COVID-19 Fortnightly Insights Report

Research & Intelligence
3rd September 2021

Executive Summary – Economic Impact

- The number of vacancies for jobs in West Yorkshire posted online during week ending 28 August remained broadly static compared with the previous week, based on a 4-week moving average (national average position also static). The moving average has now been above the pre-crisis level (March 14 2020) for 18 consecutive weeks and current figure is 39% higher than week ending 17 April.

- In the latest week some occupational categories saw declines in their count of job postings but there were increases for Sales, Clerical and administrative, Finance and Hospitality, food and tourism. Most occupations are currently well above pre-crisis vacancy levels – only Education and Training category is below that level.

- There was little change in levels of activity in West Yorkshire's main town and city centres in the week to August 26th, according to Geolytix's Retail Recovery Index. Huddersfield continues to exceed its pre-pandemic level of activity at 153% of baseline, with the other four main centres between 74% (Bradford) and 68% (Leeds) of their respective baselines.

- There were 283 business liquidations in West Yorkshire up to the week ending August 24th, based on a four-week moving average, according to data from Bureau van Dijk's Fame database. This represents a 25% fall from the previous four-week period and figures are now broadly in line with early 2020, pre-pandemic levels.

West Yorkshire Combined Authority

Executive Summary – Transport Impact

- Motor vehicle use has remained broadly stable over the last few weeks, just below pre-pandemic levels, with relatively more trips at weekends.
- Bus use at the national level has increased in recent weeks and locally, weekday bus use has increased over the school holidays driven by adult, senior and disabled & companion passengers.
- Rail use locally and nationally has increased in the last month with significant fluctuations over the August bank holiday.
- While monthly evening footfall in Leeds City Centre remains lower than the equivalent period in 2019, its higher than in 2020, with month on month increases, reflecting the slow but steady recovery of the night-time economy.
- The number of walking/running trips in over the summer 2021 are still double 2019 levels whilst cycling trip numbers have returned to 2019 baseline
- Although the number of flights at Leeds Bradford Airport rapidly increased as restrictions eased, the number of passengers using the airport in July 2021 was only 14% of equivalent 2019 levels.

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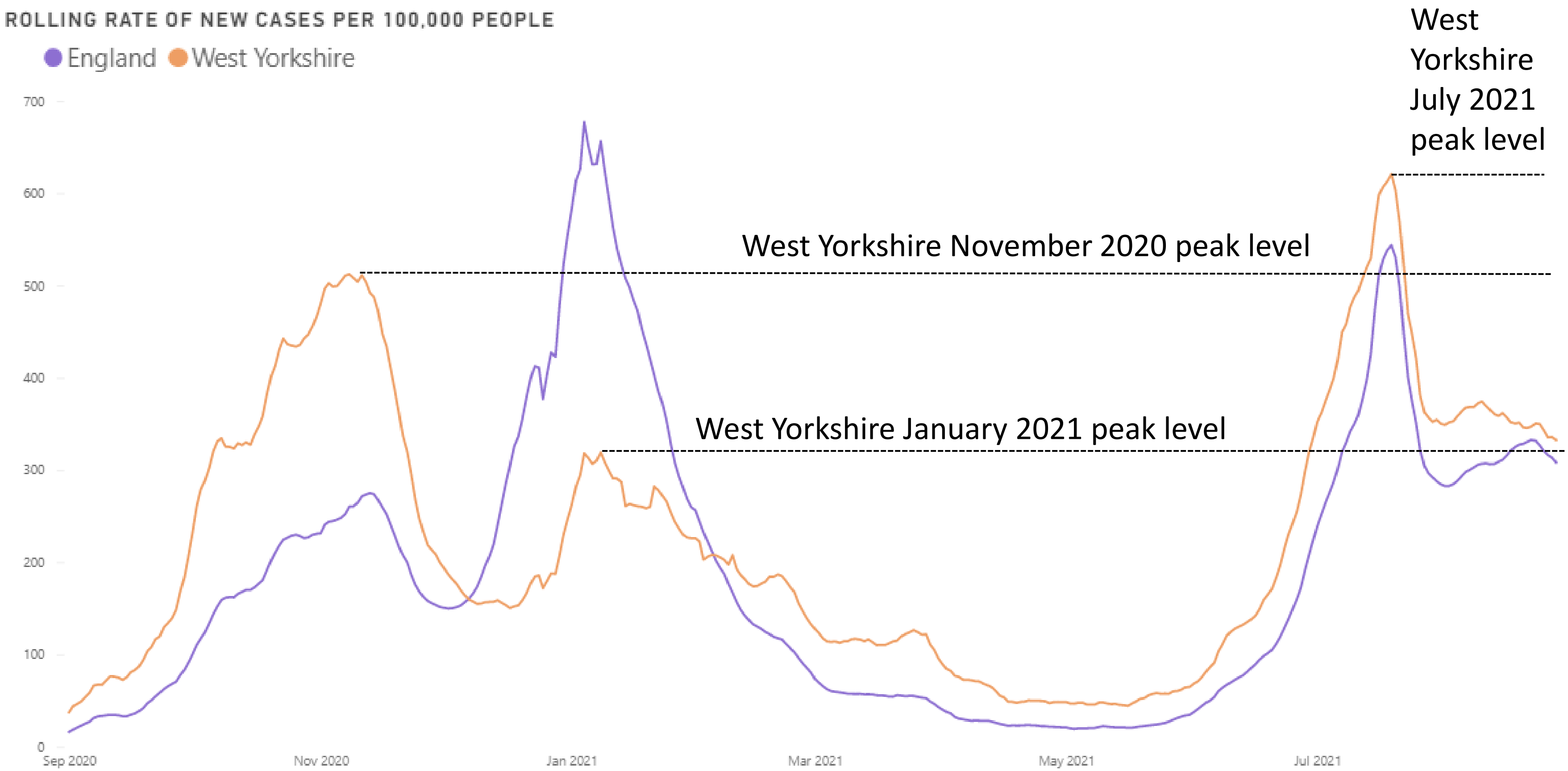
Virus prevalence – West Yorkshire trend



