

COVID-19
Economic & Transport
Insights Report

Research & Intelligence
20th December 2021

Executive Summary – Economic Impact

- Between October and November 2021, there was a net increase in payrolled employees in West Yorkshire of around 10,000 (+1%). Employment is now 25,000 (3%) above the pre-pandemic level seen in February 2020 and 50,000 (5%) higher than at its low-point in November 2020.
- The latest claimant count figures for West Yorkshire, which relate to the number of people on out-of-work benefits, show a 2% fall between October and November 2021. With around 83,000 claimants in the region, the claimant count is now 24% lower than in March 2021, when it was at its peak. West Yorkshire's claimant unemployment rate, of 5.6%, is higher than the national average of 4.7%
- According to data from Bureau van Dijk's Fame database, up to the week ending 7th December there were 407 business liquidations in West Yorkshire (4-week moving average) A growth of 10% from the previous 4 week period. Over the last month, the number of businesses liquidating has been decreasing, but over the last week this trend is starting to reverse. All districts has seen an increase in liquidations from the previous week.
- In September, 831 new bank accounts were opened in West Yorkshire, which is a 3% increase relative to the previous month. Leeds was the district with the most, new accounts (279). Kirklees and Wakefield has seen the strongest growth of 15% and 25%, growing to 171 and 100, respectively.

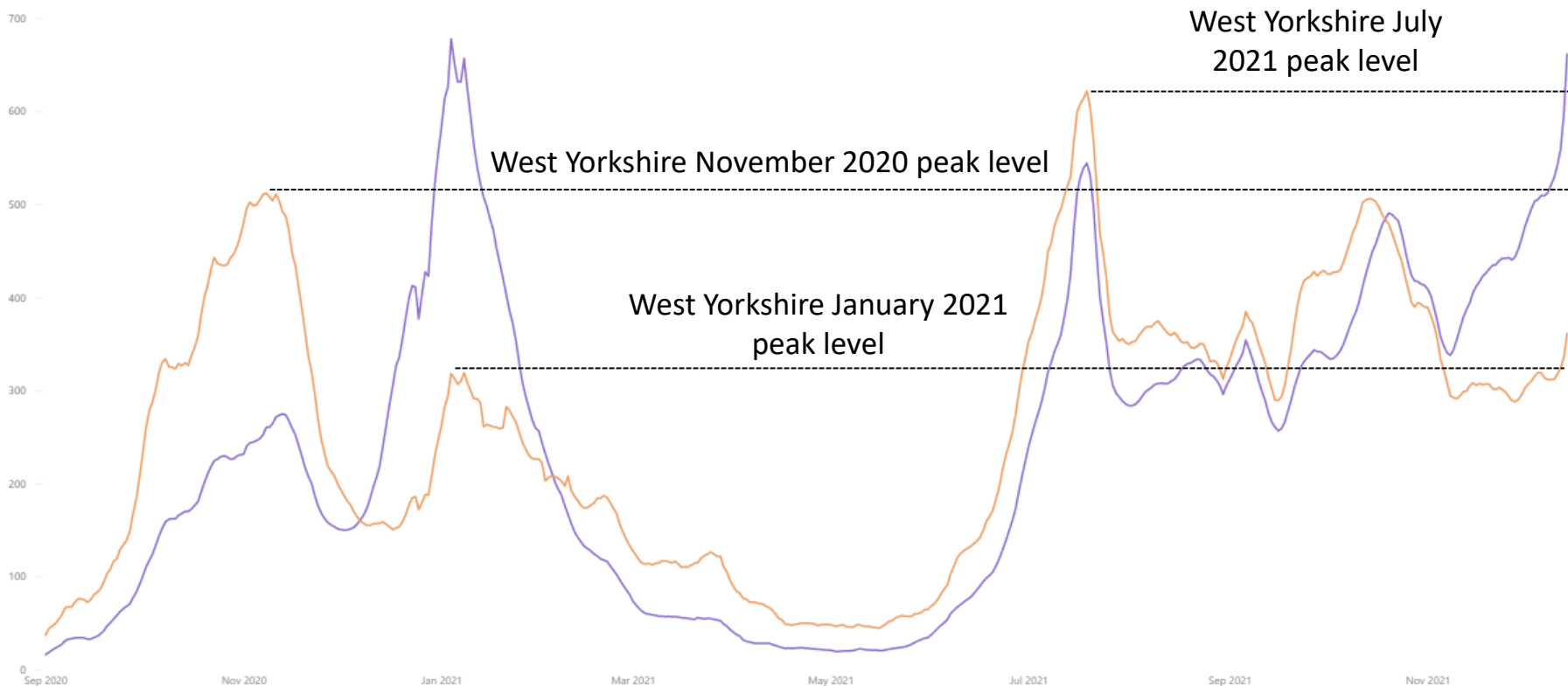
Executive Summary – Transport Impact

- National motor vehicle and bus appear to be stable in the run-up to the announcement of the new restrictions and the real impact of this is currently unclear.
- Footfall at Leeds rail station has remained broadly stable over recent weeks with some changes linked to extreme weather and weekend levels on Sunday 5th December reached the highest levels relative to the baseline. The impact of recently reintroduced restrictions, including working from home guidance, remains uncertain, however the Monday 13th December footfall does appear low compared to recent weeks.
- Provisional bus use data for 13th December (when home-working guidance was reintroduced) reveals little change compared to previous weeks.
- Looking at patterns of the time and day public transport has been used recently, relative to pre-pandemic, reveals:
 - The busiest 15 minutes in weekday AM peak footfall at Leeds Station footfall is now slightly earlier and a greater proportion of people are now traveling during the off peak period.
 - Bus use in the traditional commuter peaks periods is still substantially lower than pre-pandemic, and overall recovery has been stronger outside of peak hours, particularly on evenings and weekends.

Virus prevalence – West Yorkshire trend

ROLLING RATE OF NEW CASES PER 100,000 PEOPLE

● England ● West Yorkshire



As of the 14th December 2021, the 7-day moving average **West Yorkshire COVID-19 rate was 361.3 per 100k, a 15% increase from the previous week.** In England overall case rates increased by 30% to 661.3 per 100k, almost level with the January 2021 peak.

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.

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:
14/12/2021

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	145	304.9	↑ 3	1653	100657	18567	1293	239
Calderdale	147	299.4	↑ 2	633	37518	17744	391	185
Kirklees	146	303.9	↑ 20	1341	76918	17430	967	219
Leeds	118	439.2	↑ 32	3508	150984	18902	1598	200
Wakefield	137	380.6	↓ -1	1338	65600	18658	920	262
West Yorkshire		361.3	↑ 15	8473	431677	18407	5169	220
England		661.3	↑ 30	373985	9655061	17074	127977	226

