COVID-19
Economic &Transport Insights Report

Research & Intelligence
17th November 2021

Executive Summary – Economic Impact

- There were 34,000 employees still on furlough in West Yorkshire on 30 September - the point at which the Job Retention Scheme came to an end.

- Despite this, the claimant count (covering people on out-of-work benefits) continued to decline in October, whilst employment (in terms of PAYE employees) continued to increase beyond pre-pandemic levels.

- Recruitment activity is growing strongly across West Yorkshire, led by Leeds and Calderdale. Occupational areas hardest hit by the pandemic, such as hospitality and clerical, continue to rebound in terms of their vacancy counts.

- There were 398 business liquidations in West Yorkshire up to the week ending October 26th, based on a four week moving average. With the latest figures showing a slight decrease of 1% from the previous four week previous. This trend has been seen across all districts in the West Yorkshire region.

- Data from Bank Search shows the number new business bank accounts opened in the West Yorkshire region during the course of a month. During September the number of new bank accounts opened was 808, with Leeds having the most new accounts with 301. At West Yorkshire level there has been slight growth since the month previous of 2%.

- West Yorkshire house prices reached a record high in August 2021.

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Executive Summary – Transport Impact

- Nationally, motor vehicle use remains stable, with a similar pattern locally; Leeds traffic levels remain lower than pre-pandemic.
- Weekend footfall through Leeds rail station has recently exceeded pre-pandemic levels, whilst weekday footfall remains around 70% of pre-Covid.
- Nationally, bus use remains at around 75-80% of pre-pandemic. Local ticket machine data shows similar bus usage; weekday bus use reached 76% of baseline (March 2020) with journeys by under 19s reaching 93% of baseline, before dropping during October half-term.
- Leeds traffic has remained relatively stable over the last few months, but is still below pre-pandemic levels.
- Data from Strava shows the number of walking/running trips over the summer/autumn have doubled those recorded in 2019, in line with 2020 data, indicating that some of the behaviour changes adopted during lockdown have been sustained.
- Evening footfall in Leeds (a proxy for the night-time economy) continues to show steady signs of recovery, however it is still lower than pre-pandemic.
- Results of the latest COVID-19 Transport Recovery Survey (available here) reveals a degree of return to pre-pandemic car and public transport use, whilst some COVID-19 induced behaviour changes such as hybrid working are likely to become permanent.

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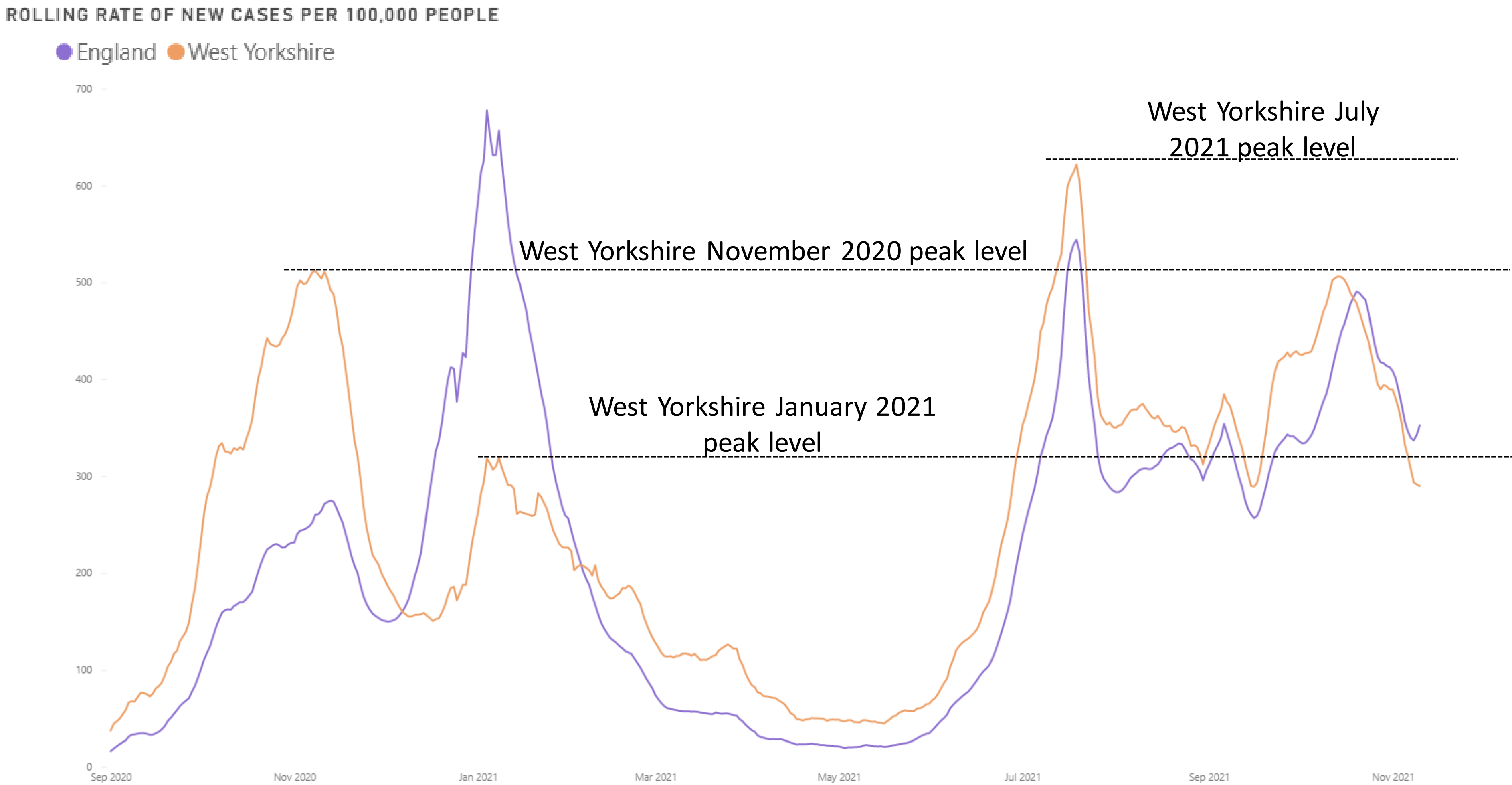
Virus prevalence – West Yorkshire trend



As of the 10th November 2021, the 7-day moving average **West Yorkshire COVD-19 rate was 290.0 per 100k, a 22% decrease from the previous week.** In Yorkshire and the Humber, case rates fell to 343.5 per 100k (15%), whilst in England overall case rates decreased by 9% to 352.5 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

The table below shows the most recent COVID-19 case data from Public Health England's (PHE). Note that 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: 10/11/2021

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	127	253.6	↓ -22	1375	93097	17173	1260	232
Calderdale	129	247.8	↓ -30	524	34460	16298	378	179
Kirklees	114	276.2	↓ -25	1219	70816	16048	933	211
Leeds	100	297.6	↓ -22	2377	136504	17089	1556	195
Wakefield	57	371.2	↓ -12	1305	58870	16744	897	255
West Yorkshire		290.0	↓ -22	6800	393747	16789	5024	214
England		352.5	↓ -9	199359	8144766	14403	124464	220

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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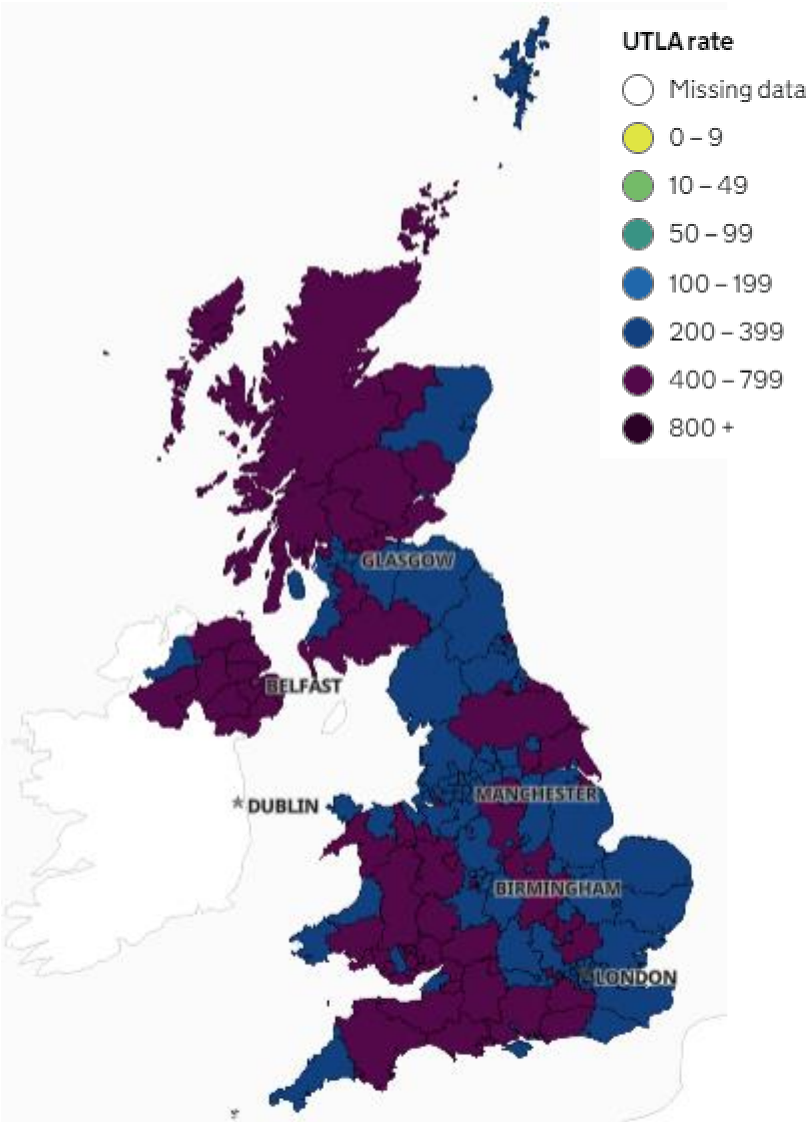
National COVID-19 new cases - 7 day rolling rate



The map (left) shows the Upper Tier Local Authority (UTLA) 7–day rolling rate of new cases up to **10th November** (available [here]()).