As of the 28th August 2021, the 7-day moving average **West Yorkshire COVD-19 rate was 332 per 100k, 4**% lower than the previous week. In absolute terms there were 7,794 new COVID-19 cases in West Yorkshire in the week to the 28th August. In the same period, the England 7-day moving average case rate fell by 7% to 308 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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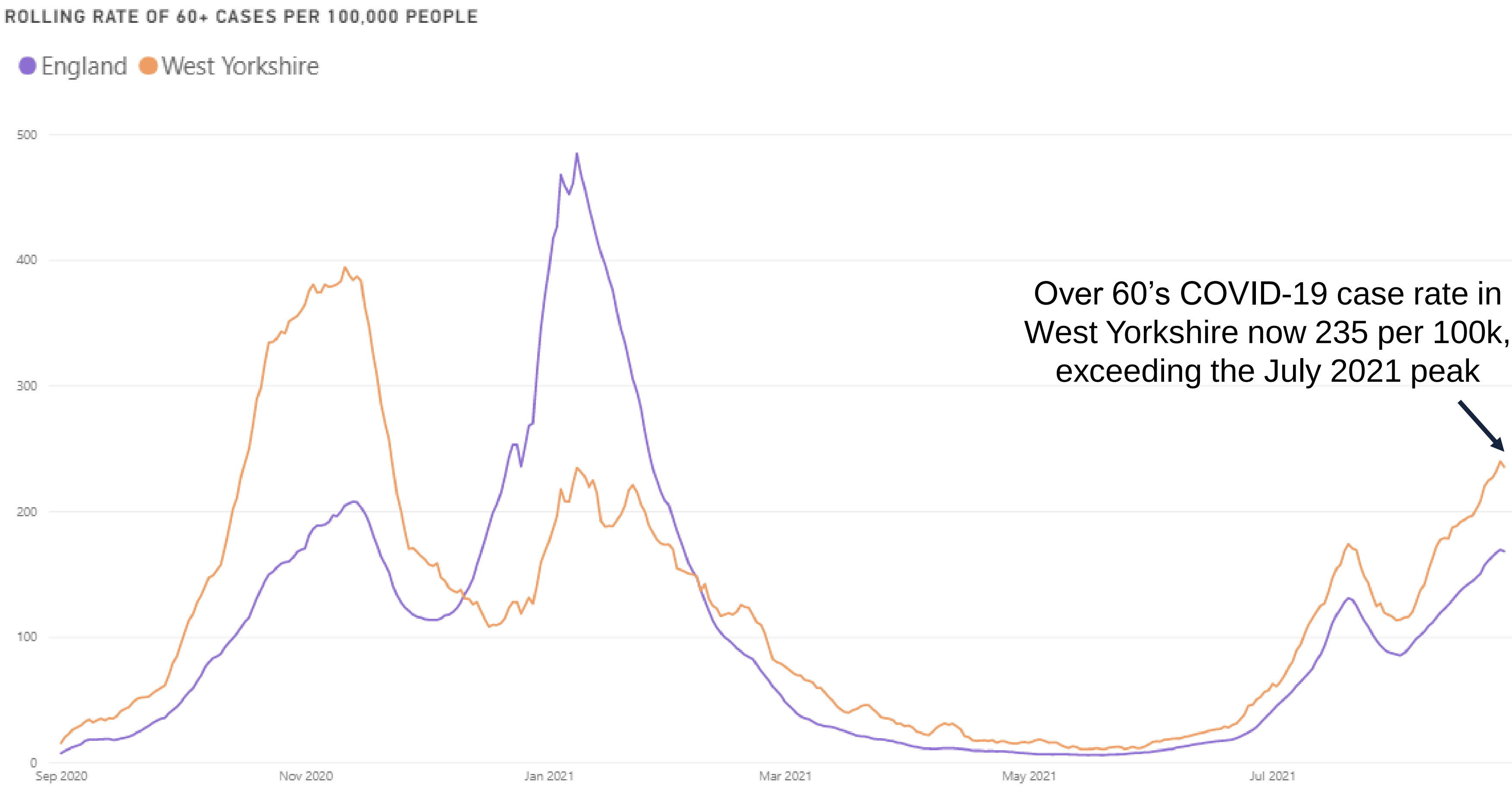
Virus prevalence – over 60s trend



Although the overall case rate in West Yorkshire decreased slightly in the week to the 28th August 2021, the over 60s COVID-19 case rate increased by 17% (14% 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: 28/08/2021

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	69	307.7	→ -1	1668	72589	13390	1155	213
Calderdale	11	409.6	↓ -3	866	24446	11562	335	158
Kirklees	64	312.9	↓ -8	1381	52227	11835	841	191
Leeds	39	340.8	↓ -5	2722	103863	13003	1414	177
Wakefield	49	329.1	↓ -1	1157	43238	12298	821	234
West Yorkshire		332.3	↓ -4	7794	296363	12637	4566	195
England		308.0	↓ -7	174167	5933034	10492	116709	206

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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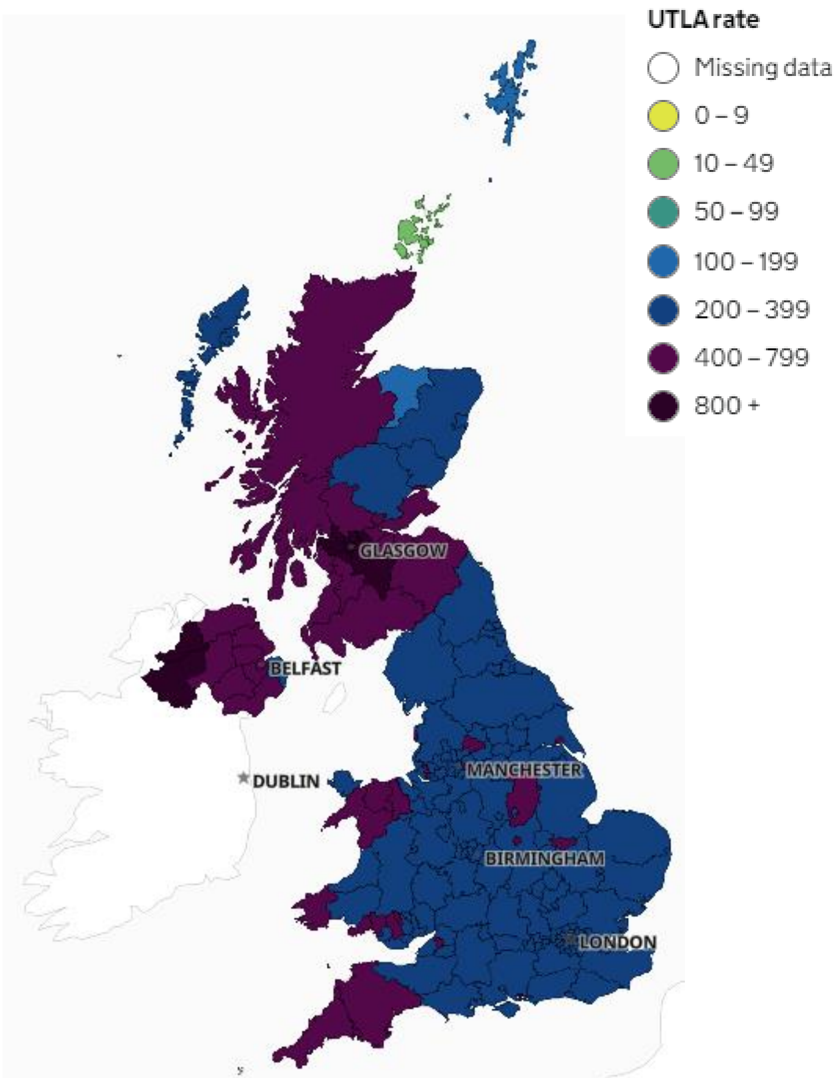
National COVID-19 Rates Map – 7 day rolling rate



The map (left) shows the Upper Tier Local Authority (UTLA) 7–day rolling rate of new cases up to **28th August 2021** (available here).

Regionally rates remain highest in Yorkshire and the Humber (347.5 per 100k), 13% higher than the England average.