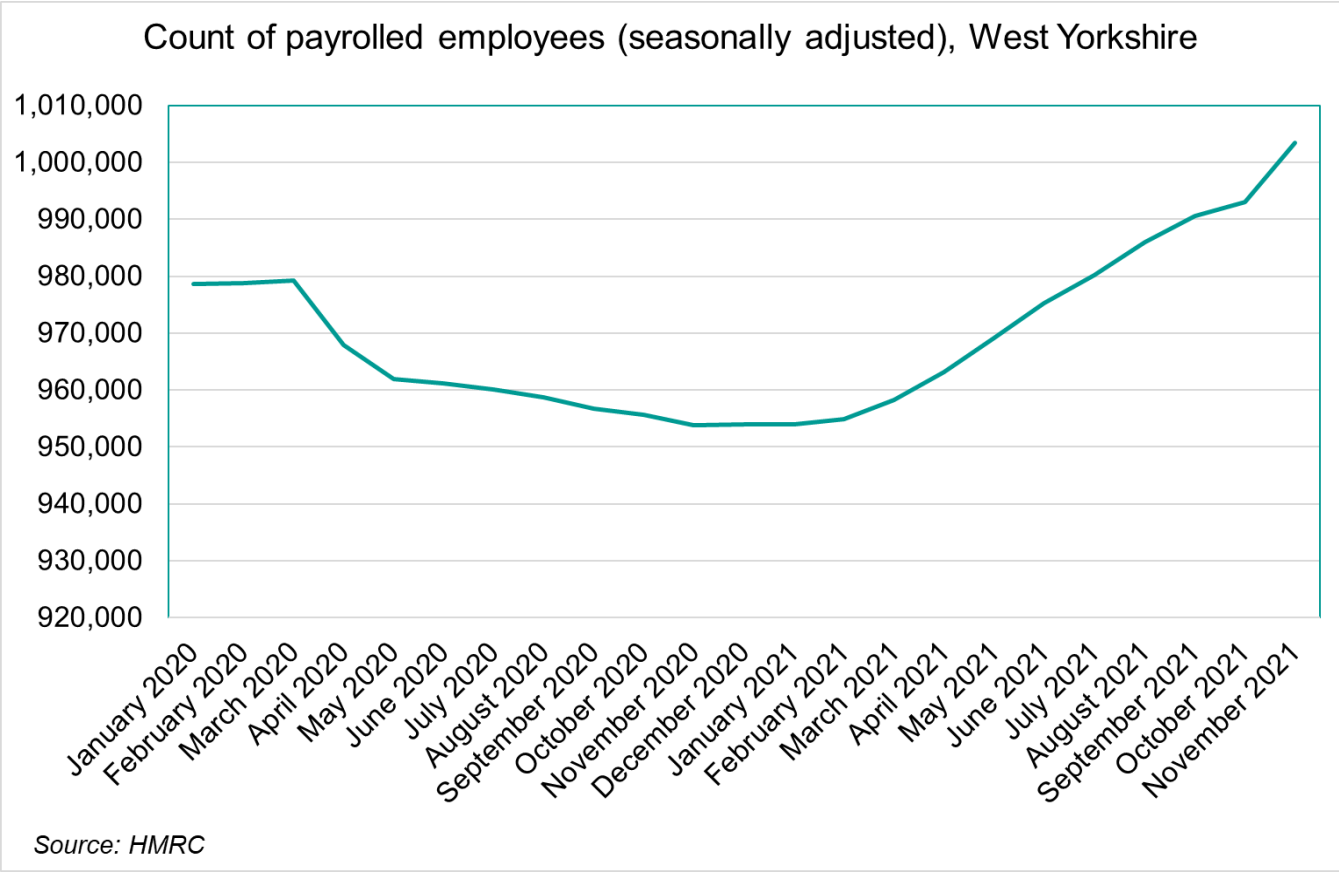
Cases: Number of people with a positive COVID-19 virus test (either lab-reported or rapid lateral flow test), reported by the specimen date
 Deaths: Total number of people who had a positive test result for COVID-19 and died within 28 days of the first positive test, reported by the date of death
 Crude death rate: total deaths per population. This does not take account of variation caused by different population age structures

Economic Insights



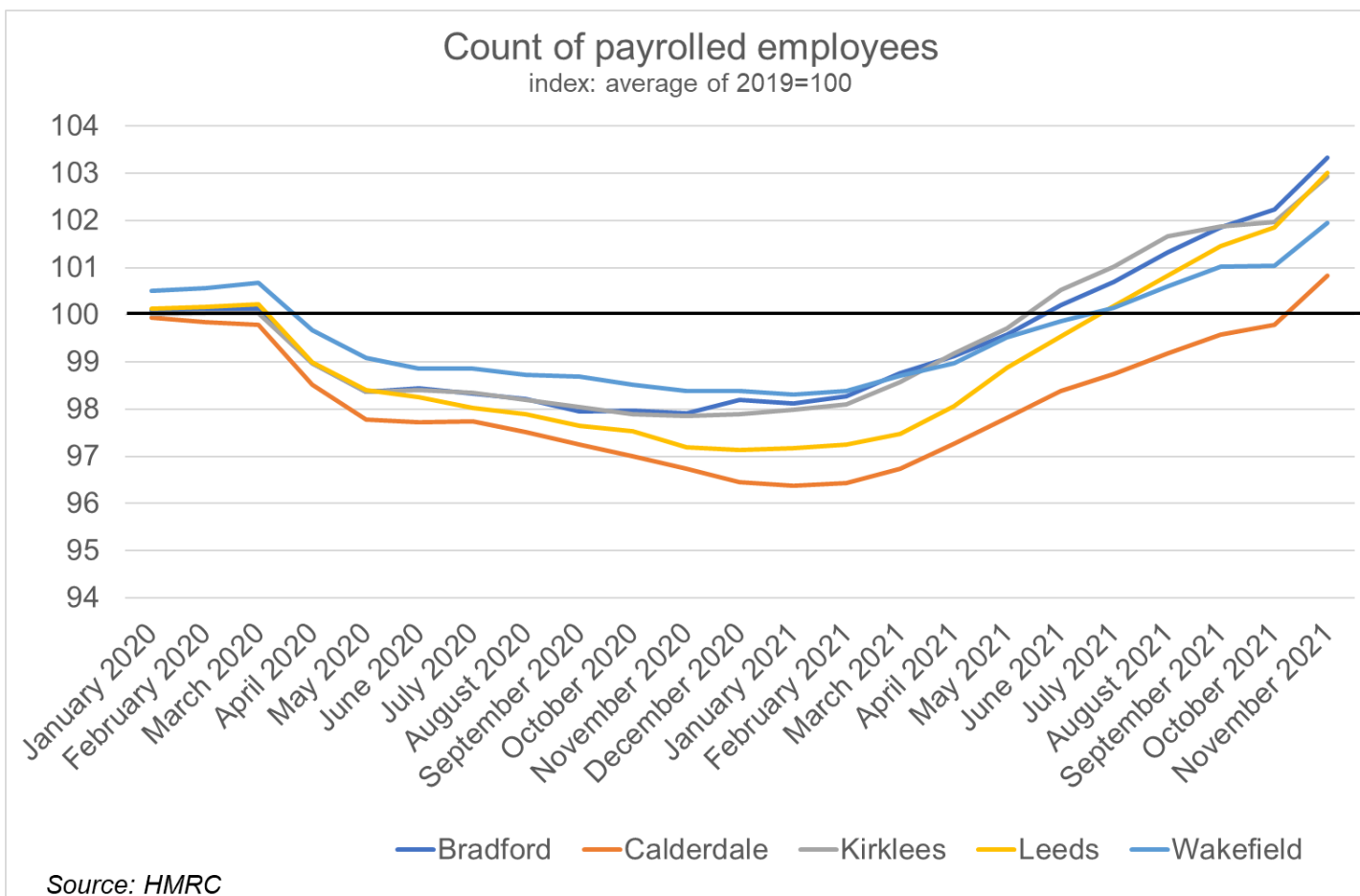
Sharp increase in employee count in November

Between October and November 2021, there was a net increase in payrolled employees in West Yorkshire of around 10,000 (+1%). Employment is now 25,000 (3%) above the pre-pandemic level seen in February 2020 and 50,000 (5%) higher than at its low-point in November 2020.



