West Yorkshire Combined Authority

COVID-19 Fortnightly Insights Report

Research & Intelligence

19th October 2021

Executive Summary – Economic Impact

- There was a net increase in employment in West Yorkshire of around 6,000 (0.6%) between August and September 2021. Employment is now 1% above pre-pandemic levels seen in February 2020 and 4% higher than its lowest point in pandemic in November 2020.

- The latest claimant count figures, which relate to the number of people on out-of-work benefits, show a 2% fall (-2,000 in absolute terms) in West Yorkshire between August and September. The claimant count is now 18% lower than at its peak in March 2021 (20,000 lower).

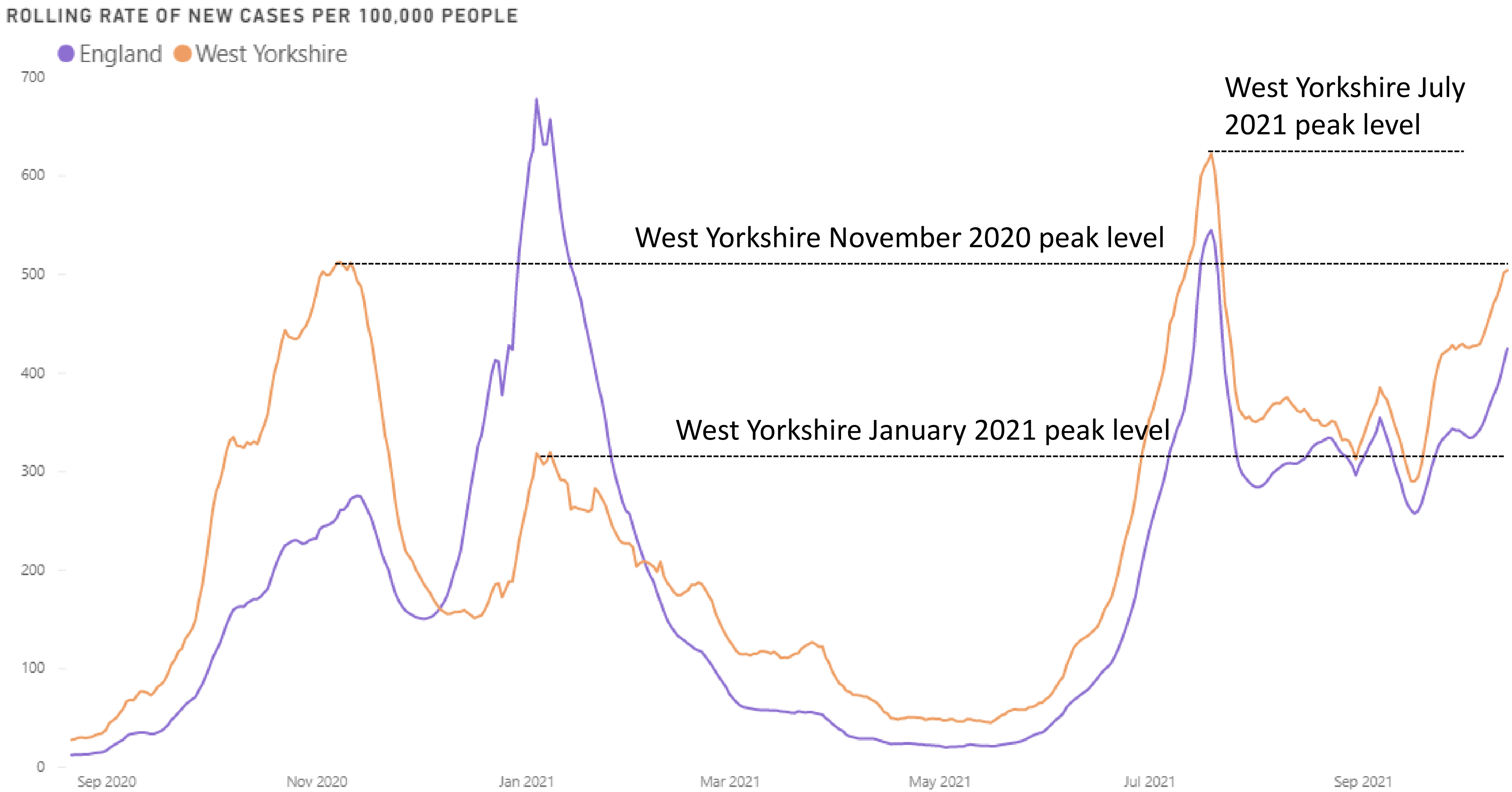
- All occupational categories experienced a fall in job postings in week ending 9 October 2021, with the biggest reductions for Hospitality, food and tourism, Education and training and Clerical and administrative. This follows strong growth in most areas in recent weeks.

- There were 413 business liquidations in West Yorkshire up to the week ending October 5th, based on a four-week moving average, according to data from Bureau van Dijk's Fame database. The latest business liquidation figures showing a 12% decrease from the previous week.

Executive Summary – Transport Impact

- Nationally, motor vehicle use remains broadly stable, whilst bus use maintains its post-summer increase, in contrast to rail, which has continued a downward trend since September 2021.
- Locally, the bus weekday usage trend (from MCard and English National Concessionary Travel Scheme data) has stabilised over the last couple of weeks, whilst weekend use has continued to increase.
- Bus Ticket machine data reveals weekday bus use reached 75% of baseline (March 2020) in the latest week. Comparing recent trends with pre-pandemic years indicates that the changes in patronage levels continue to be driven by seasonal trends.
- In contrast to the national trend, rail passenger footfall at Leeds station has increased recently, with weekend footfall exceeding pre-pandemic levels.
- Off road cycle counts, often attributed to leisure trips, have been lower this summer than in 2020 (when government restrictions were still in place). Conversely commuting trips have increased this year as people return to workplaces.
- Overall, cycle counters in Leeds district have recorded relatively more use (compared to the same months in 2020) than other West Yorkshire districts.

Virus prevalence – West Yorkshire trend



As of the 13th October 2021, the 7-day moving average **West Yorkshire COVD-19 rate was 503.6 per 100k, a 15% increase from the previous week.** Case rates in West Yorkshire are now similar to the November 2020 peak. In Yorkshire and the Humber case rates increased by 16.2% to 488 per 100k, whilst in England overall case rates increased by 21.7% to 424 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 – 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: 13/10/2021

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	46	479.4	↑ 15	2599	86139	15889	1209	223
Calderdale	9	621.0	↑ 18	1313	31382	14842	368	174
Kirklees	36	512.8	↑ 18	2263	64433	14601	887	201
Leeds	41	490.2	↑ 15	3916	124474	15583	1484	186
Wakefield	43	488.9	↑ 11	1719	53021	15080	858	244
West Yorkshire		503.6	↑ 15	11810	359449	15327	4806	205
England		424.0	↑ 22	239760	7226658	12779	121043	214

