 2021, falling by around 200. All West Yorkshire local authorities saw similarly small monthly changes, whilst nationally the count fell by 1%.

This follows a 12% decline in the count between March and June in West Yorkshire. The region's claimant count remains 71% higher than its pre-crisis level (February 2020). Leeds's count has fallen less quickly and remains 81% higher than in February 2020.



Source: Nomis, ONS

West Yorkshire's claimant rate (claimants as % of working age population) at 6.6% remains higher than the national average (5.5%) but has fallen from its March 2021 peak of 7.5%. Bradford's rate remains particularly high at 8.9% (down from a peak of 9.7%) whilst Wakefield's rate is below the national average (5.2%).

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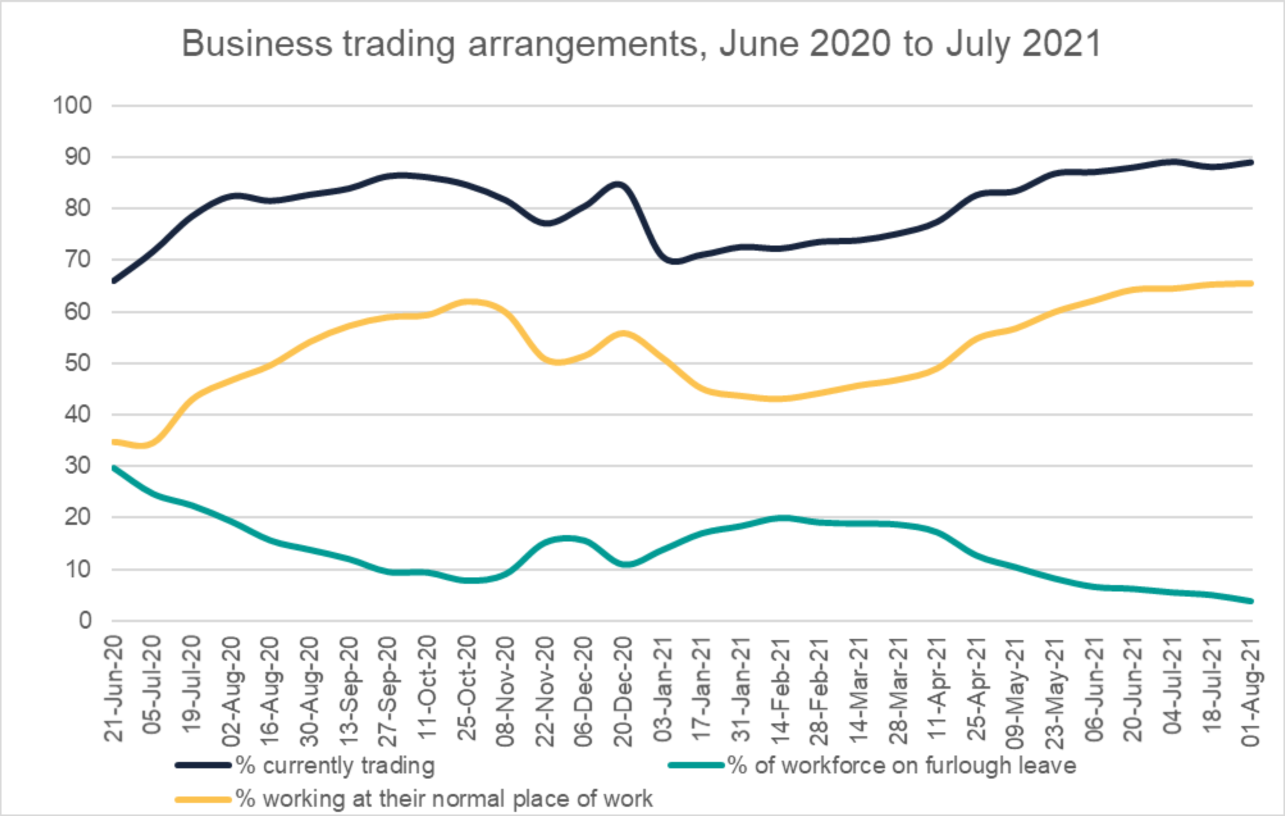
Furlough use continues to fall, but no pick up in return to work as final restrictions lift