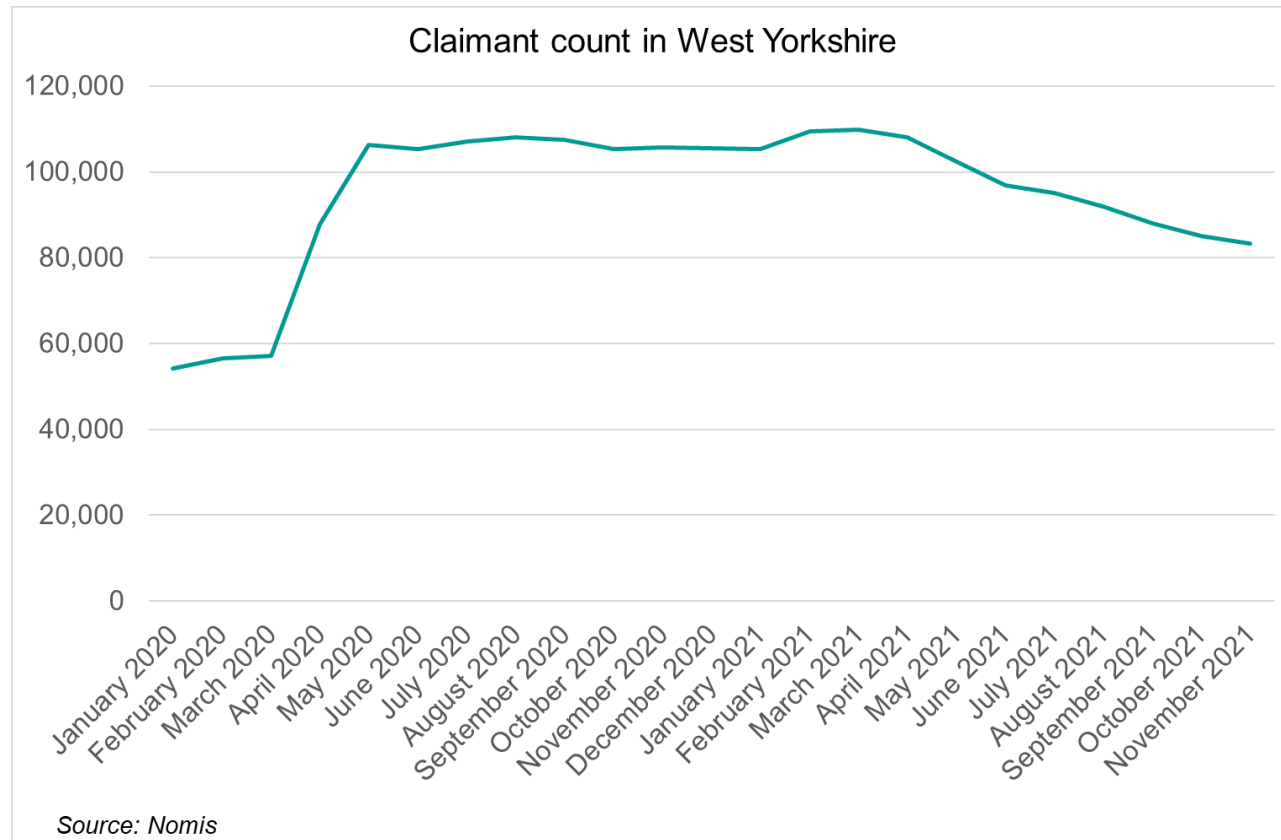
Bradford, Leeds and Kirklees performing strongest on employment

There has been a return to pre-pandemic employment levels in all local authorities from spring onwards, reflecting the national trend. Since restrictions were lifted Bradford, Leeds and Kirklees have seen the strongest growth in their employee counts.



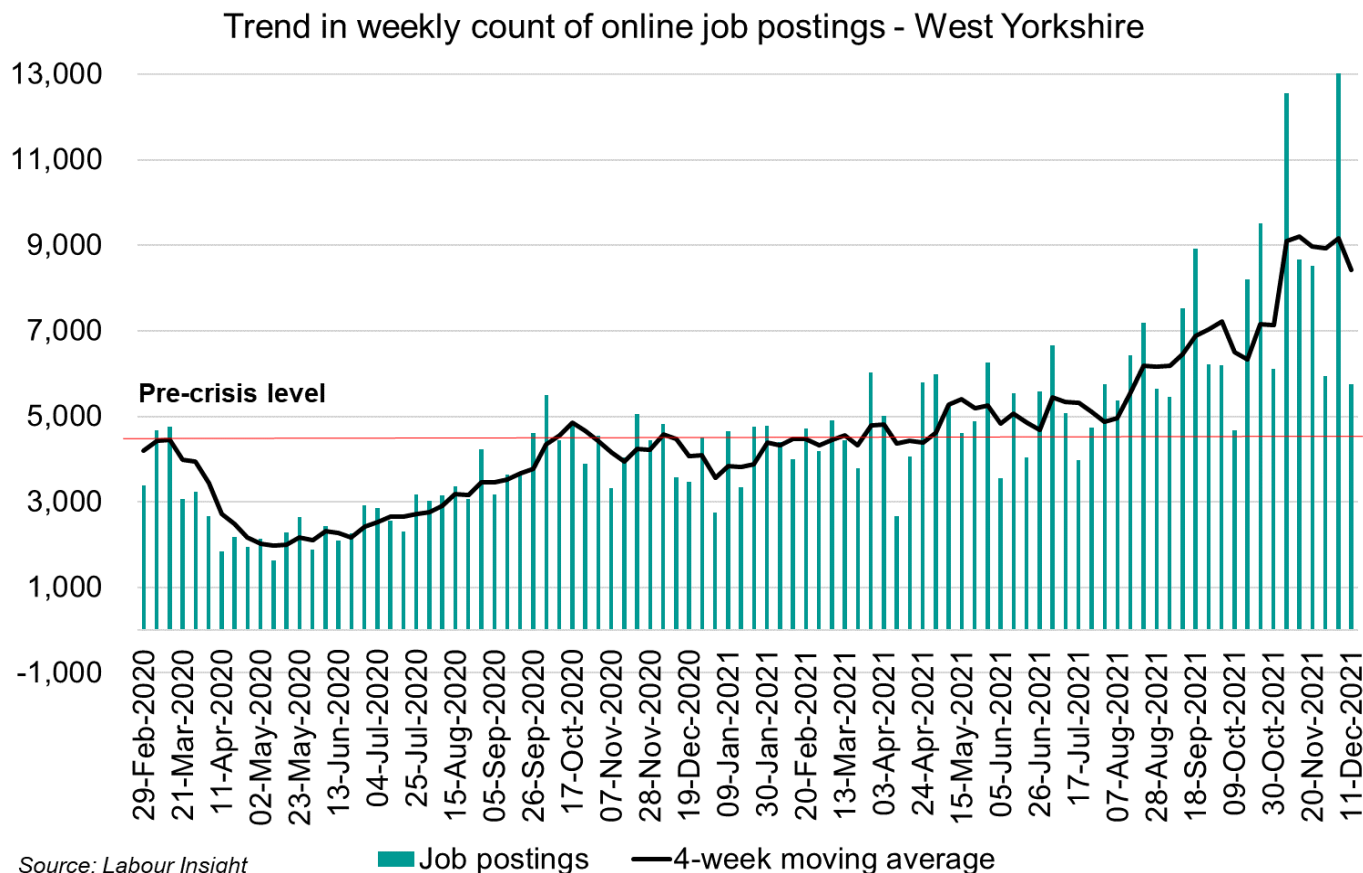
West Yorkshire claimant count (out of work benefits) continues to decline steadily

The latest claimant count figures for West Yorkshire, which relate to the number of people on out-of-work benefits, show a 2% fall (-1,700 in absolute terms) between October and November 2021. With around 83,000 claimants in the region, the claimant count is now 24% (or 27,000) lower than in March 2021, when it was at its peak, but still 47% higher than pre-pandemic, in February 2020. West Yorkshire's claimant unemployment rate, of 5.6%, is higher than the national average of 4.7%