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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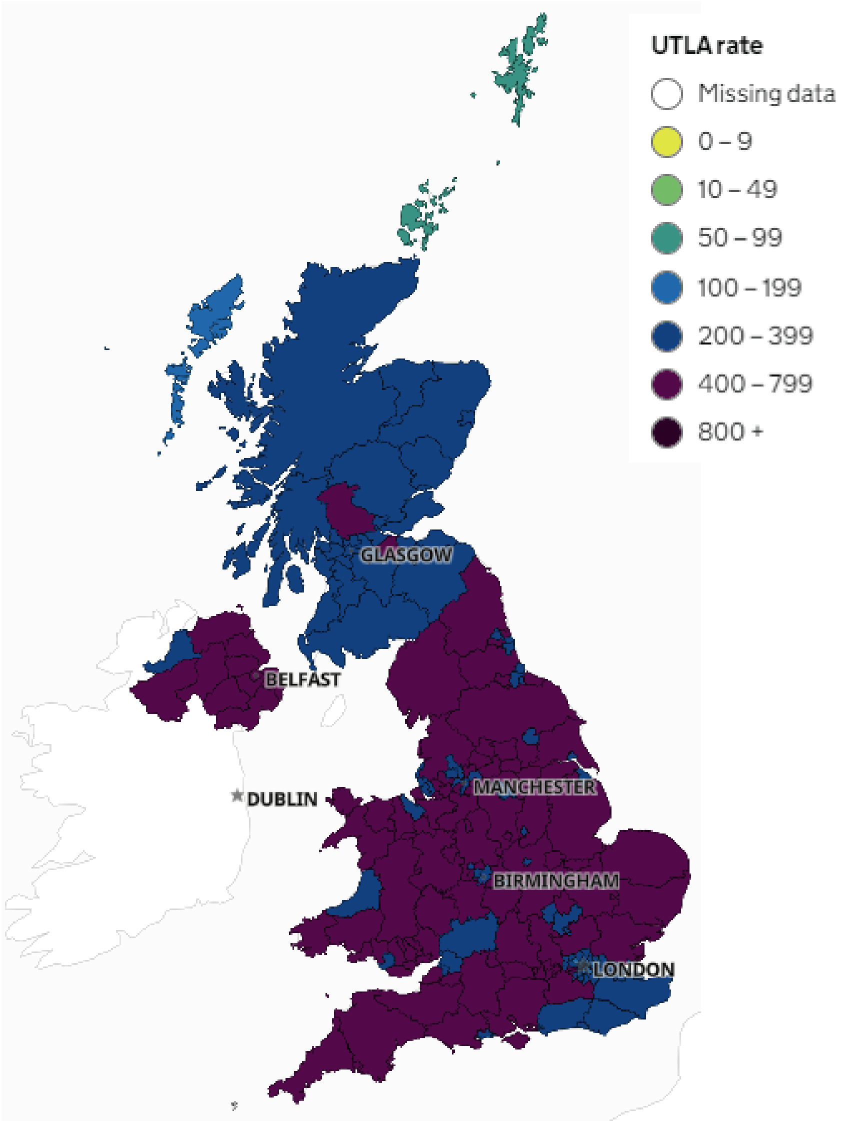
National COVID-19 Rates Map – 7 day rolling rate



The map (left) shows the Upper Tier Local Authority (UTLA) 7–day rolling rate of new cases up to **13th October** (available here).

Regionally, case rates are highest in the East Midlands whilst rates in the over 60s are highest in the North East.

	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	516.5	10.8%	201.7	25.0%
East of England	453.9	27.3%	166.8	50.8%
London	237.1	14.9%	124.3	23.4%
North East	439.4	26.5%	258.9	34.8%
North West	456.5	15.5%	235.7	24.7%
South East	416.9	28.1%	148	41.5%
South West	465.2	61.8%	164.4	57.6%
West Midlands	446.1	9.0%	197.3	24.6%
Yorkshire and Humber	488	16.2%	246.4	30.2%
England	424	21.7%	188.2	33.5%

Highest Lowest

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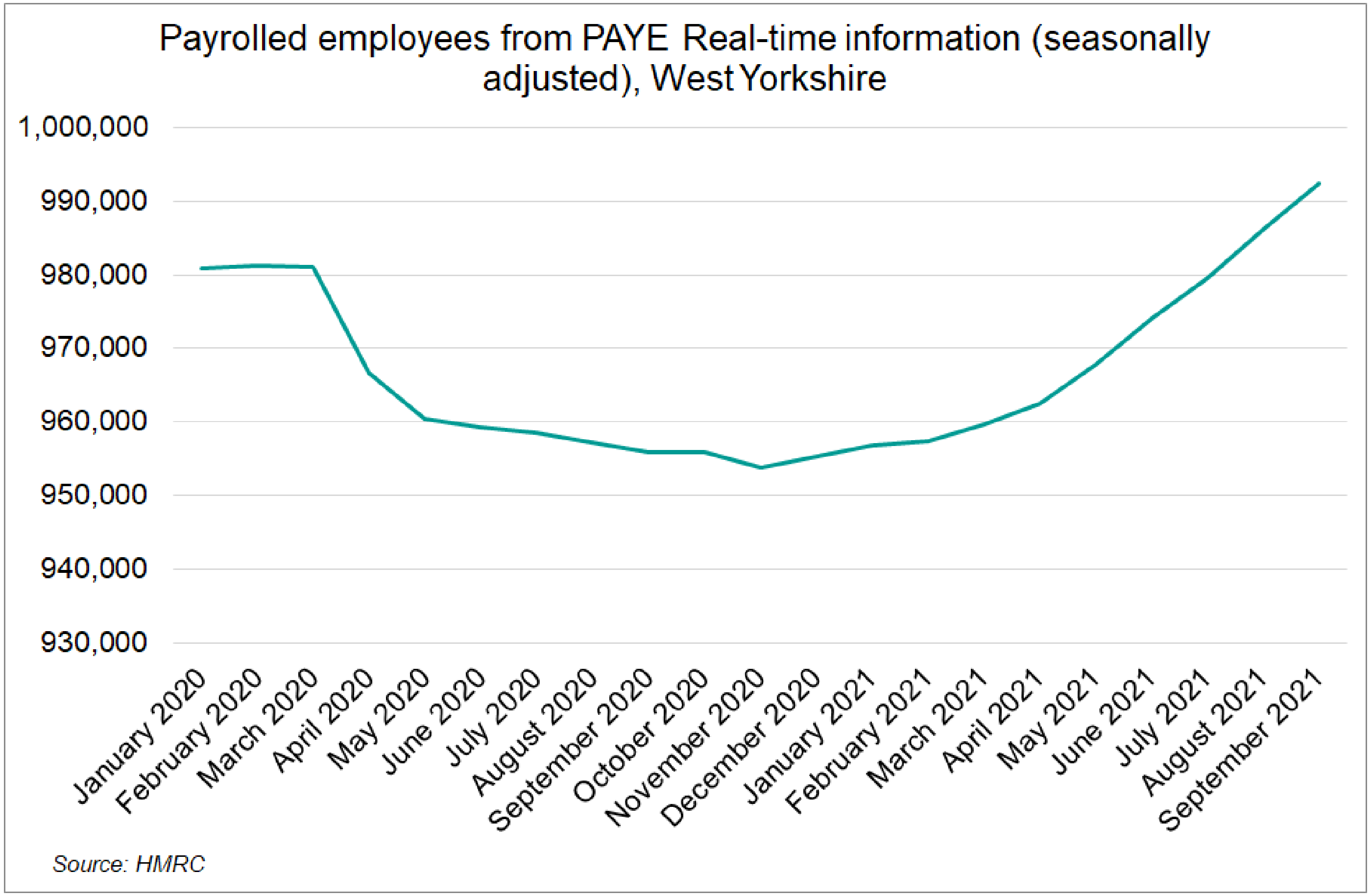
Economic Insights

