

**COVID-19**  
**Economic & Transport**  
**Insights Report**

Research & Intelligence  
21<sup>st</sup> January 2022

# Executive Summary – Economic Impact

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- Between November-December 2021, there was a net increase in payrolled employees in West Yorkshire of around 7,000 (+0.7%). Employment is now 23,000 (2%) above the pre-pandemic level seen in February 2020 and 50,000 (5%) higher than at its low-point in November 2020.
- Weekly data for December 2021 and the start of January 2022 shows a steep fall in the West Yorkshire vacancy count. High figures recorded in November 2021 were unlikely to be sustainable and the festive period also typically sees a slowing of recruitment activity. However, the omicron variant had a clear impact, with the start of the sharp decline coinciding with the Plan B announcement. The vacancy count recorded for week ending 8<sup>th</sup> January shows signs of recovery.
- Up to the week ending 11<sup>th</sup> January there were 339 business liquidations in West Yorkshire (4-week moving average, Bureau van Dijk's Fame database), a decline of 5% from the previous 4-week period. There was a sharp increase in the 4-week period ending 21<sup>st</sup> December as weekly liquidations hit 489. Since then, liquidations have declined across all districts, with Bradford (41%) and Wakefield (40%) seeing the sharpest declines.
- In November, 887 new bank accounts were opened in West Yorkshire, representing a 7% increase relative to the previous month. Leeds was the district with the most new accounts (335). Calderdale and Leeds have seen the strongest growth from September (30% and 20% respectively). Calderdale grew to 78 from 60 new business bank accounts.

# Executive Summary – Transport Impact

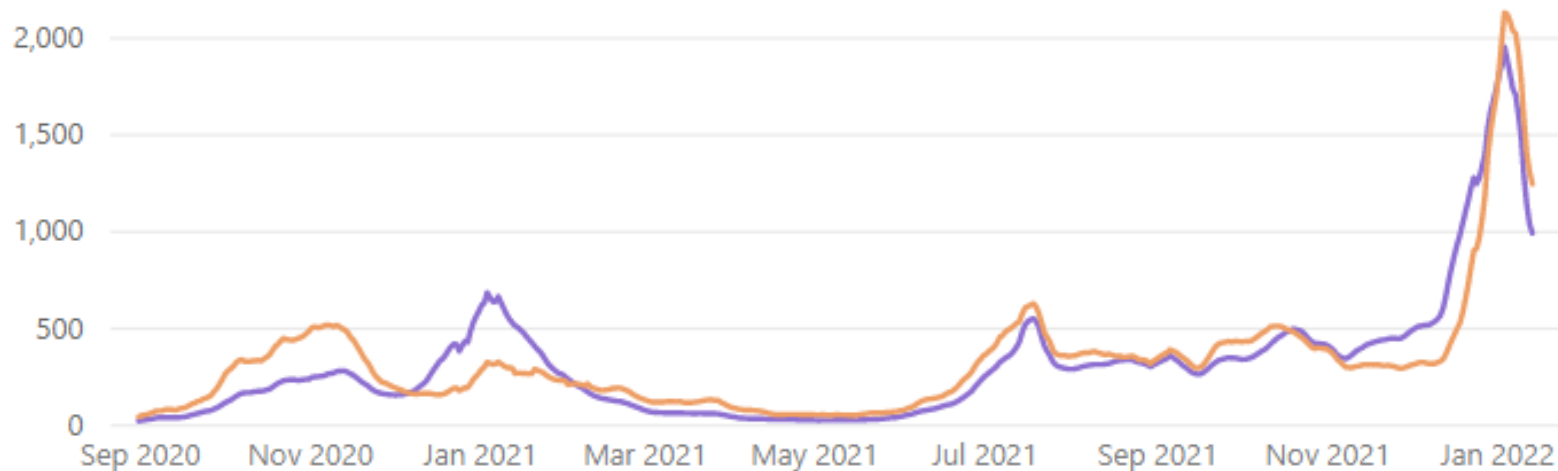
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- Nationally, following the seasonal dip in travel across all modes over the festive period, transport use has increased into January, but remains lower than levels seen before the introduction of Plan B restrictions, reflecting the advice to work-from-home. Motor vehicle use has had the fullest recovery.
- In the first few weeks of January, Leeds rail station footfall has remained lower compared to the period before Plan B and the most recent full week of data shows levels similar to those last seen in the summer of 2021, with early indications of an increasing trajectory. Overall Leeds rail station in the 2021-22 festive period was higher than in 2020-21.
- In the first fortnight of January weekday bus patronage was at two-thirds of baseline levels, below recent highs in mid-November 2021 (78%), before the Omicron variant was discovered.
- A walking & running boom was recorded in 2021, with over 4.5 million walking/running trips recorded via Strava in West Yorkshire, a 13.5% increase from 2020, and a 167% increase compared to 2019.
- Relative to 2020, off-road cycle counts fell in the last 3 months of 2021, while on-road trips increased, with Leeds District recording the greatest relative increase.
- Nitrogen Dioxide levels increased over the Autumn 2021, but were remain at or near pre-pandemic levels.