Regionally, case rates are highest in the South West, 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	381.2	0.3%	211	-8.7%
East of England	364.8	-11.8%	168.8	-18.3%
London	<u>250.4</u>	-1.6%	<u>121.9</u>	-11.3%
North East	374.7	-19.7%	<u>238.9</u>	-21.4%
North West	337.8	-10.8%	186	-17.8%
South East	382.1	-7.9%	169.1	-16.0%
South West	<u>439.6</u>	-10.0%	202.8	-15.4%
West Midlands	345.2	-7.9%	180.8	-17.3%
Yorkshire and Humber	343.5	-15.3%	201.8	-23.3%
England	352.5	-9.1%	183	-16.9%

<u>Highest</u> <u>Lowest</u>

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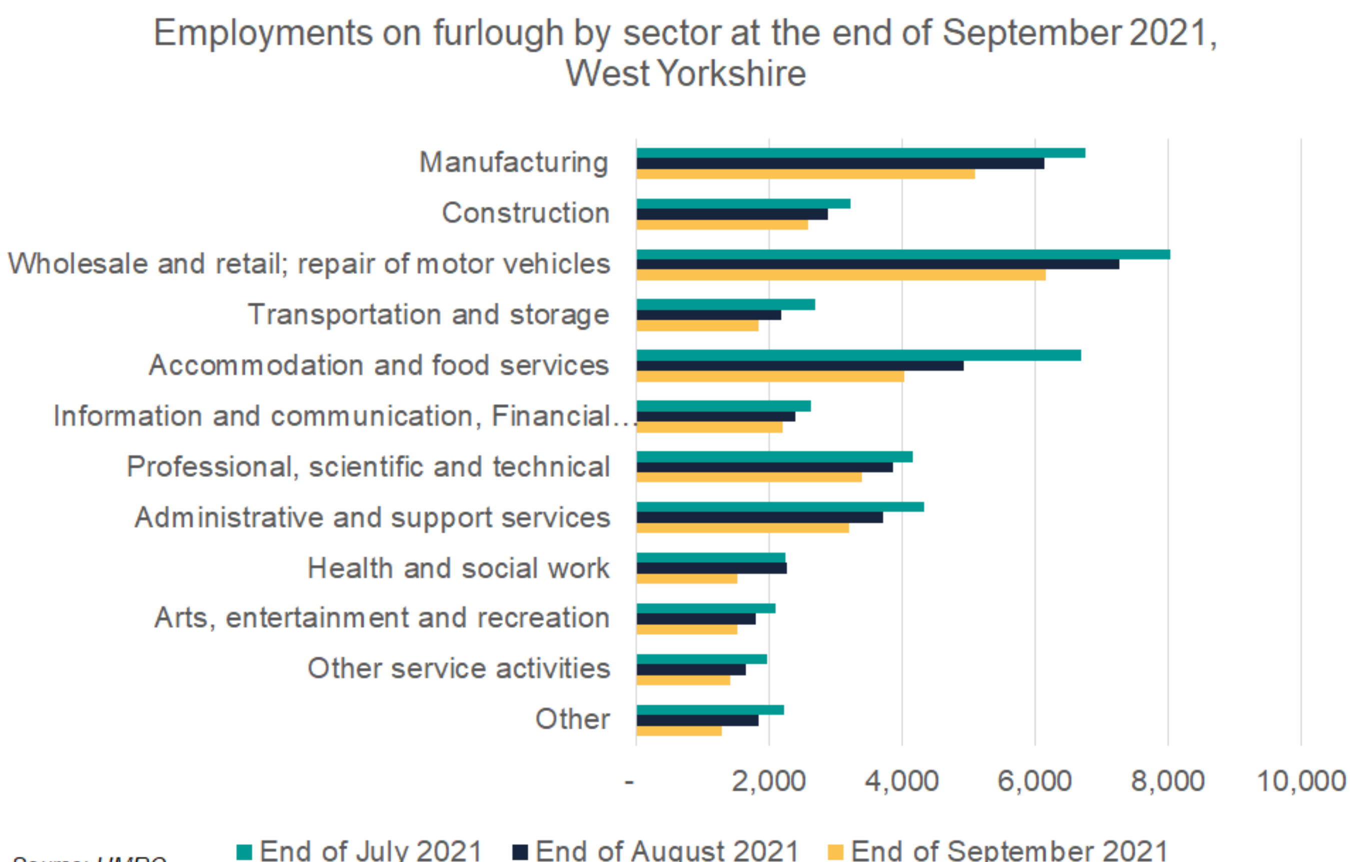
Economic Insights

34,200 employments on furlough in West Yorkshire when the scheme closed at end of September

A substantial number of employments remained on furlough at the end of September, when the scheme closed. Numbers were highest in wholesale/retail and manufacturing. Recovery in the regional labour market has meant that the impact of the ending of furlough on redundancies and unemployment has been limited so far (see claimant count slide).



Source: HMRC

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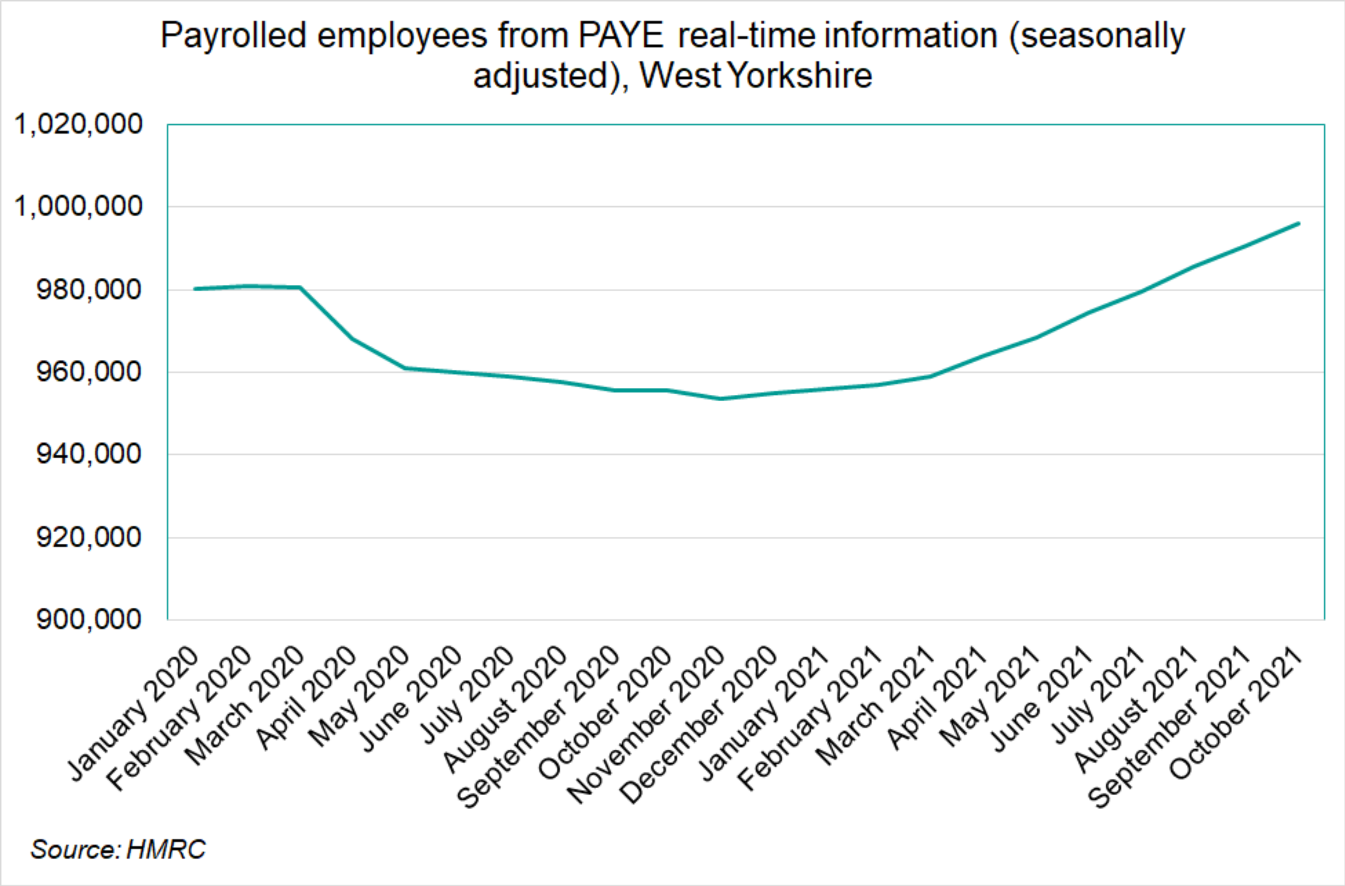
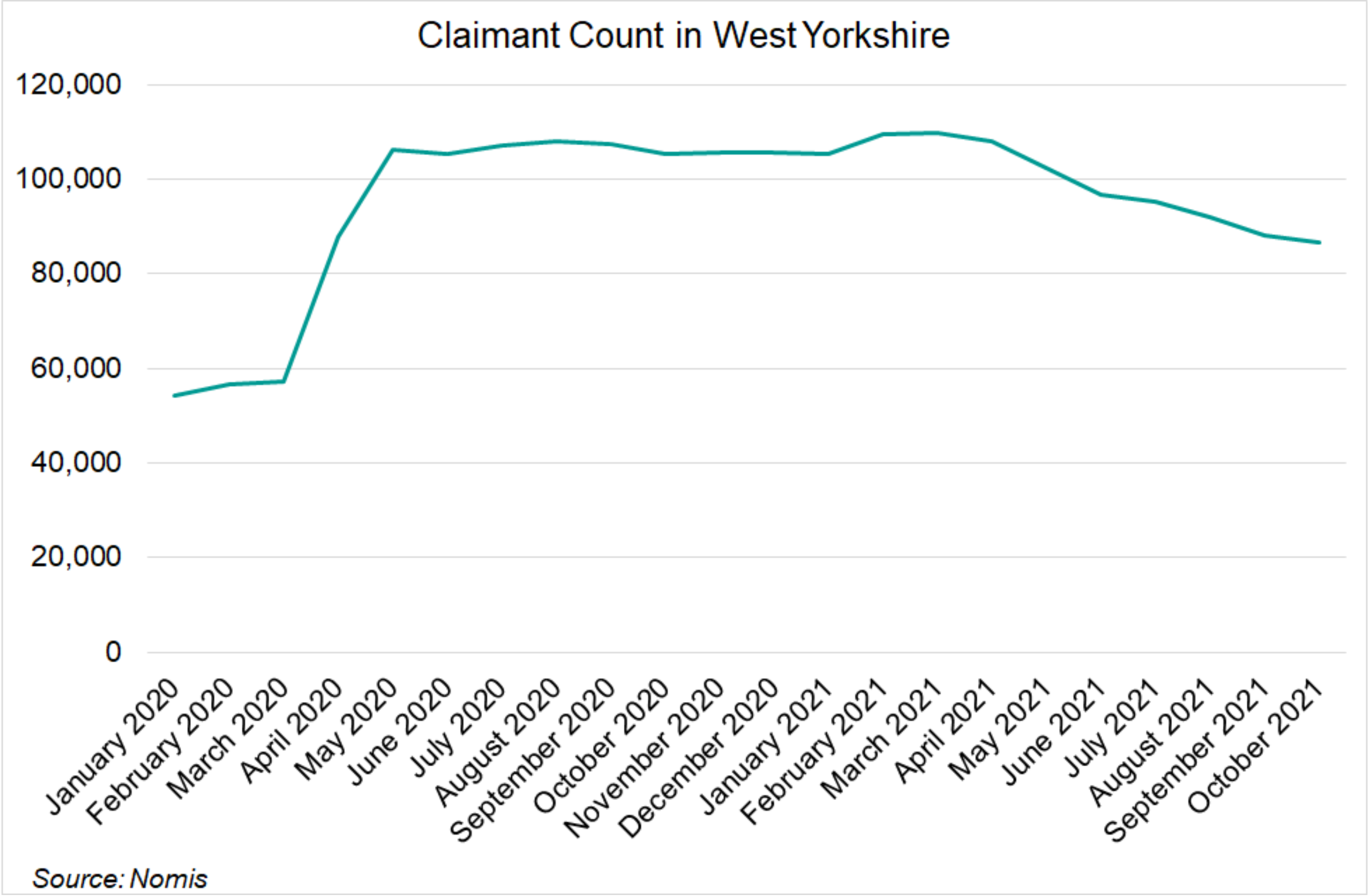
Employment (payrolled employees) continues to grow

Between September and October 2021, there was a net increase in payrolled employees in West Yorkshire of around 5,000 (+0.5%). Employment is now 2% above the levels seen in February 2020 and 4% higher than in November 2020, when it was at its lowest since the beginning of the pandemic. This represents a net increase in employment of 42,000 in the last 11 months between November 2020 and October 2021.