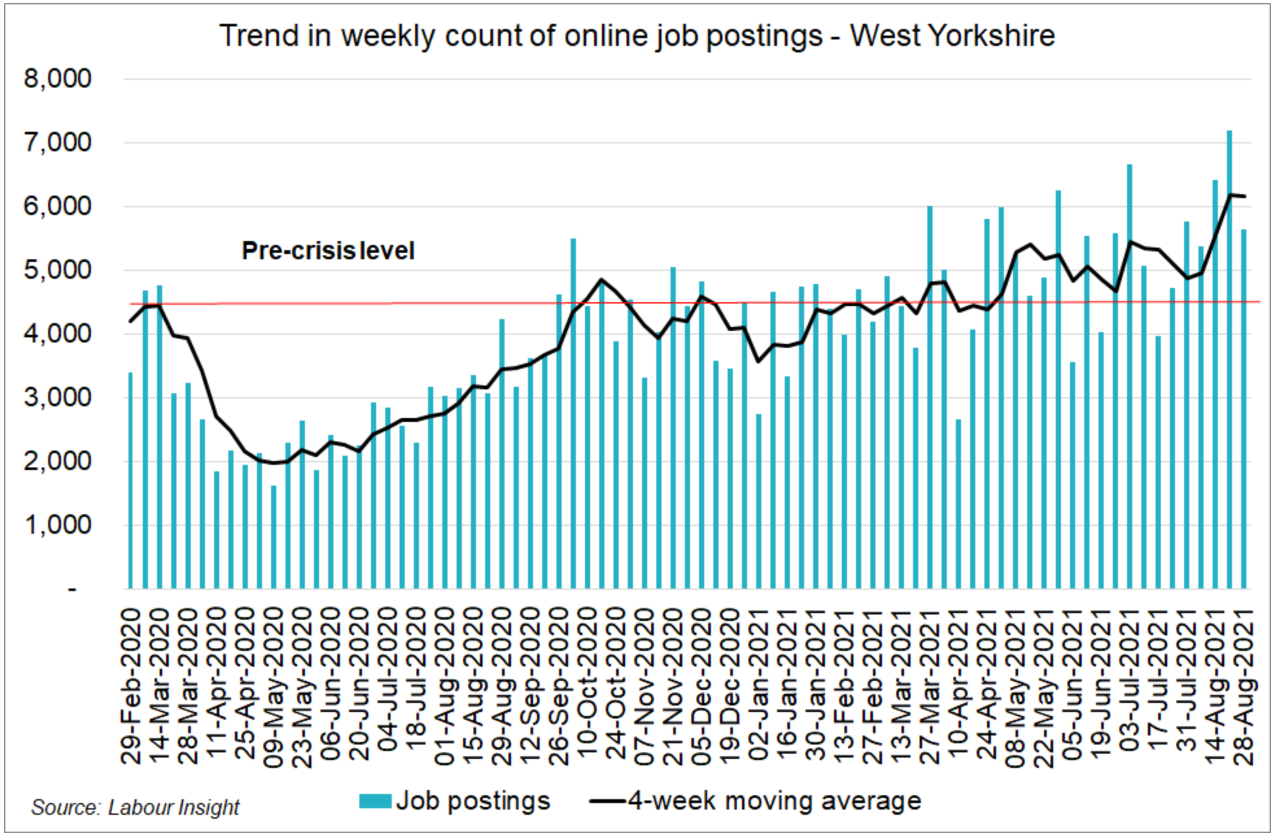
	Case rate per 100,000 population		Case rate per 100,000 population aged 60 years and over	
Area	7-day moving average	7-day change. %	7-day moving average	7-day change. %
East Midlands	358.6	-1.9%	178.7	18.7%
East of England	267.9	-4.6%	122.8	9.9%
London	239.3	-6.9%	142.8	5.7%
North East	324.3	8.4%	216	24.9%
North West	314.8	2.3%	182.9	9.7%
South East	279.3	-12.6%	127.7	12.3%
South West	379.3	-22.2%	165.3	18.3%
West Midlands	319.6	-3.6%	179.8	18.9%
Yorkshire and Humber	347.5	-2.4%	221.9	14.9%
England	308	-6.8%	165.5	14.0%

Highest   Lowest

Economic Insights

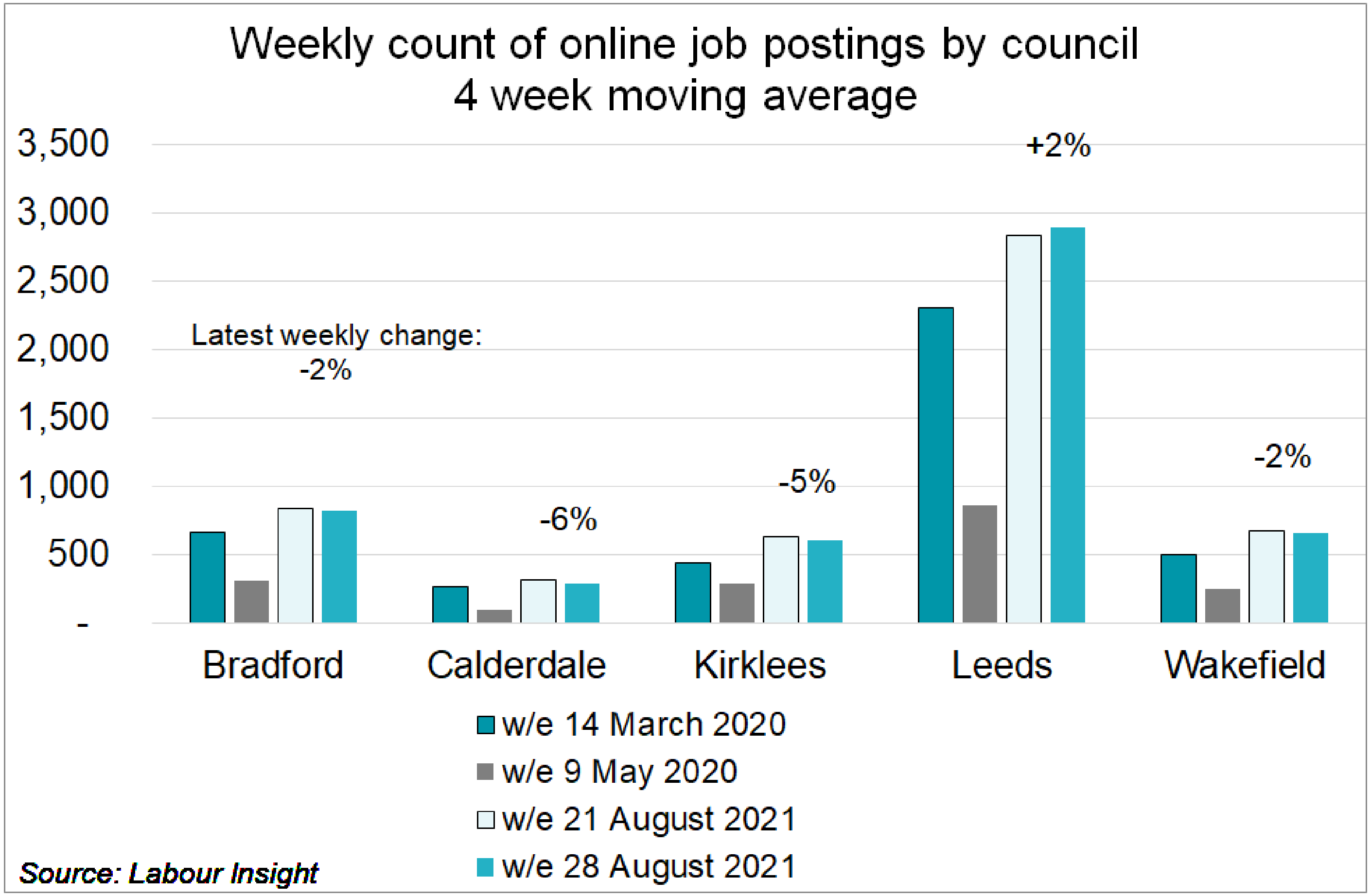
No change in West Yorks vacancies in latest week following recent large increases

The number of vacancies for jobs in West Yorkshire posted online during week ending 28 August remained broadly static compared with the previous week, based on a 4-week moving average (national average position also static). The moving average has now been above the pre-crisis level (March 14 2020) for 18 consecutive weeks and current figure is 39% higher than week ending 17 April, when much of the economy re-opened and 20% higher than week ending 24 July when final restrictions were lifted.



