

# **COVID-19 Fortnightly Insights Report**

Research & Intelligence  
17<sup>th</sup> September 2021



# Executive Summary – Economic Impact

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- There was a net increase in employment in West Yorkshire of around 5,000 between July and August. Employment is now 1% above pre-pandemic levels seen in August 2019 and 4% higher than its lowest point in pandemic in Feb 2021, meaning that number of employees has increased by 35,000 between Feb and Aug 21.
- The latest claimant count figures, which relate to the number of people on out-of-work benefits, show a 2% fall in West Yorkshire between July and August. The claimant count is now 15% or 16,000 lower than at its peak in March 2021 but still 66% higher than pre-pandemic level in Feb 2020, with around 94,000 claimants in the region.
- Across West Yorkshire there was roughly 47,000 people on furlough at the end of July. The wholesale, retail & repair of motor vehicle sector had the most people in furlough with roughly 8,000 people. The furlough figure varies between districts with accommodation and food service sector in Leeds having the highest amount of people in furlough at 2,520.
- There were 370 business liquidations in West Yorkshire up to the week ending August 24<sup>th</sup>, based on a four-week moving average, according to data from Bureau van Dijk's Fame database. This represents a 27% increase from the previous week four-week period. Nationally liquidations increased by 26%.

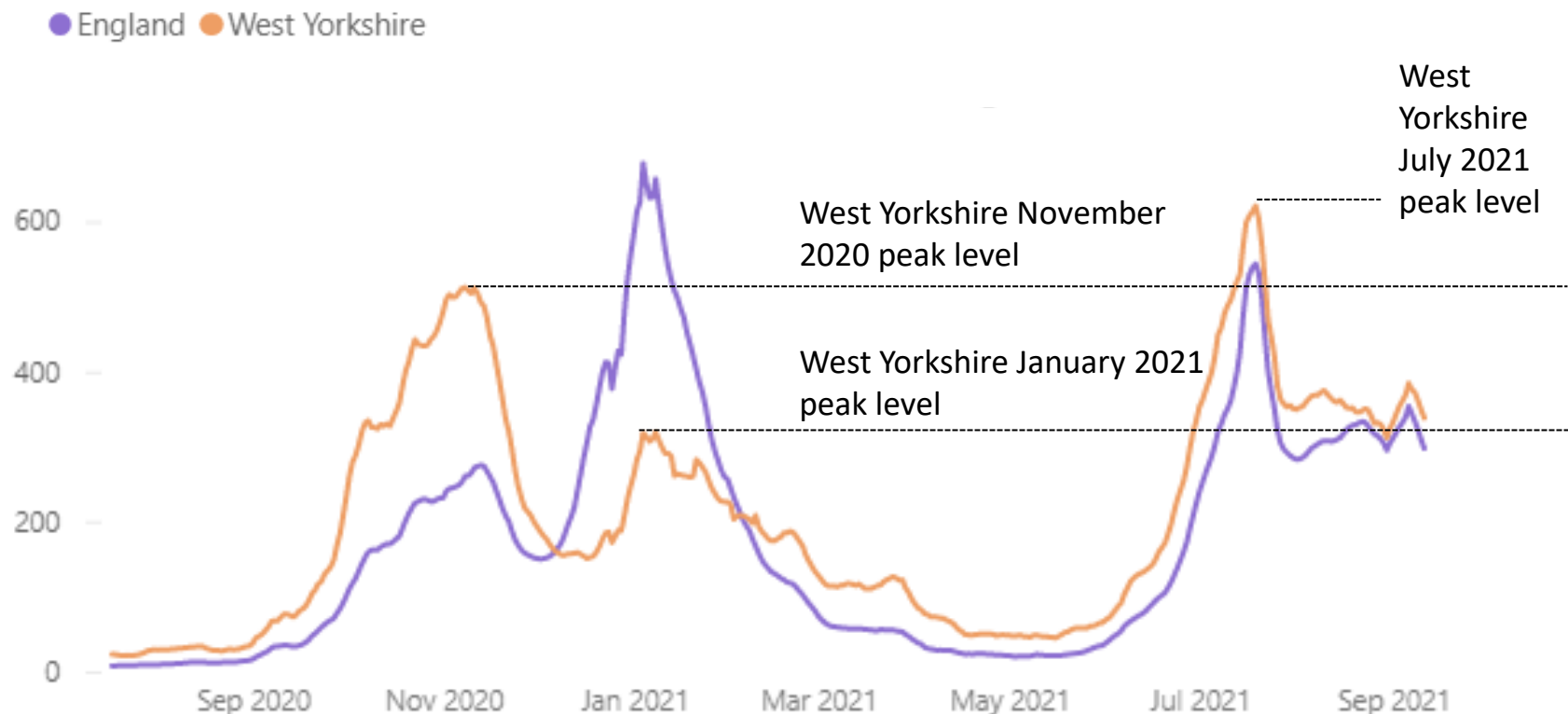
# Executive Summary – Transport Impact

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- Nationally, motor vehicle use remains broadly stable with weekday use just below pre-pandemic levels.
- Local traffic data around Leeds reveals that in the week commencing 6<sup>th</sup> September, 24-hour weekday traffic was down 15% relative to the same week in 2019, with the morning peak flow down 28% relative to 2019.
- Nationally, bus usage has increased notably since the August bank holiday, driven by the start of the academic year. Bus ticket machine data for West Yorkshire shows weekday bus use in the last week has reached its highest levels since the start of the pandemic.
- Nationally, rail use peaked at 70% of pre-pandemic levels around the August bank holiday before declining again, with similar trends occurring locally. Generally, local weekend rail travel has recovered more than weekday travel.
- Evening footfall totals for July and August in Leeds City Centre remained lower than the equivalent period in 2019. However, month-on-month increases reflect a slow, but steady recovery of the night-time economy.

# Virus prevalence – West Yorkshire trend

Rolling rate of new cases per 100,000 people



As of the 11<sup>th</sup> September 2021, the 7-day moving average **West Yorkshire COVID-19 rate was 338 per 100k**. In absolute terms there were 7,924 new COVID-19 cases in West Yorkshire in the week to the 11<sup>th</sup> September. In the same period, the England 7-day moving average case rate fell by 10% to 297 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.