Employment (payrolled employees) continues to grow beyond pre-pandemic level

There was a net increase in employment in West Yorkshire of around 6,000 (0.6%) between August and September 2021. Employment is now 1% above pre-pandemic levels seen in February 2020 and 4% higher than its lowest point in pandemic in November 2020, meaning that number of employees has increased by 39,000 between November 2020 and September 2021.



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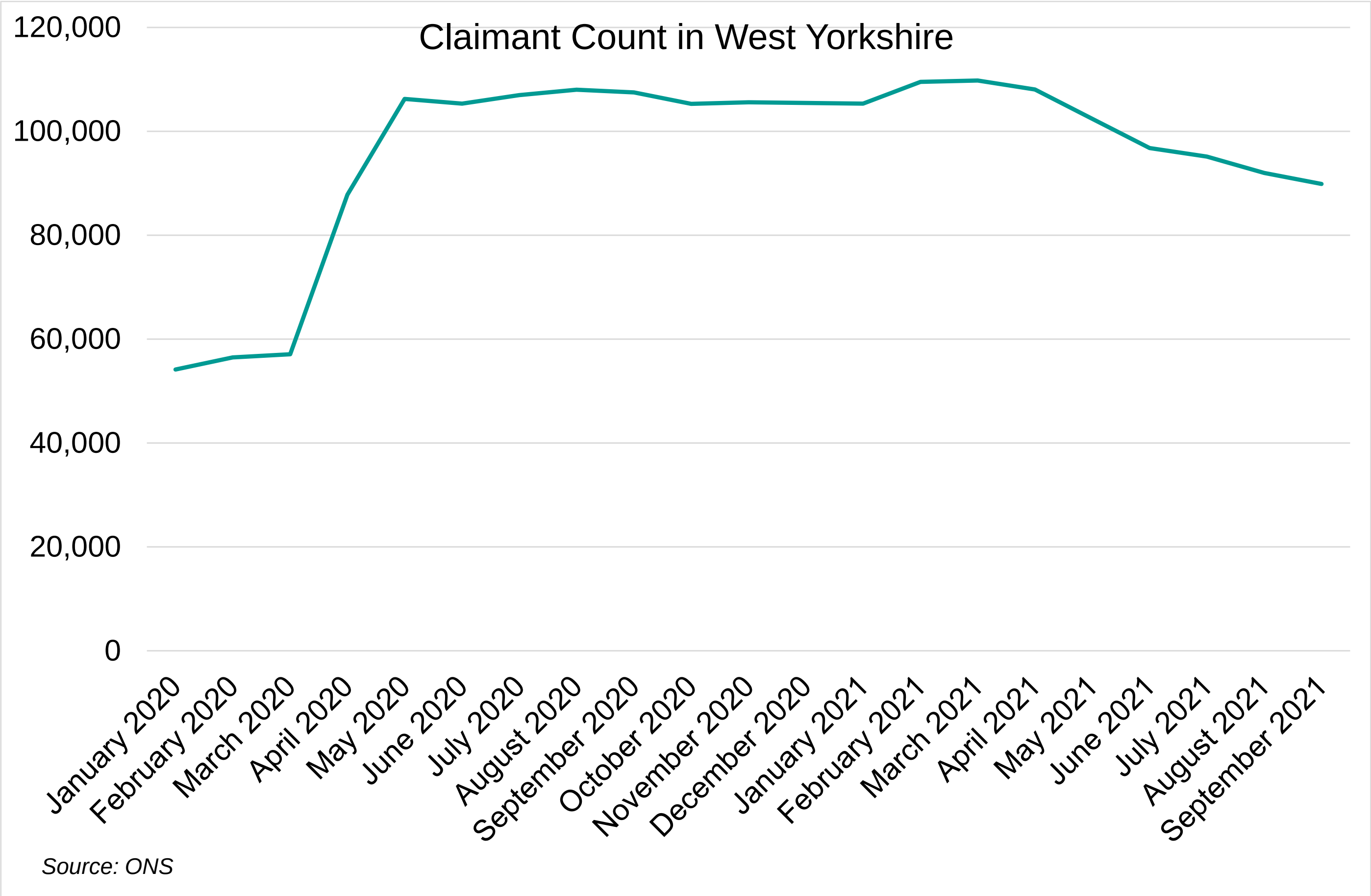
West Yorkshire claimant count (out of work benefits) continues steady decline

The latest claimant count figures, which relate to the number of people on out-of-work benefits, show a 2% fall (-2,000 in absolute terms) in West Yorkshire between August and September. The claimant count is now 18% lower than at its peak in March 2021 (20,000 lower) but still 59% higher than its pre-pandemic level in Feb 2020, with around 90,000 claimants in the region.



