COVID-19 Fortnightly Insights Report

Research & Intelligence

4th October 2021

Executive Summary – Economic Impact

- The number of vacancies for jobs in West Yorkshire posted online during week ending 11 September increased by 2% on the previous week, based on a 4-week moving average (national average fell by 2%). Leeds was the main driver behind the vacancy growth, with other West Yorkshire authorities seeing declines.

- Over the course of August, 794 new business bank accounts were opened in the West Yorkshire region, a growth of 4% from the previous month. This represents the first increase in bank accounts since March 2021. All districts except Calderdale has seen a similar increase in new business bank accounts.

- Over the last month the number of business liquidations has increased, with the latest weekly figures revealing a 7% increase from the previous week. This trend has been seen across all districts in the West Yorkshire.

- Locally and nationally, house prices have risen sharply throughout the pandemic, reaching record highs in June 2021. Despite a fall in July 2021, house prices grew by 8% and 10.7% compared to the previous year in the UK and West Yorkshire respectively, with the average house the UK worth £256,000, compared to £180,000 in West Yorkshire.

- Nationally, COVID-19 mortality has lowered male life expectancy estimates back to 2012-2014 levels, with no improvement in female life expectancy since 2015-2017.

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Executive Summary – Transport Impact

- Nationally, motor vehicle use remains broadly stable with weekday use just below pre-pandemic levels.
- Local traffic data for Leeds reveals that in the week commencing 20th September, 24-hour weekday traffic was down 13% relative to the same week in 2019 (up 1% on the previous week), with the morning peak flow down 23% relative to 2019.
- Nationally, bus usage has increased since the August bank holiday, driven by the start of the academic year and is now tracking at the highest levels since the start of the pandemic.
- Local bus ticket machine data for West Yorkshire shows weekday bus use in the last week has also reached its highest levels since the start of the pandemic (now 70% of baseline figures).
- National 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.
- Weekday and weekend evening footfall in Leeds has increased steadily throughout the summer of 2021 indicating continuing recovery of the night time economy, however overall footfall counts still remain lower than equivalent periods in 2019.

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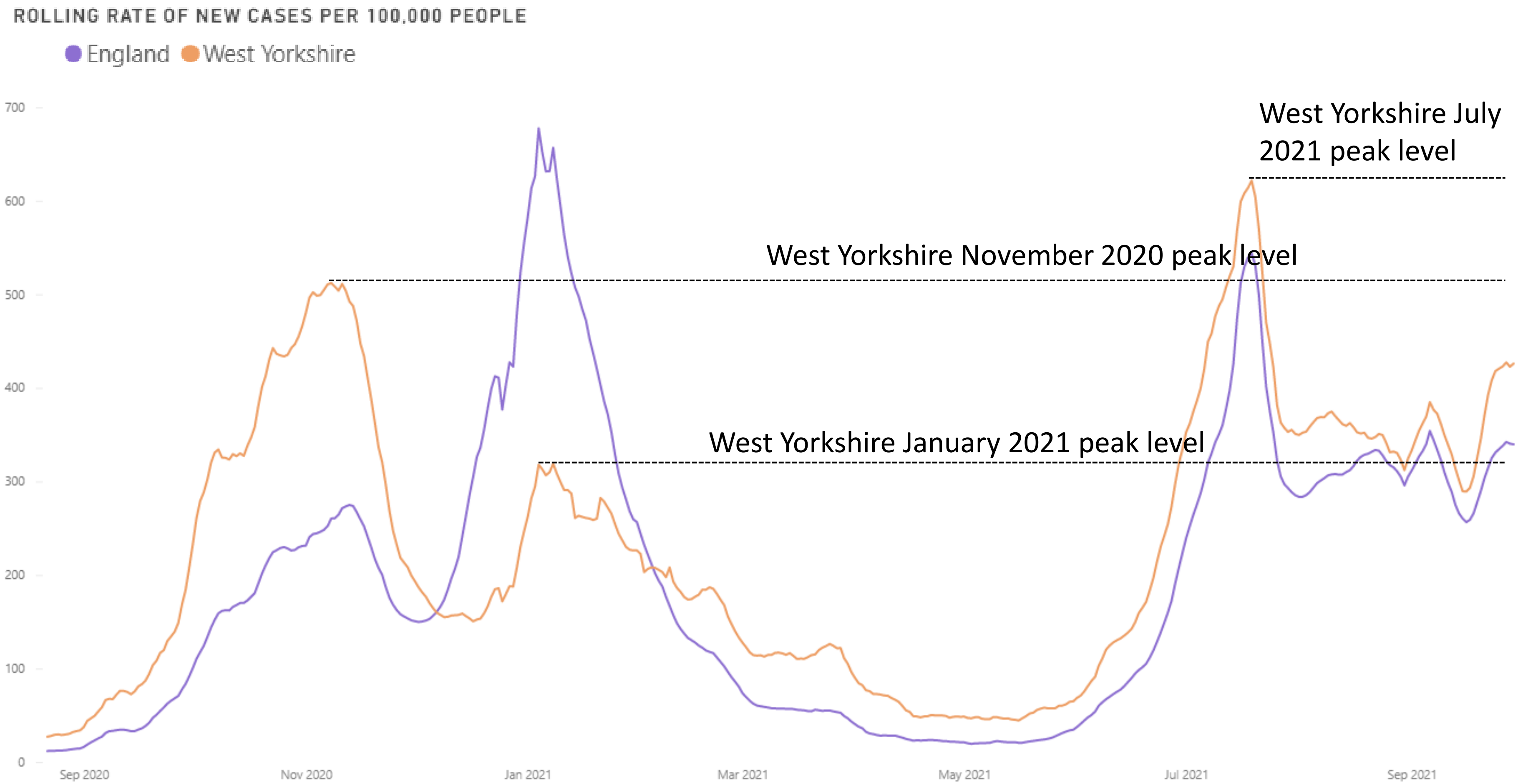
Virus prevalence – West Yorkshire trend