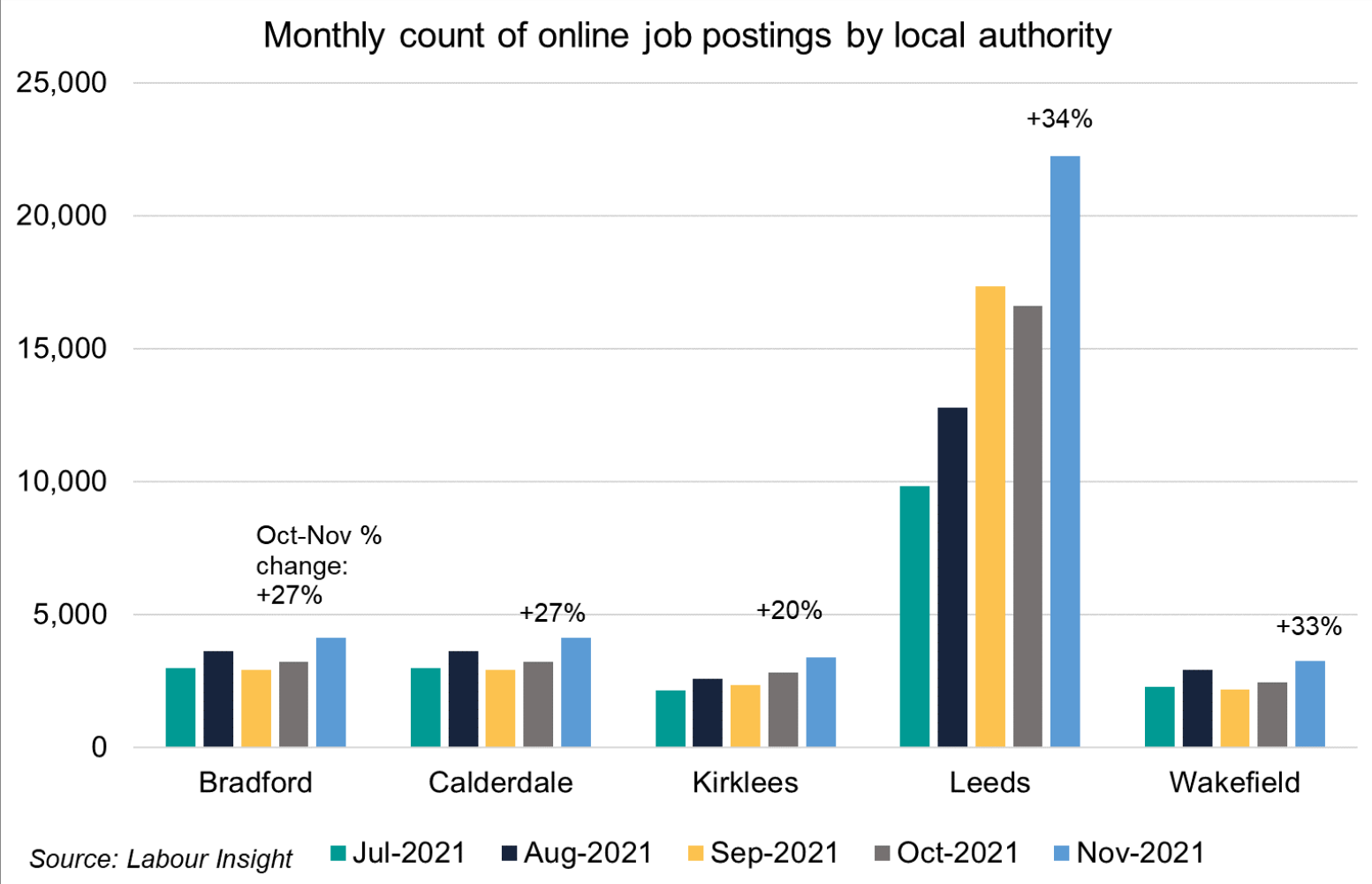
Vacancies: initial signs that Plan B is weighing on recruitment activity

The number of vacancies for jobs in West Yorkshire posted online during week ending December fell by 8% on the previous week, based on a 4-week moving average (whilst the national average also decreased by 8% for the same period). The sharp fall in the unadjusted count of postings in week ending 11 December may reflect the impact of the government's Plan B announcement



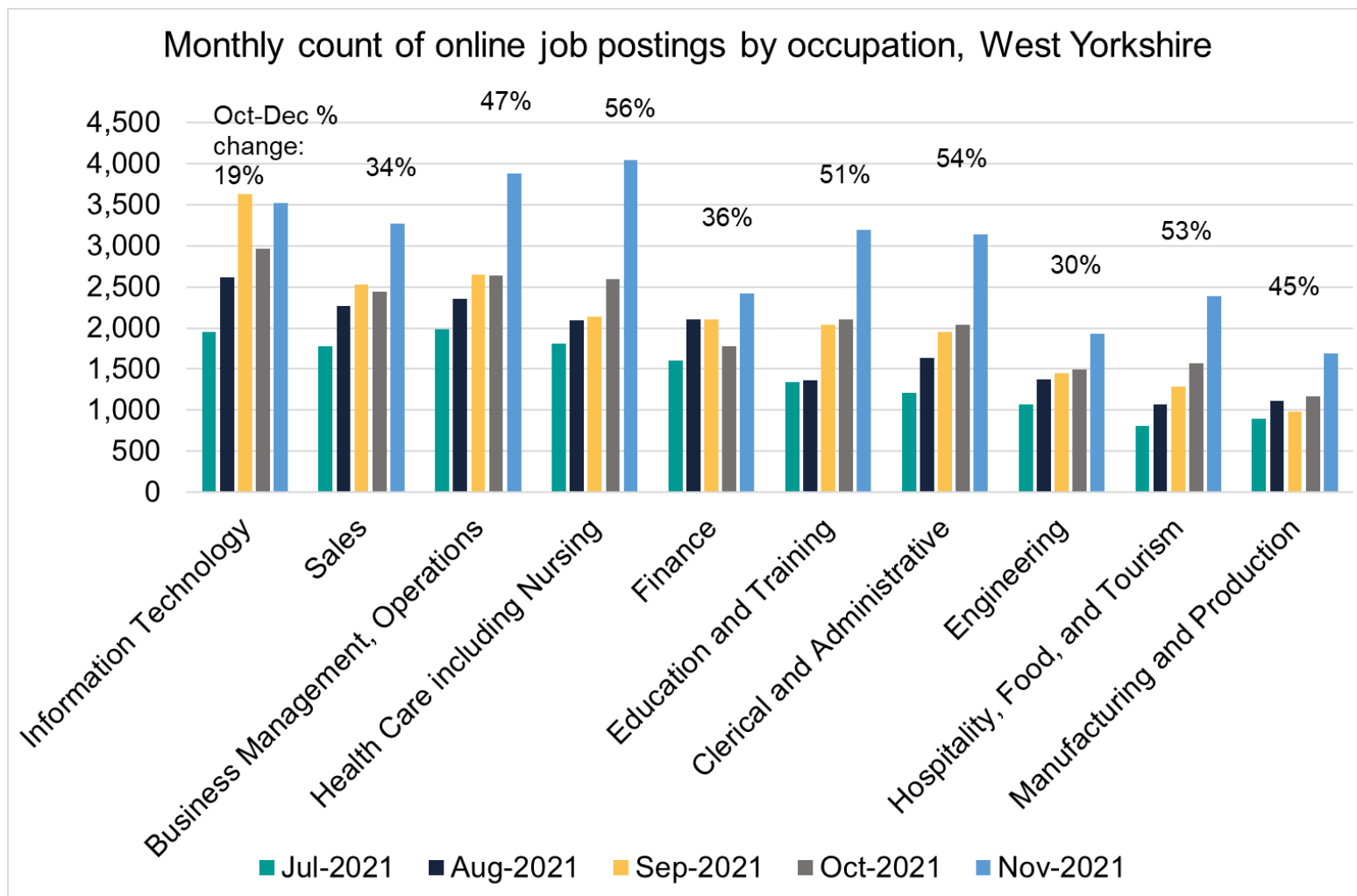
Vacancies: strong growth in postings for all local authorities in November

All West Yorkshire’s local authority areas saw substantial growth in postings during November, continuing the trend since restrictions were lifted. Leeds and Kirklees registered the strongest growth rates.