# Virus prevalence – West Yorkshire trend

ROLLING RATE OF NEW CASES PER 100,000 PEOPLE

● England ● West Yorkshire



As of the 14<sup>th</sup> January 2021 (latest case data), the 7-day moving average West Yorkshire COVID-19 rate was 1,240 per 100k, a 39% fall from the previous week. In England overall case rates fell by 43% to 986 per 100k. In the week to the 14<sup>th</sup> January there were 29k new COVID-19 cases in West Yorkshire, and over 557k in England. Currently, South Tyneside has the highest COVID-19 case rates in England (1,674 per 100k), and the Isle of Wight has the lowest (609 per 100k). Currently, relative to other Upper Tier Local Authorities (UTLAs) West Yorkshire districts are at the higher end of the spectrum in terms of case rates; all districts are within the top 35 UTLAs in England.

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:  
14/01/2022

District	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 deathrate per 100,000 population
Bradford	15	1343.6	↓ -27	7284	131322	24223	1331	246
Calderdale	22	1240.1	↓ -39	2622	51209	24219	413	195
Kirklees	35	1168.4	↓ -44	5156	104316	23639	998	226
Leeds	23	1231.0	↓ -37	9833	204074	25548	1670	209
Wakefield	30	1192.9	↓ -51	4194	89887	25566	954	271
<b>West Yorkshire</b>		<b>1240.4</b>	<b>↓ -39</b>	<b>29089</b>	<b>580808</b>	<b>24765</b>	<b>5366</b>	<b>229</b>
<b>England</b>		<b>986.2</b>	<b>↓ -43</b>	<b>557695</b>	<b>13160429</b>	<b>23272</b>	<b>132965</b>	<b>235</b>

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

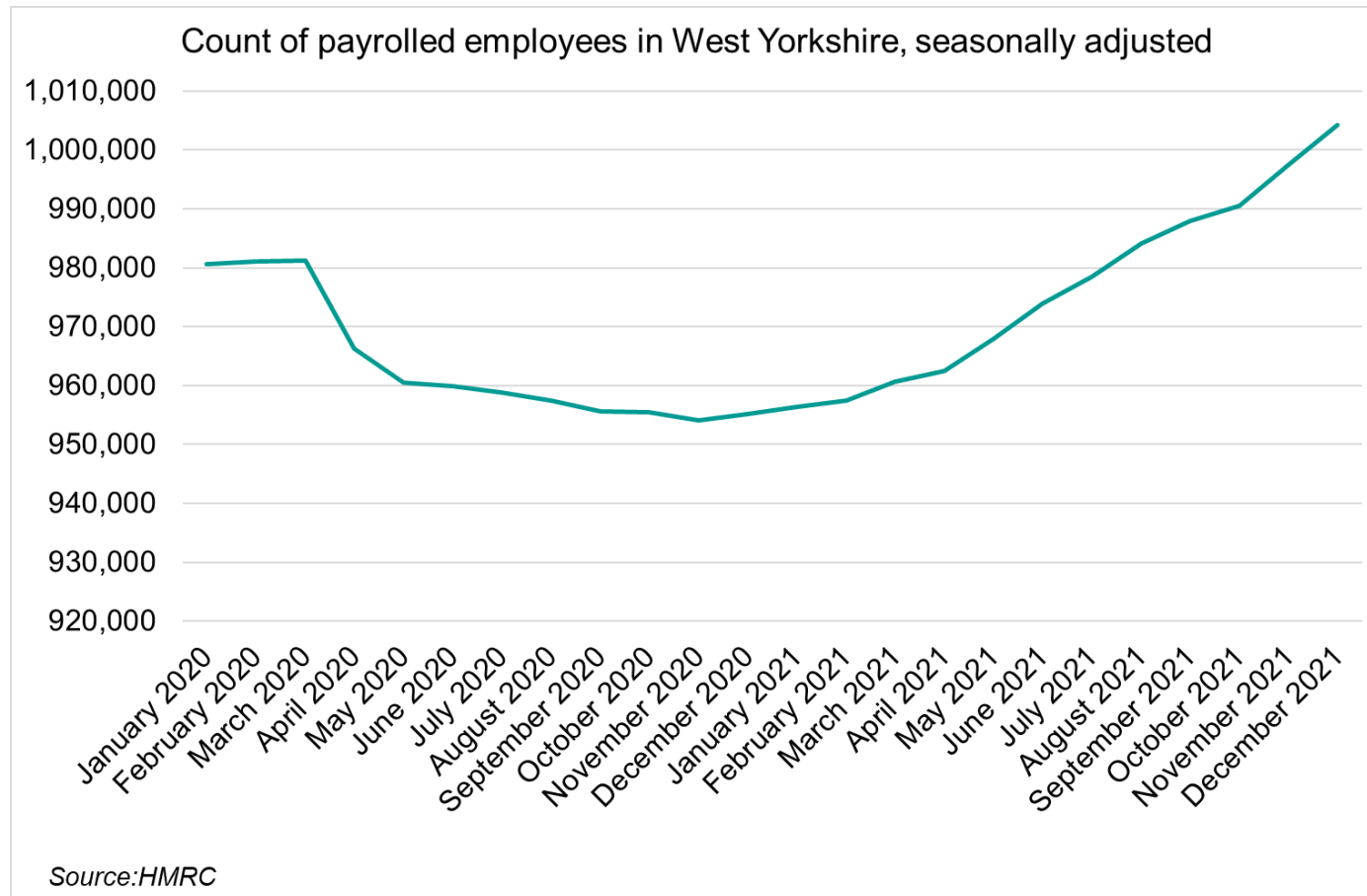
Crude death rate: total deaths per population. This does not take account of variation caused by different population age structures