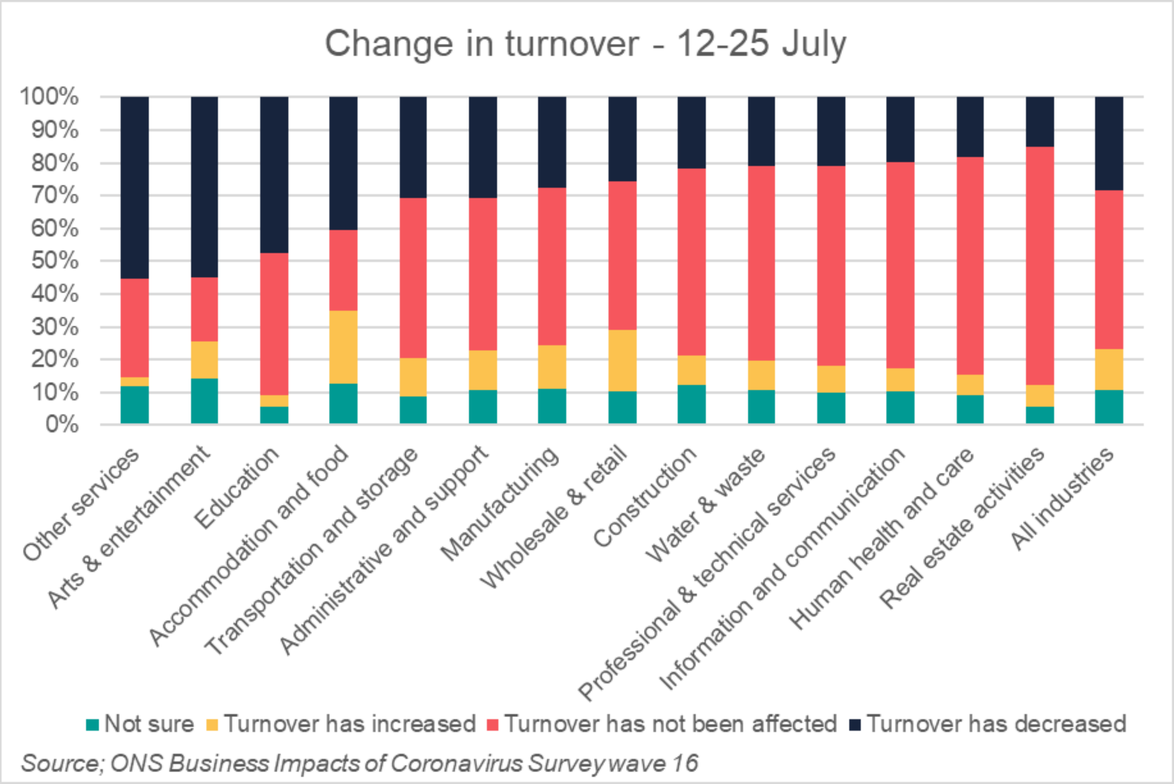
With 89% of businesses nationally continuing to trade, relatively little changed over recent weeks, the level of furlough use continues to fall. 3.7% of workers were furloughed in late July according to the ONS Business Insights and Conditions Survey, down from 4.9% a fortnight earlier. There does not appear to have been a significant shift in working patterns as final restrictions eased however, with 65.4% of workers in their usual workplace in late July, up just 0.1% on a fortnight earlier.



Source: ONS Business Insights and Conditions Survey

Other services and arts & entertainment more likely to report lower turnover

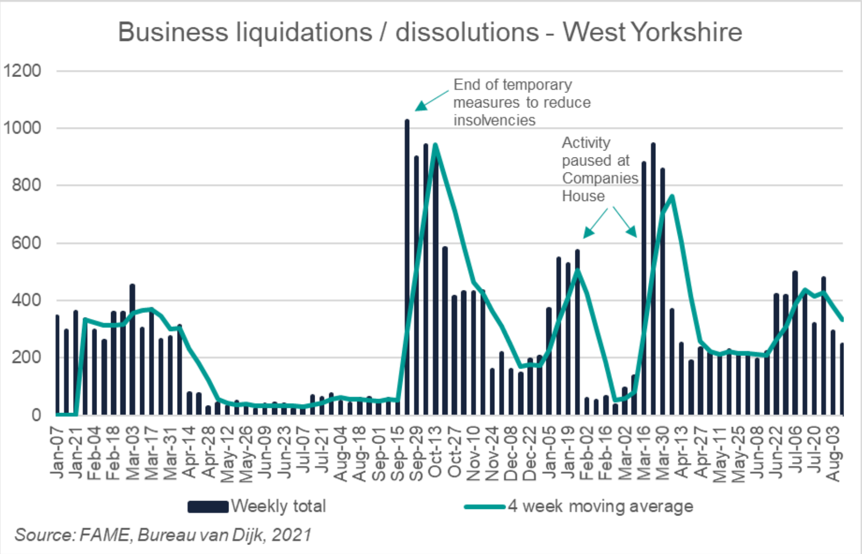
Nationally the proportion of businesses seeing reduced turnover has continued to decline slightly in late July, to 28.5% from 29% a fortnight earlier. However, some sectors still report more challenging conditions, particularly the other service and arts & entertainment sectors, where more than half of businesses continue to report lower than normal turnover. 12.5% of businesses report higher than normal turnover, and this is highest in accommodation & food (22%) and wholesale & retail (18%).