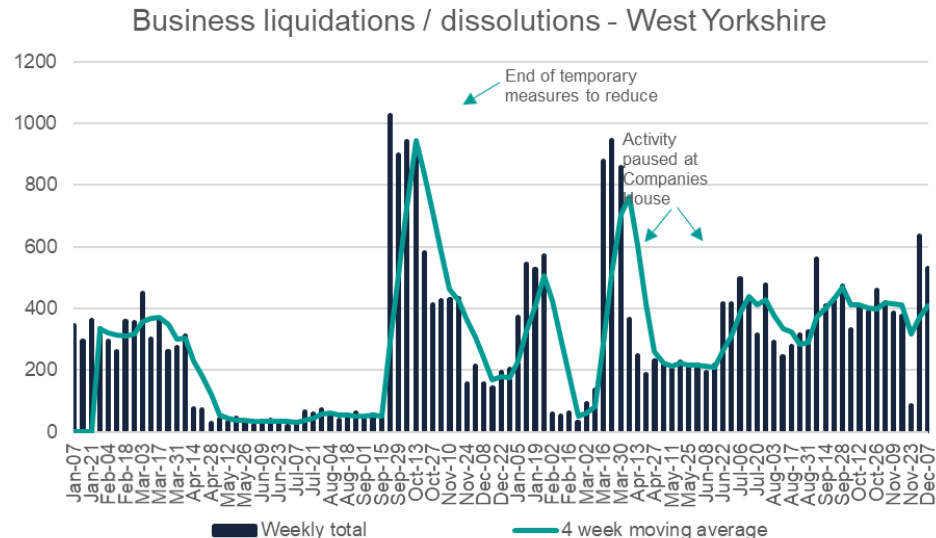
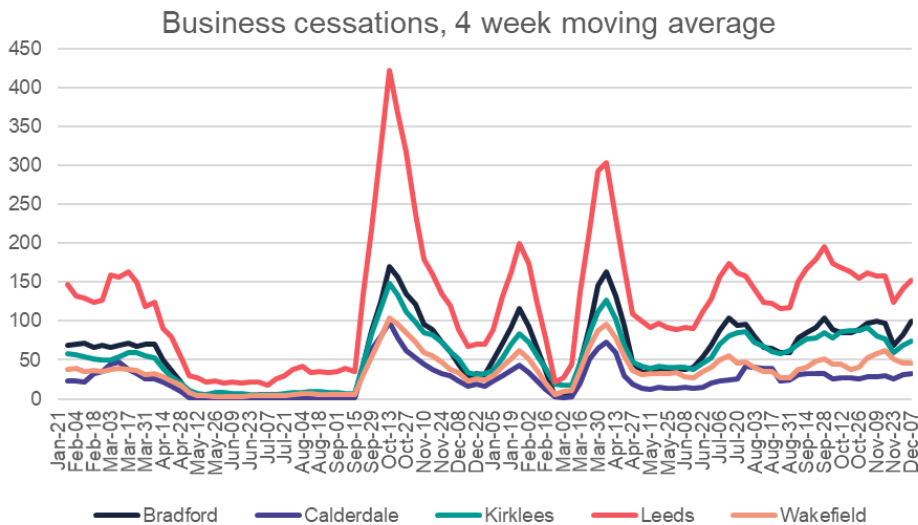
Vacancies: big increases in postings for all occupations in November

There were strong increases in the count of online job postings for all occupational categories in November, the biggest rates of growth being for Health care, Clerical and administrative and Hospitality, food and tourism.



Business liquidations have seen an increase in recent weeks

According to data from Bureau van Dijk's Fame database, up to the week ending 7th December there were 407 business liquidations in West Yorkshire (4-week moving average) A growth of 10% from the previous 4 week period. Over the last month, the number of businesses liquidating has been decreasing, but over the last week this trend is starting to reverse. All districts has seen an increase in liquidations from the previous week.



Source: FAME, Bureau van Dijk, 2021

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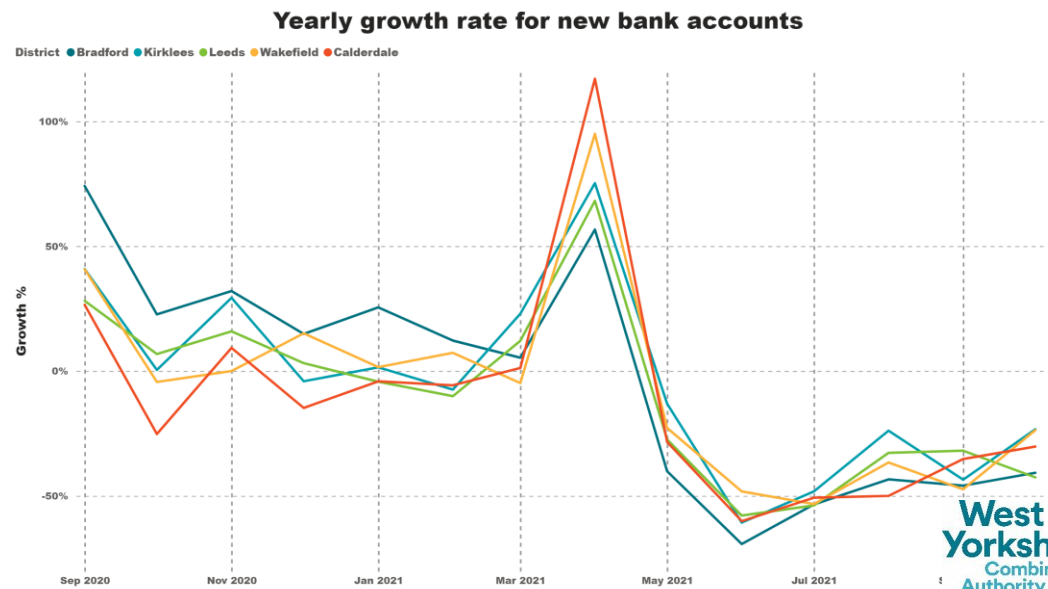
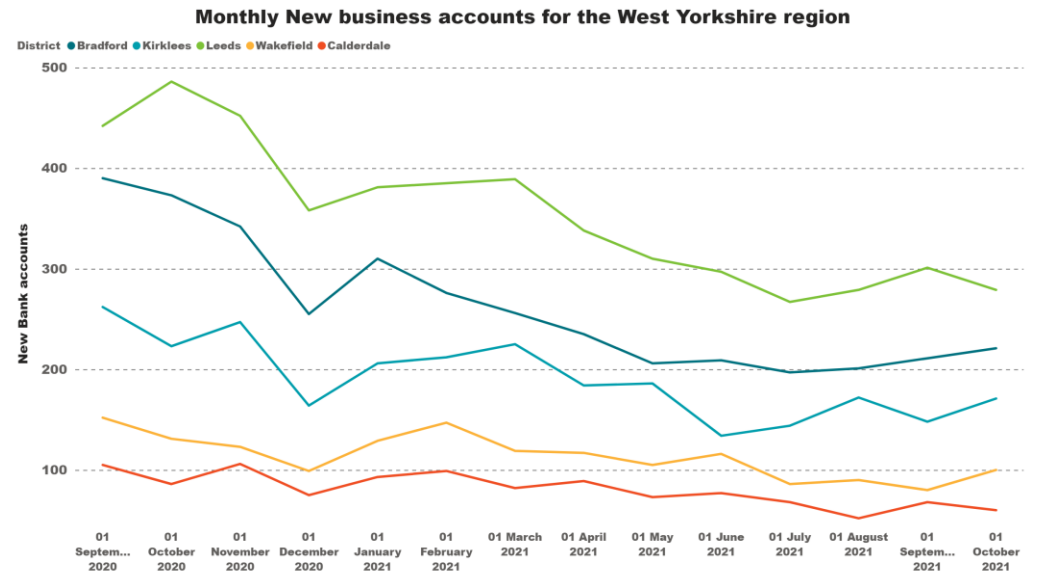
*Source: FAME, Bureau van Dijk, 2021. Analysis based on company registration address, location of activity may differ in some cases.

Strong 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, 831 new bank accounts were opened in West Yorkshire, which represents a 3% increase relative to the previous month. Leeds was the district with the most new accounts (279). Kirklees and Wakefield has seen the strongest growth of 15% and 25%, growing to 171 and 100, respectively.