As of the 28th September 2021, the 7-day moving average **West Yorkshire COVD-19 rate was 425.9 per 100k, an 8% increase from the previous week.** Case rates in West Yorkshire remain higher than the January 2021 peak. In Yorkshire and the Humber case rates increased by 7% to 424 per 100k, whilst in England overall case rates increased by 8% to 339.6 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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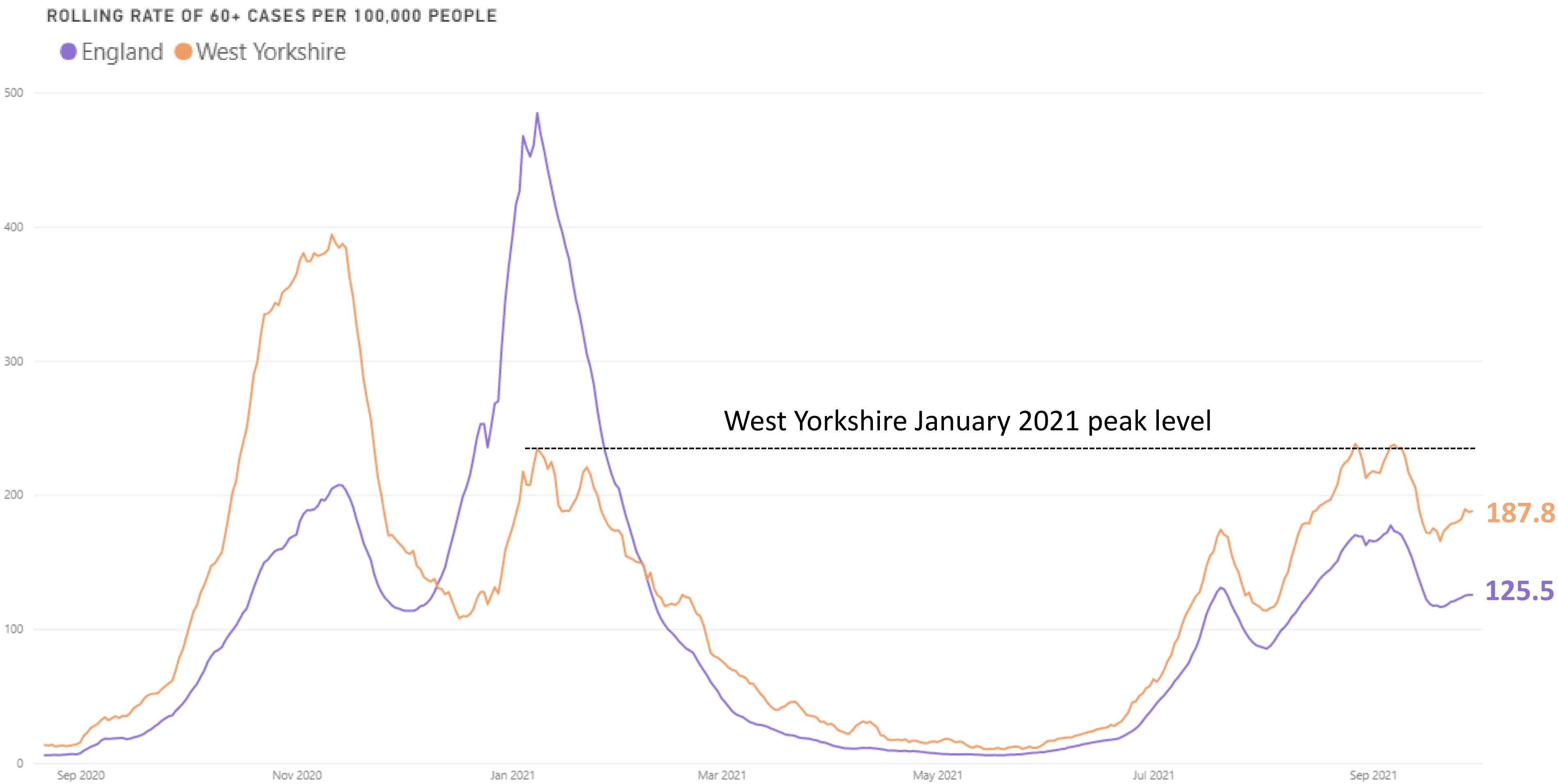
Virus prevalence – over 60s trend



In the last week, case rates in the over 60's in West Yorkshire increased by 12% whilst rates in England increased by 7%. Calderdale and Wakefield have the 3rd and 4th highest over 60 COVID-19 rates in England (Barnsley has the highest).

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:
29/09/2021

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	37	392.2	↑ 4	2126	81181	14975	1196	221
Calderdale	6	561.4	↑ 7	1187	28933	13684	354	167
Kirklees	17	470.4	↑ 10	2076	60150	13631	875	198
Leeds	46	377.2	↑ 12	3013	116881	14632	1465	183
Wakefield	24	451.1	↑ 7	1586	49650	14122	846	241
West Yorkshire		425.9	↑ 8	9988	336795	14361	4736	202
England		339.6	↑ 8	192058	6752536	11941	119826	212

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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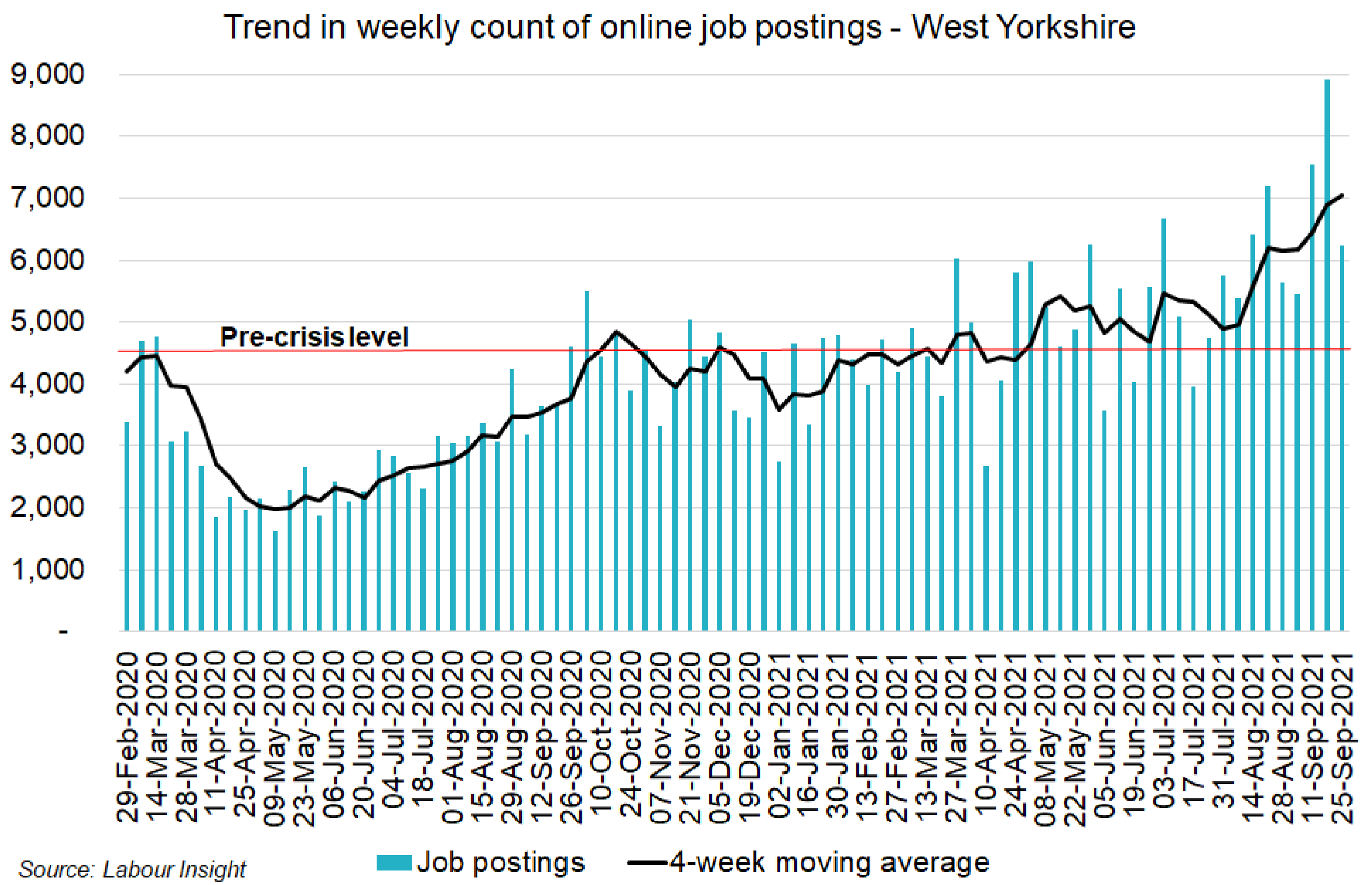
Economic Insights

Vacancies: Level of vacancies remains high

The number of vacancies for jobs in West Yorkshire posted online during week ending 11 September increased by 2% on the previous week, based on a 4-week moving average (national average fell by 2%). The moving average has now been above the pre-crisis level (March 14 2020) for 21 consecutive weeks and current figure is 38% higher than week ending 24 July when final restrictions were lifted.