# **Economic Insights**



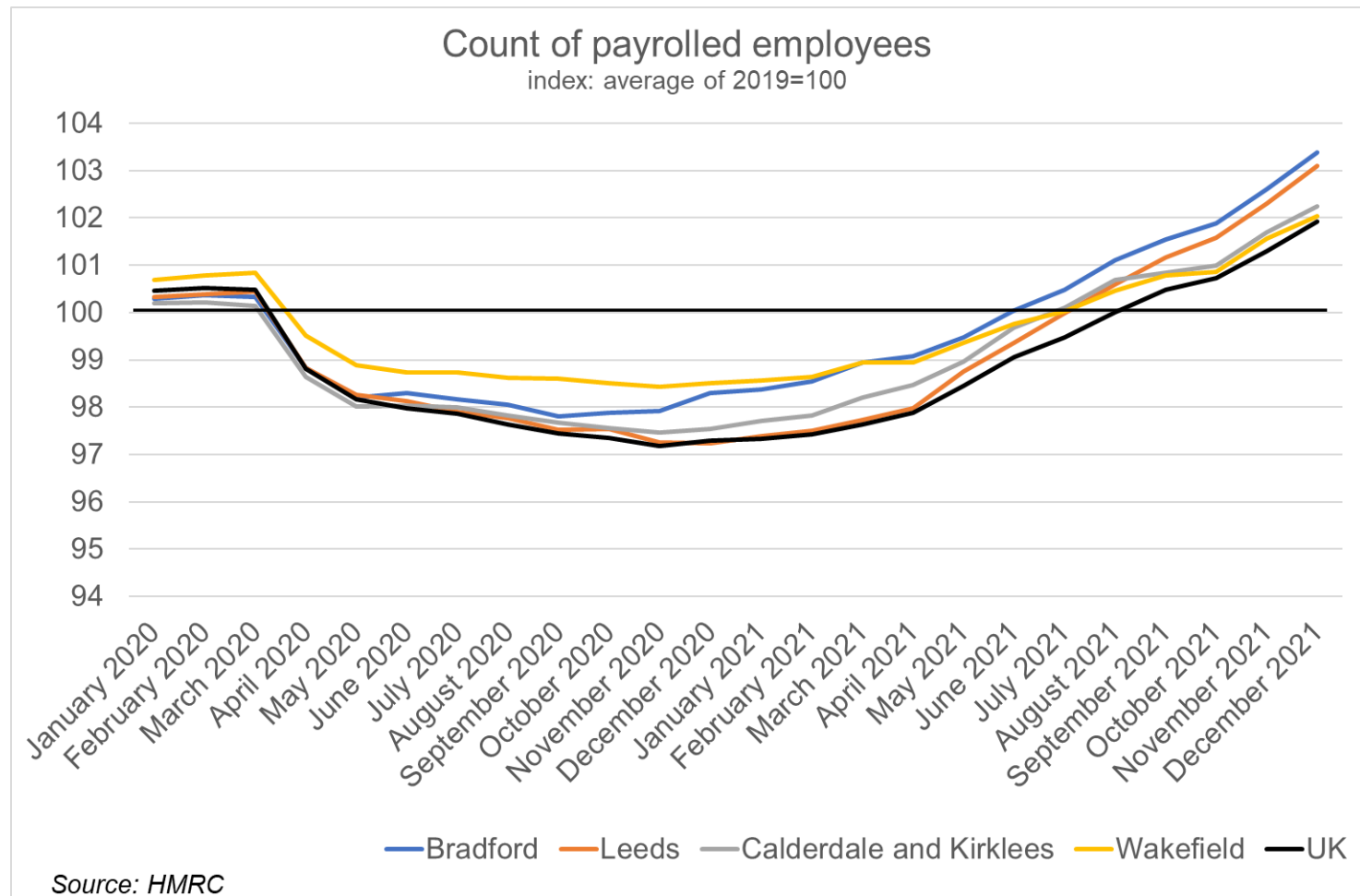
# Employee count continues to grow

Between November and December 2021, there was a net increase in payrolled employees in West Yorkshire of around 7,000 (+0.7%). Employment is now 23,000 (2%) above the pre-pandemic level seen in February 2020 and 50,000 (5%) higher than at its low-point in November 2020.