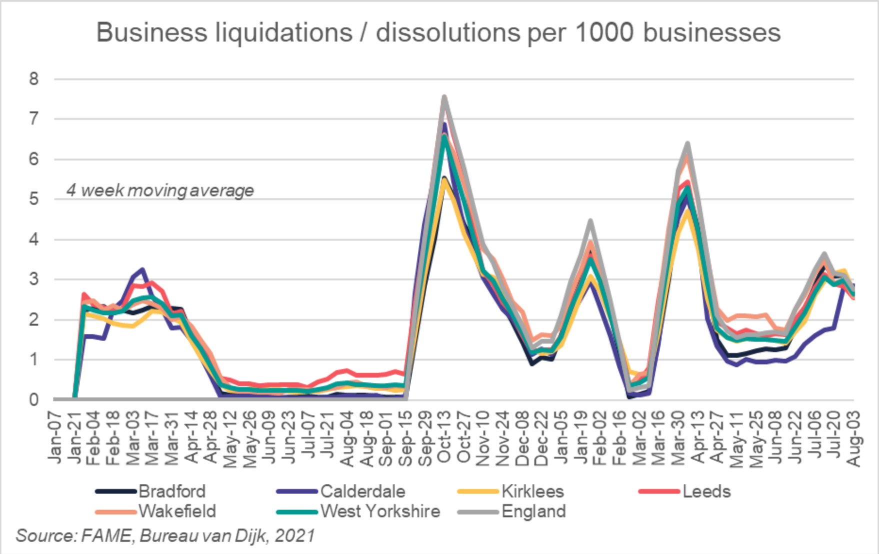


Source: ONS Business Insights and Conditions Survey

Business liquidations falling gradually

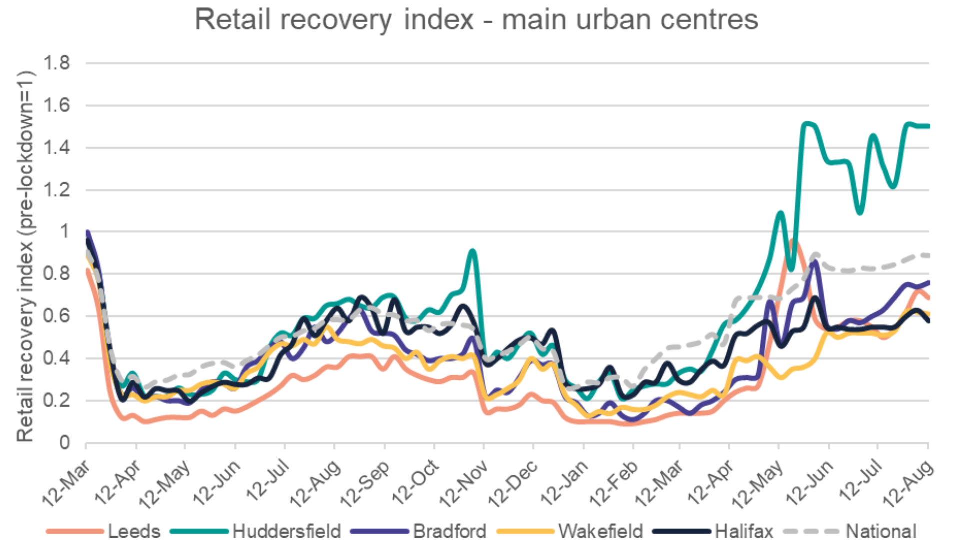
There were 334 business liquidations in West Yorkshire up to the week ending August 10th, based on a four week moving average, according to data from Bureau van Dijk's Fame database. This represents a 24% fall from the previous four-week period and figures are now broadly in line with early 2020, pre-pandemic levels. Nationally liquidations dropped by 32%. Rates have fallen by between 16% (Kirklees) and 36% (Bradford and Wakefield) in most local authorities in West Yorkshire. The exception is Calderdale which saw a 58% increase, largely driven by what appears to be a one off spike in late July.