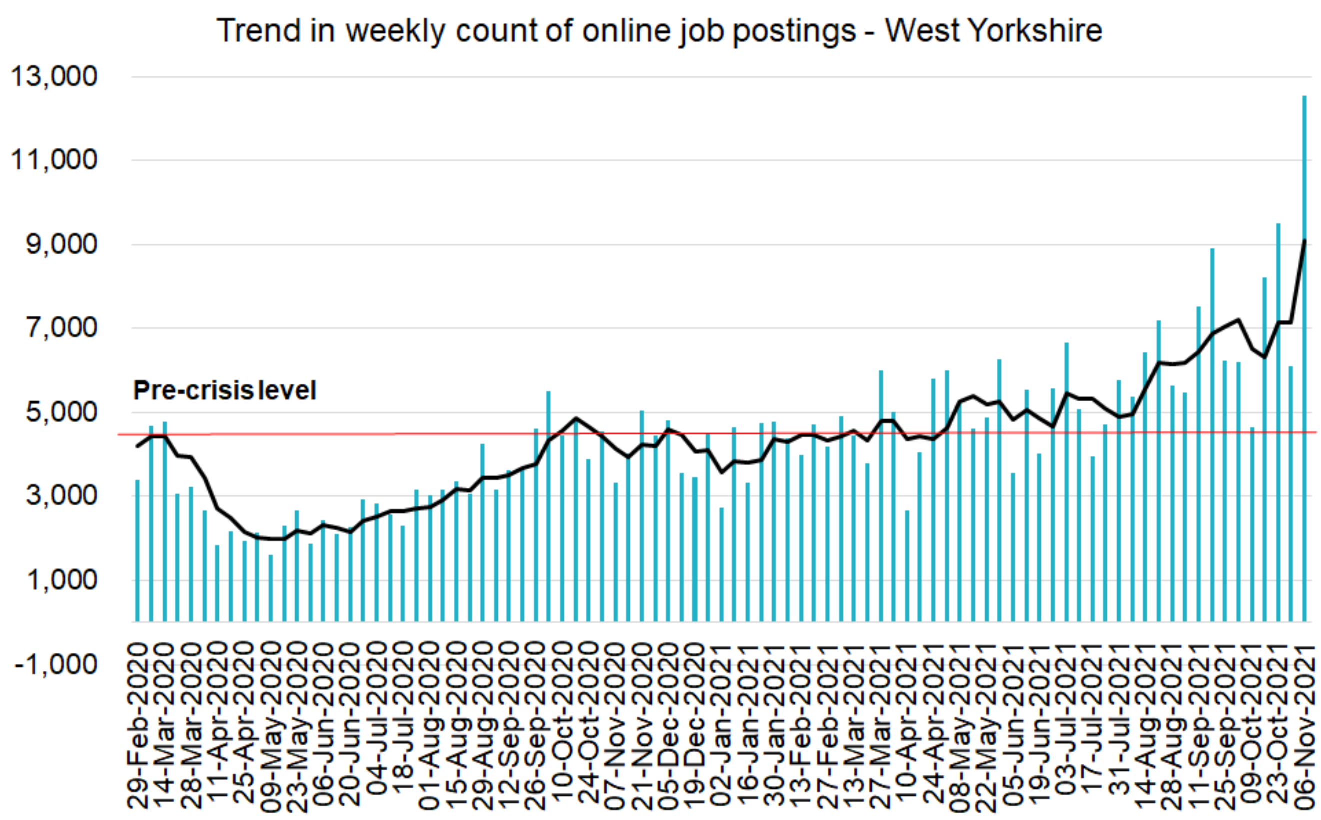
West Yorkshire claimant count (out of work benefits) declined further in October

The latest claimant count figures for West Yorkshire, which relate to the number of people on out-of-work benefits, show a 2% fall (-1,500 in absolute terms) between September and October 2021. With around 87,000 current claimants in the region, the claimant count is now 21% (or 23,000) lower than in March 2021, when it was at its peak, but still 53% higher than pre-pandemic, in February 2020.



Vacancies: sharp increase in job postings in latest week to highest level so far

The number of vacancies for jobs in West Yorkshire posted online during week ending 6 November grew sharply by 28% on the previous week, based on a 4-week moving average (whilst the national average increased by 21% for the same period). This is the highest weekly figure recorded since the beginning of the pandemic by a considerable margin.



Source: Labour Insight

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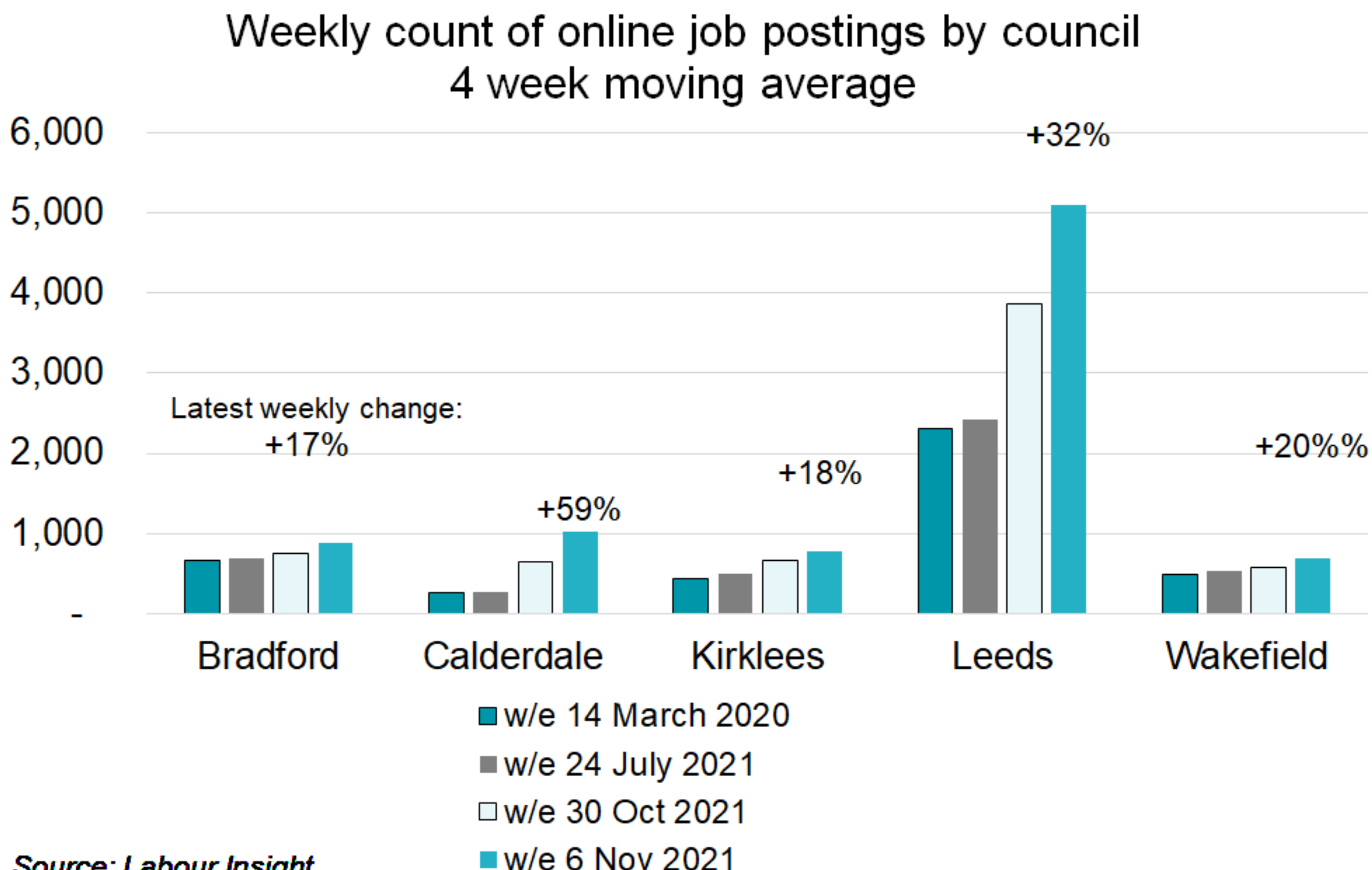
Vacancies: strong growth across West Yorkshire's local authorities

All West Yorkshire's local authority areas saw substantial growth in postings during the week ending 6 November. Calderdale and Leeds saw an unprecedented increase in their weekly count of postings