# 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:  
11/09/2021

| 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              | 74        | 291.6                                    | ↓ -6                                     | 1581                                   | 75861                         | 13993  | 1177                           | 217                                     |
| Calderdale            | 21        | 393.5                                    | ↑ 5                                      | 832                                    | 26060                         | 12325  | 343                            | 162                                     |
| Kirklees              | 56        | 334.7                                    | ↓ -3                                     | 1477                                   | 55162                         | 12500  | 854                            | 194                                     |
| Leeds                 | 40        | 348.8                                    | ↓ -8                                     | 2786                                   | 109433                        | 13700  | 1439                           | 180                                     |
| Wakefield             | 32        | 355.0                                    | ↓ -13                                    | 1248                                   | 45792                         | 13024  | 836                            | 238                                     |
| <b>West Yorkshire</b> |           | <b>337.9</b>                             | <b>↓ -6</b>                              | <b>7924</b>                            | <b>312308</b>                 | <b>13317</b>                                 | <b>4649</b>                    | <b>198</b>                              |
| England               |           | 297.2                                    | ↓ -10                                    | 168049                                 | 6281236                       | 11107  | 118229                         | 209                                     |

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

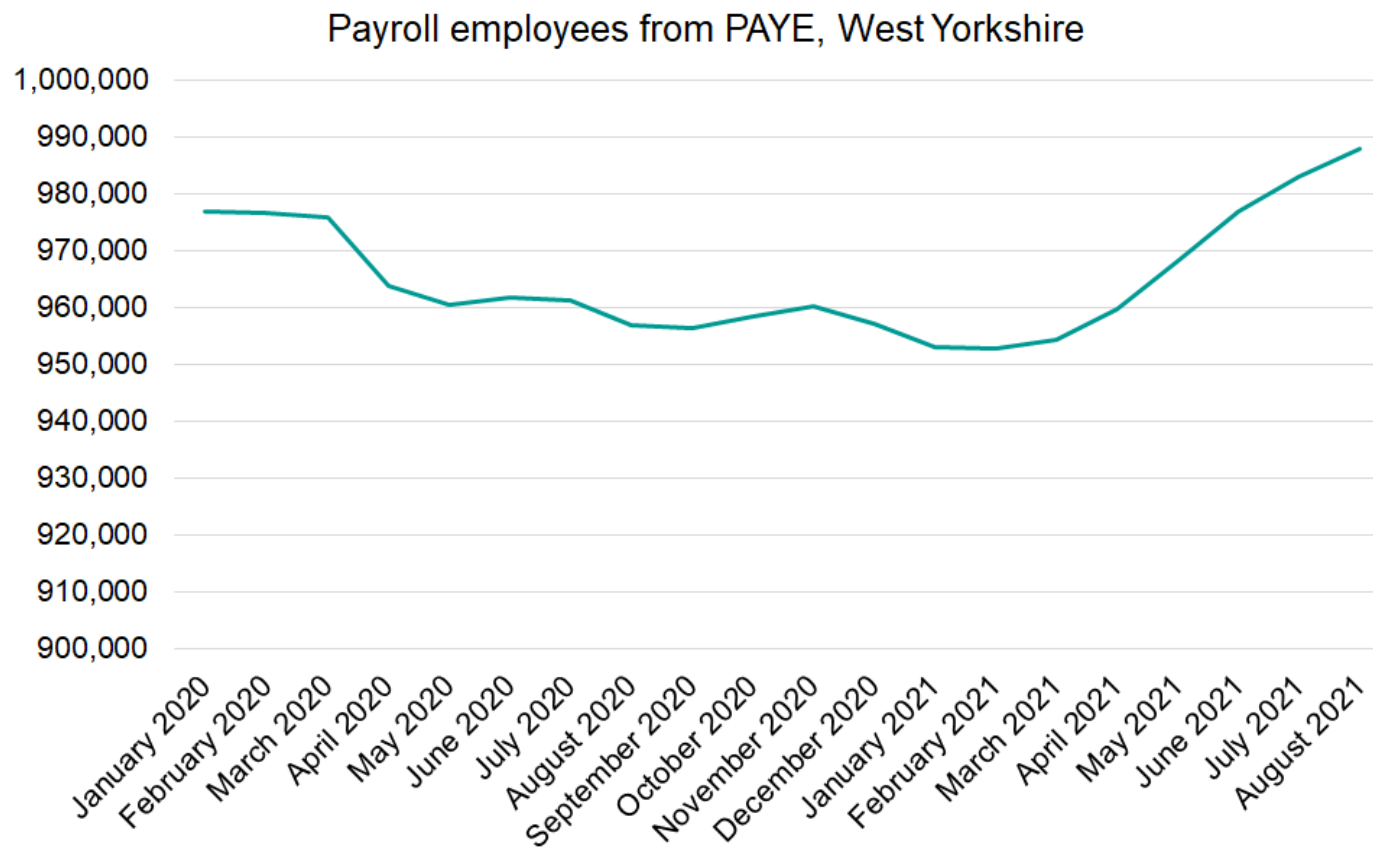
Crude death rate: total deaths per population. This does not take account of variation caused by different population age structures

# **Economic Insights**



# Employment (payroll employees) now exceeds pre-pandemic level

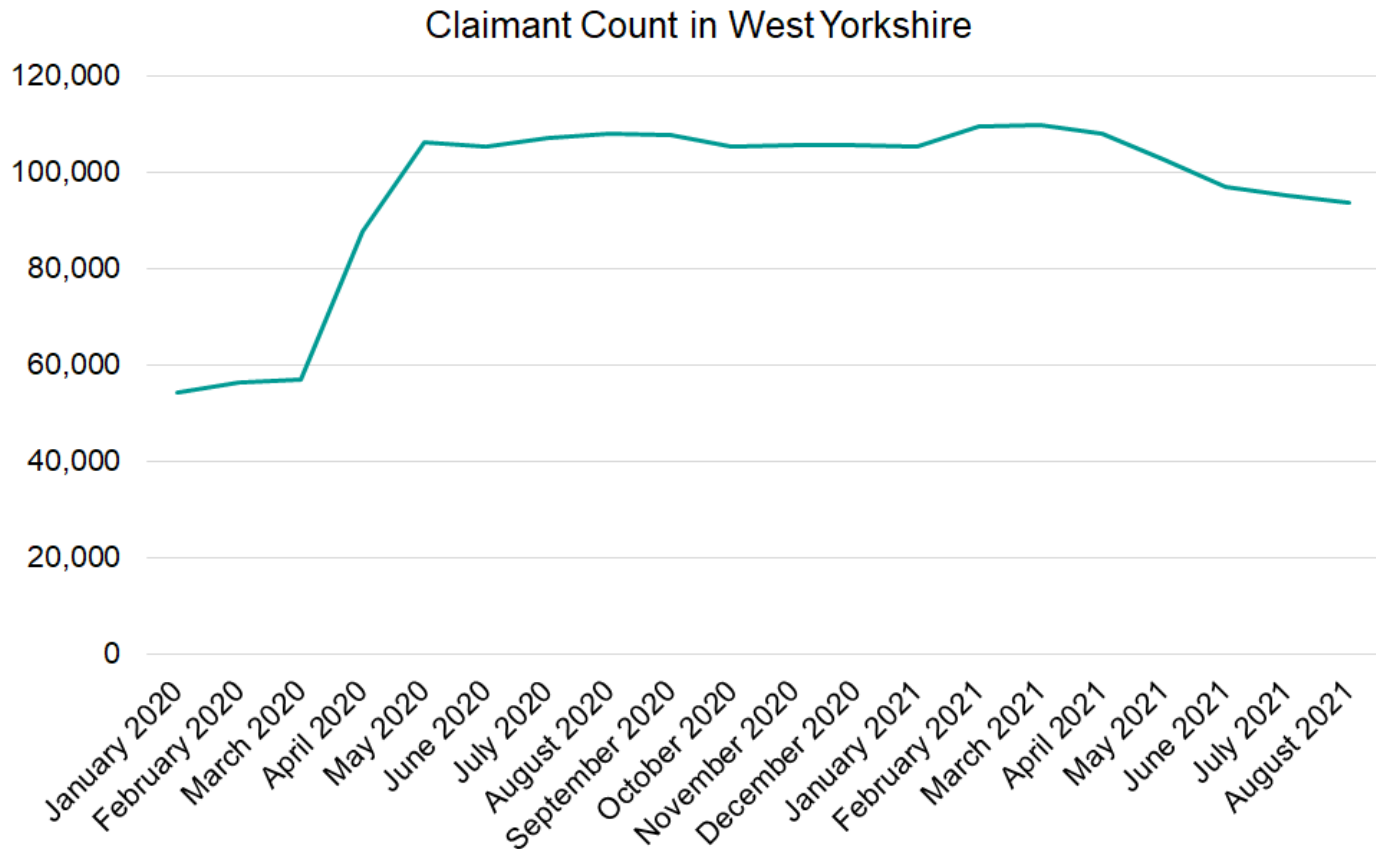
There was a net increase in employment in West Yorkshire of around 5,000 between July and August. Employment is now 1% above pre-pandemic levels seen in August 2019 and 4% higher than its lowest point in pandemic in Feb 2021, meaning that number of employees has increased by 35,000 between Feb and Aug 21.