# All local authorities have seen a stronger employment recovery than nationally

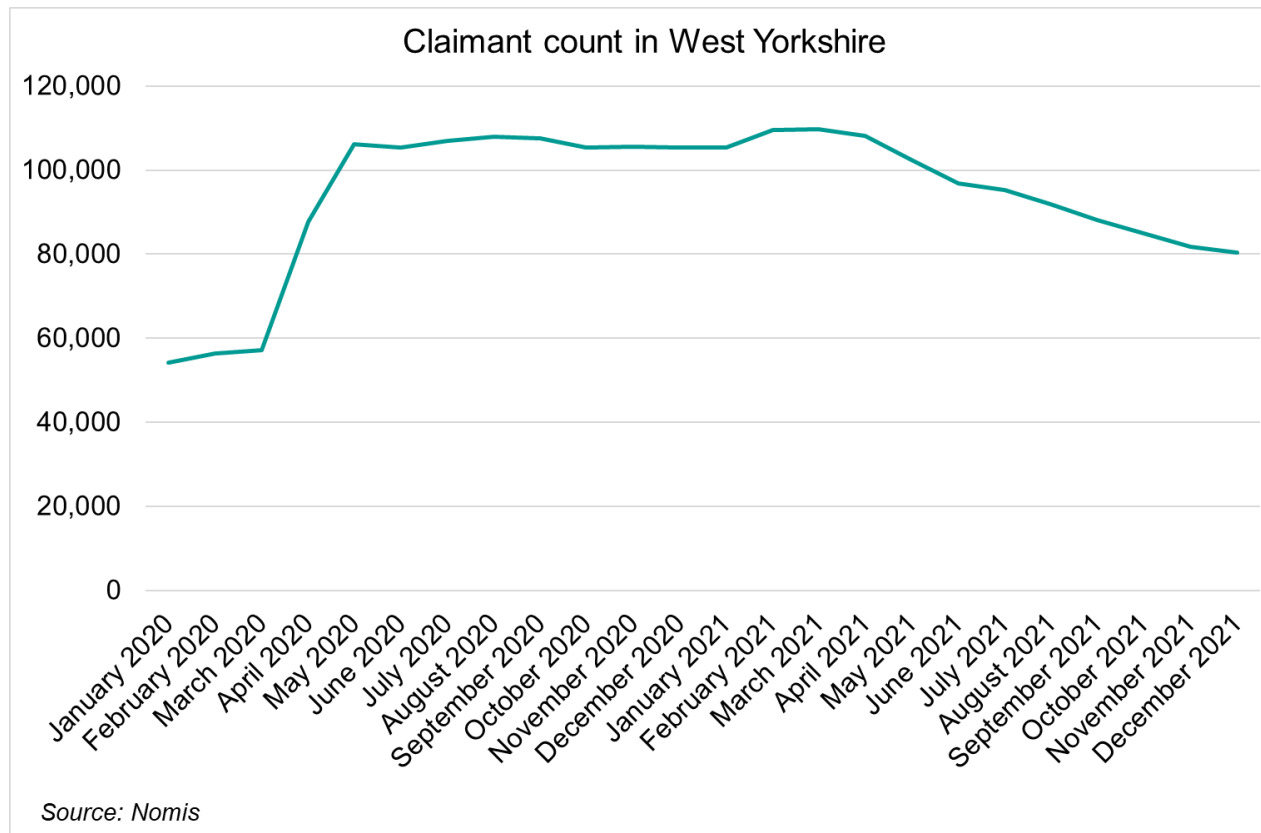
All local authorities continue to register employment growth with Bradford and Leeds seeing a slightly faster recovery than other parts of West Yorkshire (although separate data not available for Calderdale and Kirklees this month).