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

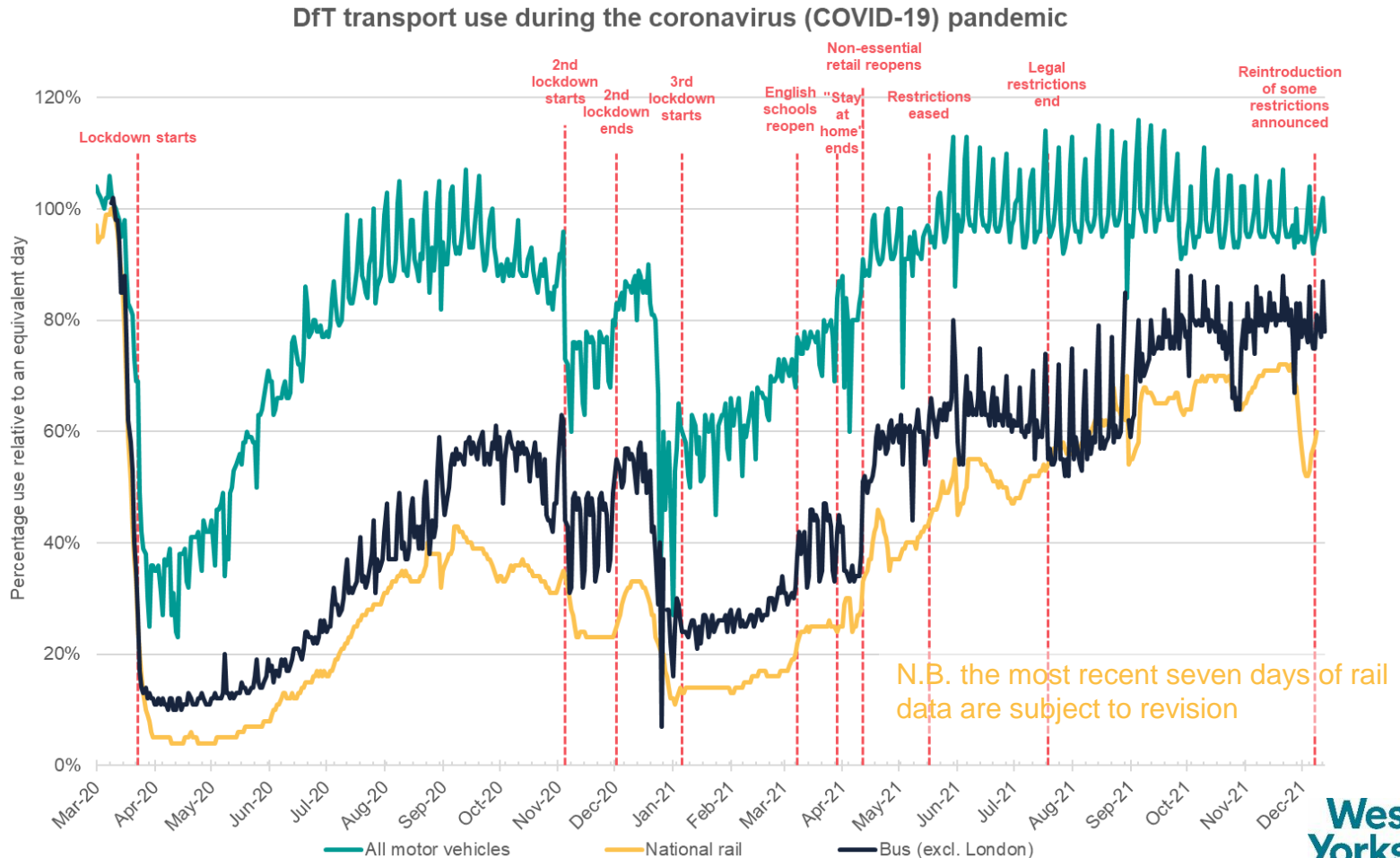


Transport Insights



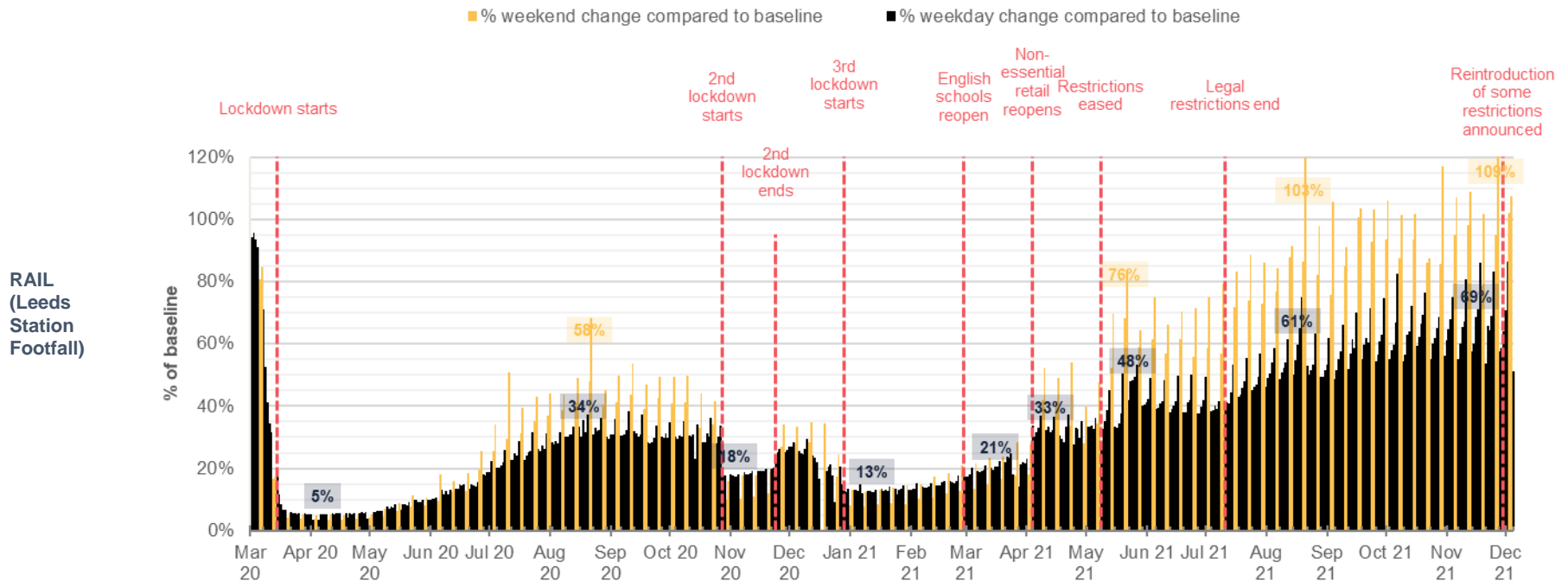
Nationally, road and bus usage remain broadly stable over recent weeks

Motor vehicle and bus use appear to be stable at slightly lower levels than September, with reduced fluctuation. Rail use declines notably however as there are missing dates and the local picture does not reflect this, this rail data should be treated with caution.



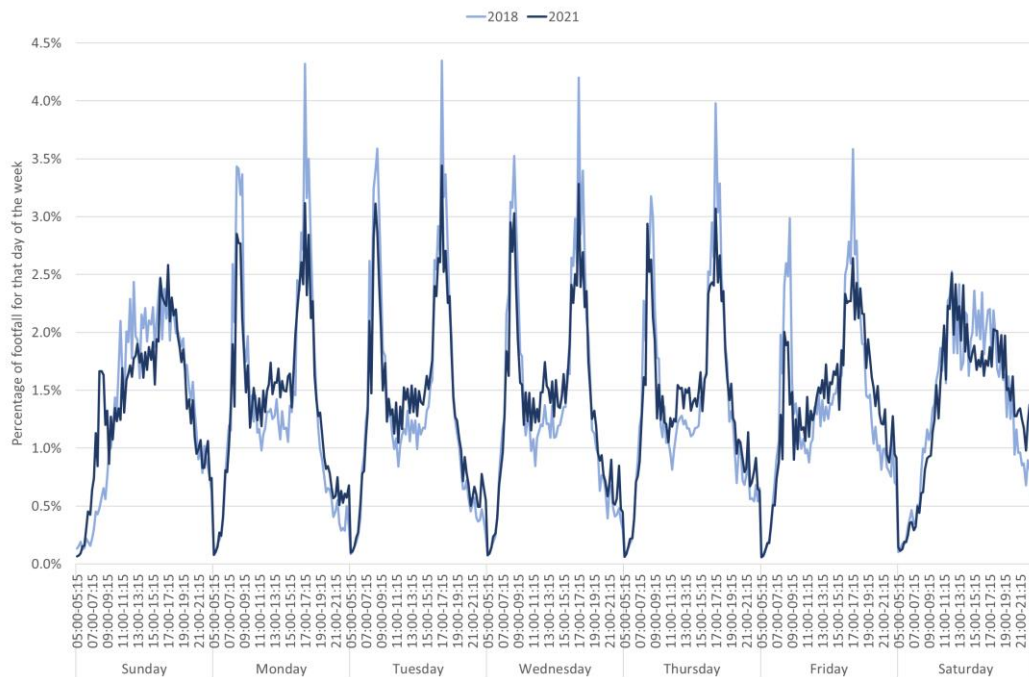
Leeds rail station weekday footfall remains broadly stable while weekends fluctuate

The level of footfall at Leeds rail station has remained broadly stable over recent weeks with some changes linked to extreme weather. Weekend levels have fluctuated but reached the highest increase observed against baseline on Sunday 5th December. The impact of recently reintroduced restrictions, including working from home guidance, is not yet apparent however the most recent Monday does appear low compared to recent weeks.