Source: Labour Insight

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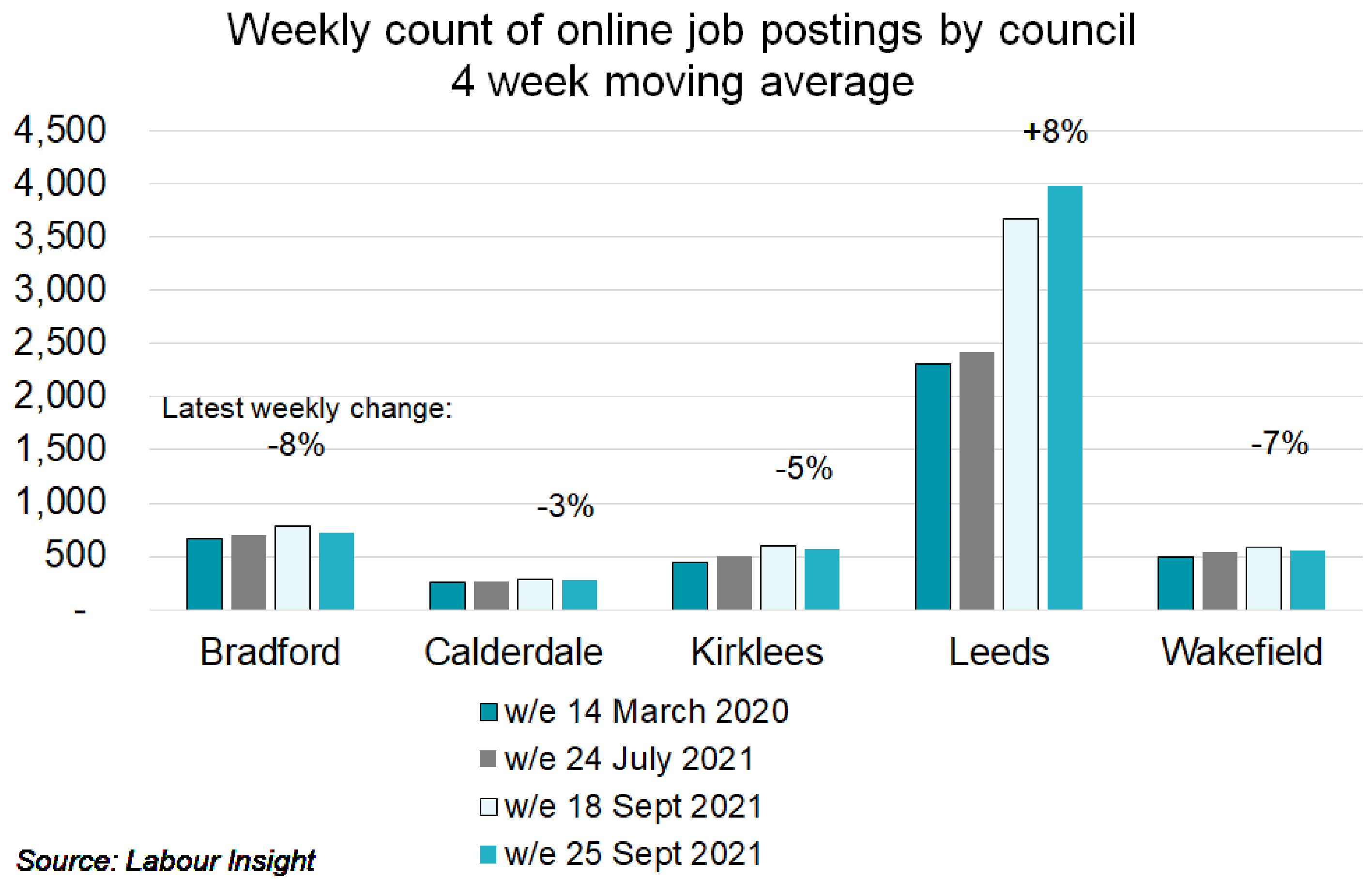
Vacancies: Growth driven by Leeds

Leeds was the source of vacancy growth in the current week (based on moving average) with remaining local authorities seeing declines.



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.

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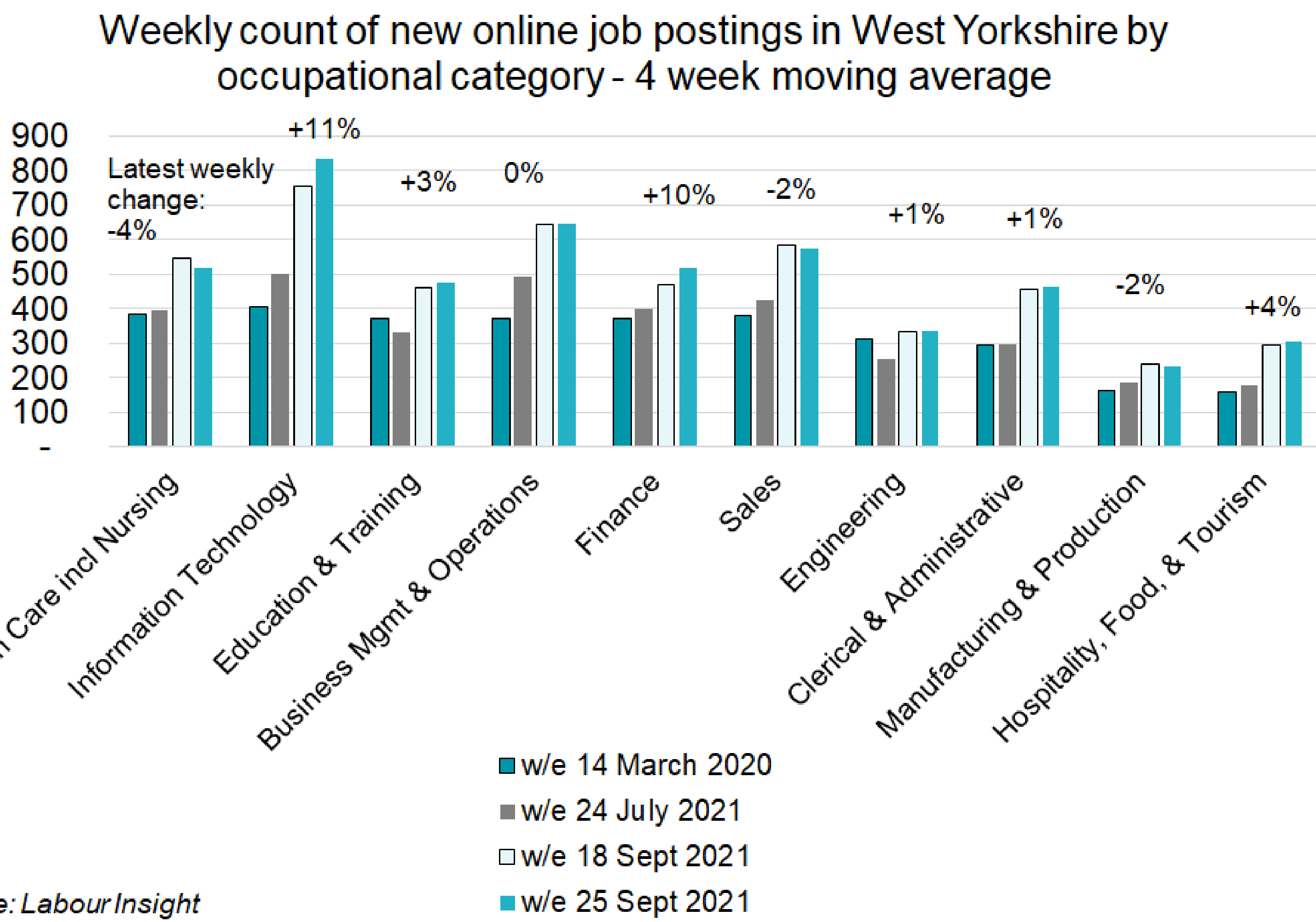
Vacancies: Mixed picture for occupations