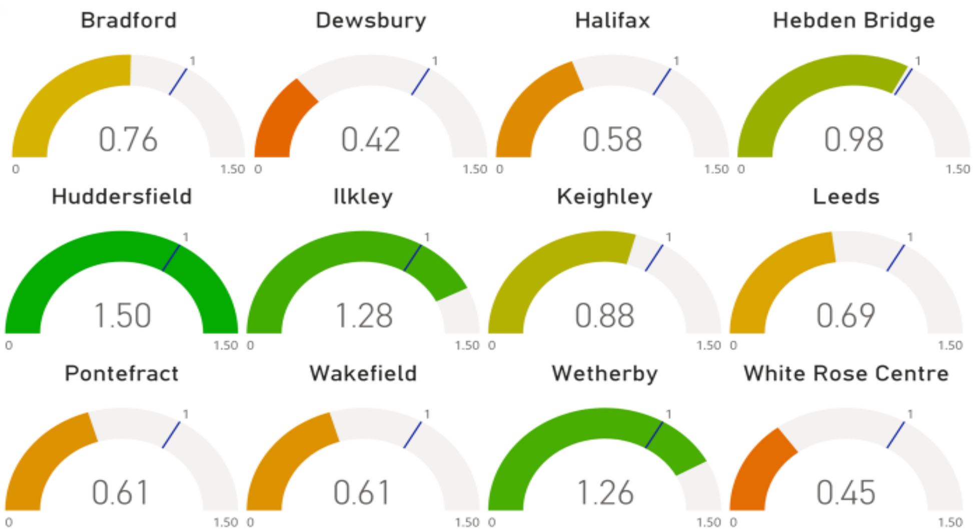


**Source: FAME, Bureau van Dijk, 2021. Analysis based on company registration address, location of activity may differ in some cases*

Footfall stable in most town and city centres



Source: Geolytix Retail Recovery Index, 2021



1=pre-pandemic baseline for each place

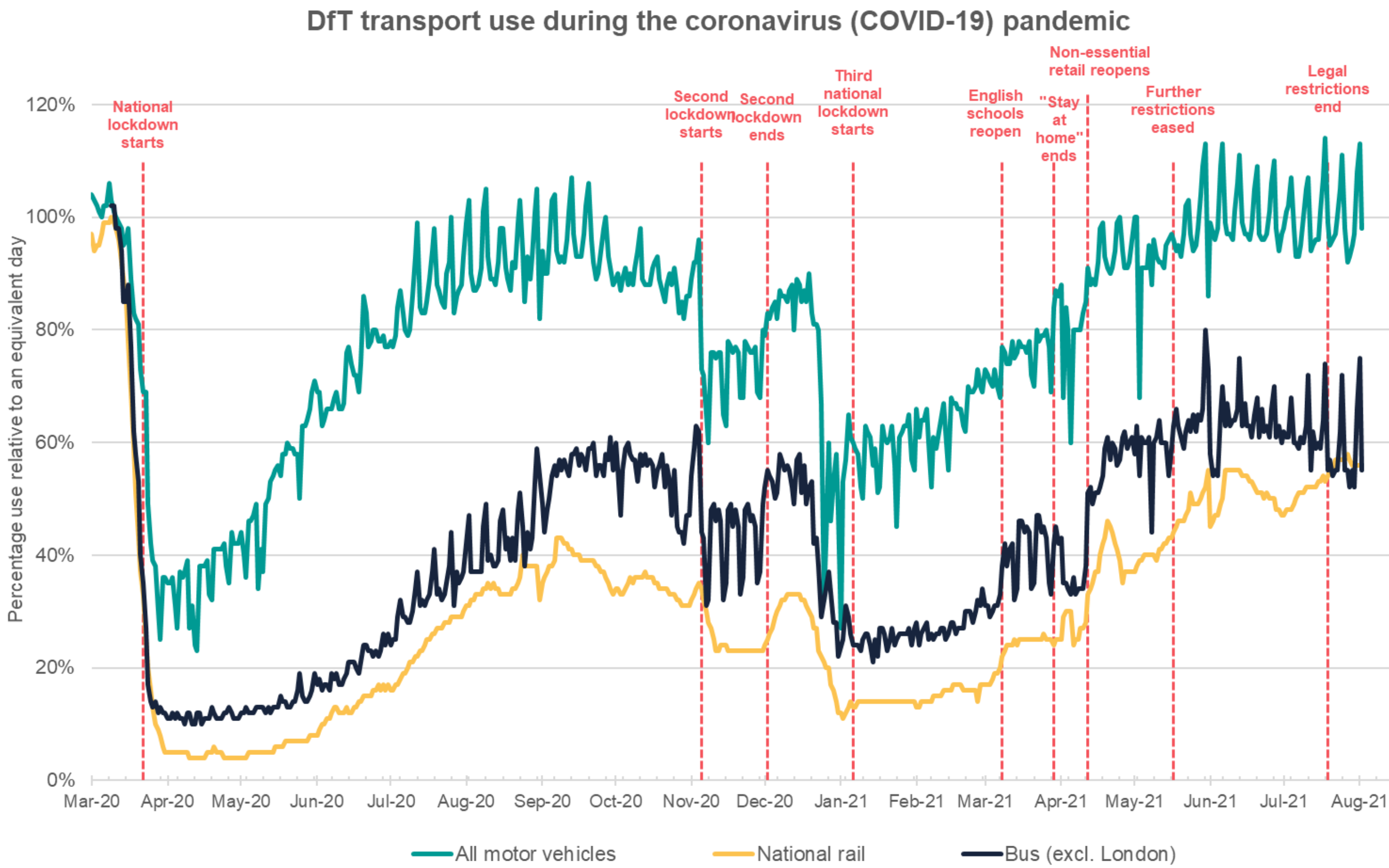
There was little change in levels of activity in West Yorkshire's main town and city centres in the week to August 12th, according to Geolytix's Retail Recovery Index. Huddersfield continues to exceed its pre-pandemic level of activity at 150% of baseline, with the other four main centres between 58% (Halifax) and 69% (Leeds) of their respective baselines.