Vacancy growth in Leeds but declines elsewhere

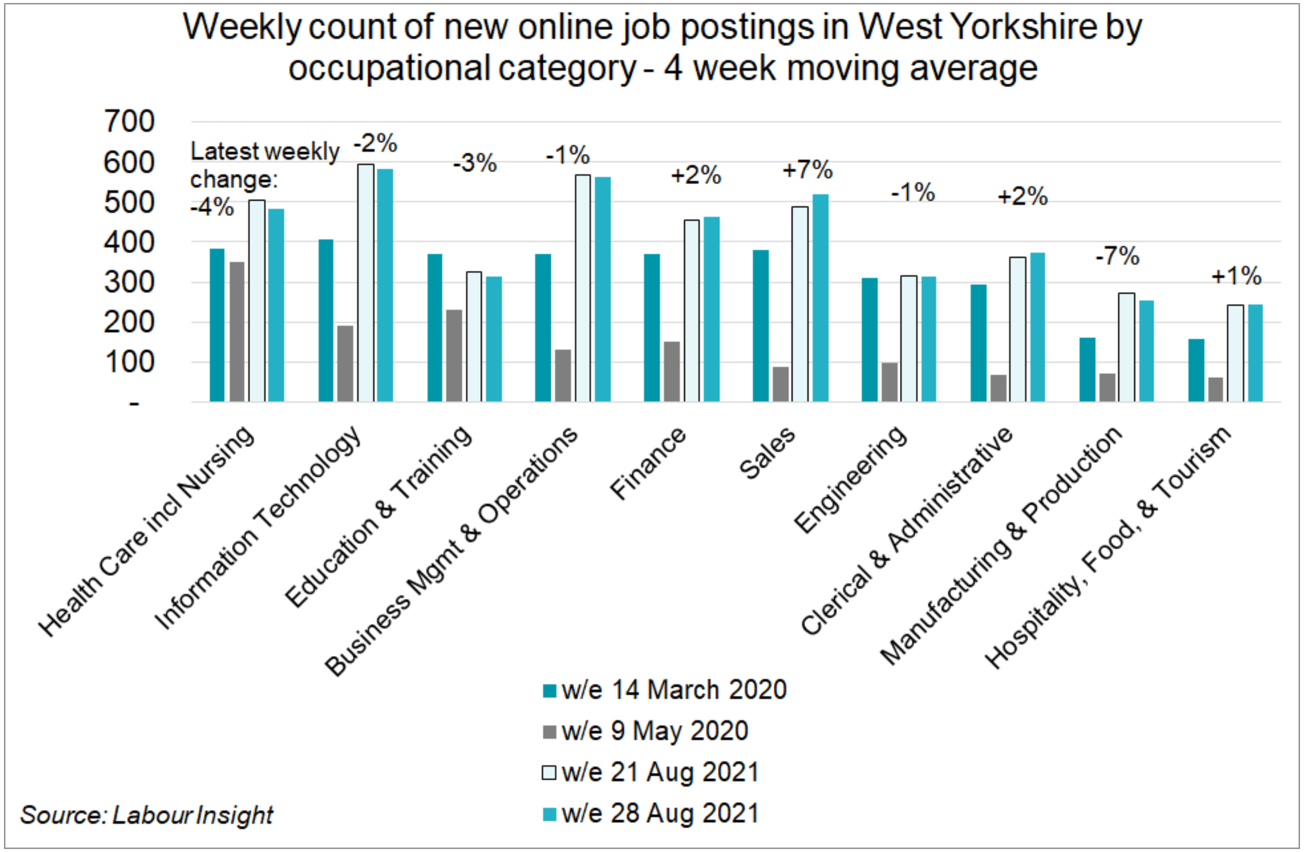
Four out of five local authorities saw reductions in job postings in the latest week, but Leeds recorded modest growth.



Note: a significant number of West Yorkshire job postings are not attributed to a local authority. Movements in vacancy levels at West Yorkshire level may therefore appear inconsistent with changes at local authority level.

Mixed picture for vacancies by occupation

In the latest week some occupational categories saw declines in their count of job postings but there were increases for Sales, Clerical and administrative, Finance and Hospitality, food and tourism. Most occupations are currently well above pre-crisis vacancy levels – only Education and Training category is below that level.



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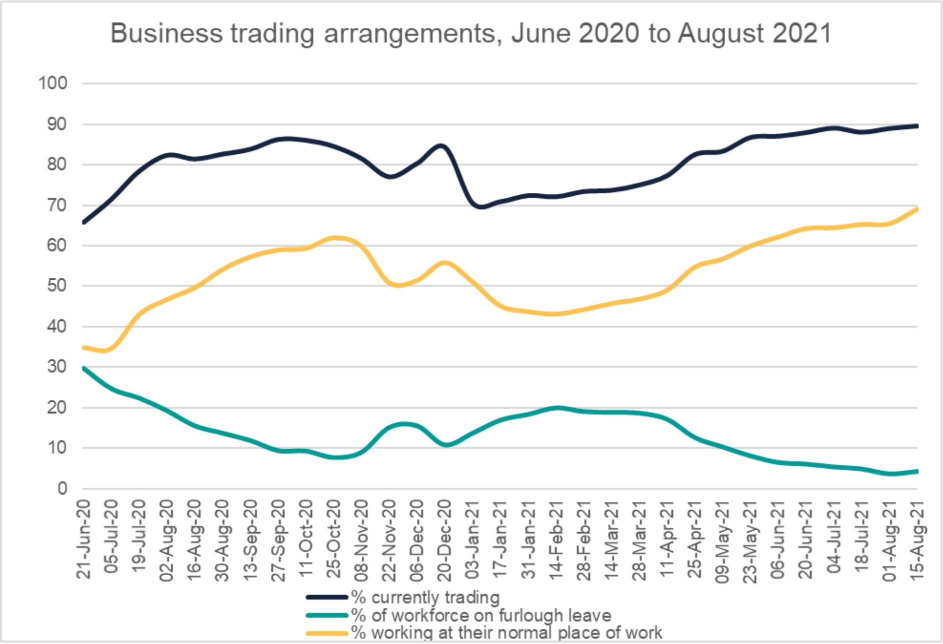
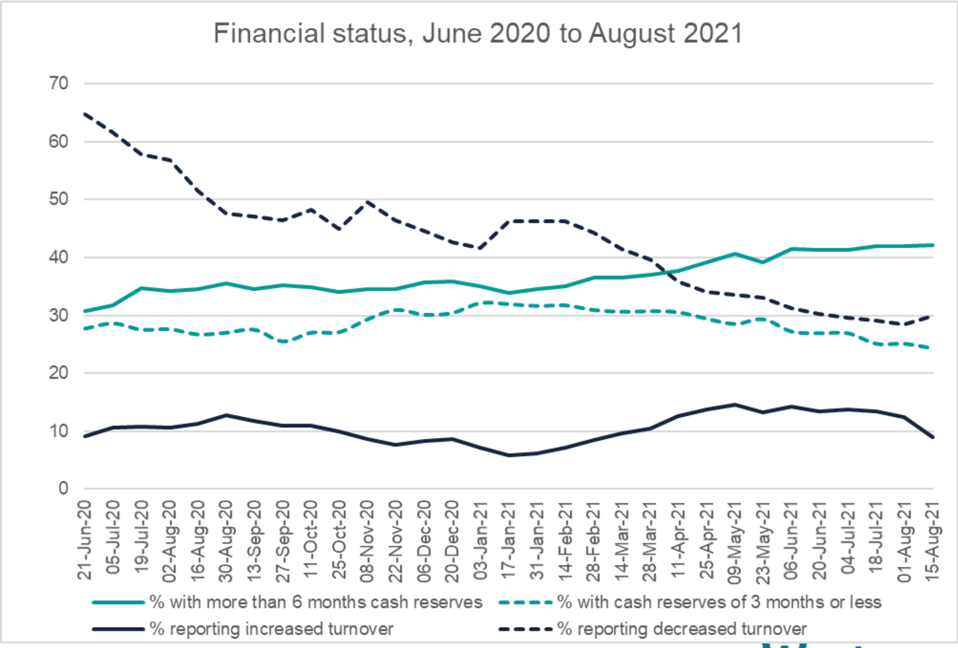
Furlough use broadly static and modest increase in return to work as final restrictions lift

With 89.6% of businesses nationally continuing to trade, relatively little changed over recent weeks, the level of furlough has remained stagnant with 4.3% of workers furloughed in mid August according to the ONS Business Insights and Conditions Survey, up slightly from 3.7% a fortnight earlier. There does not appear to have been a significant shift in working patterns as final restrictions eased , with 69% of workers in their usual workplace in mid August, up just 4 points on a fortnight earlier. There has been a reduction in companies reporting increased turnover, with only 8.9% a drop from 12.5% from a fortnight earlier. This has translated into a slight increase of 1.5 points in proportion of companies seeing a drop in turnover – at 30%.