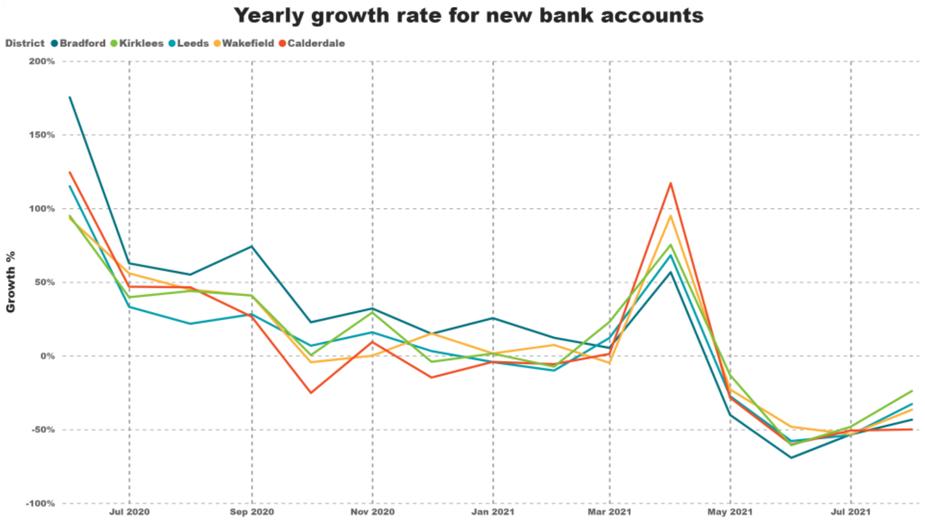
Information Technology and Finance saw the strongest vacancy growth in the current week, with small falls in other areas, such as Sales.

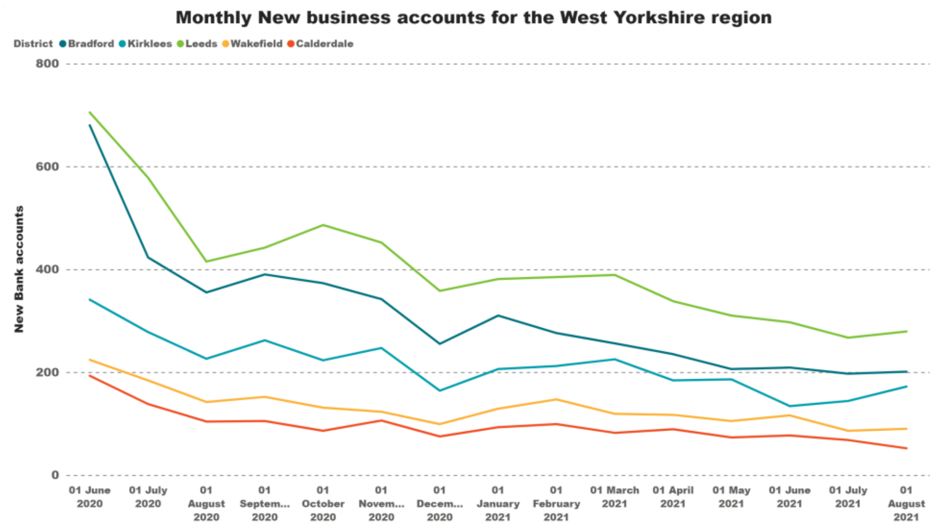


Source: Labour Insight

Number of new business bank accounts opening have remained steady over the four months

Over the course of August there was 794 new business bank accounts opened in West Yorkshire, a growth of 4% from the previous month. This represents the first increase in bank accounts since March 2021. All districts except Calderdale has seen a similar increase in new business bank accounts. With Kirklees growing the fastest at 20% from 144 to 172 new business bank accounts.





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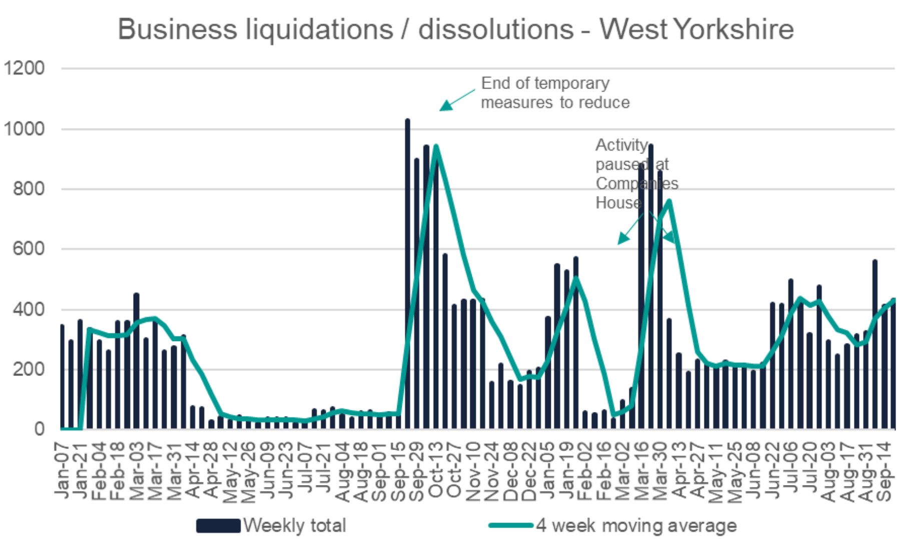
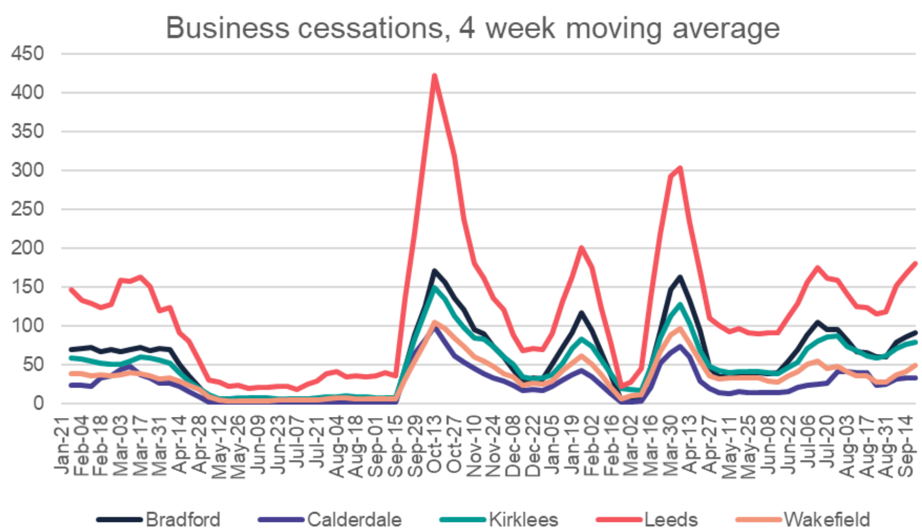
Source: Bank Search New Business Back Accounts Data, Sept 2021