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

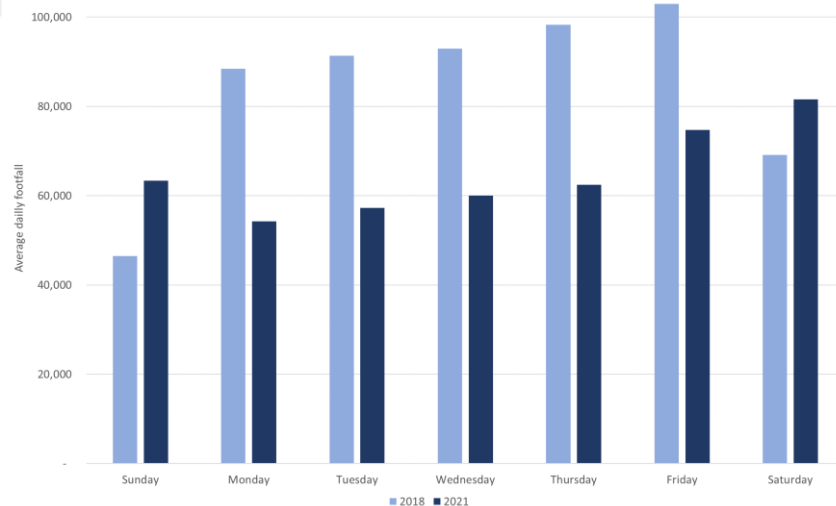
Changes in travel time/day - Rail



- people are travelling later on Saturdays and earlier on Sundays
- looking at the days on which people are choosing to travel reveals that footfall during the working week has not returned to pre-pandemic levels, Friday remains the busiest working week day and footfall at weekends during this period in 2021 was 37% higher than in 2018.

A comparison of Leeds Station footfall data from 3 weeks in 2018 and 2021 in 15 minute time slices reveals that

- the busiest 15 minutes in weekday AM peak periods is now slightly earlier
- a greater proportion of people are now traveling during the off peak period
- a greater proportion of people are travelling late in the evening particularly on Fridays



Data used is from 30/09/2018 to 20/10/2018 and 26/09/2021 to 16/10/2021. 2018 has been used as a pre-covid comparison rather than 2019 when footfall counts were affected by the work moving the barriers and improving the concourse at Leeds Station.

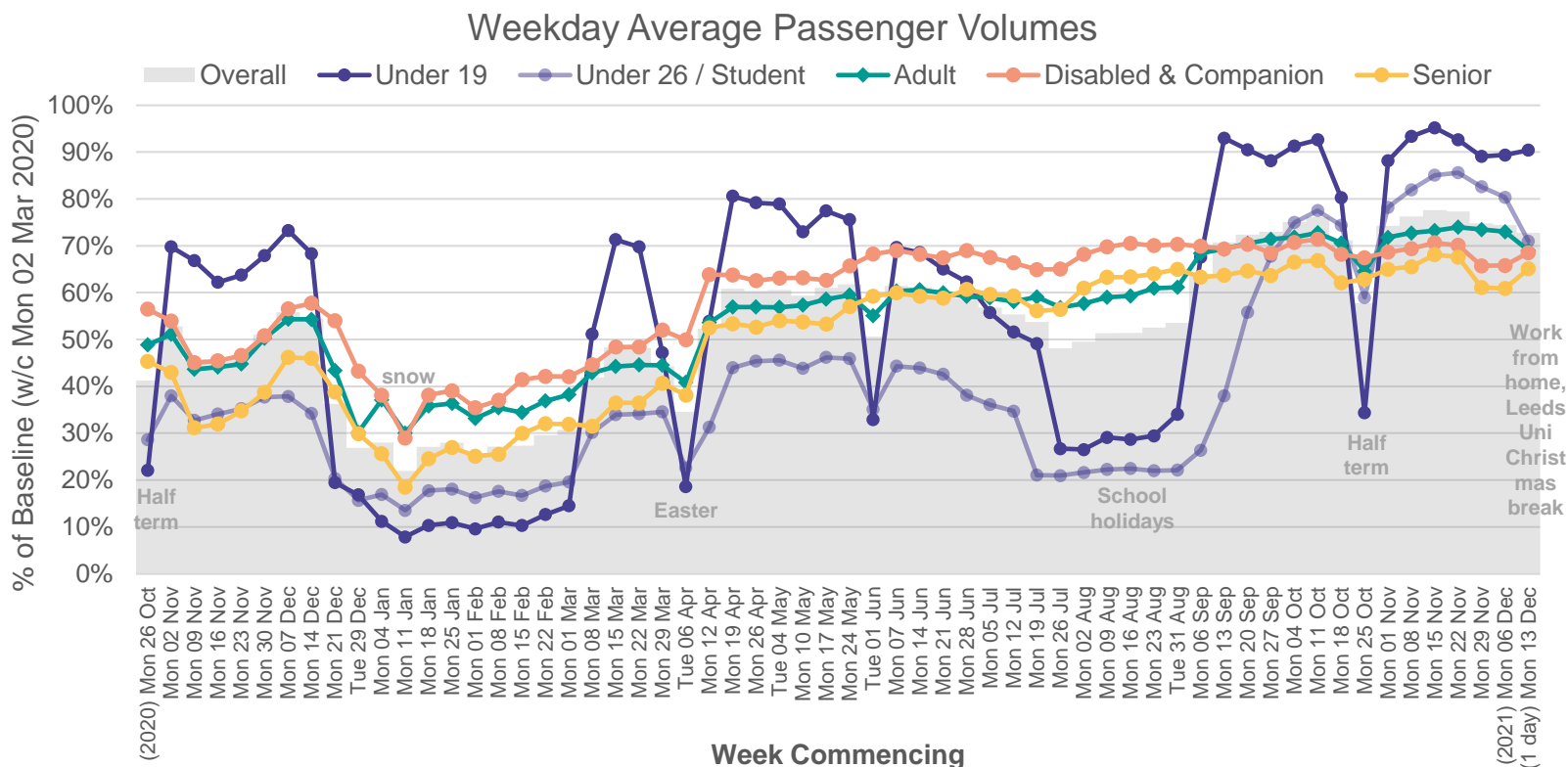
Source: Leeds Rail Station Footfall - Network Rail

Initial indications are that latest Government advice has had little effect on bus use

Ticket machine data shows weekday bus use reached 78% of baseline in mid November before dropping a little. Initial data for 13 December reveals that the latest Government advice has had little impact if any. Use by Under 26 / Students has dropped but this coincides with the start of the University of Leeds Christmas break. Use by adults appears to have dropped a little but it is only 2% lower than the previous Monday. Other cohorts exhibit an increase in use.