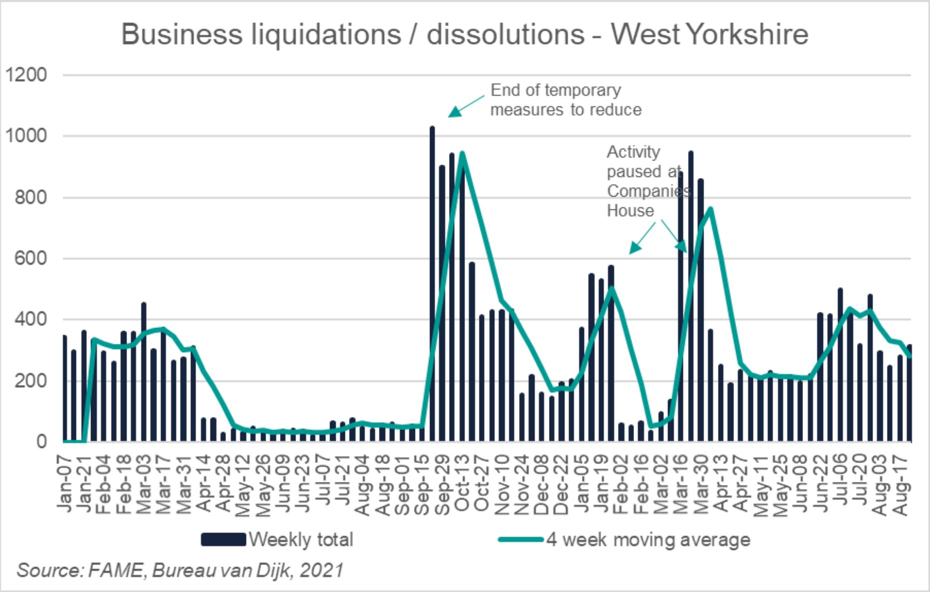


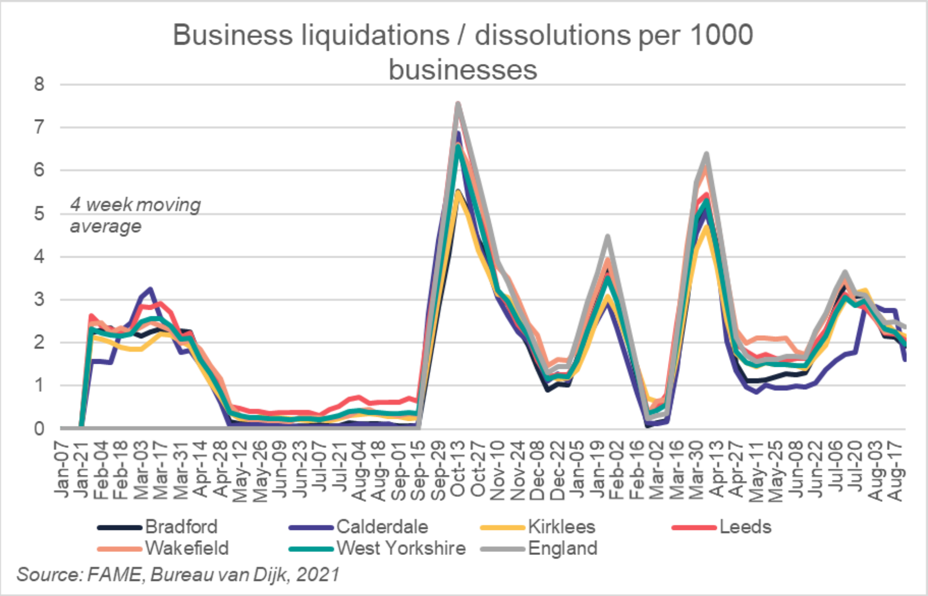


Source: ONS Business Insights and Conditions Survey

Business liquidations falling gradually

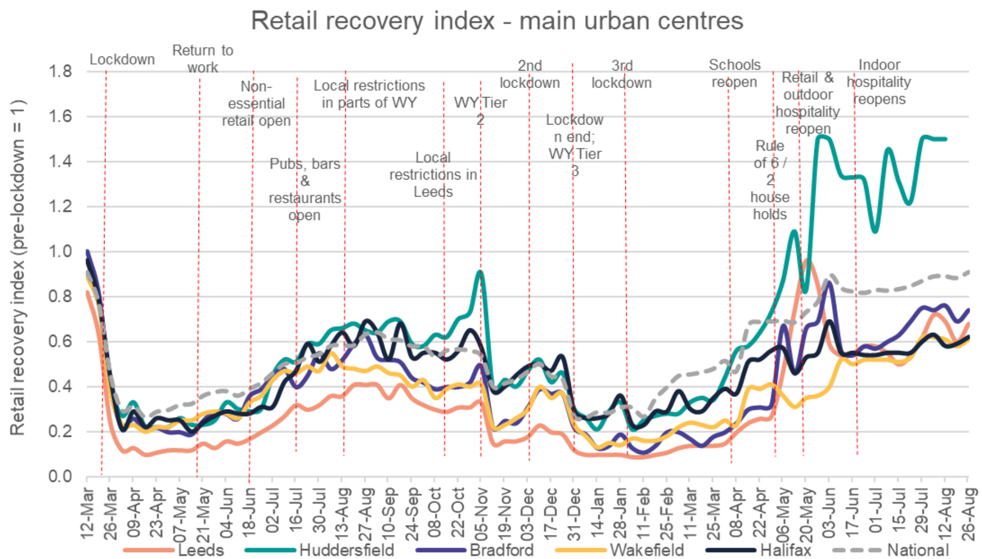
There were 283 business liquidations in West Yorkshire up to the week ending August 24th, based on a four week moving average, according to data from Bureau van Dijk's Fame database. This represents a 25% fall from the previous four-week period and figures are now broadly in line with early 2020, pre-pandemic levels. Nationally liquidations dropped by 14%. Rates have fallen by between 18% (Leeds) and 43% (Calderdale) in most local authorities in West Yorkshire. Leeds had the highest number of liquidations at 123 and Wakefield had the lowest with 35 liquidation based on a four week moving average.





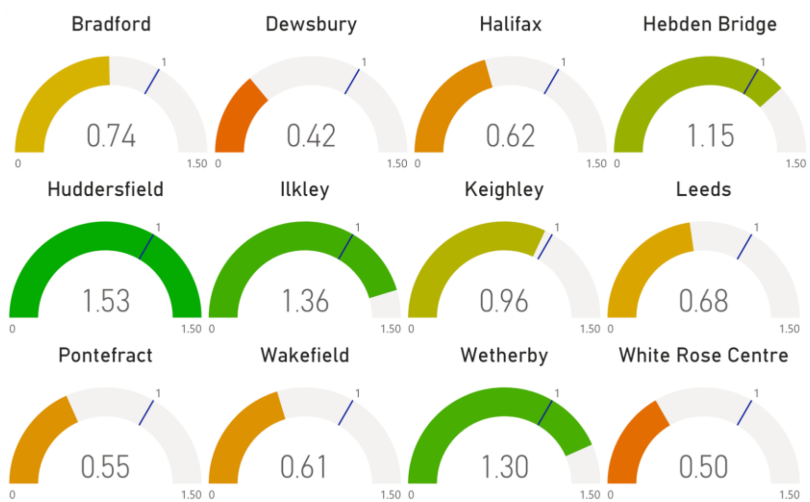
**Source: FAME, Bureau van Dijk, 2021. Analysis based on company registration address, location of activity may differ in some cases*

Footfall stable in most town and city centers



Source: Geolytix Retail Recovery Index, 2021

There was little change in levels of activity in West Yorkshire's main town and city centres in the week to August 26th, according to Geolytix's Retail Recovery Index. Huddersfield continues to exceed its pre-pandemic level of activity at 153% of baseline, with the other four main centres between 74% (Bradford) and 68% (Leeds) of their respective baselines.