Among smaller centres, activity is a little over 25% higher than pre-pandemic in Ilkley and Wetherby, with Hebden Bridge also broadly in line with its own baseline. Activity is presently just over 40% of baseline in Dewsbury and at the White Rose Centre.

Transport Insights

Car usage peaks seen nationally, rail levels up with weekday bus usage

Motor vehicle use saw its absolute maximum on the weekend of the 14 August, although weekday values remain stable at levels just below the baseline. Bus weekday usage shows certain decline relative to the previous month, but weekend usage remains relatively stable with values of around 70% of baseline. Unlike road and bus travel, rail usage is not subject to weekend fluctuations. Rail usage has experienced a continuous increase in the last month, and usage now is similar to that of bus, at levels of just under 60%.



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

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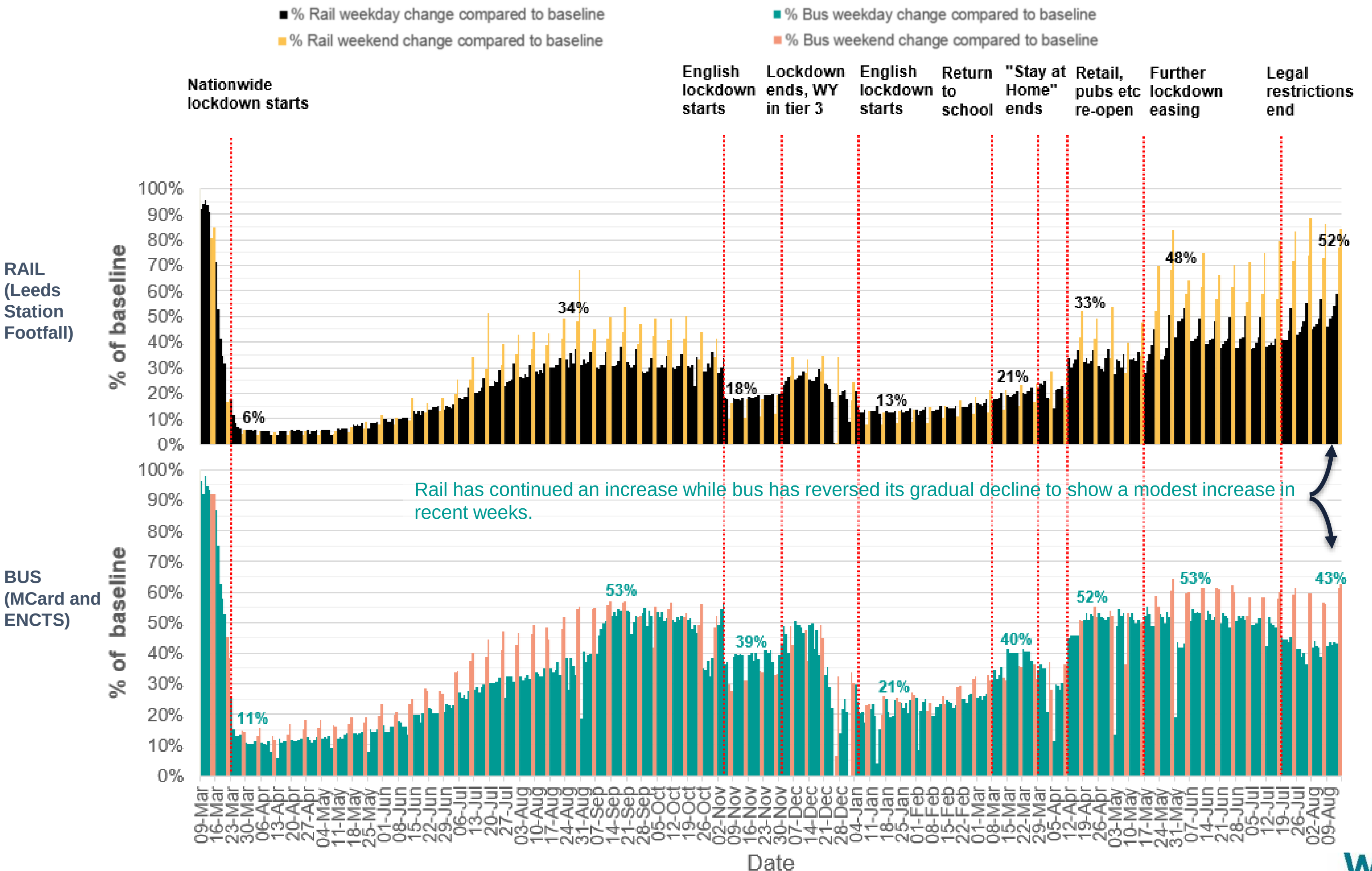
Rail and bus patronage proxies increase over recent weeks