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

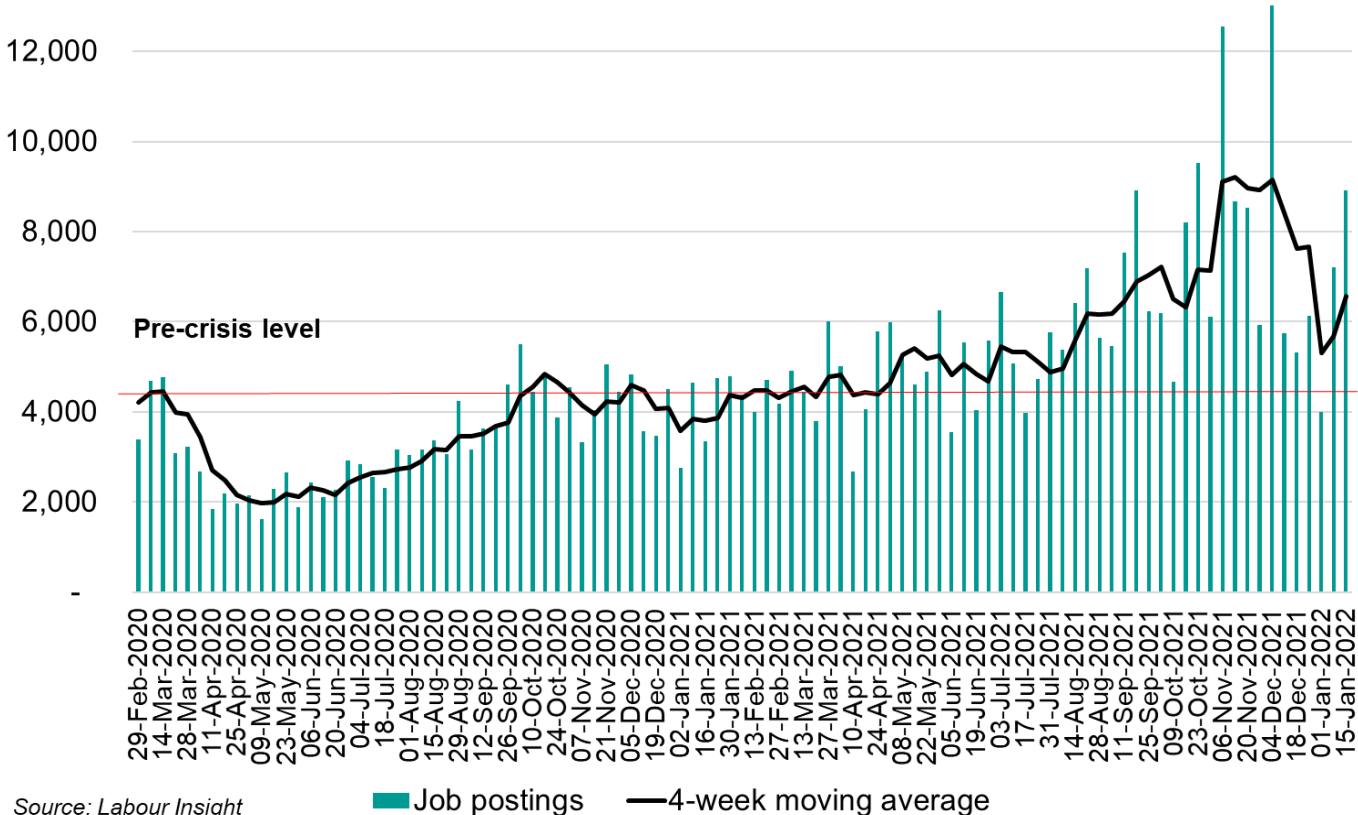
The latest claimant count figures for West Yorkshire, which relate to the number of people on out-of-work benefits, show a 2% fall (-1,400 in absolute terms) between November and December 2021. With around 80,000 claimants in the region, the claimant count is now 27% (or 29,000) lower than in March 2021, when it was at its peak, but still 42% higher than pre-pandemic, in February 2020. West Yorkshire's claimant unemployment rate, of 5.5%, is higher than the national average of 4.5%