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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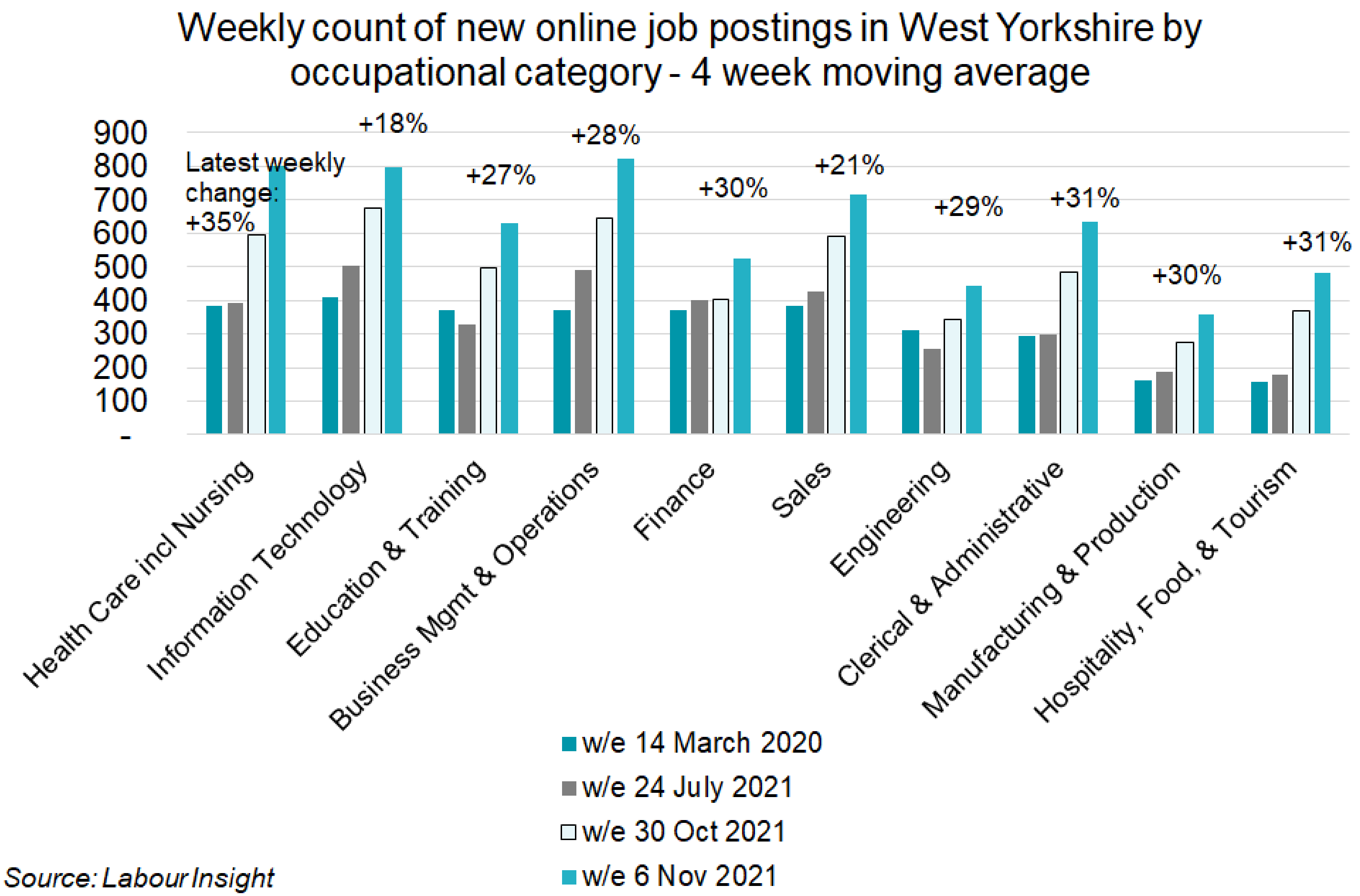
Vacancies: all occupational categories shared in strong growth

The majority of occupational categories registered growth of more than 20% in their weekly count of postings for week ending 6 November. Several categories, including Health care, Clerical and Hospitality grew by more than 30% in a single week.



Source: Labour Insight

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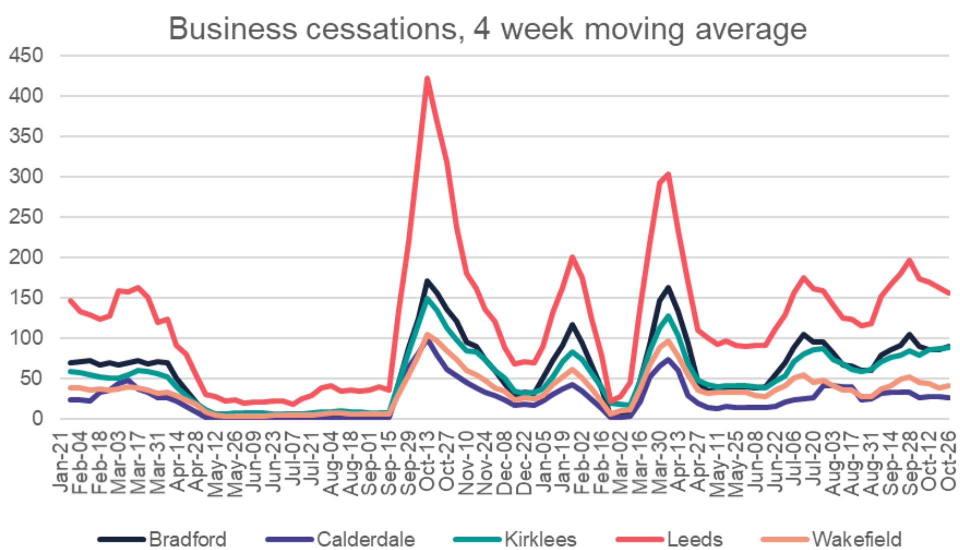
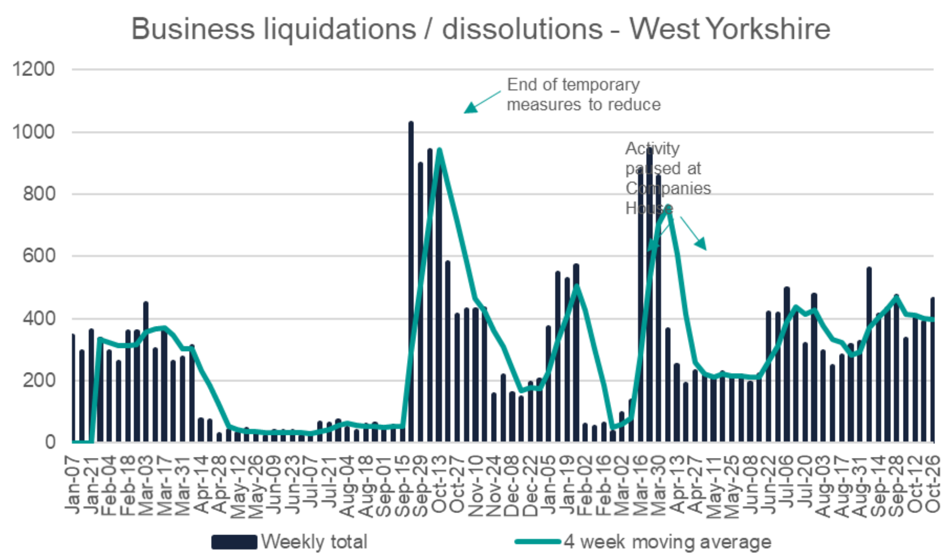
Business liquidations have seen a decrease in recent weeks

According to data from Bureau van Dijk's Fame database, up to the week ending October 26th there were 398 business liquidations in West Yorkshire (4-week moving average). Over the last month, the number of businesses liquidating has been decreasing, the latest figures showing a decrease of 1% from the previous period. This trend has been seen across all West Yorkshire districts except Wakefield, where liquidations have grown by 5%



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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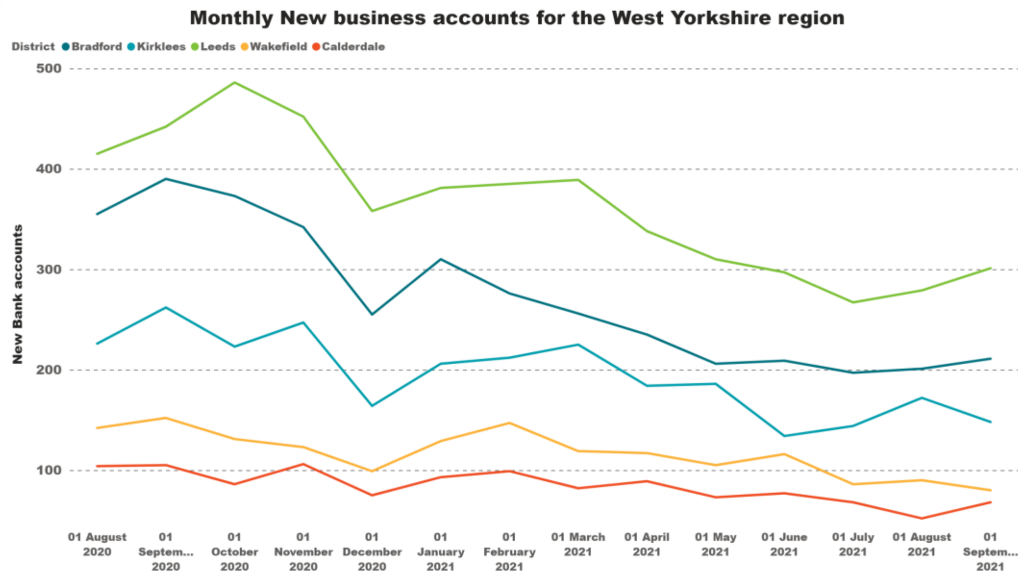
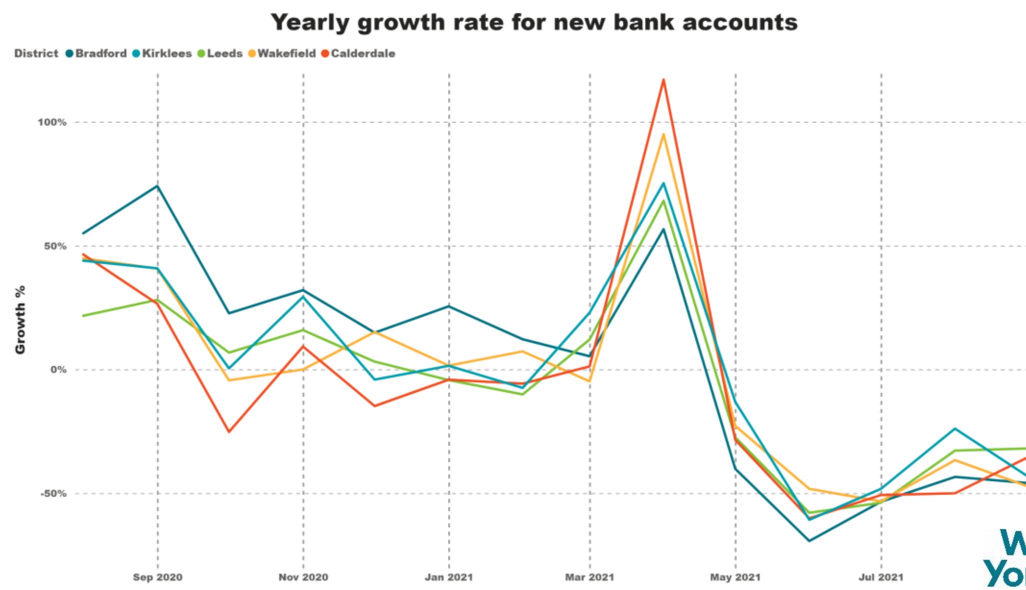
Growth in new business bank accounts in some districts

The Bank Search data shows the number of new business bank accounts opened in West Yorkshire during the course of a month.