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)

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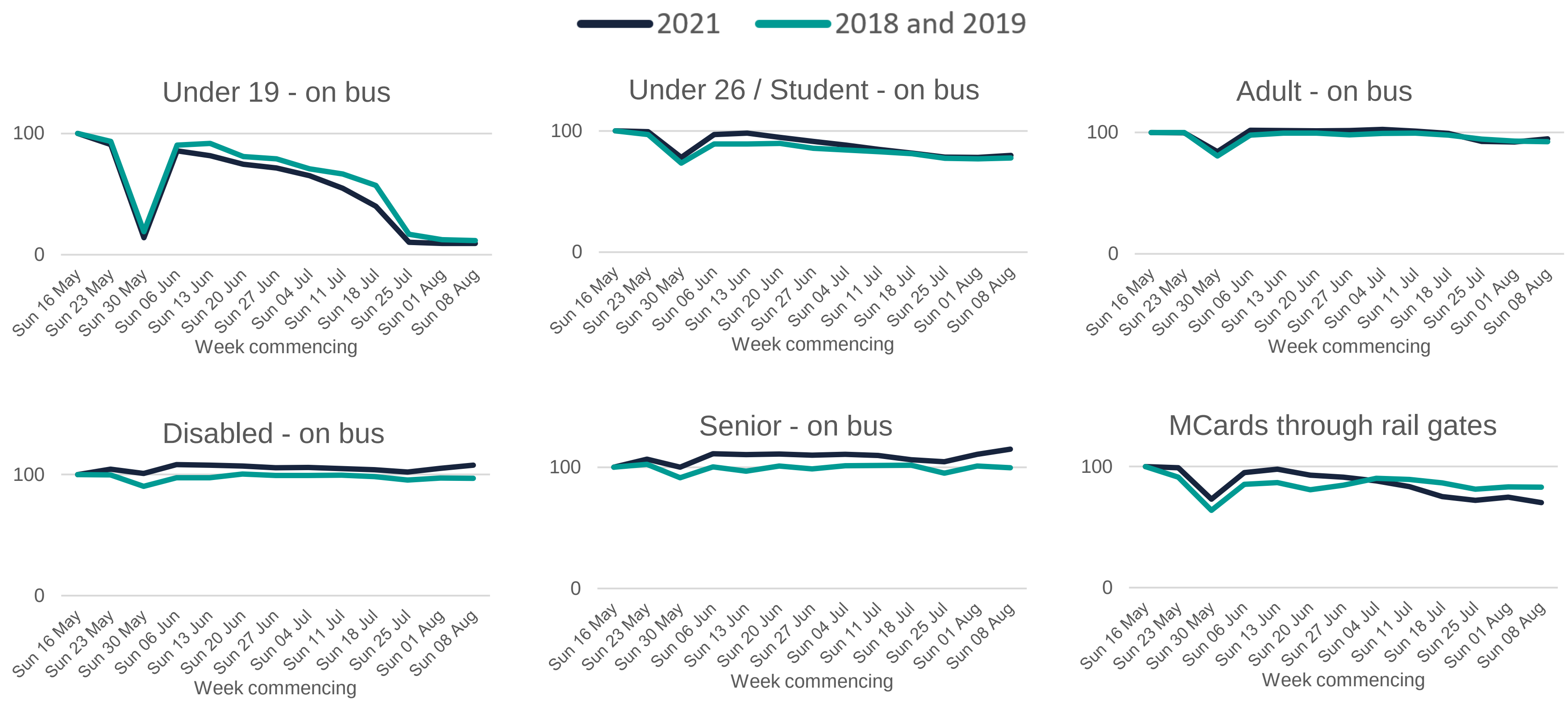
Recent changes in smartcard use on bus appear to be seasonal

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, as are changes in use by adults. Use by senior and disabled people grew slightly to the beginning of June and has fluctuated since then. MCard usage at rail gates suggests a comparative small boost after the easing of restrictions in May, followed by an unseasonal decline.