# Vacancies: Omicron / Plan B have had negative impact on recruitment activity but there are signs of recovery

Weekly data for December 2021 and the start of January 2022 shows a steep fall in the count of vacancies for West Yorkshire. High figures recorded in November 2021 were unlikely to be sustainable and the festive period also typically sees a slowing of recruitment activity. However, the omicron variant had a clear impact, with the start of the sharp decline coinciding with the Plan B announcement. The vacancy count recorded for week ending 8 January shows signs of recovery.

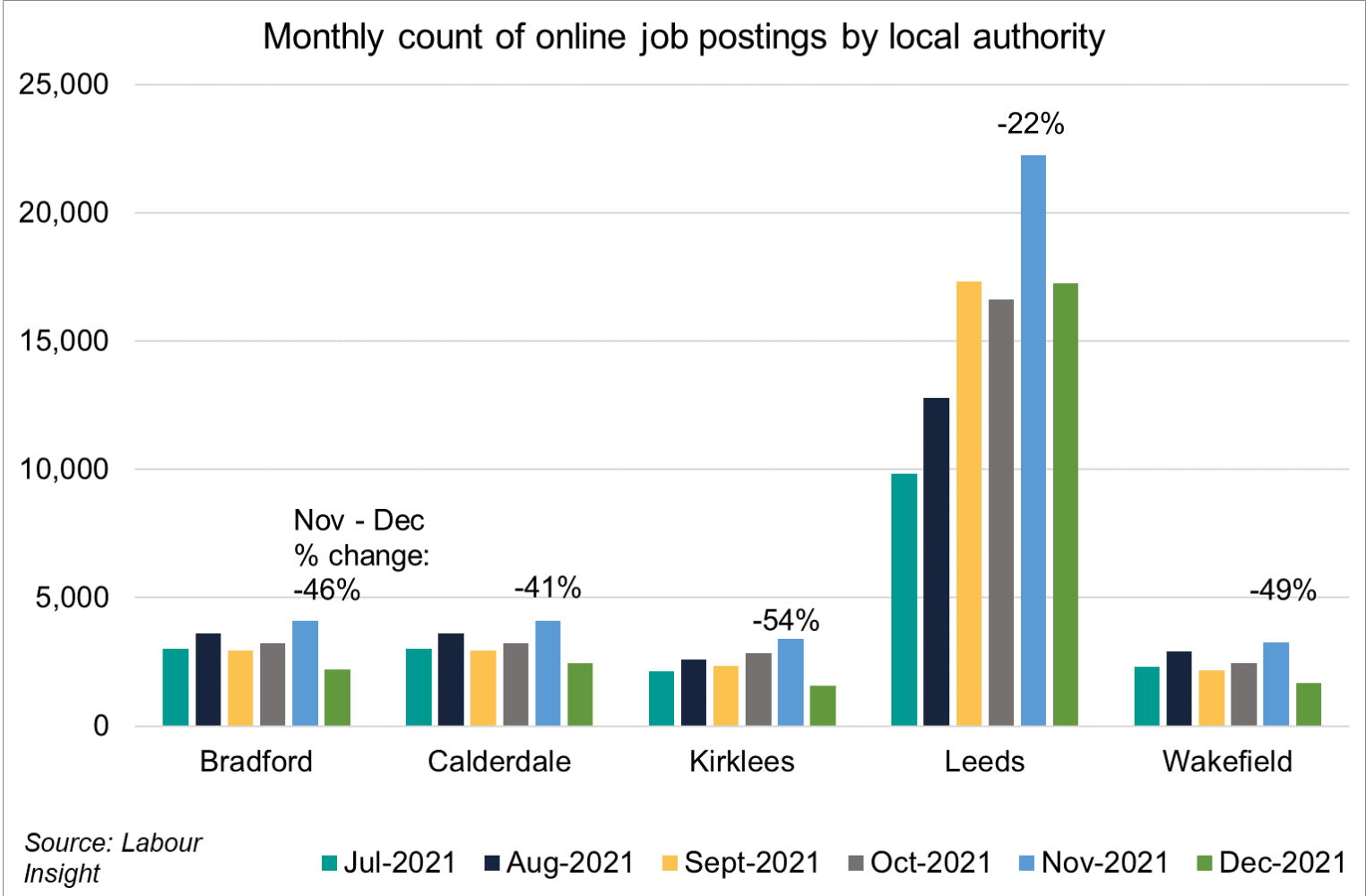
Trend in weekly count of online job postings - West Yorkshire