In September, 808 new bank accounts were opened in West Yorkshire, which represents a 2% increase relative to the previous month. Leeds was the district with the most new accounts (301, or 37%), and also one of the districts, together with Calderdale, which has driven the growth (8% and 30% increase, respectively).

However, the number of new business bank accounts was considerably lower than during the same period last year.





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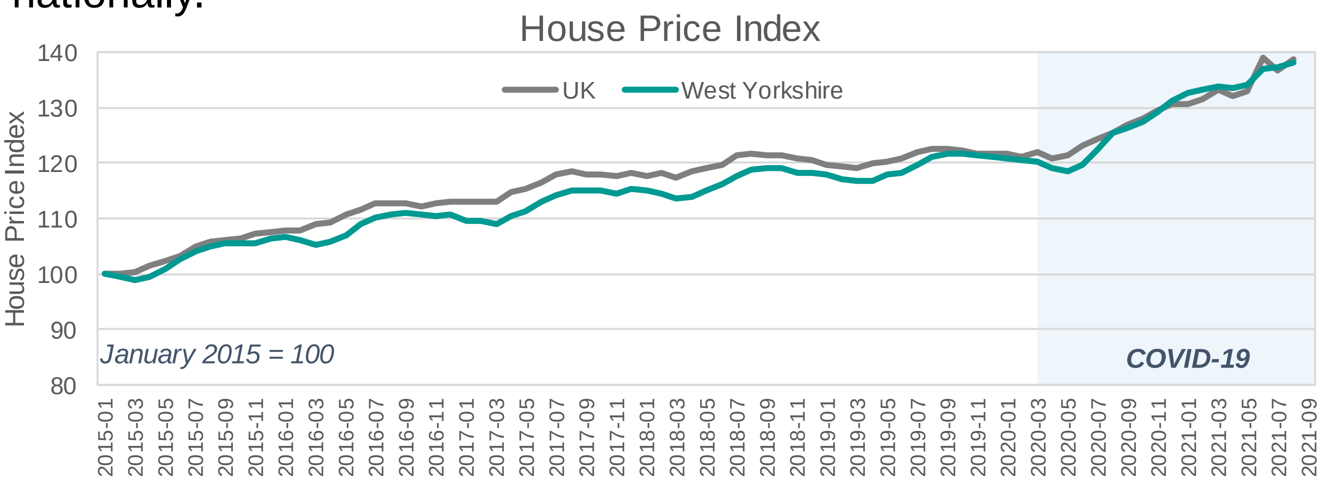
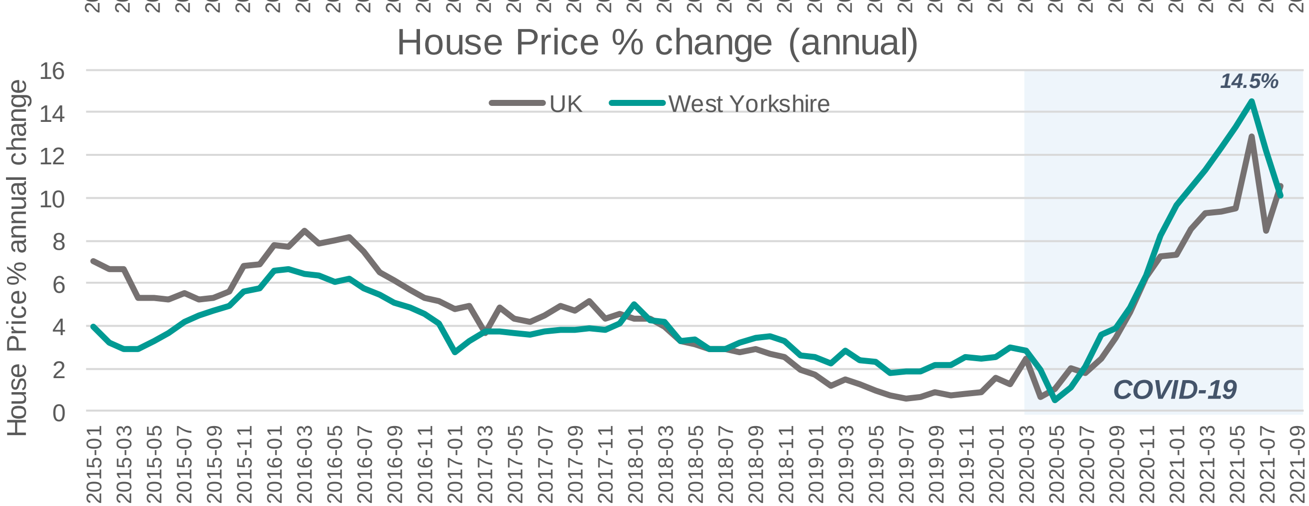
House prices locally & nationally continue to grow – prices reached a record high in August 2021

House prices have risen sharply throughout the pandemic, both locally and nationally. In West Yorkshire, the record was set in August 2021 at £183,484, compared with an average UK price of £264,858. This month’s increase was 10% relative to the previous year, both locally and nationally.





The median 2021 workplace-based full time gross annual salary in West Yorkshire (provisional data) is £28,930, which means house prices locally are 6.3x average pay.

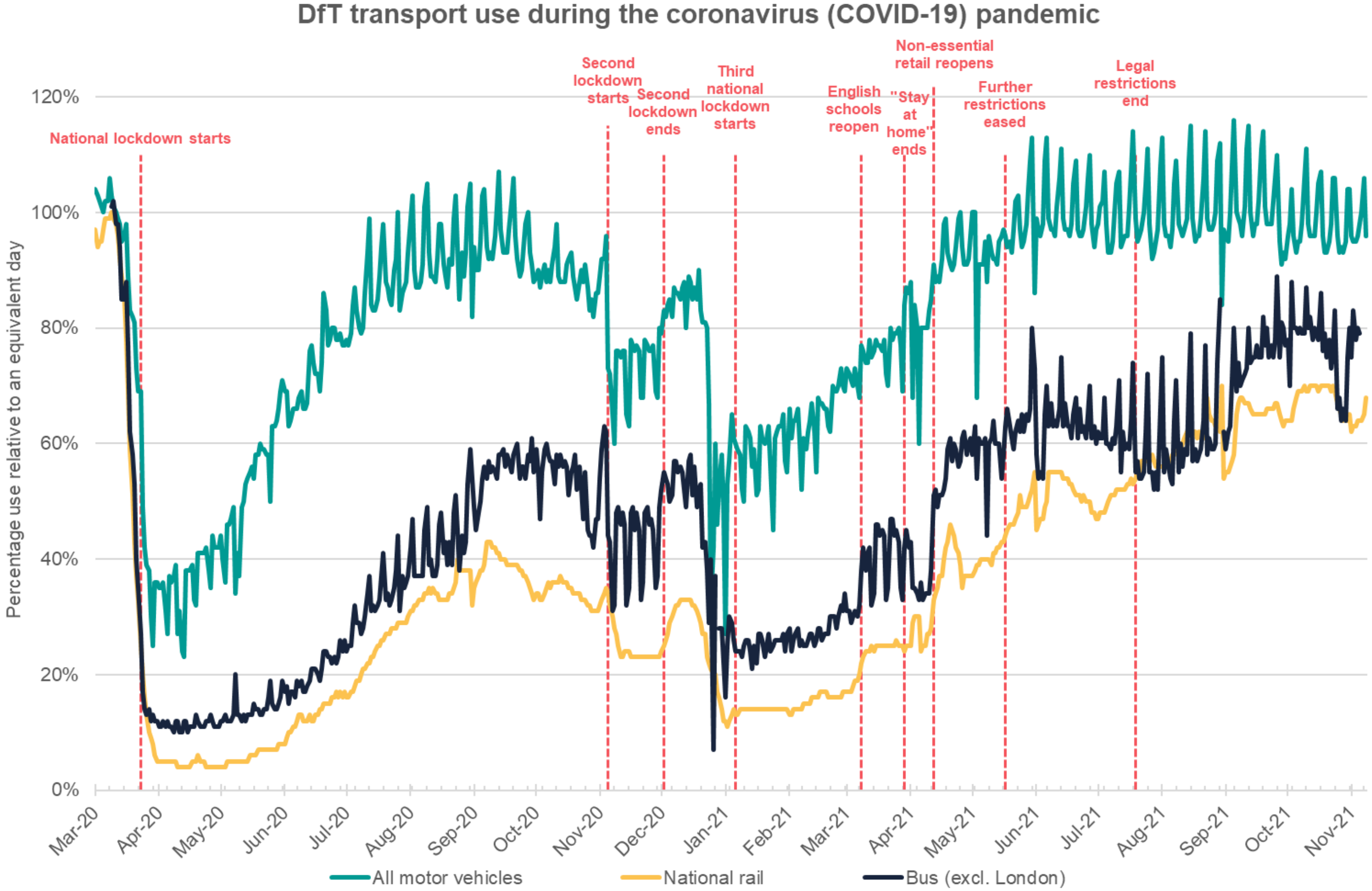
Nationally the ratio is higher (skewed by London's higher house prices), at 8.4x average pay (based on UK average salary of £31,285.

Source: HM Land Registry.

Transport Insights

Nationally, public transport use recovers from half term decline, road slightly down

Motor vehicle use appears to be stable at a slightly lower level than in September. Bus and rail appear to have recovered from a decline in usage, which coincided with school half-term holidays, and is not at similar levels as in October.