Business liquidations have seen an increase in recent weeks

There were 432 business liquidations in West Yorkshire up to the week ending September 21st, based on a four week moving average, according to data from Bureau van Dijk's Fame database. Over the last month the number of businesses liquidating have been increasing. With the latest figures showing a 7% increase from the previous week. This trend has been seen across all districts in the West Yorkshire region. The largest increase was seen in Wakefield of 18% and the lowest in Calderdale at 1%



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*

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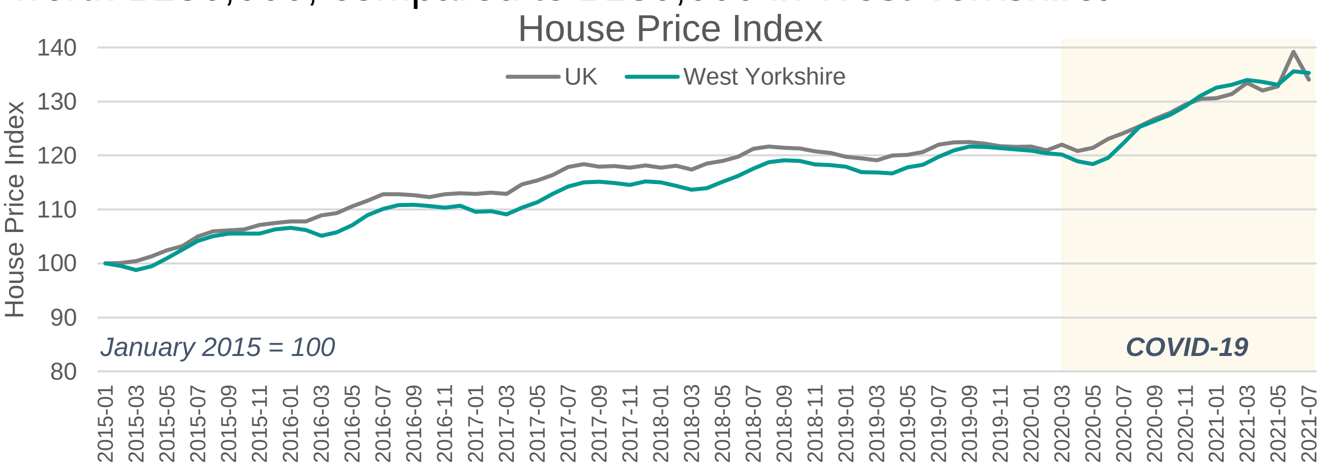
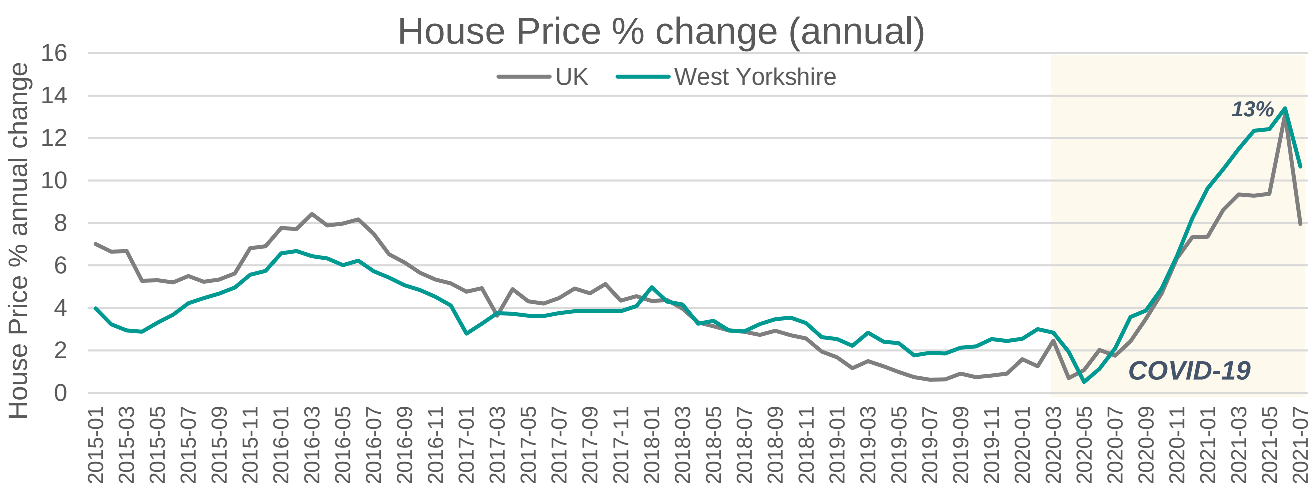
House prices locally and nationally reached a record high in June 2021

Locally and nationally, house prices have risen sharply throughout the pandemic, reaching record highs in June 2021. Despite a fall in July 2021, house prices grew by 8% and 10.7% compared to the previous year in the UK and West Yorkshire respectively, with the average house the UK worth £256,000, compared to £180,000 in West Yorkshire.





Source: HM Land Registry.

Although house prices in West Yorkshire broadly follow the national trend, the Office for National Statistics [report](#) that house prices in some rural and coastal areas have risen at three times the national rate. Young and low-paid workers in particular are at risk of being priced out of such areas, which may lead to skill shortages in the tourism and hospitality industries that their local economies rely on.

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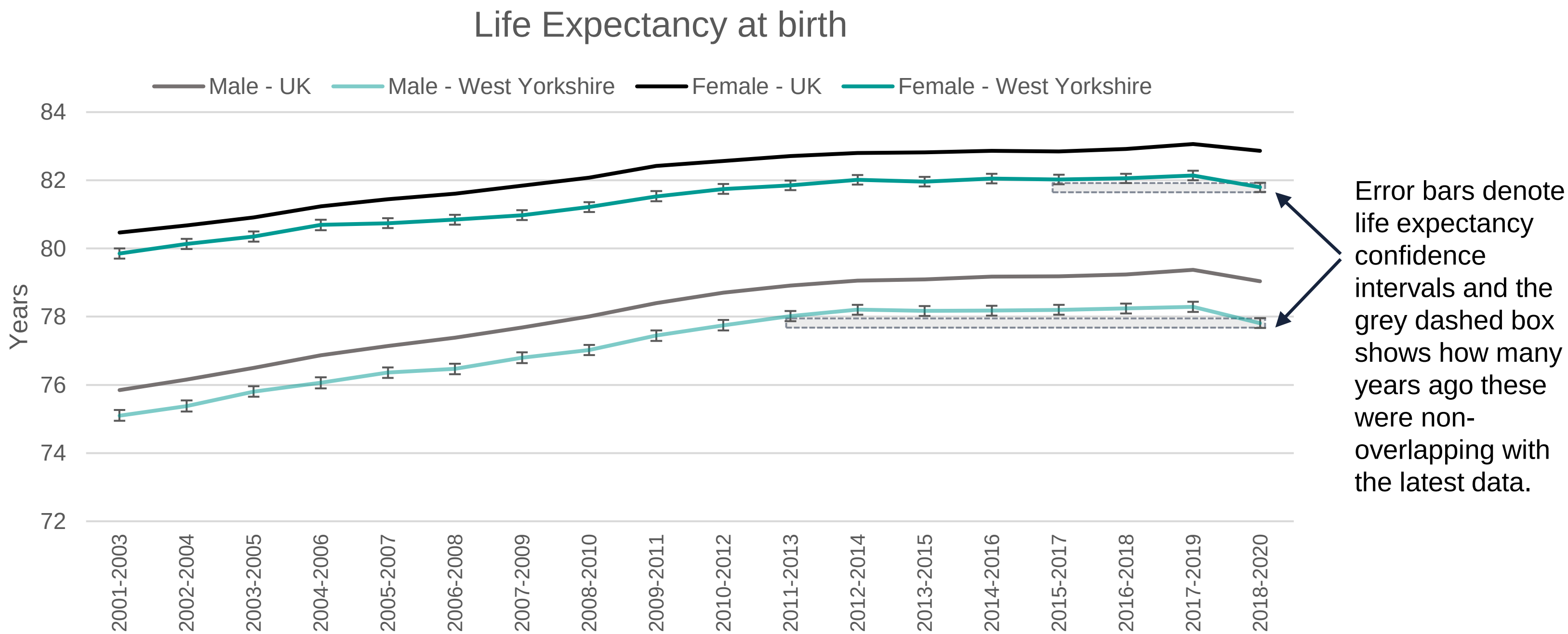
COVID-19 mortality has lowered male life expectancy with no improvement in female life expectancy