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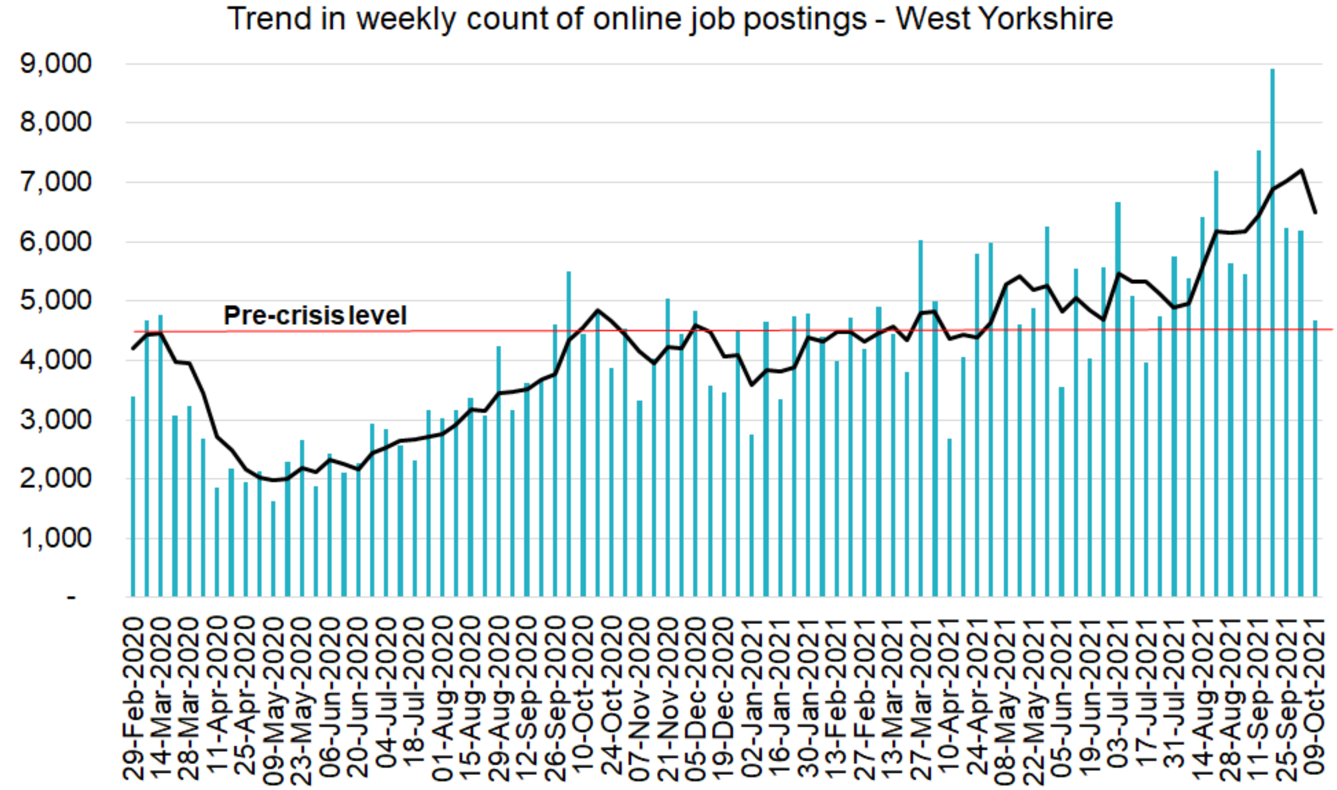
Vacancies: sharp fall in current week following recent growth

The number of vacancies for jobs in West Yorkshire posted online during week ending 9 October fell substantially by 10% on the previous week, based on a 4-week moving average (national average fell by 9%). This follows several weeks of high levels of postings. Despite the decrease in the latest week the moving average is 27% higher than week ending 24 July when final restrictions were lifted.



Source: Labour Insight

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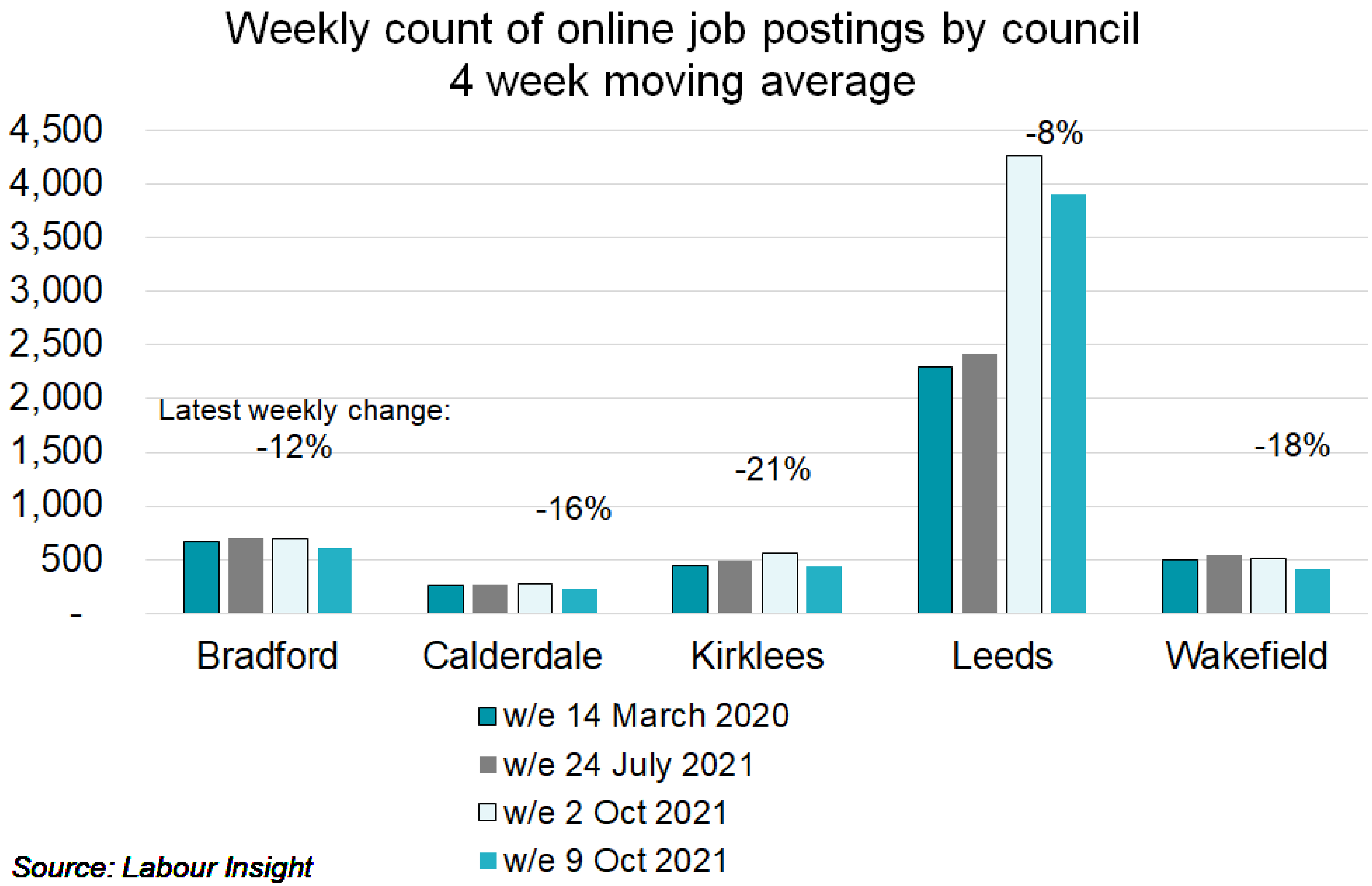
Vacancies: declines across all local authorities in latest week

All local authority areas saw significant falls in postings during week commencing 9 October, ranging from -8% in Leeds to -21% in Wakefield. As a result, only Leeds and Kirklees remained above pre-pandemic levels in the latest week.