Source: Nero records of smart card ticket use on buses and at gated rail stations.
Aligned on Spring Bank Holiday week. Indexed on mid-May.

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Bus use by cohorts shows clear impact of academic holidays

Overall weekday use declined to the start of the academic summer holidays. Data up to 10th August shows increased use except for adults. All cohorts showed more usage at the start of August 2021 than at the start of August 2020. This is the first year-on-year comparison of the pandemic period with broadly similar lifting of restrictions.

Thousand passengers per weekday before COVID

Adult
221,000

Under 19
101,000

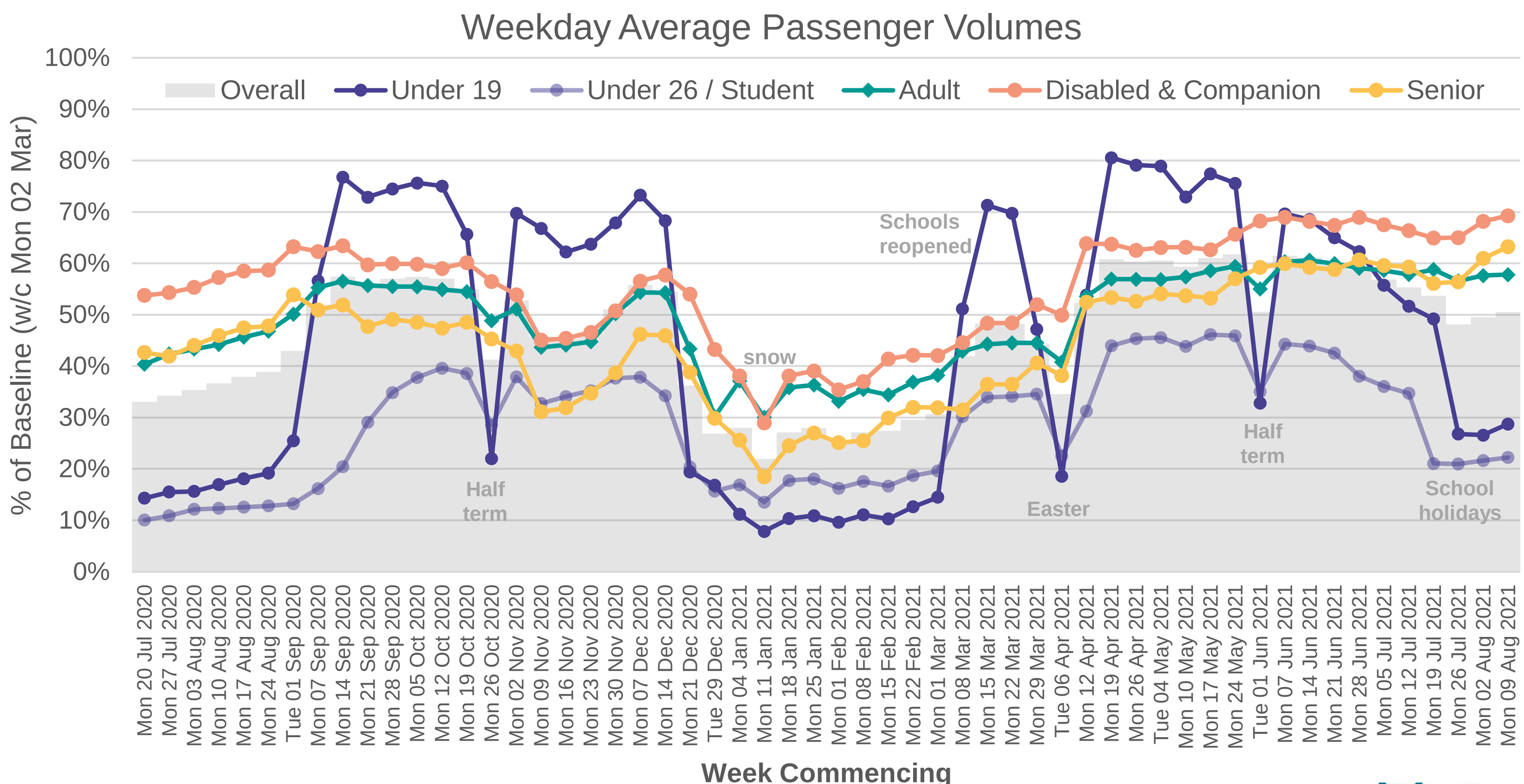
Senior
74,000

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, Transdev and Yorkshire Tiger data. Data is for weekdays excluding bank holidays, with ticket types assigned to broad cohorts.