COVID-19 has led to a greater number of deaths than normal in 2020. As result the latest estimates of UK life expectancy (at birth) show a fall in male life expectancy back to 2012-2014 levels, although the drop was steeper in West Yorkshire. Nationally, this is the first time the UK has recorded a decline when comparing non-overlapping time periods since the series began in the early 1980s. For females, at the UK level there was no improvement in life expectancy since 2015 to 2017 (the last non-overlapping period) at 82.9 years and a similar trend is observed in West Yorkshire accounting for life expectancy confidence intervals.



Note that estimates rely on the assumption that current levels of mortality, which are unusually high, will continue for the rest of someone's life. Once the coronavirus pandemic has ended and its consequences for future mortality are known, it is possible that life expectancy will return to an improving trend in the future.

Source: Office for National Statistics Life Expectancy Estimates

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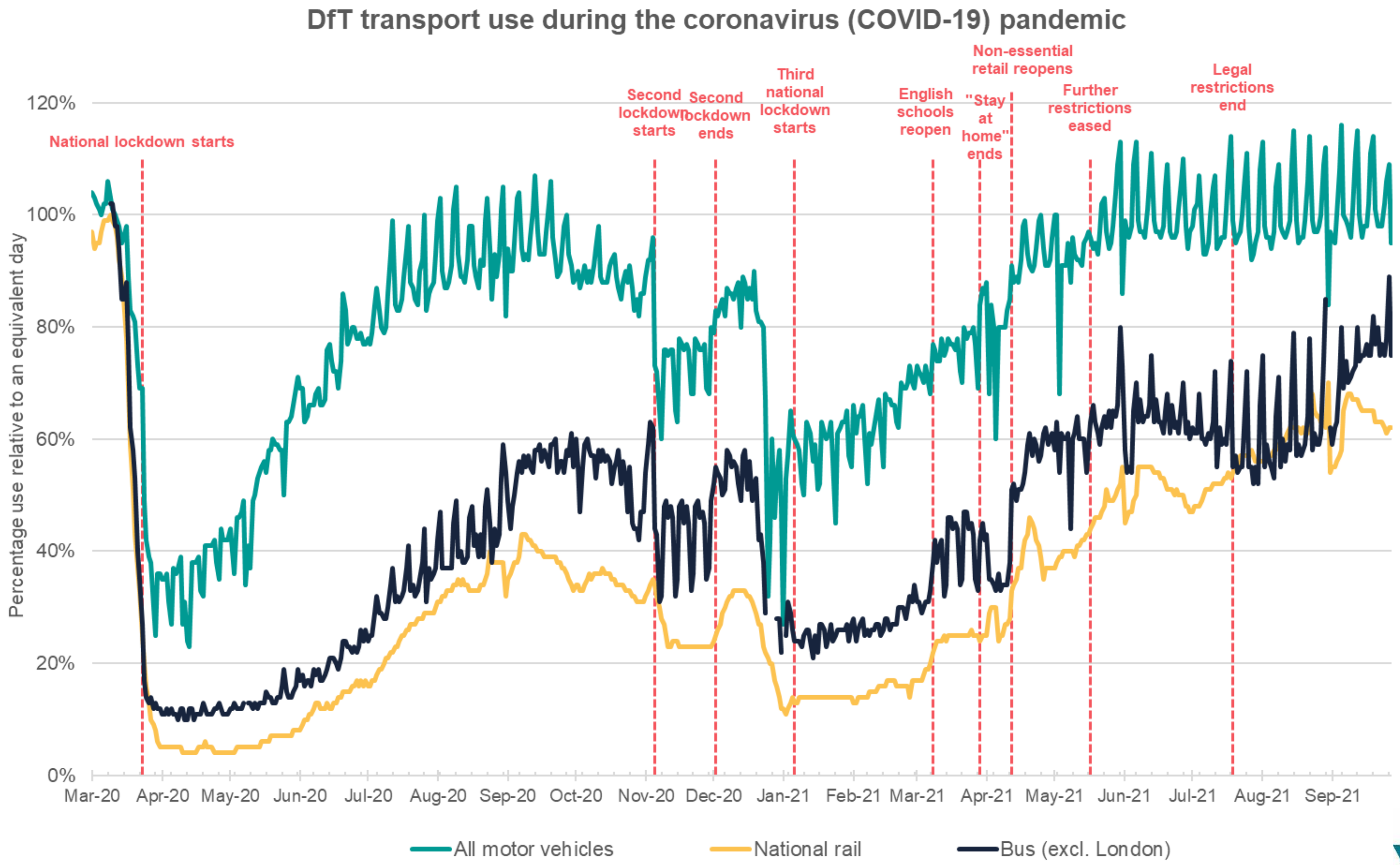
Transport Insights

Nationally, bus use increases while rail use declines

Motor vehicle use remains broadly stable but with a decrease in the most recent weekend. Bus usage has maintained its post-summer increase and is tracking at the highest levels since the pandemic started. Rail usage has declined over recent weeks.