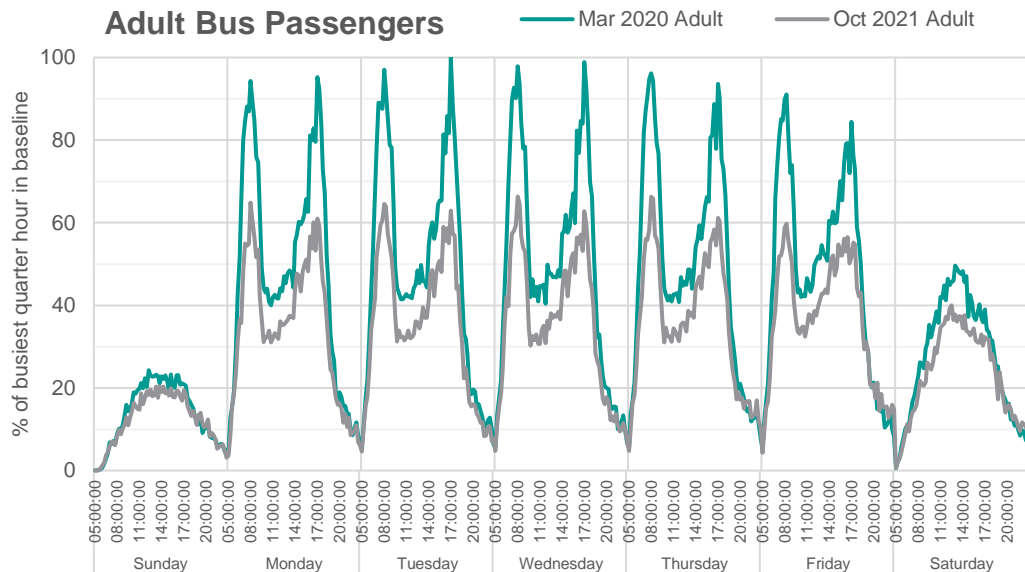
Passengers per weekday before COVID
Adult 221,000
Under 19 101,000
Senior 74,000
Under 26 / Student 34,000
Disabled & Companion 29,000
Miscellaneous 9,000

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.

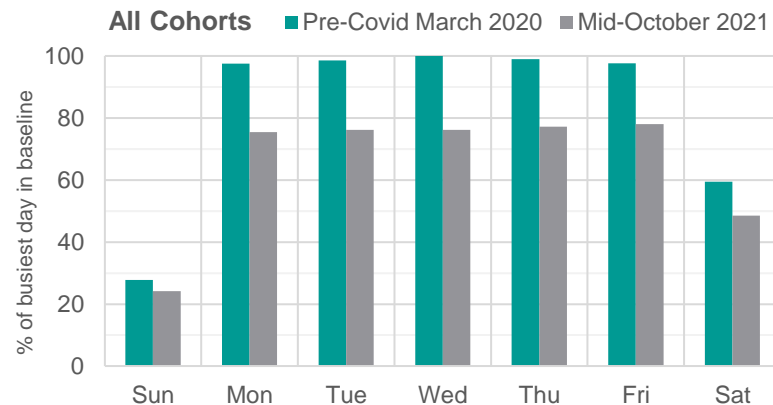
Changes in bus use are most apparent in the traditional commuter peaks



A comparison of adult bus use shows:

- Use in the traditional commuter peaks is still substantially lower than pre-pandemic
- The weekday peaks in use by adults have remained at 08:00 to 08:15 and 17:00 to 17:15.
- Recovery has been stronger outside of peak hours, particularly on evenings and weekends.

Bus use remains lower on all days of the week than pre-pandemic. This is true of each cohort, and therefore also true of all cohorts combined. Unlike the Leeds station footfall figures the overall distribution by day of the week follows a similar pattern to pre-pandemic, with perhaps Sunday being nearest to the baseline.



Extract of bus ticket machine data from 01/03/2020 to 07/03/2020 and 10/10/2021 to 16/10/2021. Data may not be fully representative of West Yorkshire.

Source: Leeds Rail Station Footfall - Network Rail

Off-road cycle counts fall while commuting trips increase

Off-road cycle counts, often attributed to leisure trips, are 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.

CityConnect Phase 2: Annual Change in Average Daily Cycle Counts 2020/21

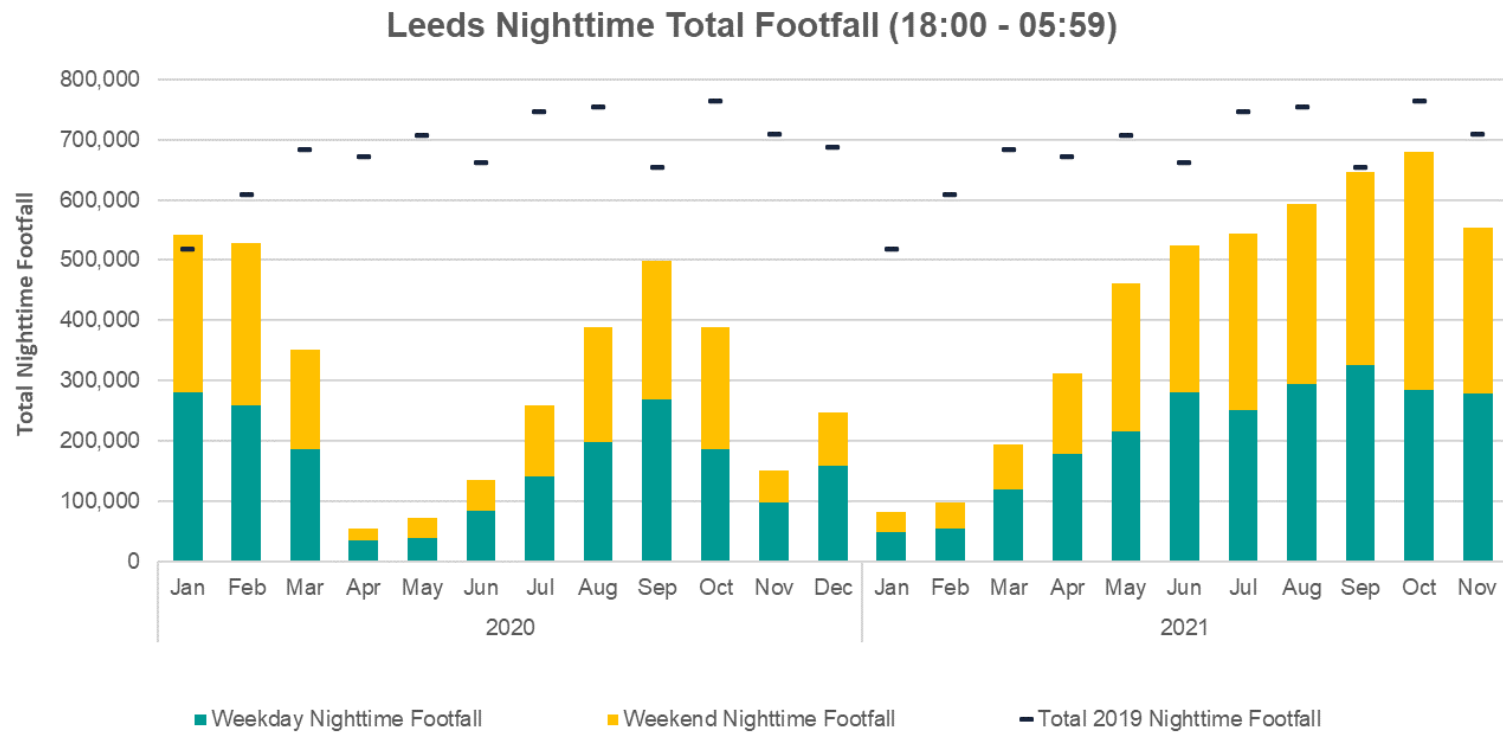


* Denotes cycle counters located on canal towpaths

Source: Leeds City Council

Evening footfall in Leeds City Centre decreased from October to November

Weekday and weekend evening footfall (Friday 18:00 – Monday 05:59) in Leeds decreased in November, the first time a decline from the previous month has occurred in 2021, however declines into the winter months are normal. Although footfall remains above 2020 levels, this is still lower than the same period in 2019.



Source: Leeds City Council