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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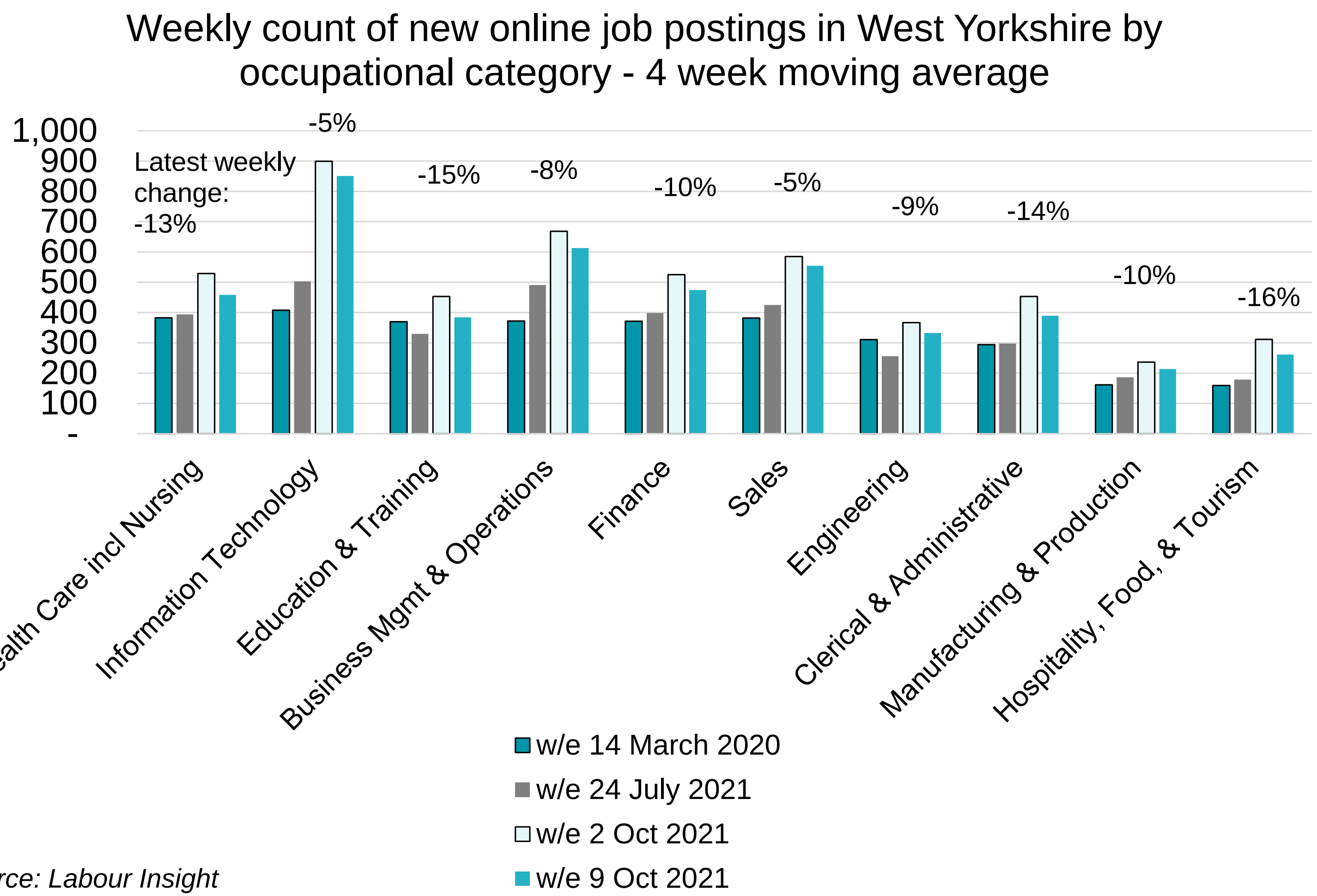
Vacancies: decline across all occupations this week

All occupational categories experienced a fall in job postings in week ending 9 October 2021, with the biggest reductions for Hospitality, food and tourism, Education and training and Clerical and administrative. This follows strong growth in most areas in recent weeks.



Source: Labour Insight

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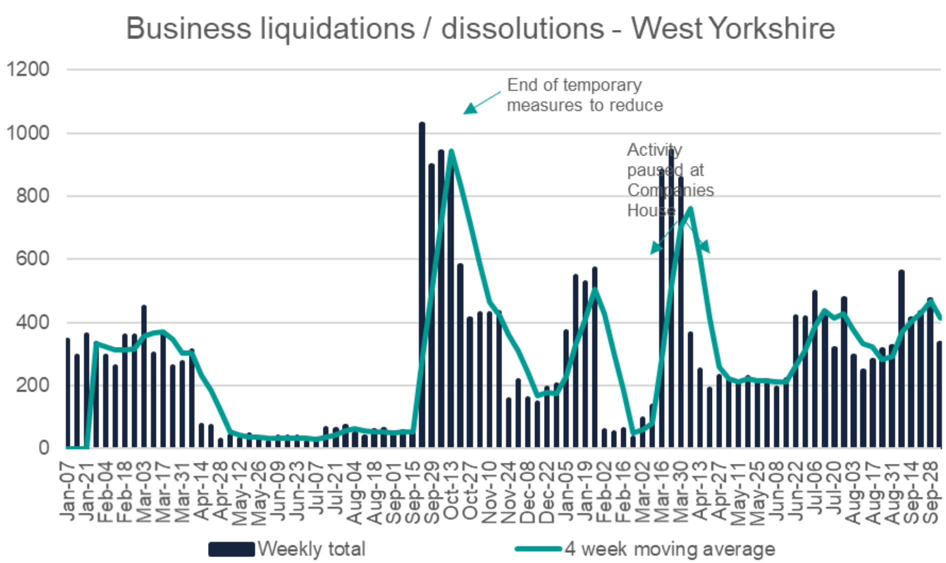
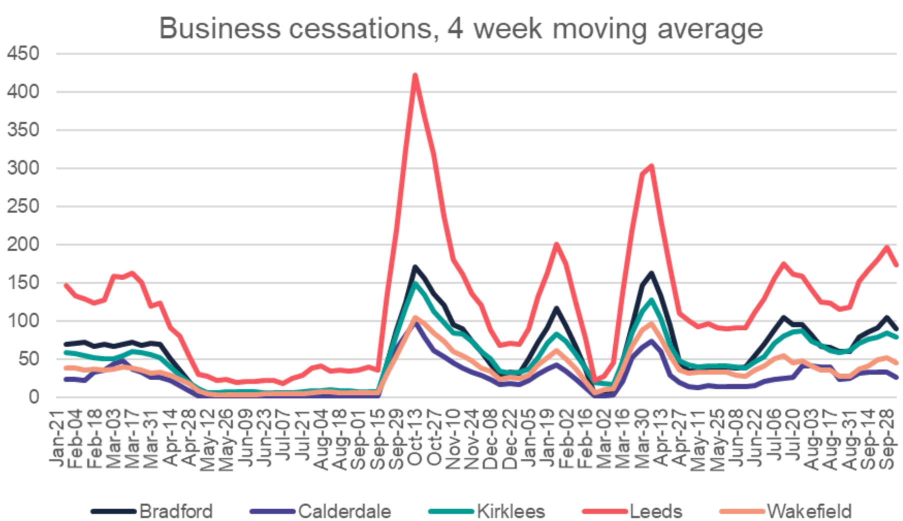
Business liquidations have seen an increase in recent weeks

There were 413 business liquidations in West Yorkshire up to the week ending October 5th, 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 decreasing. With the latest figures showing a 12% decrease from the previous week. This trend has been seen across all districts in the West Yorkshire region. With the largest dropping in Leeds dropping from 196 to 174 rolling four week average.