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

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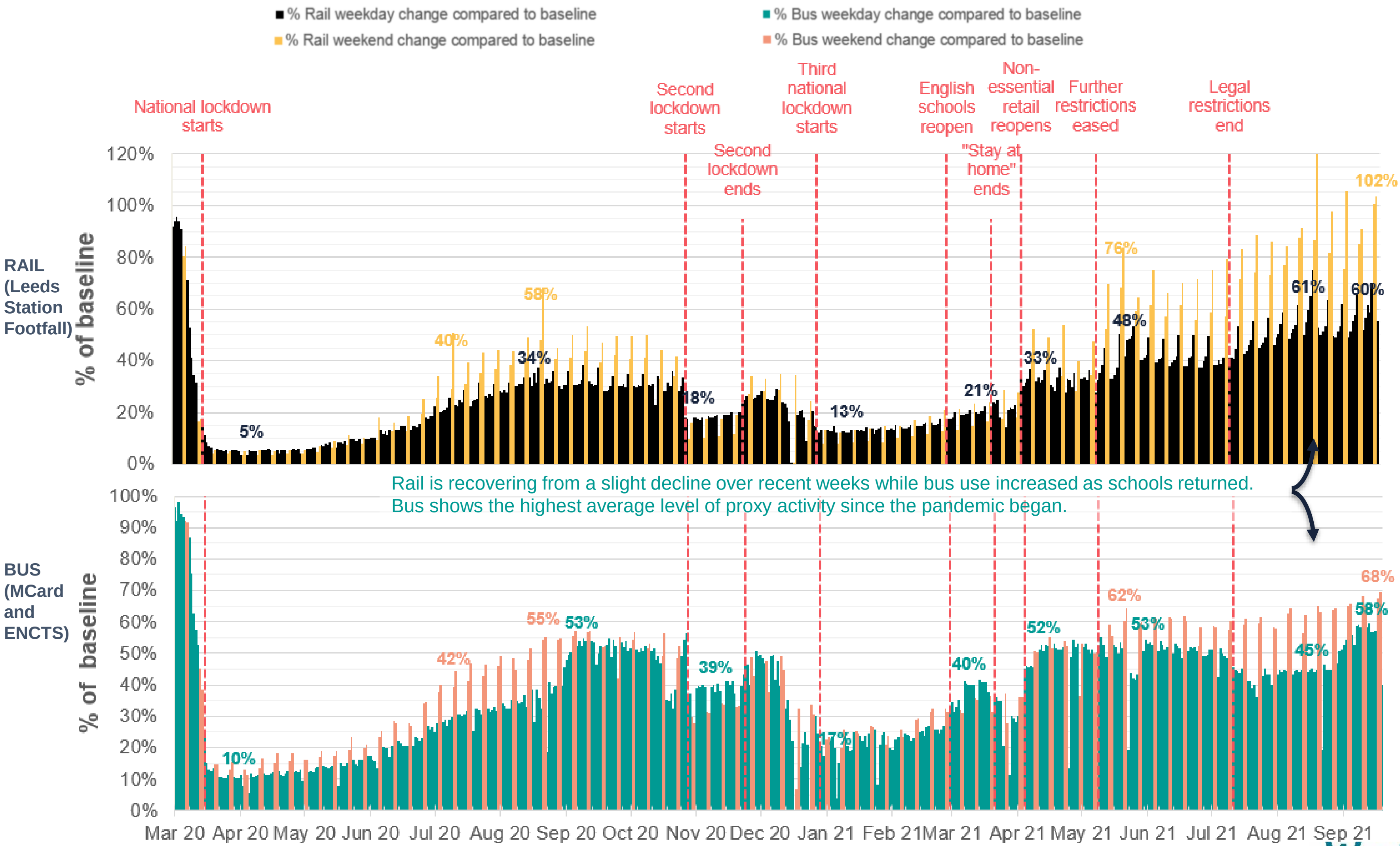
Local bus proxy shows increase while rail stabilises



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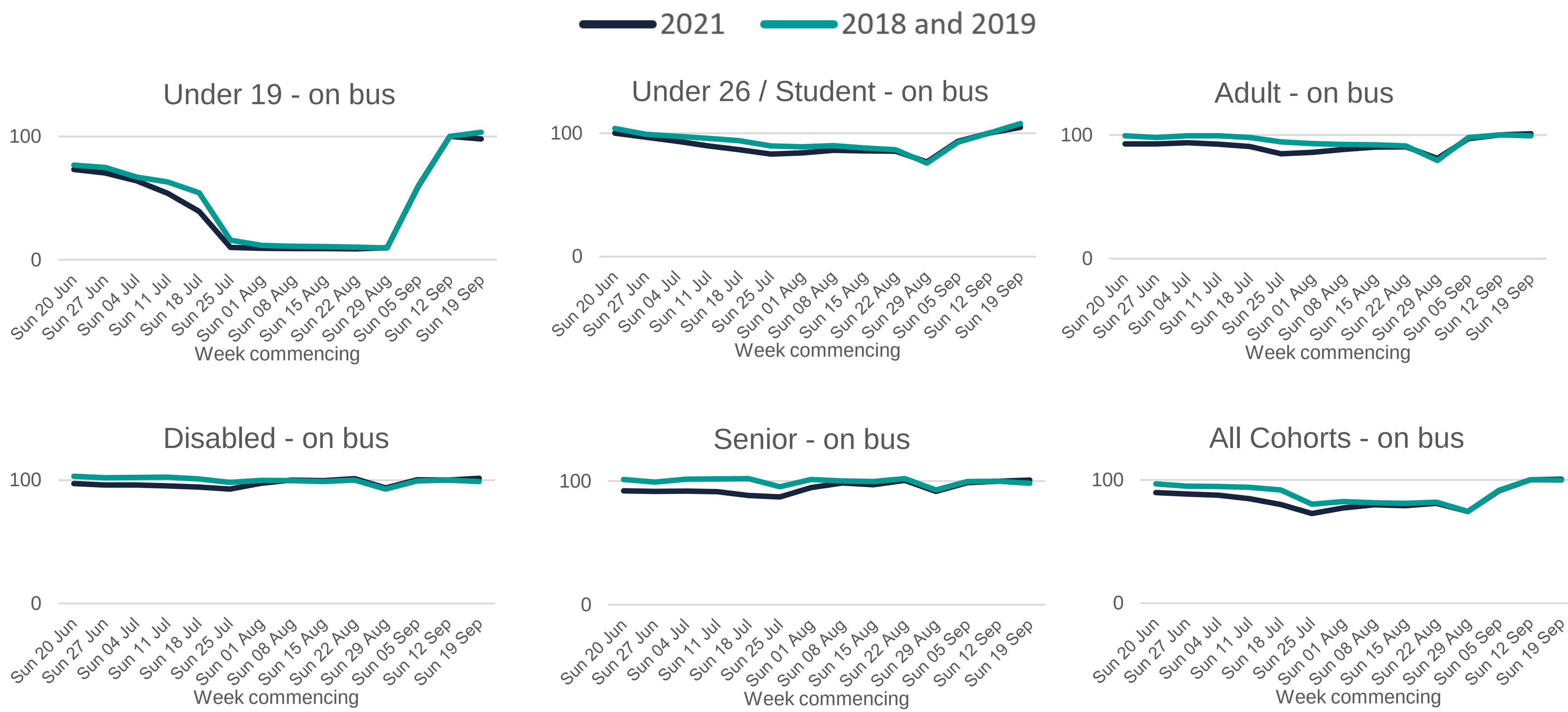
Changes in smartcard use on bus continue to mirror pre-COVID years

Data continues to indicate that the changes in patronage levels continue to be seasonal more than COVID recovery. There has been a little non-seasonal growth comparing early September against late June. It is possible that gradual adoption of smartphones to replace smartcard technology is masking changes in MCard use by Under 19, Under 26 / Student and Adult cohorts.



Source: Nero records of smart card ticket use on buses.
Aligned on start of school term holidays. Indexed on week commencing 12 September.

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Bus use at its highest since March 2020

Ticket machine data shows weekday use exceeded 70% of baseline in the week commencing 13 September, which is the highest since March 2020. This is the effect of the start of the school year and use by all cohorts being higher than the corresponding week in 2020. Early indications are that use by the Under 26 / Student is continuing to increase as it did in late September 2020.