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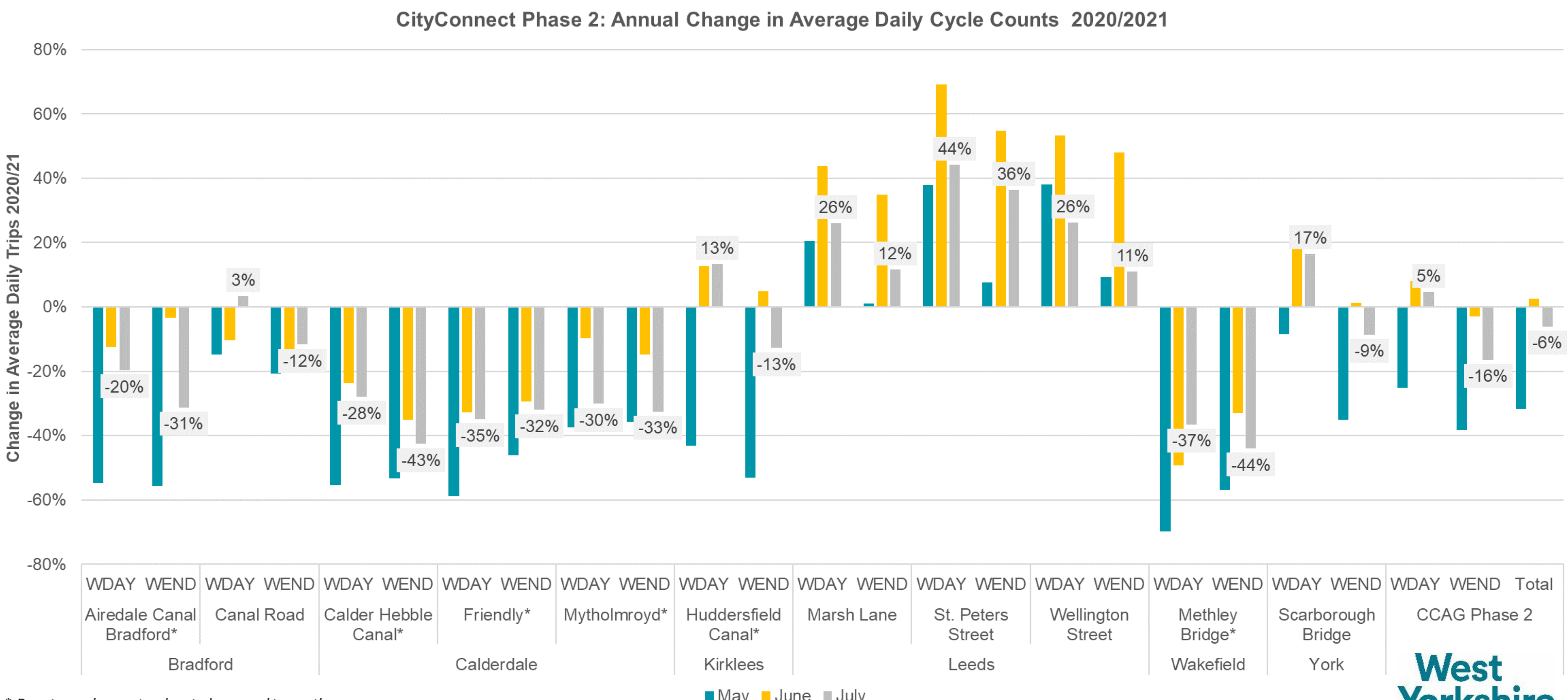
Average daily cycle trips are increasing in city centers as commuters return to work, while leisure trips decrease.

In July 2021 the average number of daily cycle trips recorded on CityConnect cycle counters decreased 6% compared to July 2020, with the biggest decreases observed at weekends, where the average number of daily trips has decreased 16%. Weekday counts have increased at city centre locations such as Leeds compared to 2020 but it should be noted that in the comparator months offices and non-essential business remained closed.



** Denotes cycle counters located on canal towpaths*

Source: WYCA

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