Among smaller centres, activity is a little over 15% to 36% higher than pre-pandemic in Ilkley and Wetherby, with Hebden Bridge also broadly in line with its own baseline. This recovery is not shared equally across smaller non city centres. White Rose Centre foot fall is at 50% of the pre pandemic level,

1=pre-pandemic baseline for each place

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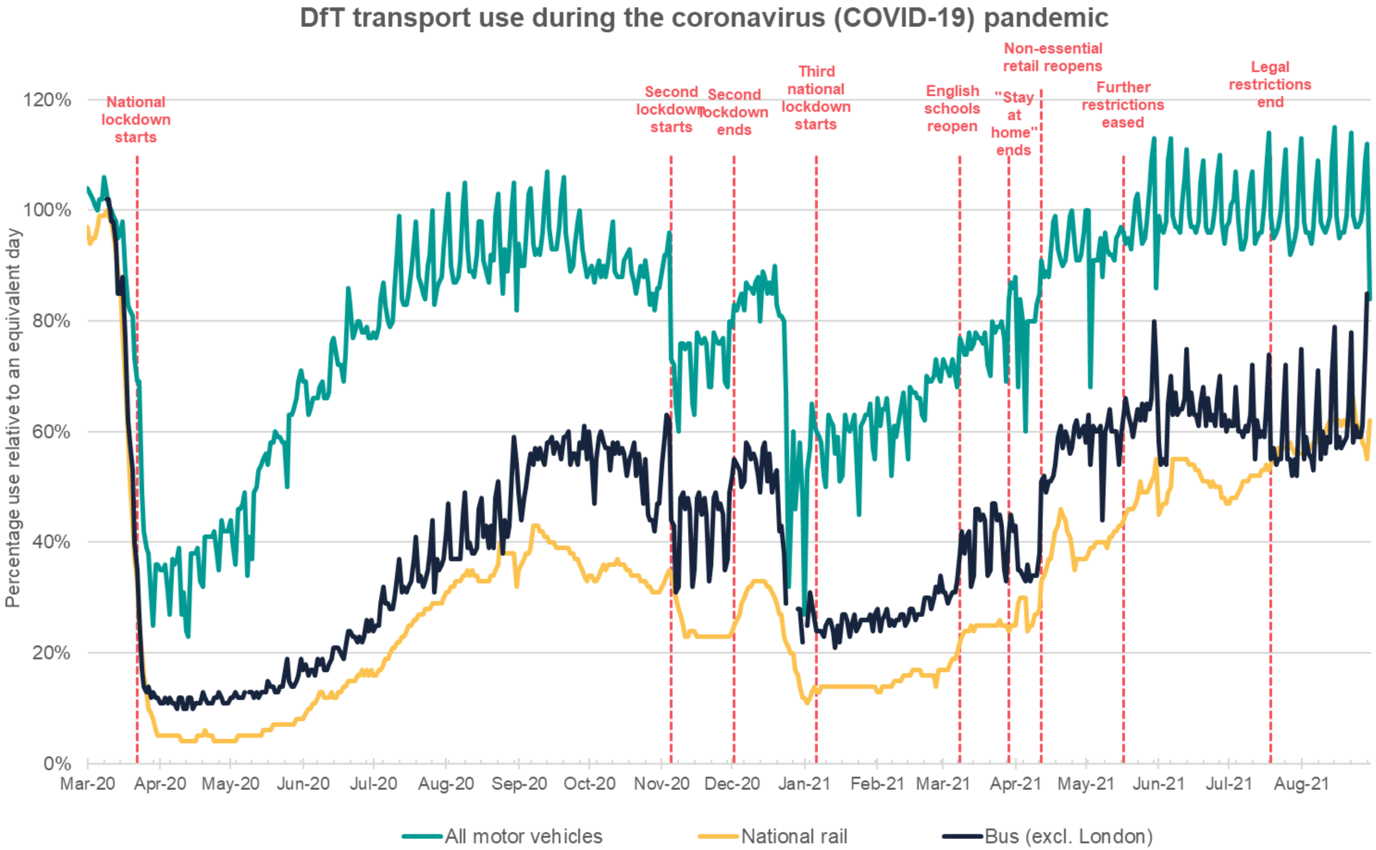
Transport Insights

Motor vehicle usage peaks seen nationally, public transport use increasing

Motor vehicle use remains broadly similar with weekend usage spikes and weekdays just below the baseline level, however recent weekdays have shown a slight upwards trend while weekends have been coming down. Bus usage has been increasing on weekends and weekdays. Rail usage continued its increase in the last month with usage similar to that of weekday bus. Significant fluctuations can be seen over the recent August bank holiday.



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

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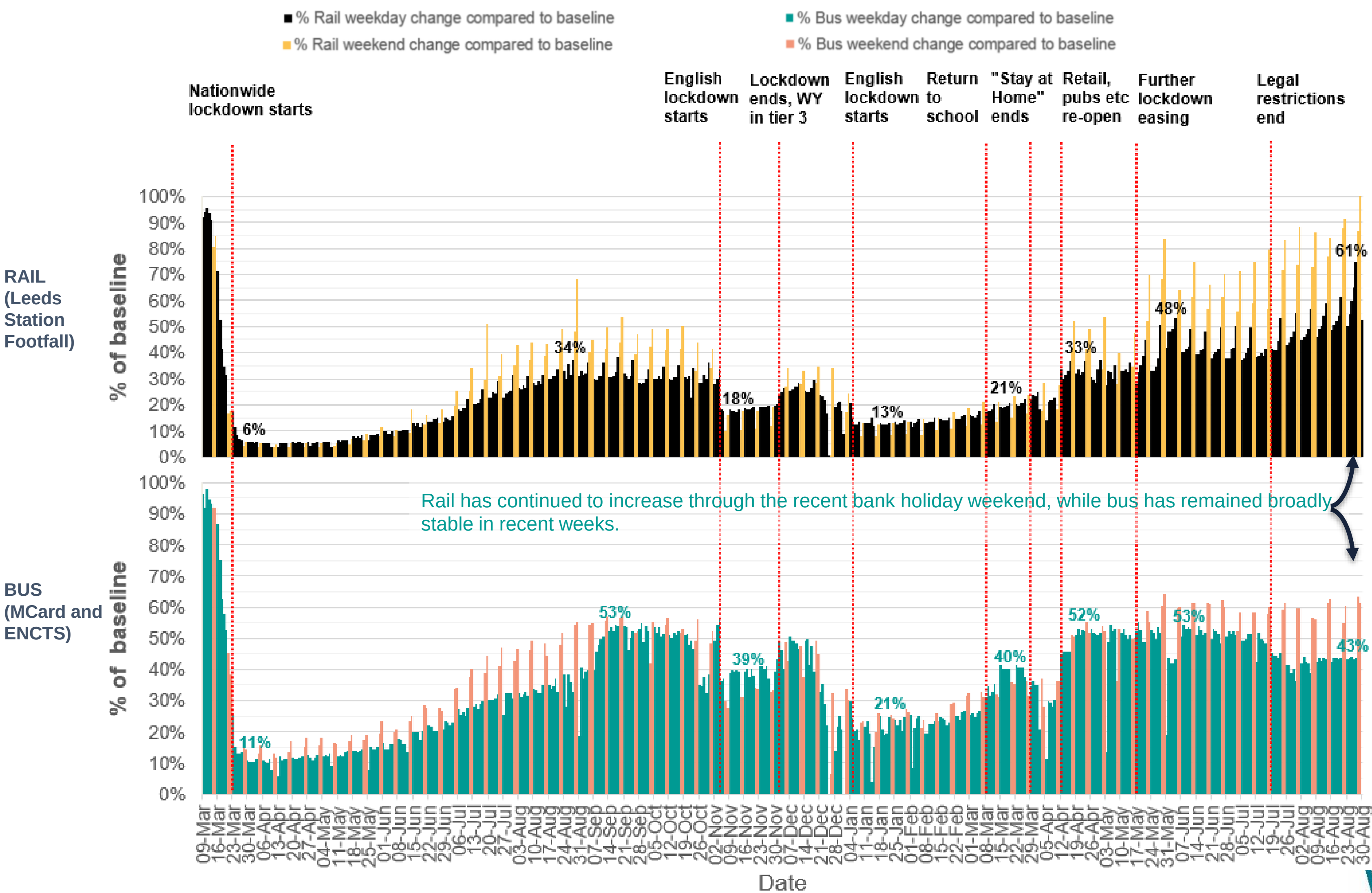
Rail patronage proxy increases over recent weeks, bus shows little change