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

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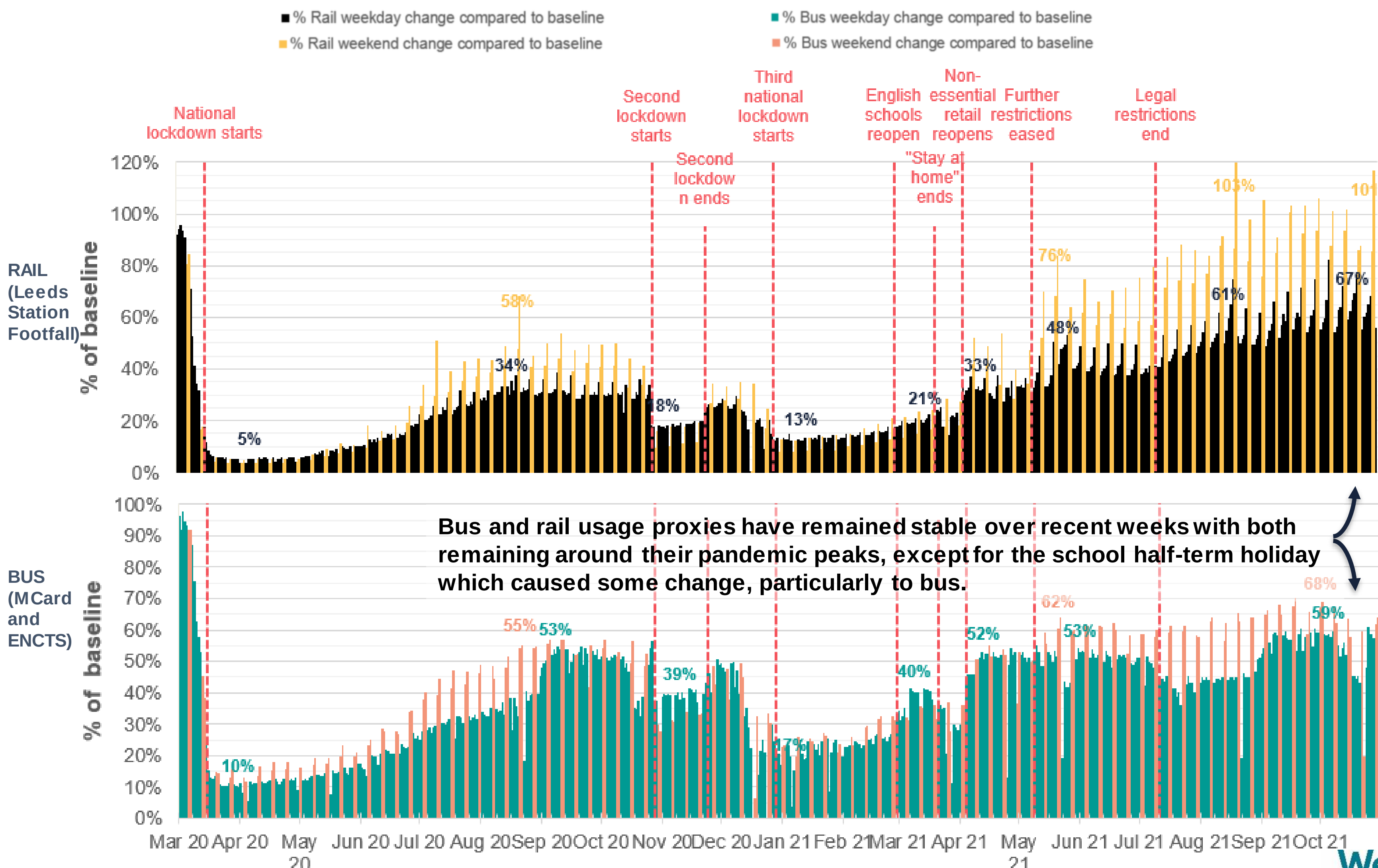
Local bus and rail usage indicators remain stable



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.

Bus use continued to recover against the March 2020 baseline before it dipped for half-term

Ticket machine data shows weekday bus use reached 76% of baseline (March 2020) before the October half term drop. Under 19s peaked at 93% of baseline weekday average, while Under 26 / Students peaked at 77%. Data is not complete for the week commencing 1 Nov, although it suggests a bounce-back of the Under 19, Under 26 / Student and Adult cohorts after half term.

Passengers per weekday before COVID

Adult
221,000

Under 19
101,000

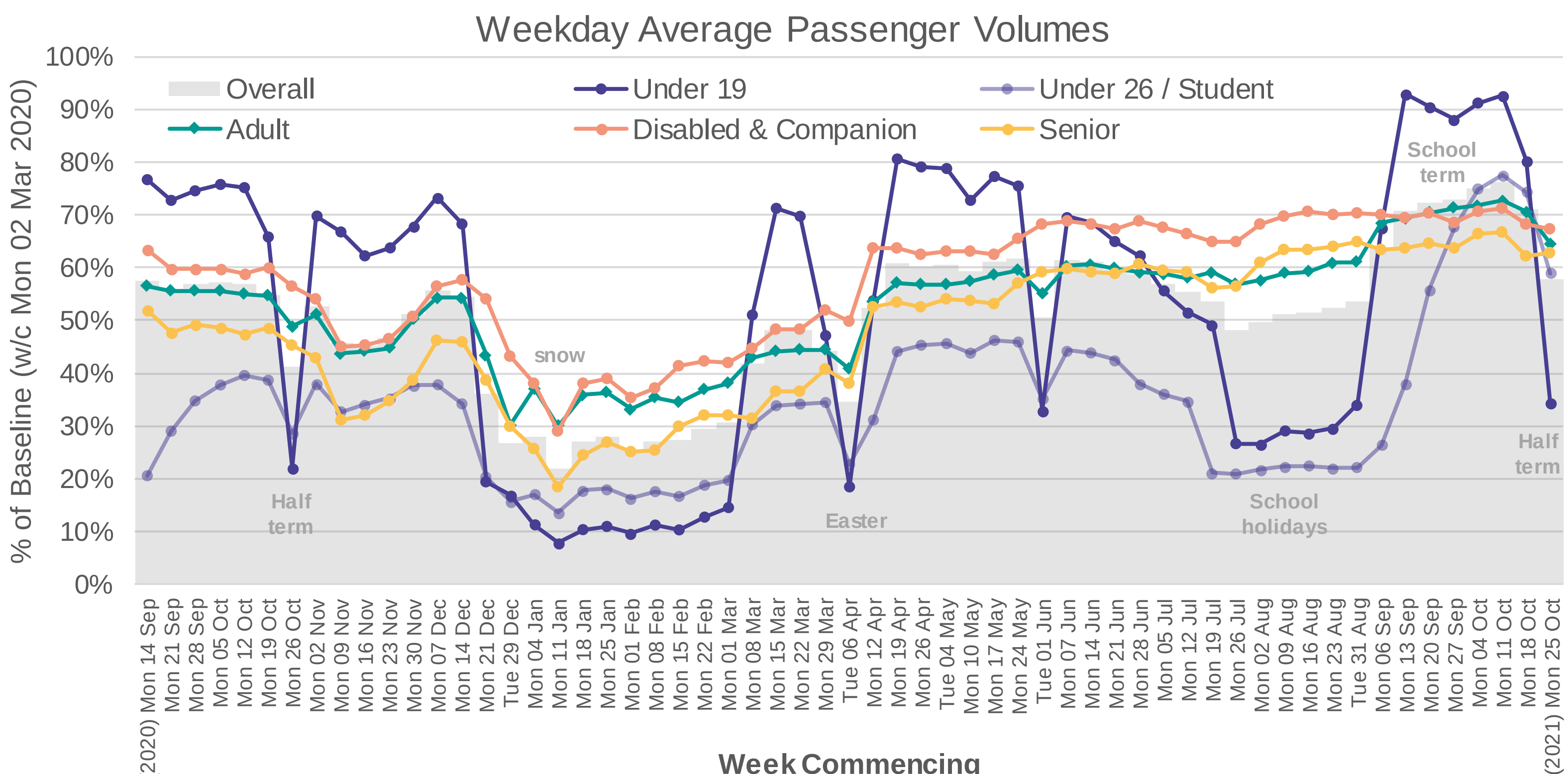
Senior
74,000

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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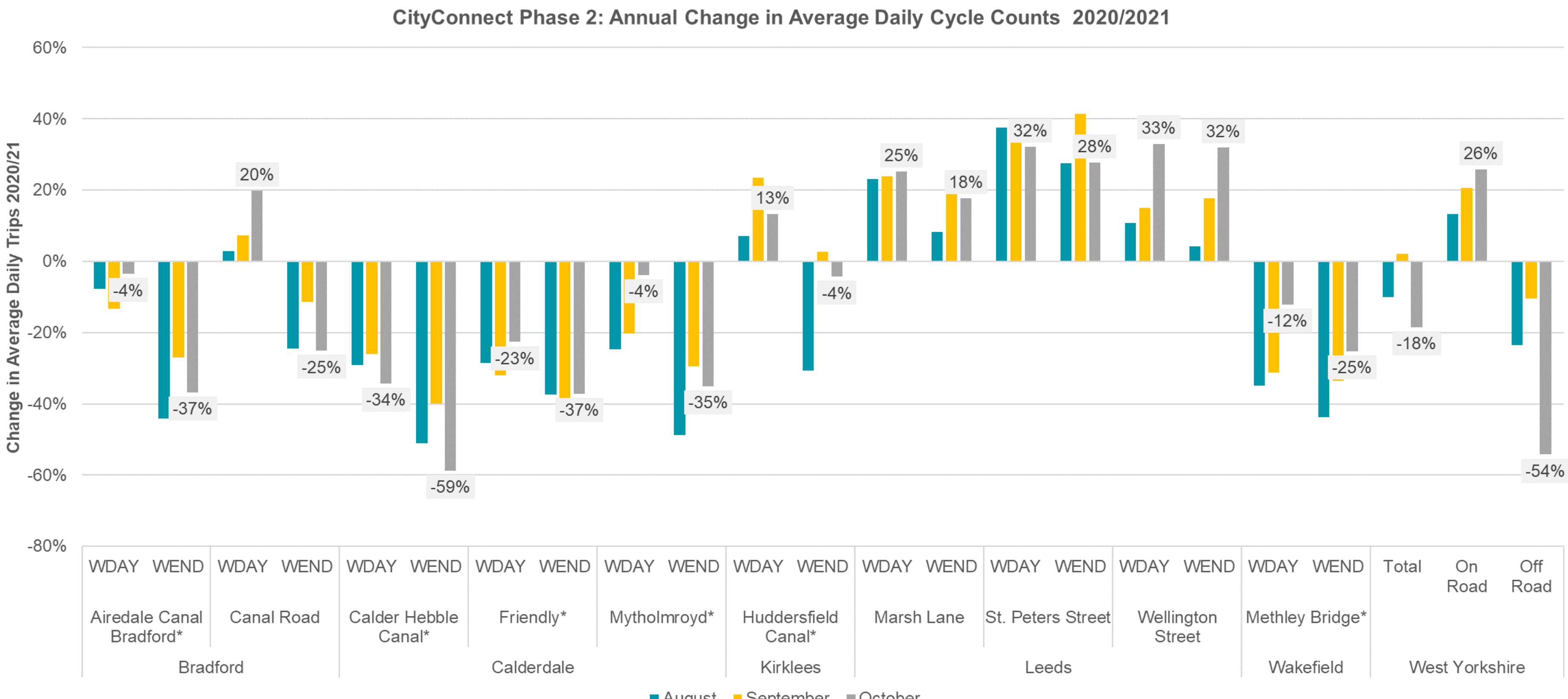
Off-road cycle counts fall while commuting trips increase

Off-road cycle counts, often attributed to leisure trips, are notably lower than the same months in 2020 –when government restrictions were in place. Conversely, on-road counts have increased 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 have recorded more use, relative to the same months in 2020, than other West Yorkshire districts.