Source: HMRC Real Time Information

# West Yorkshire claimant count fell by 2% between July and August

The latest claimant count figures, which relate to the number of people on out-of-work benefits, show a 2% fall in West Yorkshire between July and August. The claimant count is now 15% or 16,000 lower than at its peak in March 2021 but still 66% higher than pre-pandemic level in Feb 2020, with around 94,000 claimants in the region.

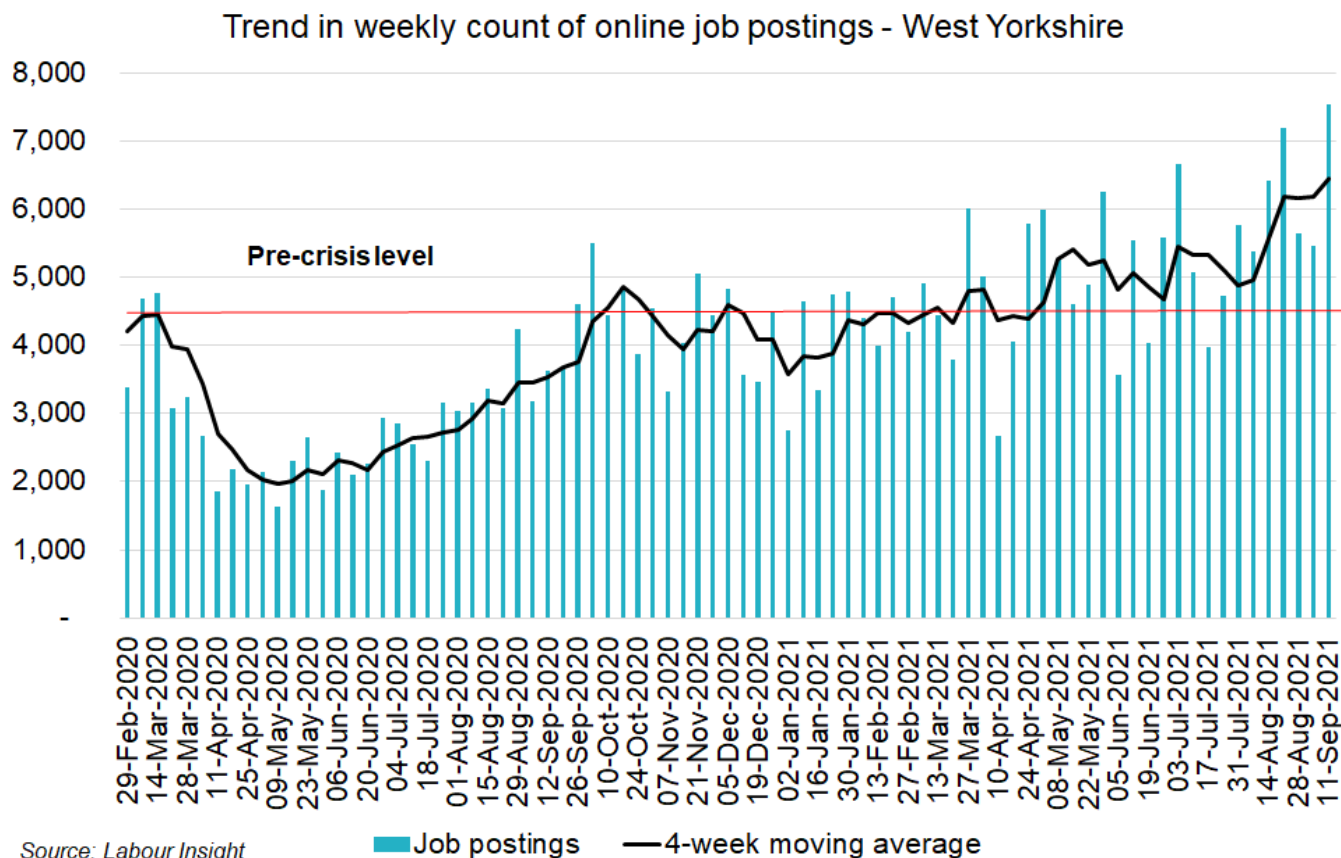


Source: NOMIS



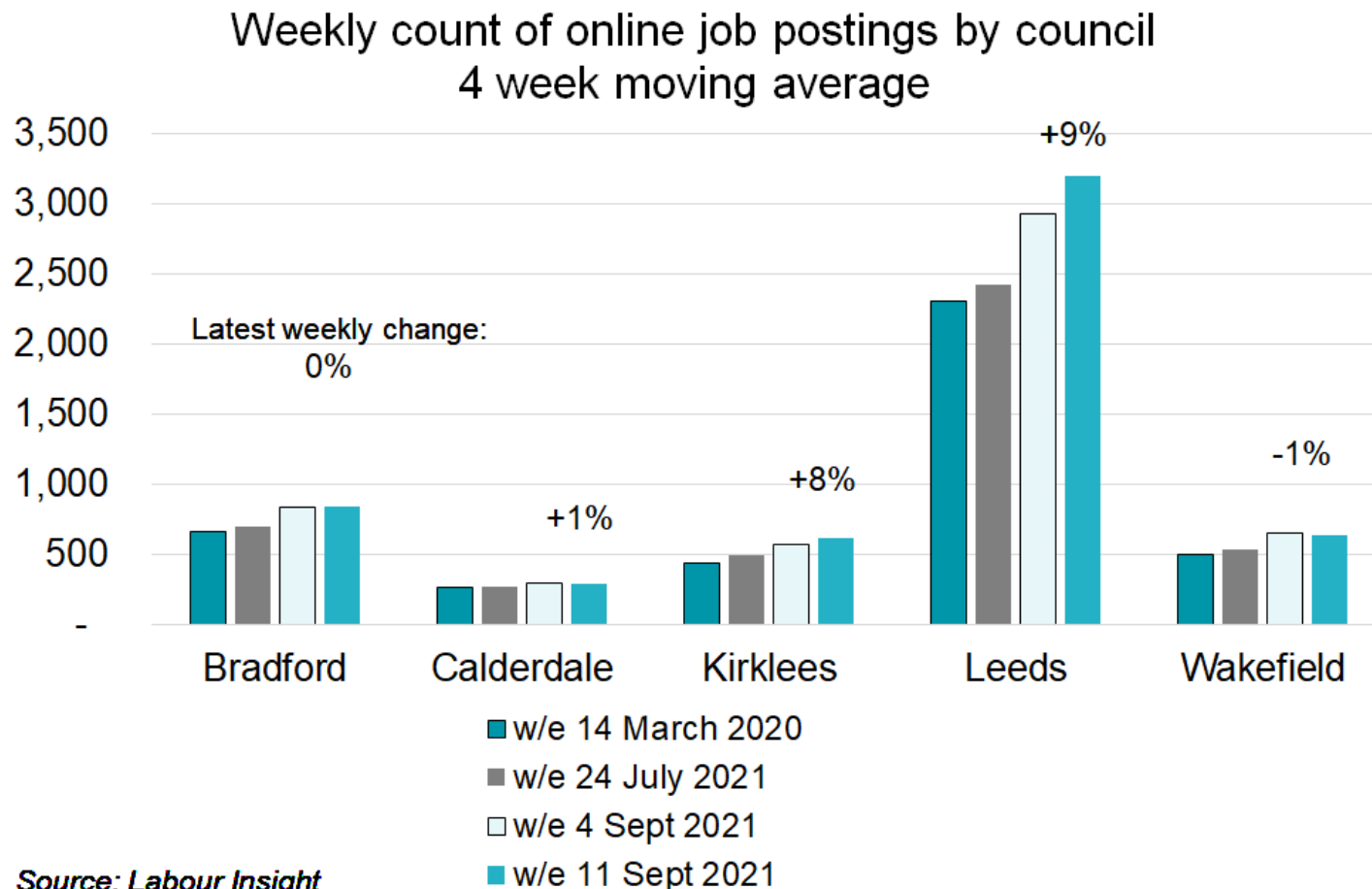
# Level of vacancies highest since pandemic began

The number of vacancies for jobs in West Yorkshire