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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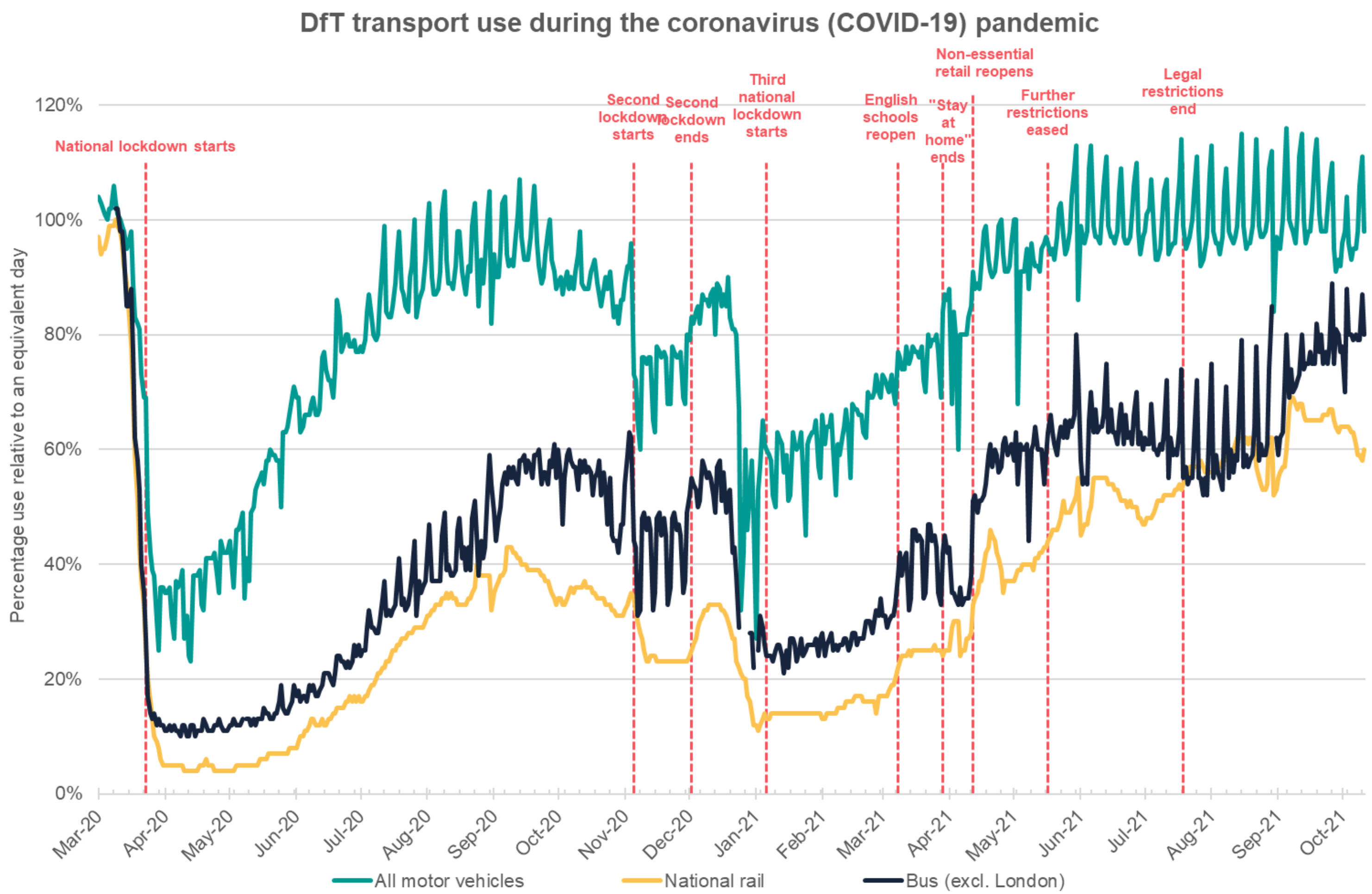
Transport Insights

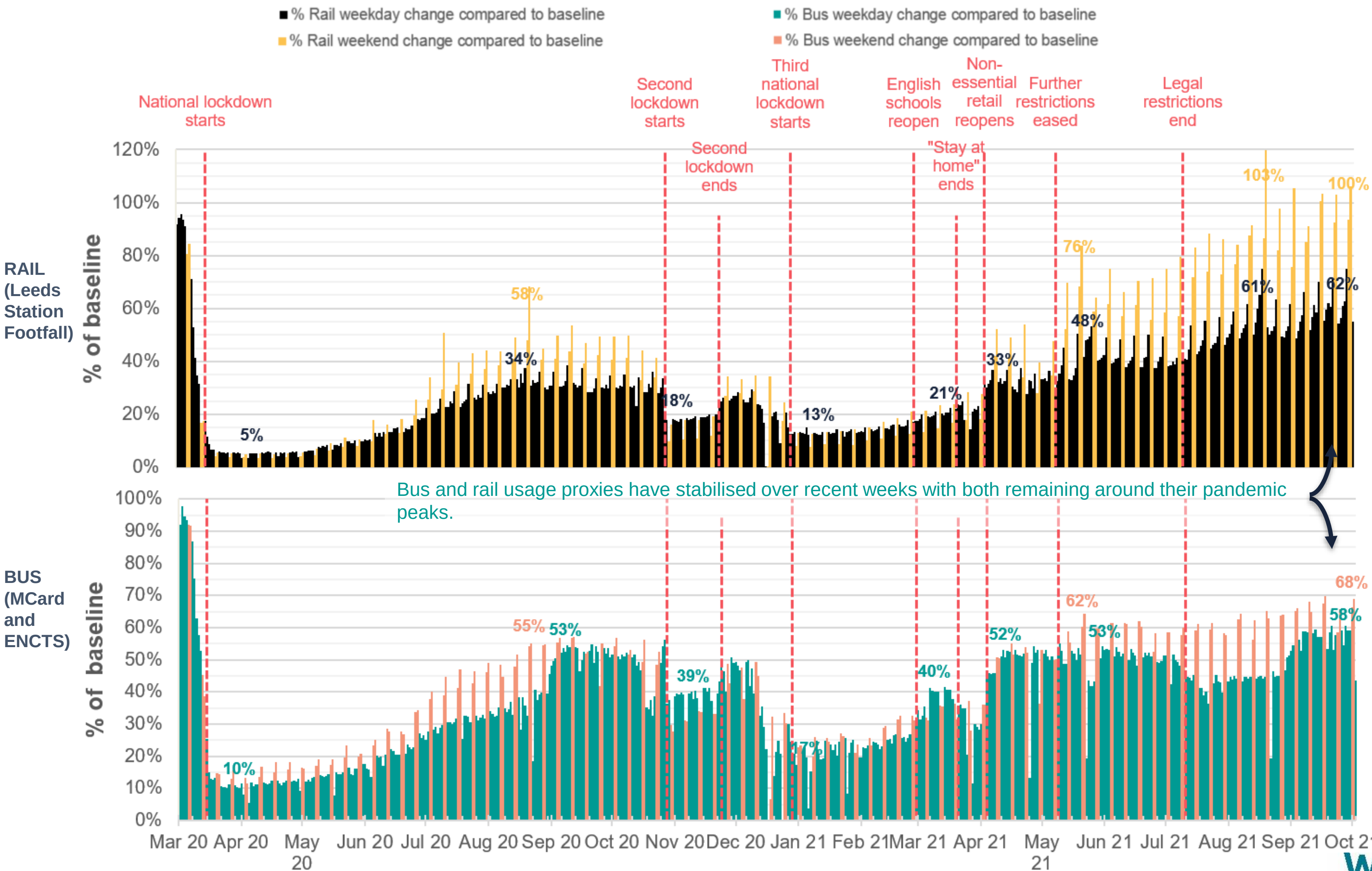
Nationally, bus use maintains its peak while rail declines