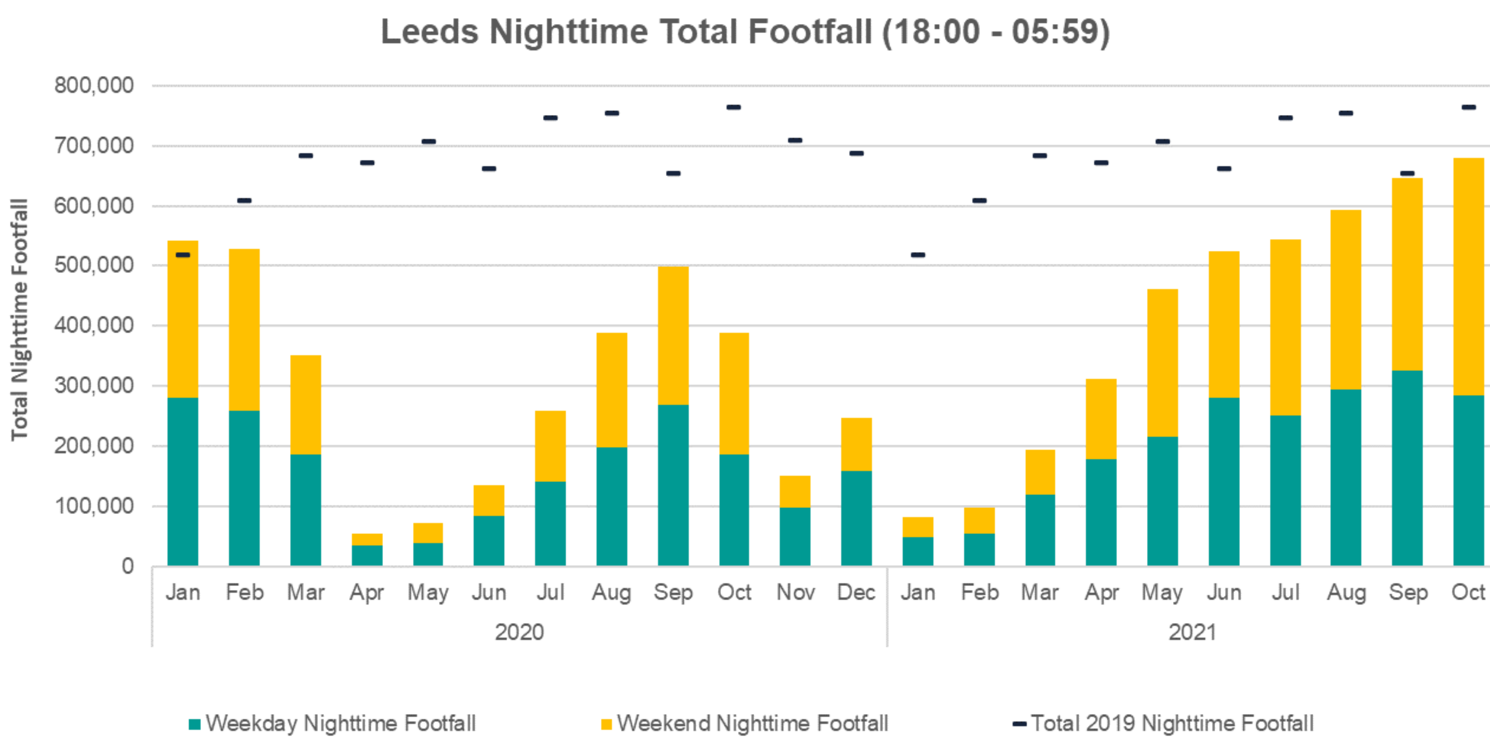


** Denotes cycle counters located on canal towpaths*

Source: Leeds City Council

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

Weekday and weekend evening footfall (Friday 18:00 – Monday 05:59) in Leeds has increased steadily through 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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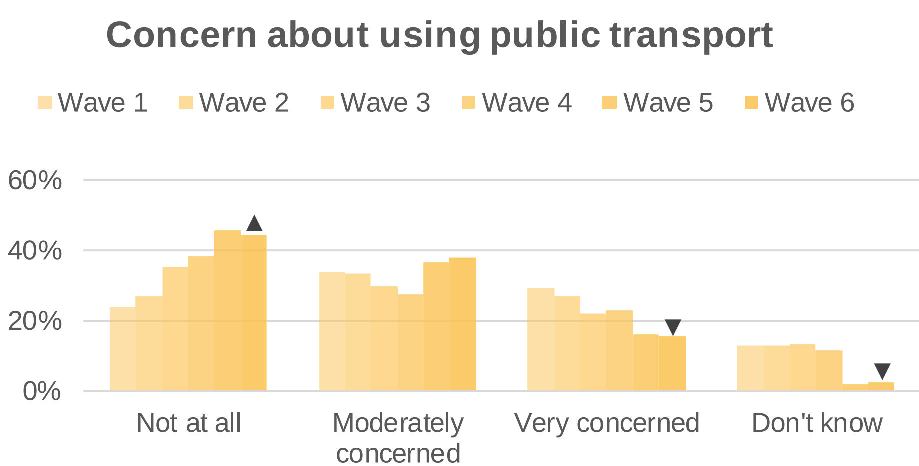
COVID-19 Transport Recovery Survey - Concerns about using PT have fallen, but remain unchanged since restrictions were eased

In response to the COVID-19 pandemic, the Combined Authority have been running a COVID-19 Transport Recovery Survey series since June 2020, and this week we published the latest results (wave 6). Fieldwork was conducted between 28th September - 13th October 2021 and involved telephone interviews with 1,000 West Yorkshire residents aged 16 and over, with quotas for age, gender, ethnicity and home district, making it a statistically representative view of the local population. The full report is available here (with previous reports here). The following slides cover a selection of some of the headlines.

Concerns about using public transport have fallen significantly over time, particularly among younger respondents, although there is little change since the previous wave (in June 2021).



For further information about this survey, please contact Research@westyorks-ca.gov.uk

▲ / ▼ denote significant changes in the responses compared to wave 1.

Q: In relation to COVID, would you be concerned about using public transport over the coming weeks? Base = 1,000

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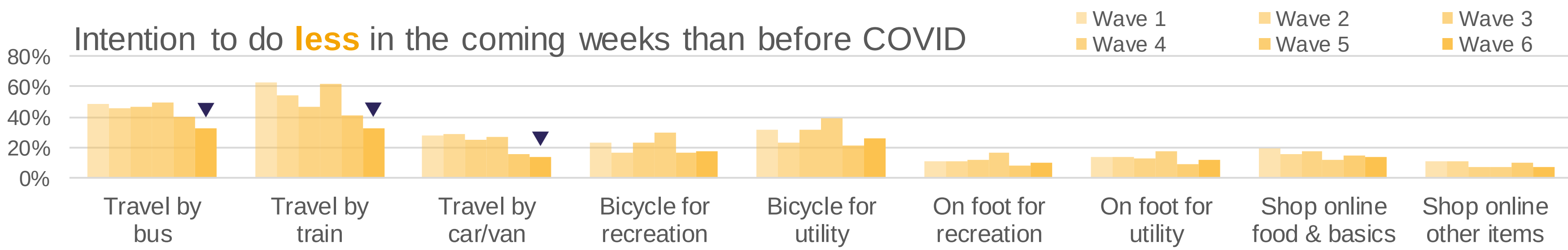
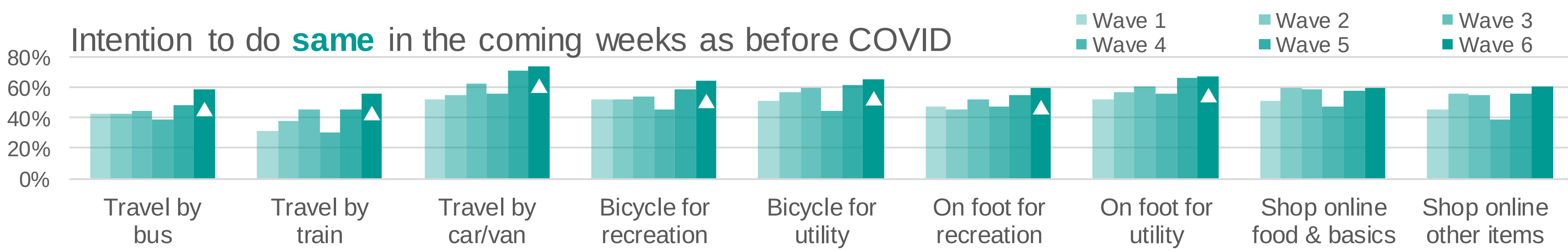
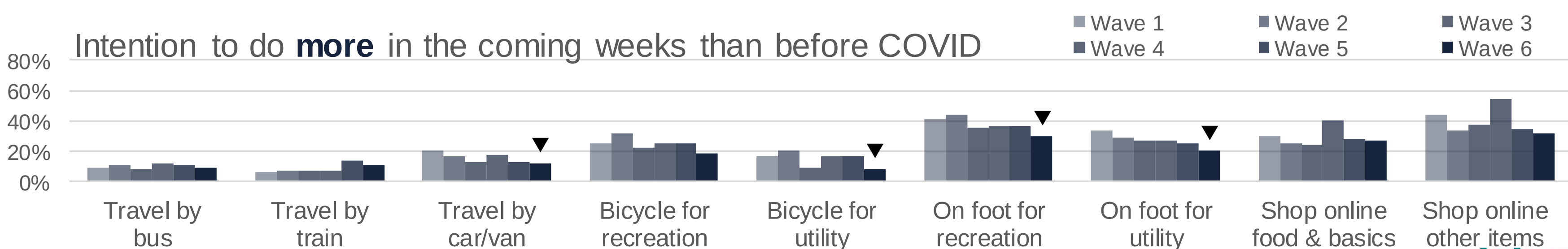
COVID-19 Transport Recovery Survey – Evidence of continued signs of recovery

There is a continued move towards pre-pandemic travel activity compared with waves 4 and 5, with some *statistically significant* changes with respect to wave 1.







▲ / ▼ denote significant changes in the responses compared to wave 1.

Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?