posted online during week ending 11 September increased by 4% on the previous week, based on a 4-week moving average (national average fell by 1%). The moving average has now been above the pre-crisis level (March 14 2020) for 19 consecutive weeks and current figure is 26% higher than week ending 24 July when final restrictions were lifted.



# Strong vacancy growth in Leeds and Kirklees

West Yorkshire vacancy growth was largely due to large week-on-week increases in Leeds and Kirklees, with little change elsewhere.



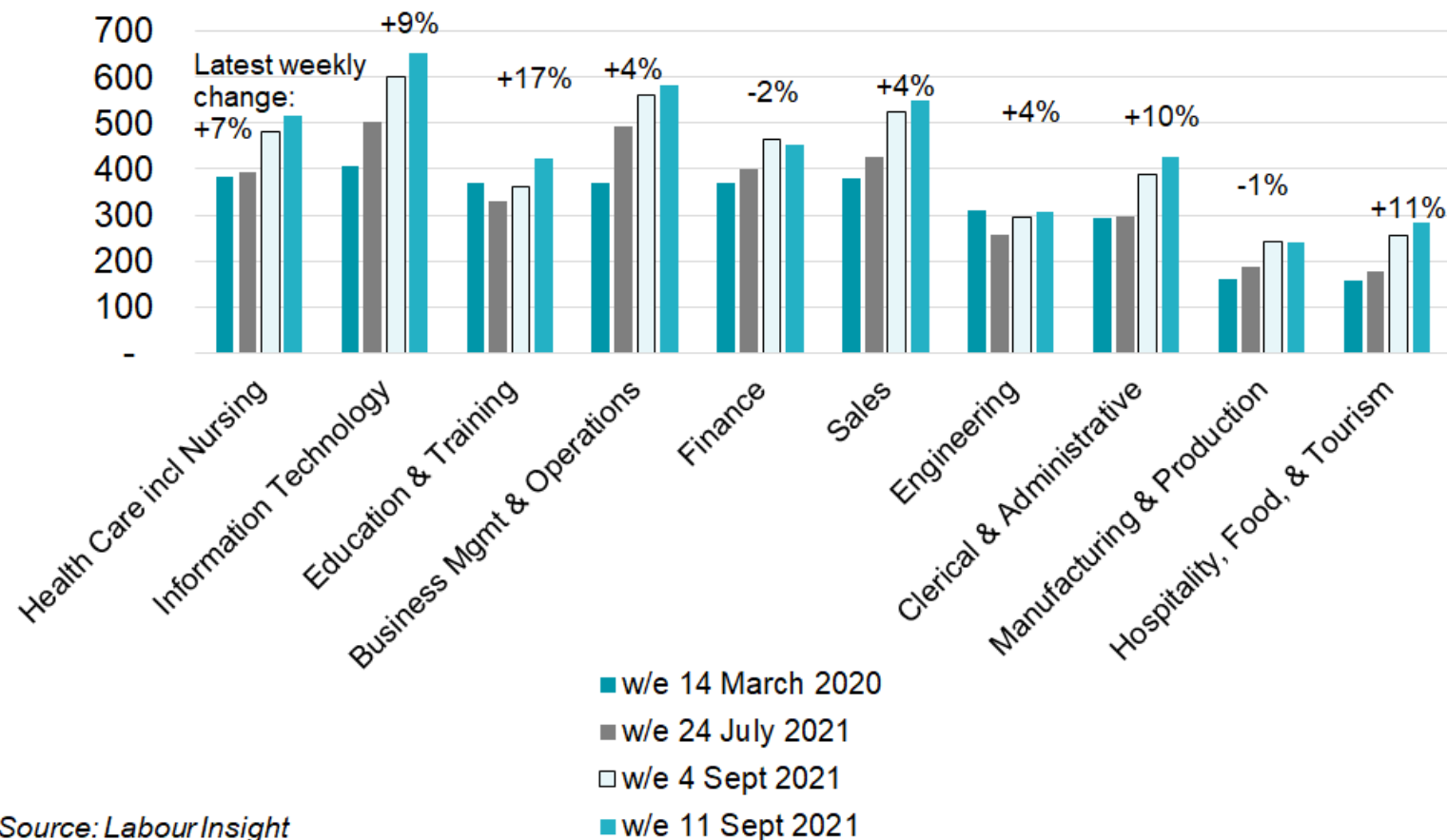
Source: Labour Insight

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.