Source: Labour Insight

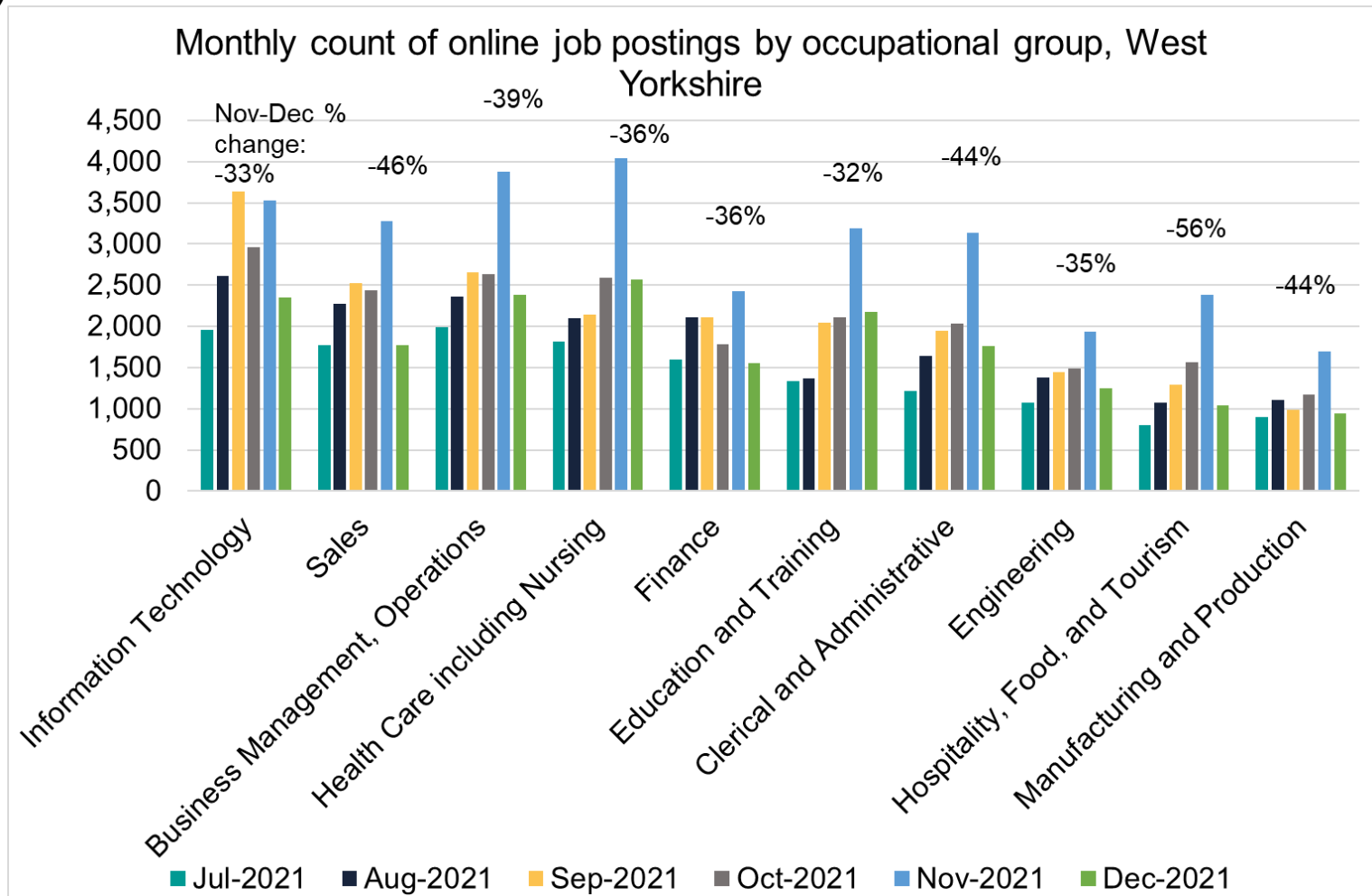
# Vacancies: marked decline in postings across all local authorities in December

Data for December 2021 shows a steep fall in the count of vacancies across all five local authorities in West Yorkshire, following peak levels during November. The scale of the month-on-month decline ranged from -22% in Leeds to -54% in Kirklees.