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 use of MCards and concessionary passes on buses is following a pattern similar to the same time of year in 2018/2019, indicating changes over the last few weeks are largely seasonal rather than COVID-demand related. It is not yet clear why the use of MCards through rail gates dropped and remain below the seasonal pattern, in contrast to the seasonal patterns of the adult and under 26 / student cohorts on bus.

Source: Nero records of smart card ticket use on buses and at gated rail stations.
Aligned on start of school summer holidays. Indexed on start of June.

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Bus use increasing since start of academic holidays

Overall weekday bus use has increased recently, with all cohorts showing slightly higher usage than the start of school holidays five weeks ago and the total increasing from 48% to 53% of baseline. Interestingly use increased from 34% to 39% in the similar period last year.

Thousand passengers per weekday before COVID

Adult
221,000

Under 19
101,000

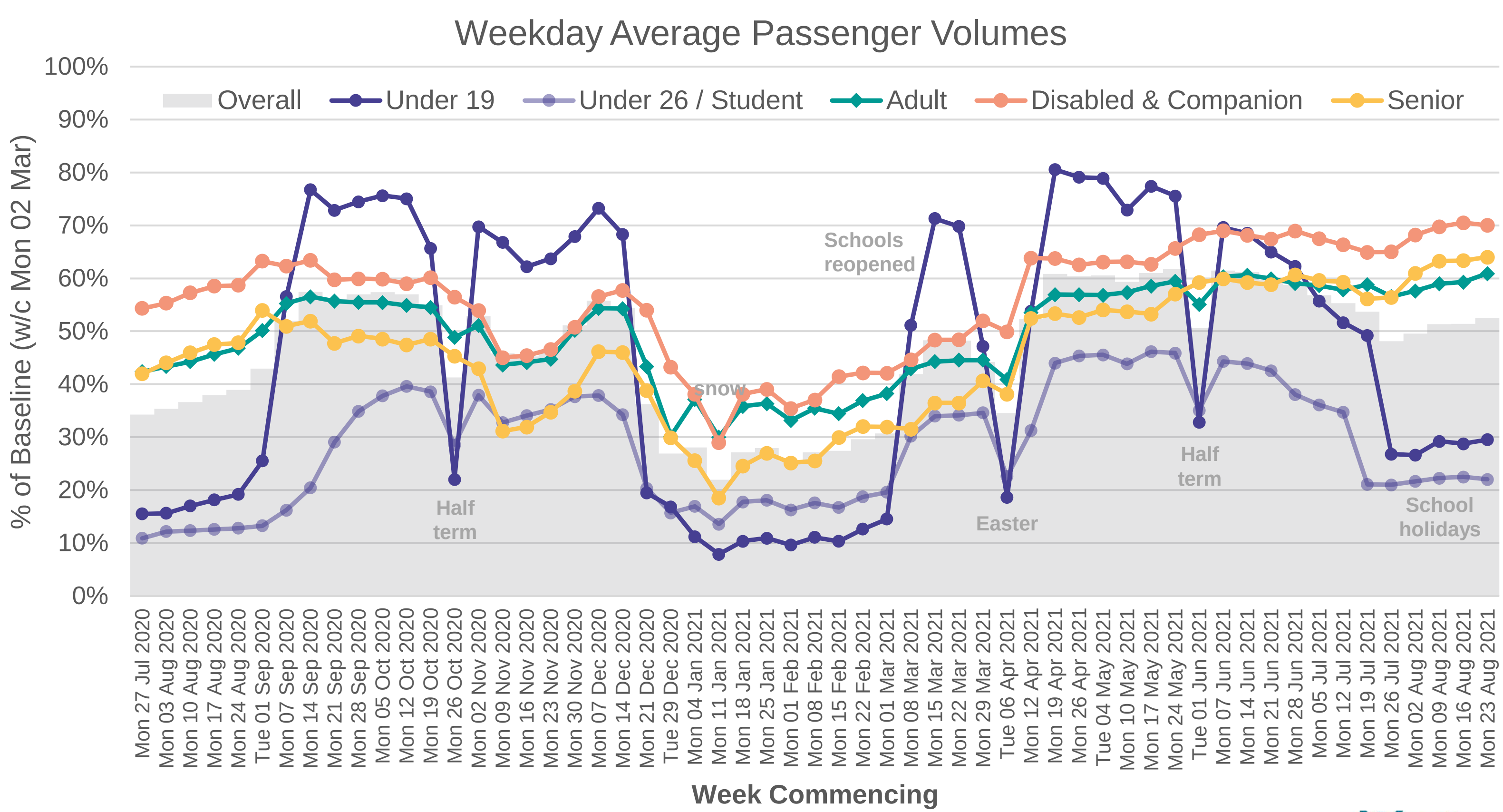
Senior
74,000

Under 26 / Student
34,000

Disabled & Companion
29,000

Miscellaneous
9,000

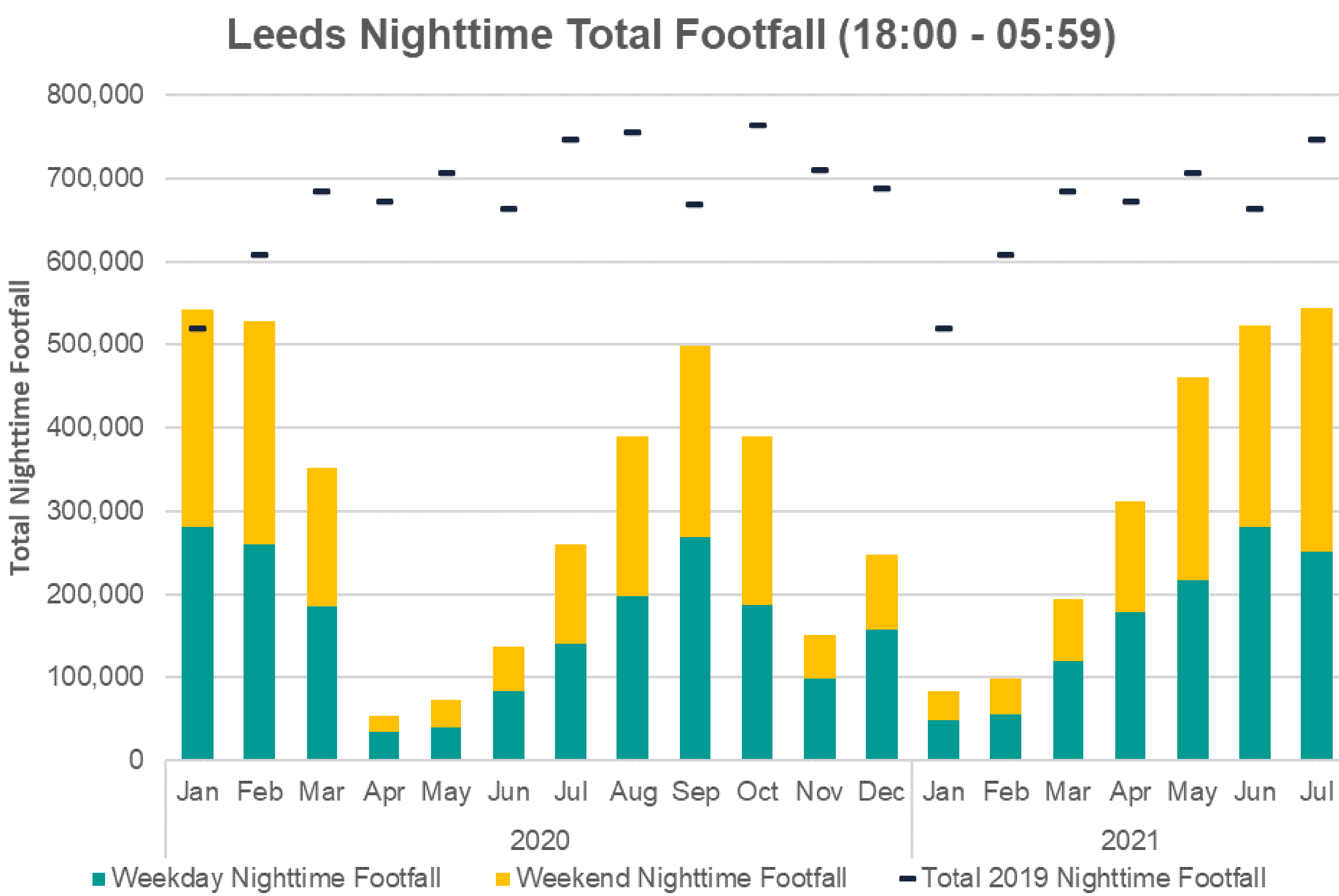