# Vacancy growth for majority of occupational groups

Several groups saw strong increases in online job postings in the latest week, including Education and training, Hospitality, food and tourism and Clerical and administrative

Weekly count of new online job postings in West Yorkshire by occupational category - 4 week moving average



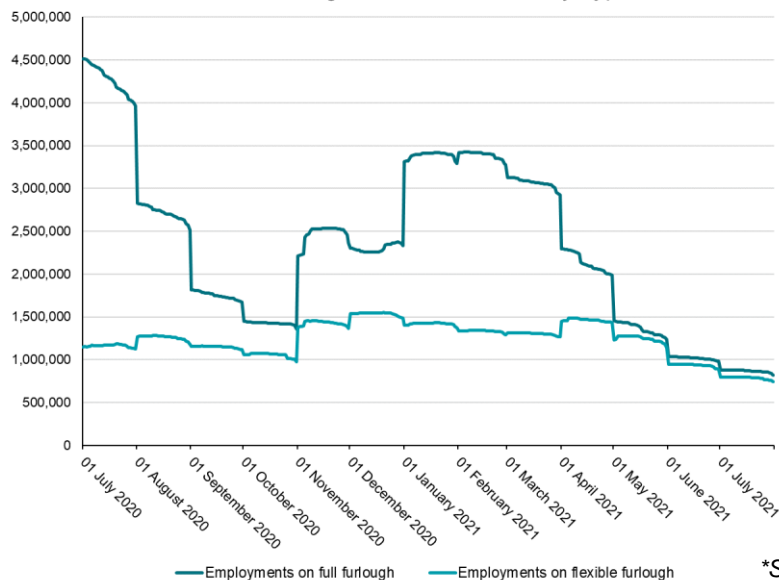
Source: Labour Insight

# A steady decline in furlough use since January 2021. Wholesale & Retail and Manufacturing had the most workers on furlough in West Yorkshire

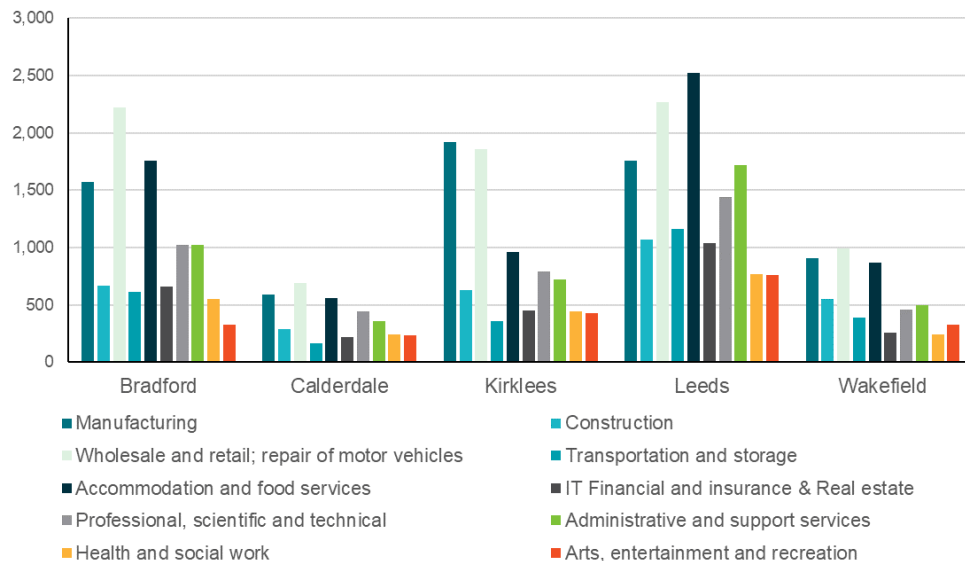
At the end of July there was roughly 1.5 million people on furlough, falling steadily from the end of January peak of roughly 5 million. By the end of July the number of those on full furlough and flexible furlough with 800,000 and 700,000 respectively.

Across England furlough numbers being the highest in the Accommodation and Food Services sector, with 213,000 still in furlough by the end of July.

UK Furlough levels time series by Type



Numbers of Furlough by Sector & District

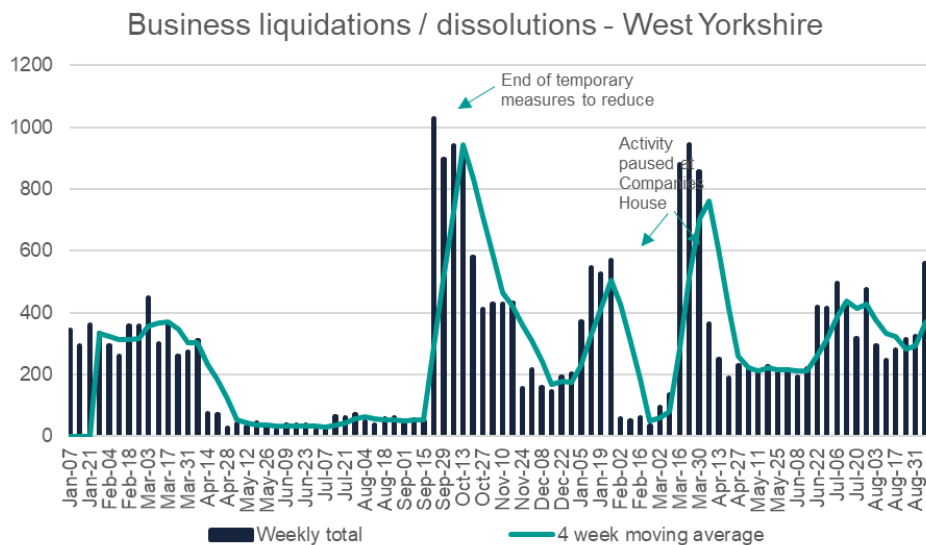


Across West Yorkshire there was roughly 47,000 people on furlough by the end of July. The Wholesale, Retail & repair of motor vehicle sector has the most people in furlough with roughly 8000 people in furlough. This varies between districts with Leeds having the most people in furlough in the Accommodation and Food Service sector at 2520.

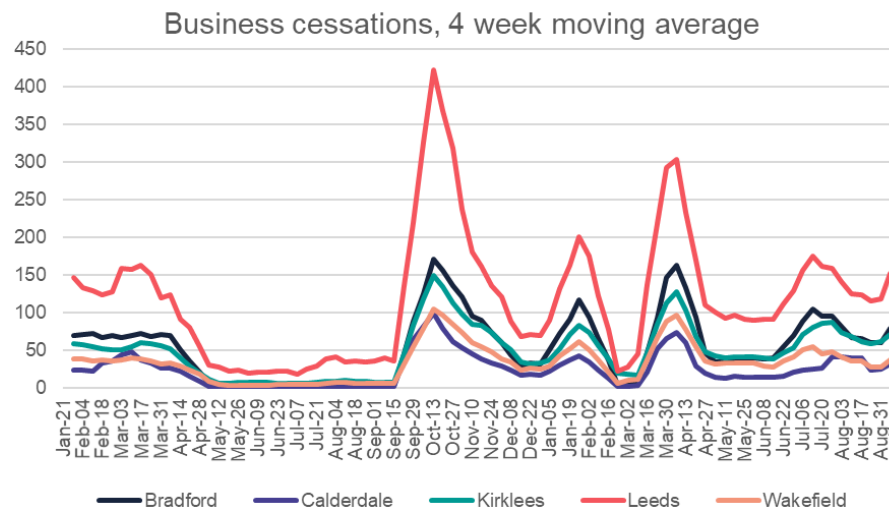
\*Source: HMRC Coronavirus Job Retention Scheme Statistics, Sept 2021

# Business liquidations have increased in the first week for September.

There were 370 business liquidations in West Yorkshire up to the week ending August 24<sup>th</sup>, based on a four week moving average, according to data from Bureau van Dijk's Fame database. This represents a 27% increase from the previous week four-week period. Nationally liquidations increased by 26%. Rates have increased the most in Leeds growing to 152 an increase of 35% in Leeds and the lowest in Kirklees growing to 71 a increase of 14%.