Motor vehicle use appears to be stabilising following a dip in the past two weeks. Bus usage has maintained its post-summer increase. Rail usage has continued a downward trend since September.



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

Local bus and rail usage proxies remain stable



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). Note MCard time-series does not include the new MCard data.

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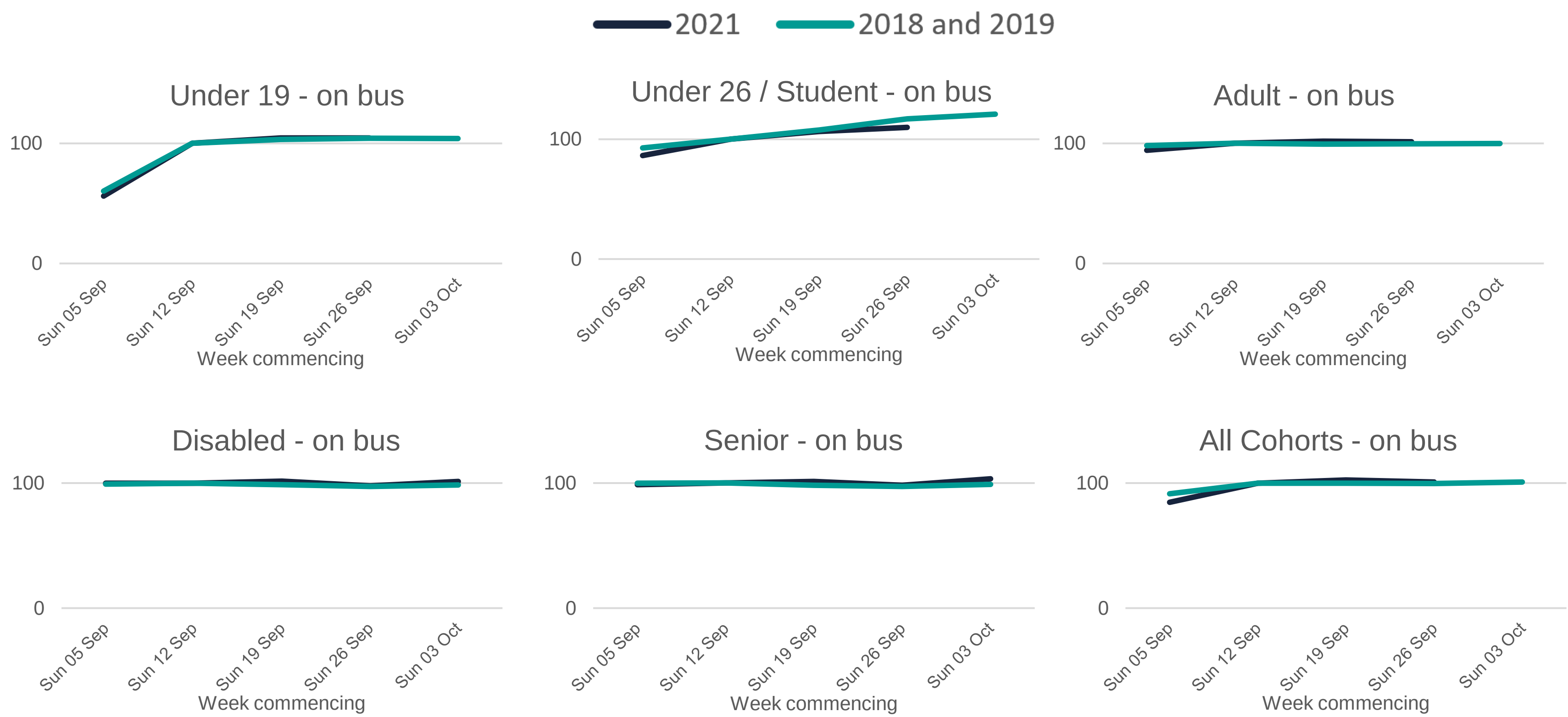
Changes in smartcard and smartphone use on bus continue to mirror pre-COVID years

Comparing recent bus ticket machine data with patterns in previous years (before the pandemic), indicates that the recent changes in patronage levels can be attributed to seasonal trends rather than COVID recovery. Smartphone MCard data has been included because transfer from smartcard to smartphone MCard is impacting the smartcard trends.



Source: Nero records of smart card ticket use on buses, plus ticket machine records of smart phone MCards on most buses. Aligned on start of school term holidays. Indexed on week commencing 12 September.

Bus use continues to recover against the March 2020 baseline, in contrast to Sept 2020

Ticket machine data shows weekday bus use reached 75% of baseline (March 2020) in the latest week. Since late August use by adults (the largest cohort) has continued to recover steadily, use by the under 26 / student cohort has shown substantial recovery, having previously remained relatively low during term time. Use by seniors has continued a slight recovery, which contrasts with a slight decrease in the similar period of 2020.