Data from First, Arriva, Yorkshire Tiger and Transdev



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.

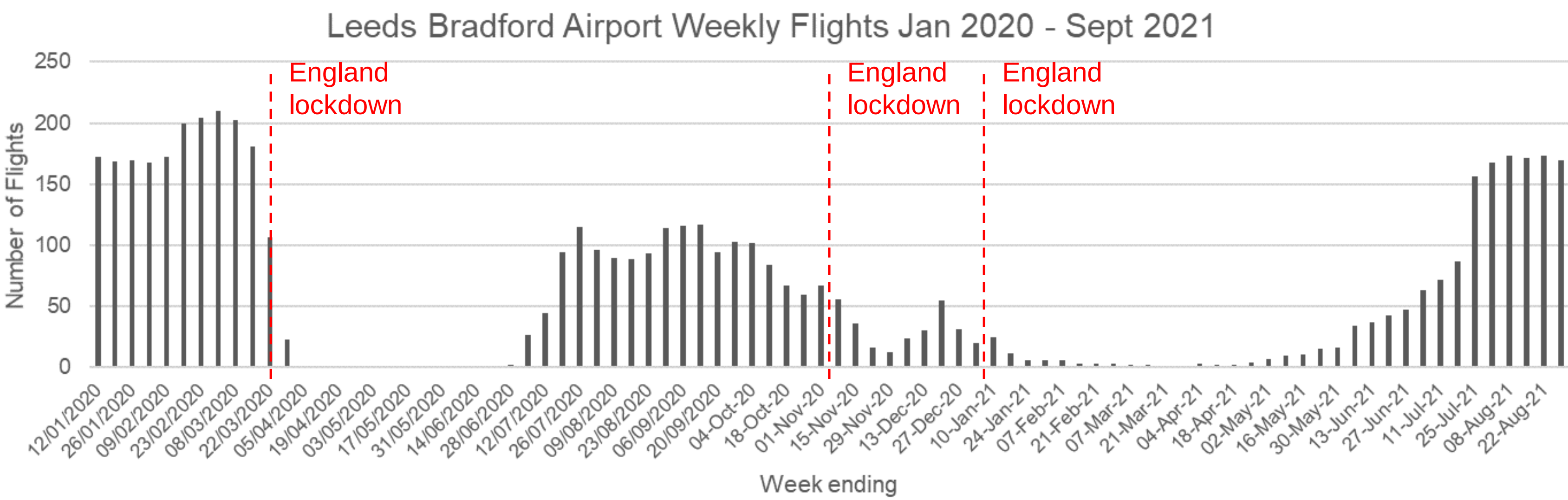
Evening footfall in Leeds City Centre is increasing but remains below pre-pandemic levels

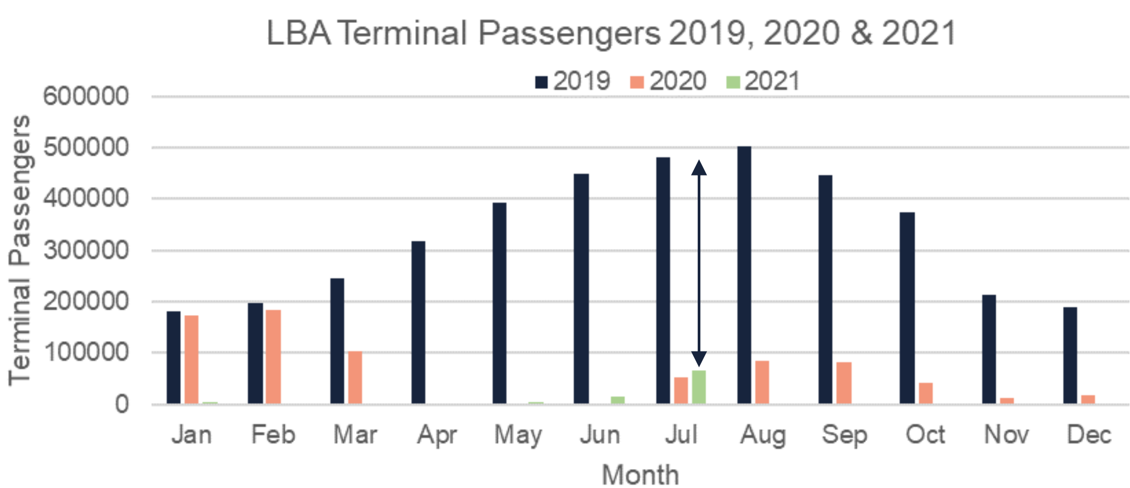
While footfall has increased on weekday and weekend (Friday 18:00 – Monday 05:59) evening footfall has increased steadily throughout 2021 total evening footfall remains lower than that for comparator months in 2019. Evening footfall is however higher than in 2020 showing that the night-time economy is recovering.



Source: Leeds City Council

Number of passengers using Leeds Bradford Airport in July 2021 only 14% equivalent 2019 levels





The top chart illustrates the impact of COVID-19 on the number of flights departing from Leeds Bradford Airport (LBA) throughout the pandemic to date. Although the number of flights departing LBA has increased following easing of restrictions, the number of terminal passengers (bottom chart) in July 2021 was just 14% of July 2019 levels.

Source: Data collated by ODI Leeds using data from Leeds Bradford Airport FlightAware API (top), and data from the Civil Aviation Authority (bottom).