Source: FAME, Bureau van Dijk, 2021



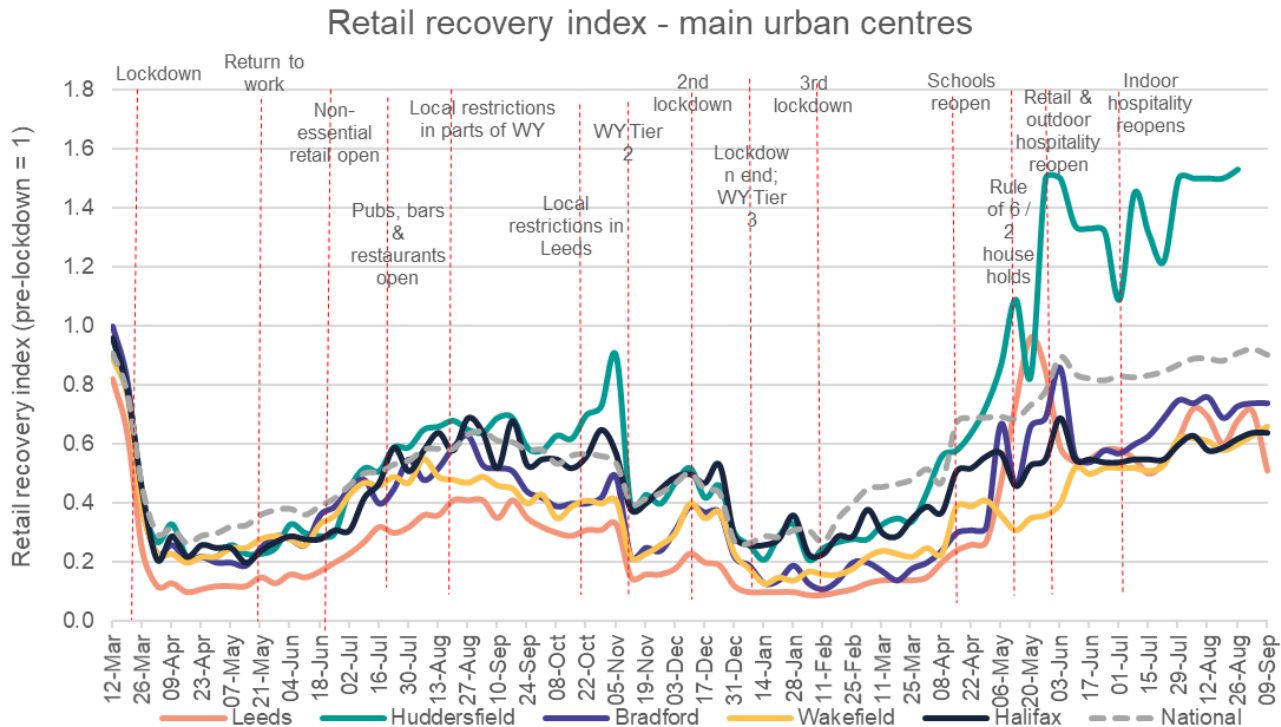
Source: FAME, Bureau van Dijk, 2021

\*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

There was little change in levels of activity in West Yorkshire's main town and city centres in the week to 3<sup>rd</sup> September, according to Geolytix's Retail Recovery Index. The footfall in major town and city centres in West Yorkshire have continued to be lower than the pre pandemic baseline. With Bradford having the highest footfall recovery of 74% of pre pandemic baseline. Among smaller centres, activity is a little over 22% to 40% higher than pre-pandemic in Ilkley and Wetherby, with Hebden Bridge also broadly in line with its own baseline.

*Note: Huddersfield figure has seen a large increase in recent weeks. This figure has been removed from the timeline graph while we investigate possible reason for this increase*



Source: Geolytix Retail Recovery Index, 2021 note: recent data for Huddersfield has been removed due to being an outlier.