Passengers per weekday before COVID

Adult
221,000

Under 19
101,000

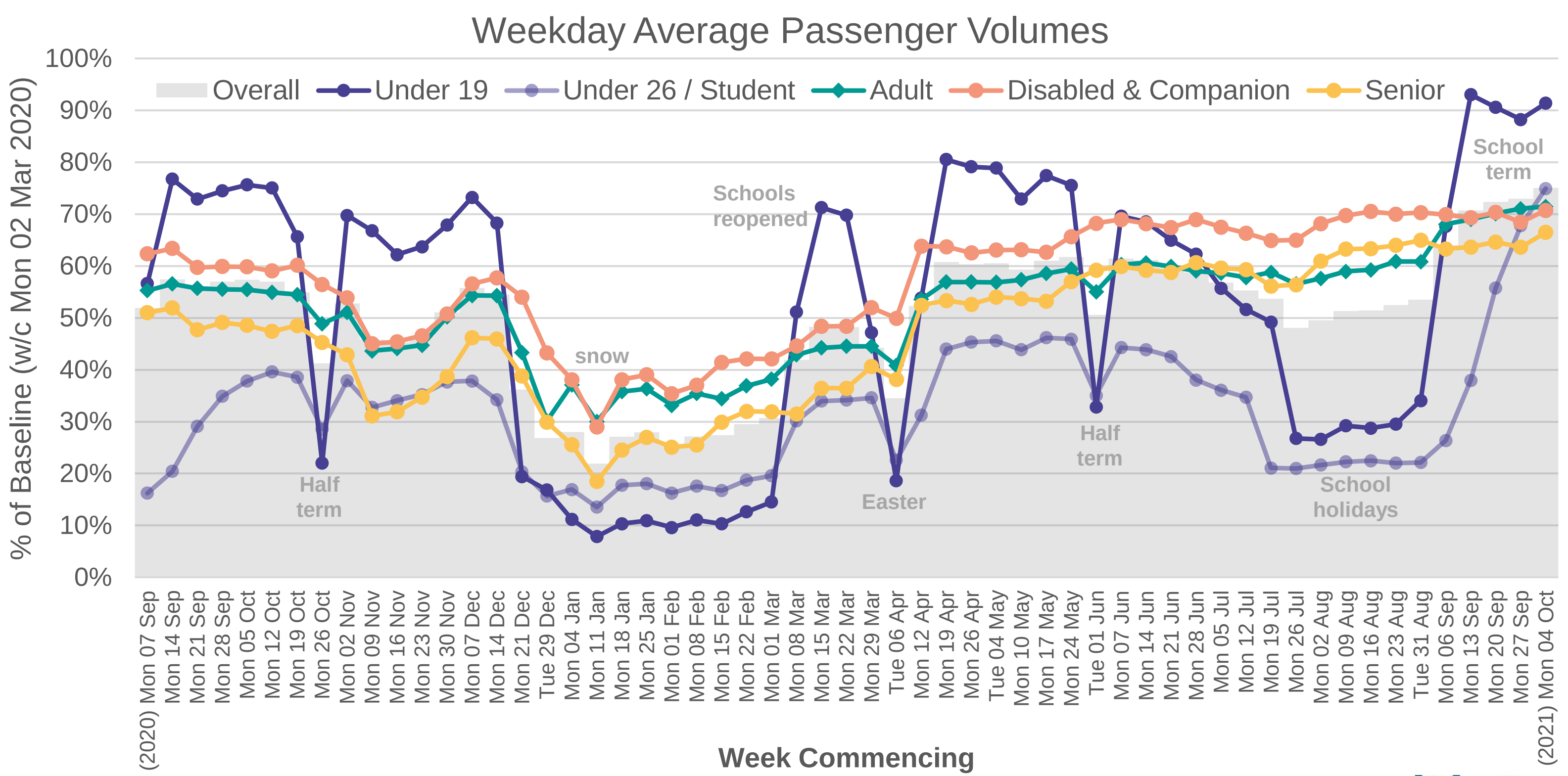
Senior
74,000

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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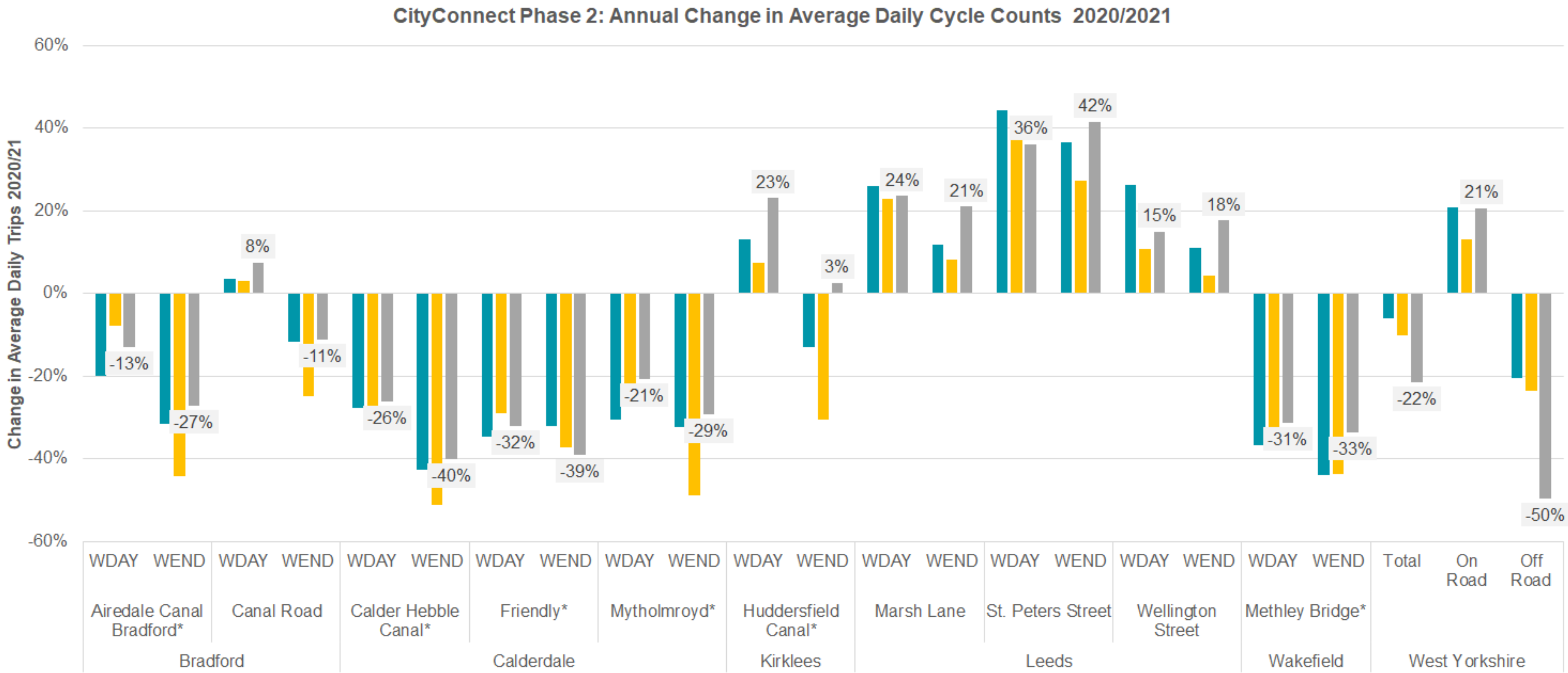
Off road cycle counts fall while commuting trips increase

Off road cycle counts, often attributed to leisure trips, have been lower this summer than in 2020 (when government restrictions were still in place). Conversely commuting trips have increased this year as people return to workplaces. This can be seen at sites approaching Leeds City Centre and on weekdays at Canal Road, Bradford and Huddersfield Canal, Kirklees, which are both on the approach to urban centres. Overall, cycle counters in Leeds district have recorded relatively more use (compared to the same months in 2020) than other West Yorkshire districts.



* *Denotes cycle counters located on canal towpaths*

Source: Leeds City Council