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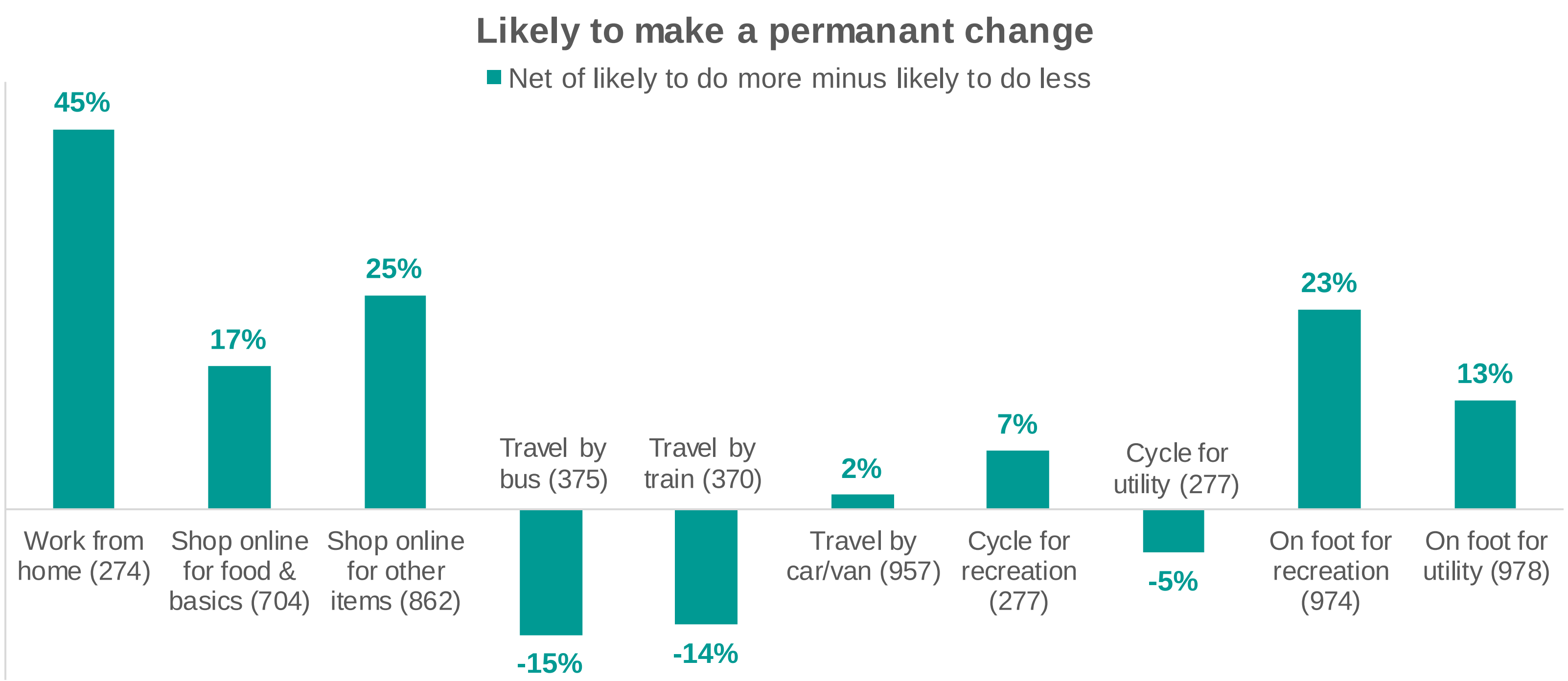
COVID-19 Transport Recovery Survey – some travel behaviours and choices likely to stay

In addition to asking if people would do certain activities, less, the same or more over the coming weeks (compared to pre-COVID-19), we also asked how likely those changes were to be permanent. The chart below illustrates the net change. Net change figures show that In the long-term, respondents are more likely to increase their walking and undertake more remote activities (work from home, shop online). They are also likely to reduce their bus and train usage. Increases and decreases in car/van travel could balance each other out. Likewise, long-term decreases in utility cycling could be offset by increases in recreational cycling.



Q: Over the coming weeks do you think you will do each of the following more, less, or the same as before COVID?
Q: How likely or unlikely is the change going to be permanent?
Base (in brackets): People who were routed to answer more, less, or the same, excluding 'I never do this' responses.

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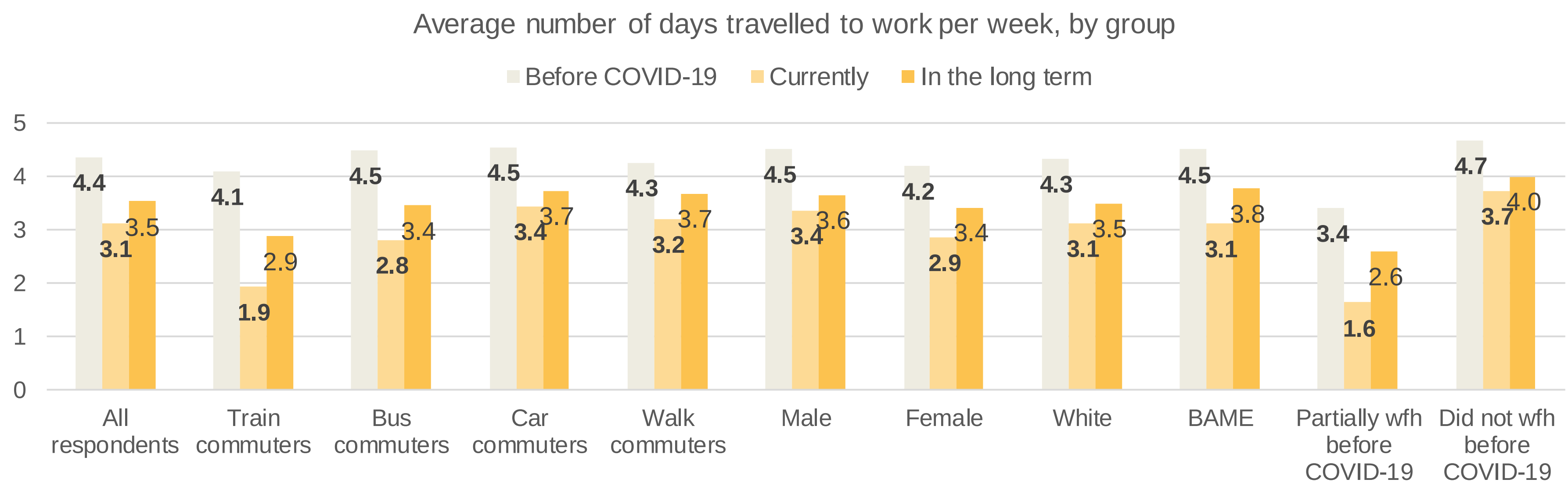
COVID-19 Transport Recovery Survey – Changes in travel to work frequency

Before COVID-19, West Yorkshire residents reported traveling to work 4.4 days a week on average. The current figure is 28% lower, at 3.1 days a week, reflecting the 21% of respondents that reported still working from home exclusively. Although an increase in commuting is expected in the long term, it is unlikely it recovers to pre-COVID-19 levels; results suggest a 19% reduction relative to pre-pandemic values, and a *significantly* higher reduction (30%) among those who commuted by train, as well as those who had done some work from home before COVID-19.



Q. Before COVID how many days a week did you normally travel to work? | Q. How many days a week do you currently travel to work? | TN63. In the long term, once COVID is no longer considered a problem, how many days per week do you think you will travel to work, roughly? (Less than once a week / 0/1/2/3/4/5/6/7)

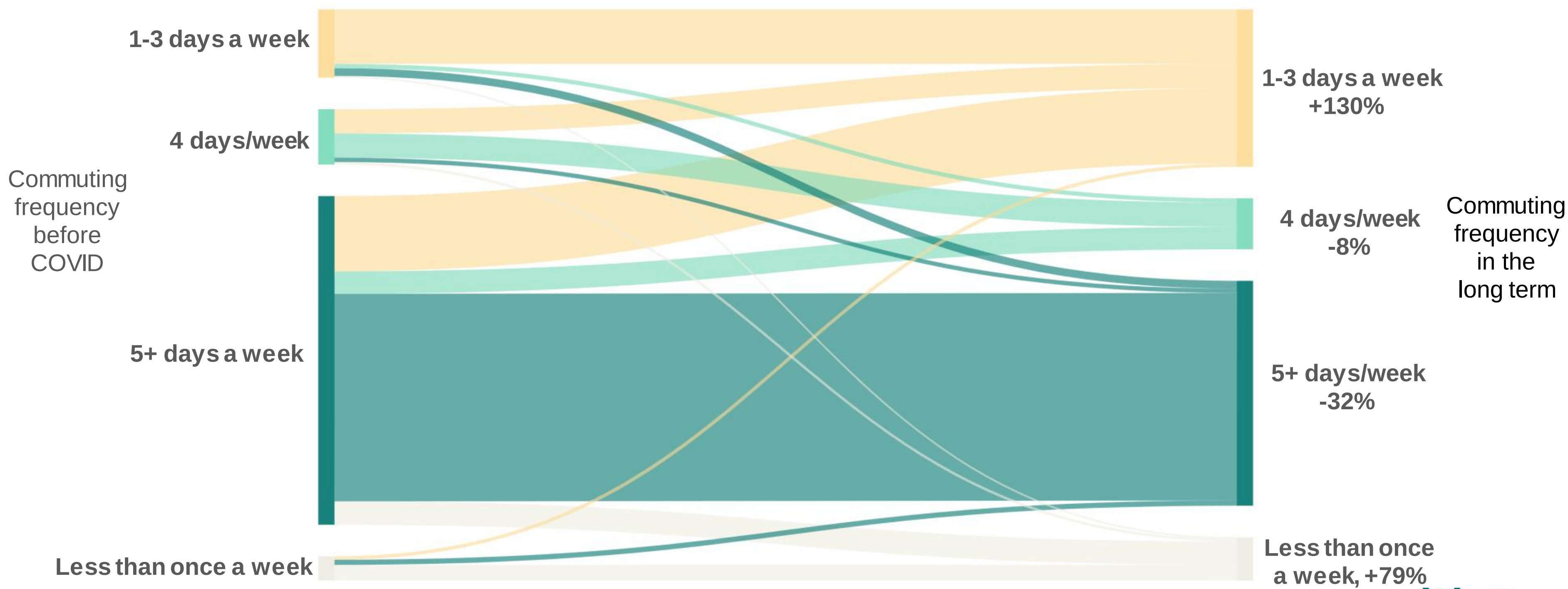
Note: For the obtention of an average 'less than once a week' was assigned a numerical value of 0.25 days/week

Note: The cycling commuting sub-group was too small for the results to be significant (12 responses)

COVID-19 Transport Recovery Survey - A shifting preference of less frequent commuting long term

The survey results reveal a clear preference for less frequent commuting in the long term, with the proportion of those commuting between 1 and 3 days a week more than doubling relative to pre-pandemic. Although nearly 50% of respondents still expect to travel to work 5 days a week or more in the long term, the proportion of those doing so falls by around a third relative to pre-COVID. The Sankey diagram below highlights the shift in respondents' commuting frequency from pre-COVID-19 (left) to long term intentions (right).

Change in long-term commuting frequency, relative to pre-pandemic



Source: West Yorkshire Combined Authority COVID-19 Transport Survey of West Yorkshire Residents, 28th Sept to 13th Oct 2021
Q. Before COVID how many days a week did you normally travel to work? | In the long term, once COVID is no longer considered a problem, how many days per week do you think you will travel to work, roughly? (Less than once a week / 0/1/2/3/4/5/6/7)

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