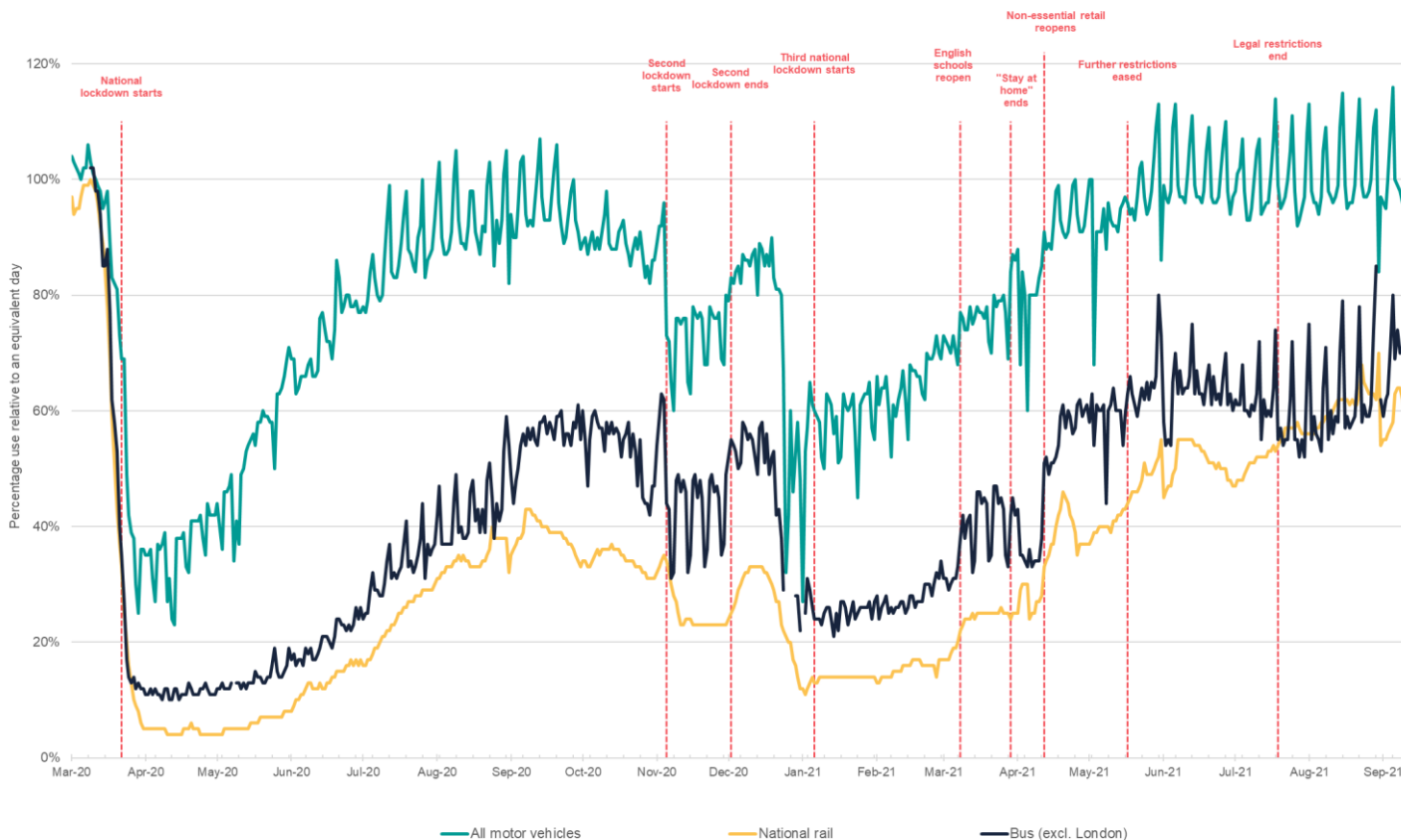
# Transport Insights



# Bus use increases, rail use declines after August bank holiday

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. Bus usage has increased notably since the August bank holiday. Rail usage peaked around the bank holiday before beginning to decline. Similar trends occur locally.

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

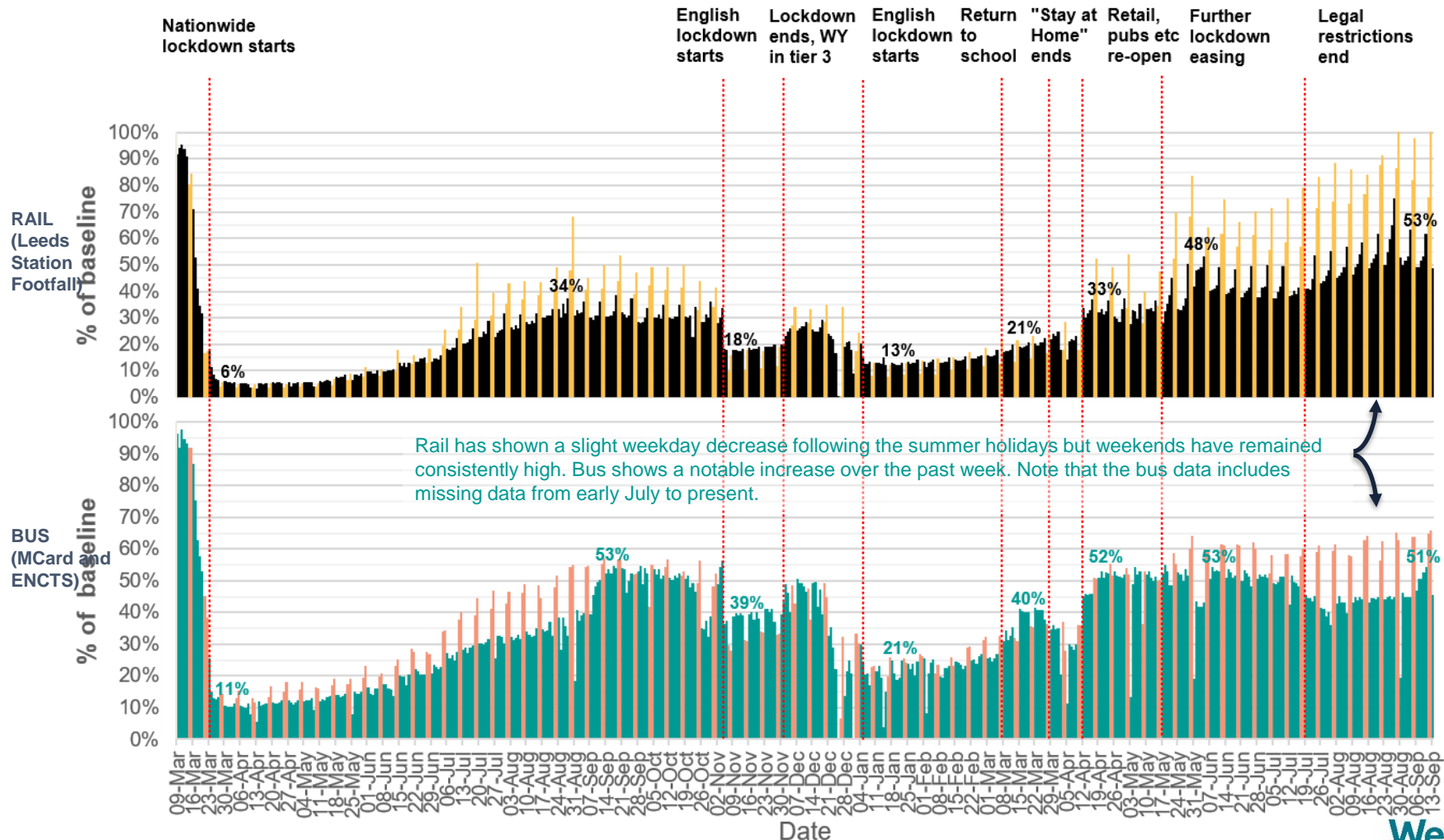


Source: <https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic>



# Local bus patronage proxy increases over past week, rail shows slight decline

■ % Rail weekday change compared to baseline  
■ % Rail weekend change compared to baseline  
■ % Bus weekday change compared to baseline  
■ % Bus weekend change compared to baseline