Passengers per weekday before COVID

Adult
221,000

Under 19
101,000

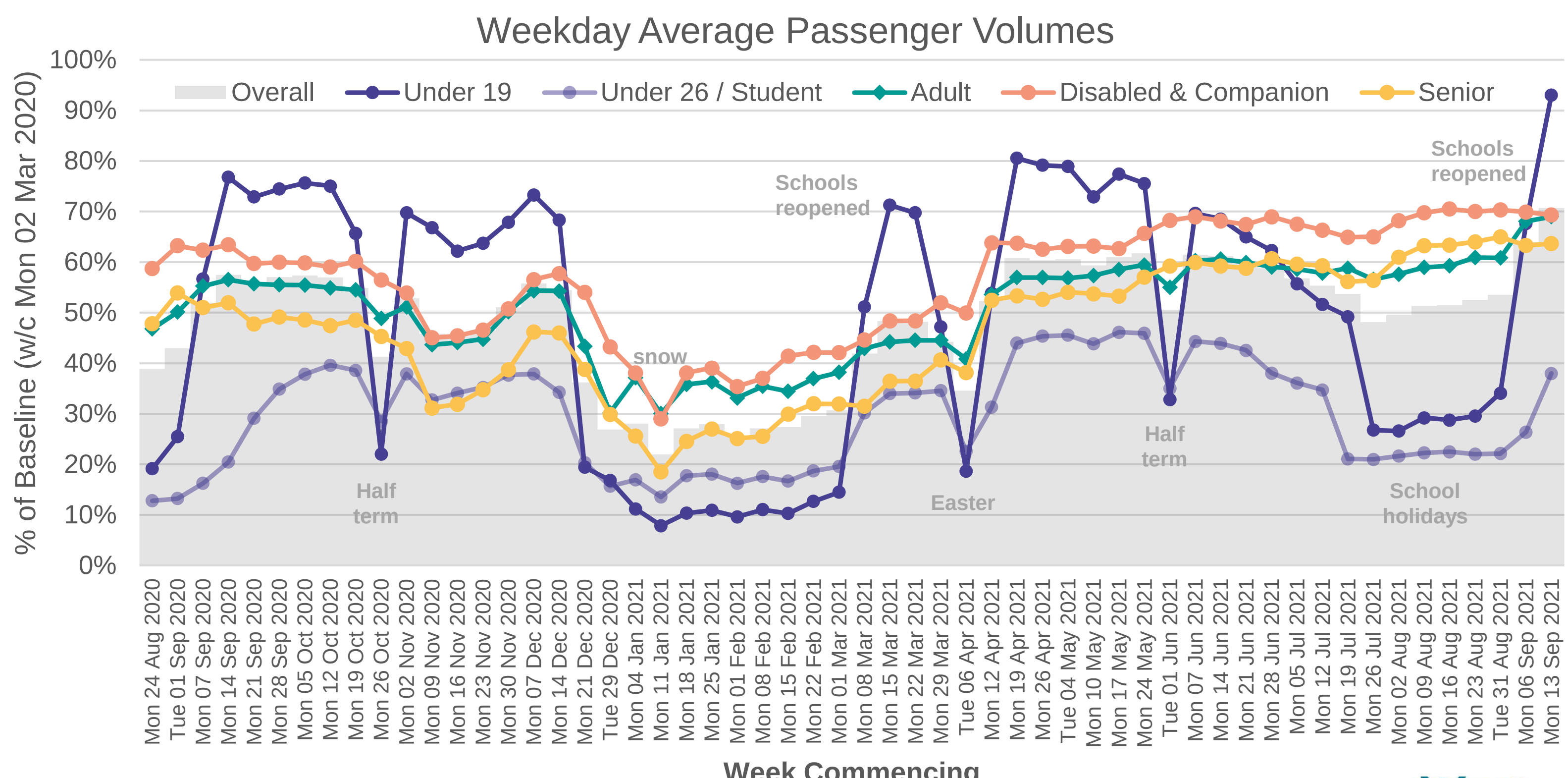
Senior
74,000

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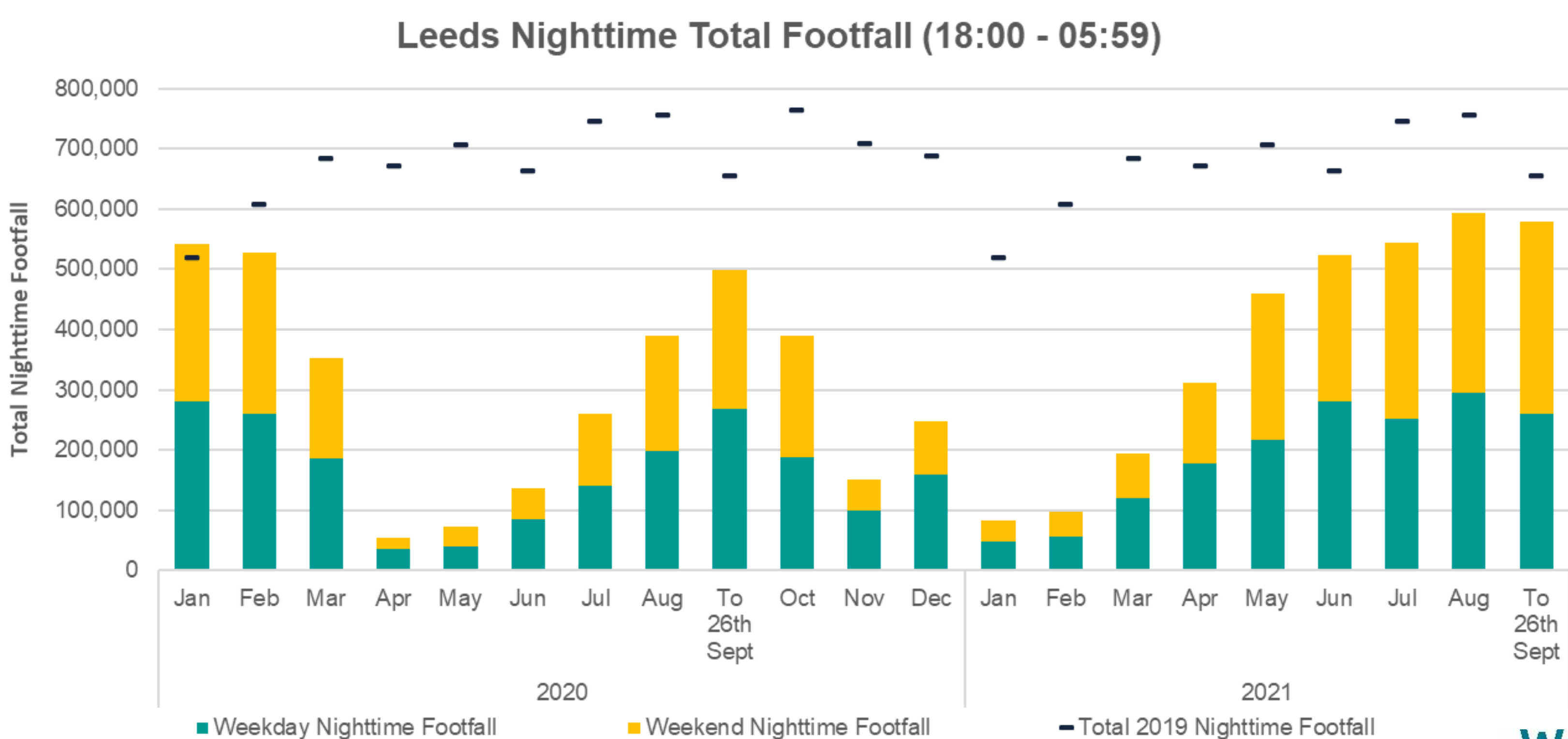
Evening footfall in Leeds City Centre is increasing but still remains below pre-pandemic levels

Weekday and weekend evening footfall (Friday 18:00 – Monday 05:59) in Leeds has increased steadily throughout the summer of 2021 showing continuing recovery of the night time economy. Although recent footfall counts have been tracking above 2020, total numbers are still lower than the same period in 2019.



Source: Leeds City Council

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