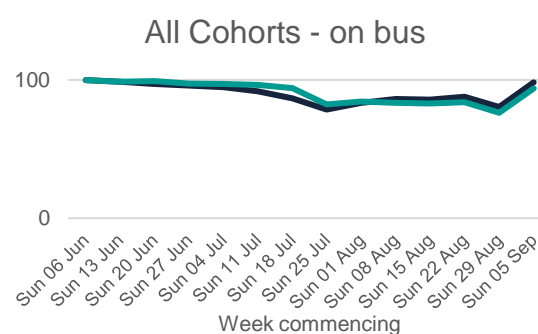
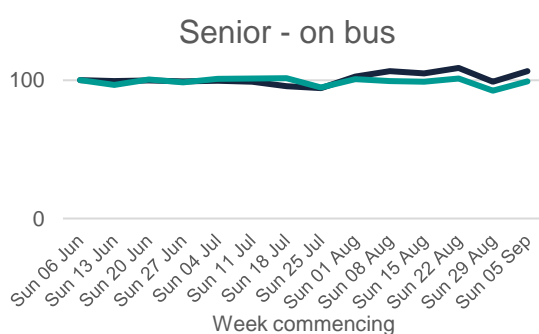
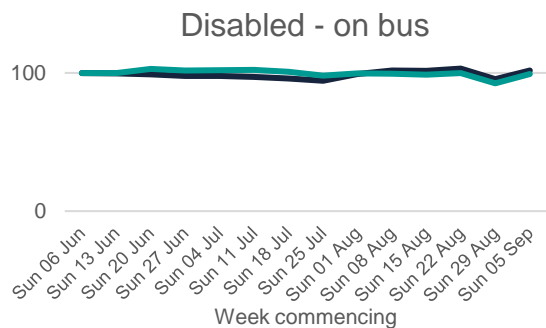
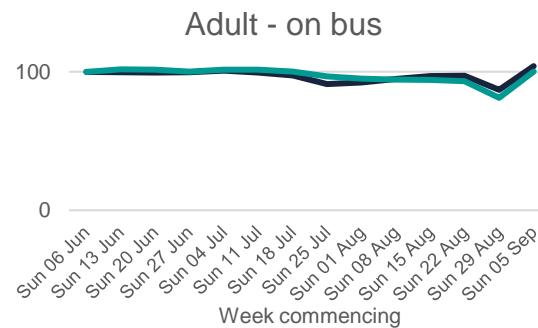
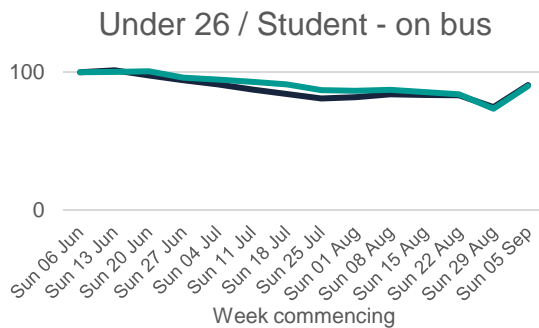
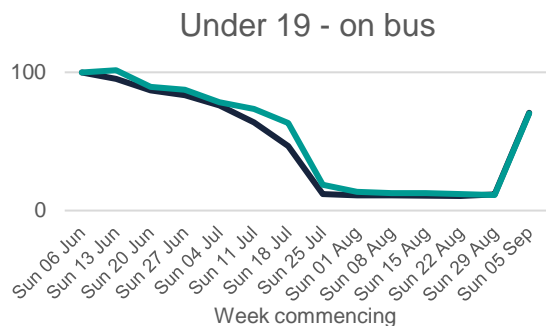
Baseline period is Monday 2nd - Friday 6th March 2020 (weekdays) and 29th Feb -1st March and 6th-7th March (weekends)

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

# Changes in smartcard use on bus continue to mirror pre-COVID years

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 similar pattern to the same time of year in 2018/2019, indicating changes over the last few weeks are largely seasonal, with a little non-seasonal growth in use by seniors.

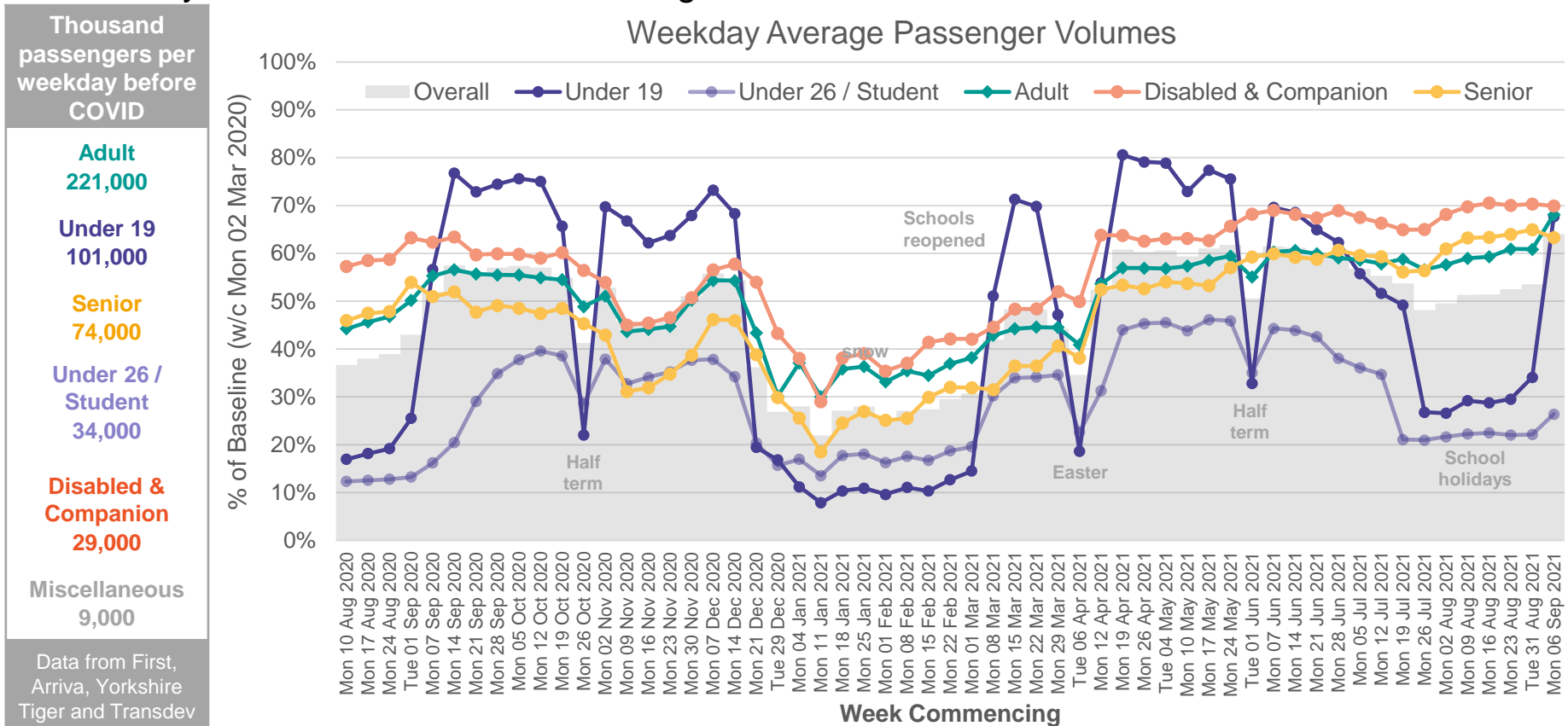
— 2021 — 2018 and 2019



Source: Nero records of smart card ticket use on buses.  
 Aligned on start of school summer holidays. Indexed on start of June.

# Bus use at its highest since March 2020

Ticket machine data shows weekday use reached 64% of baseline in the latest week's data, which is the highest since March 2020. This is the effect of the start of the school year and of use by all cohorts being higher than the corresponding week in 2020. Early indications are that use by the under 19 cohort will be higher this week than last.



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.