# Vacancies: big declines in postings for all occupations in December

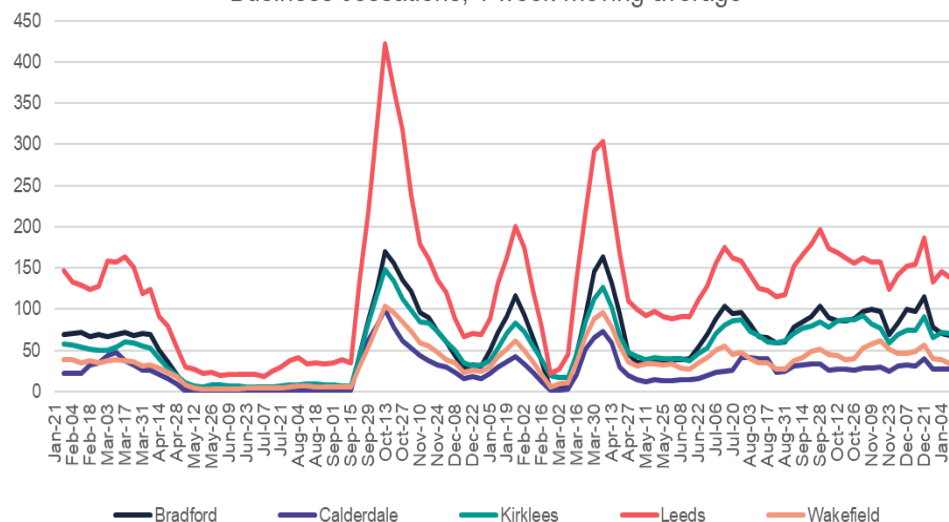
All occupational categories saw big declines in postings between November and December 2021. The worst-affected groups were the ones most exposed to the impact of omicron, namely Hospitality, food and tourism and Sales (a category which primarily comprises retail roles)



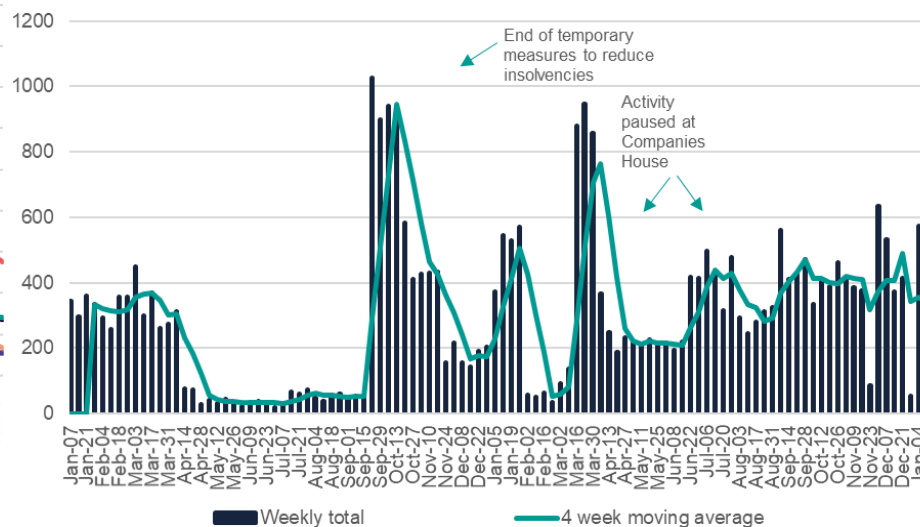
# Business liquidations have been declining across all local authorities

According to data from Bureau van Dijk's Fame database, up to the week ending 11th January there were 339 business liquidations in West Yorkshire (4-week moving average), a decline of 5% from the previous 4-week period. There was a sharp increase in the 4-week period ending 21st December as weekly liquidations hit 489. Since then, liquidations have declined across all districts, with Bradford (41%) and Wakefield (40%) seeing the sharpest declines.

Business cessations, 4 week moving average



Business liquidations / dissolutions - West Yorkshire



Source: FAME, Bureau van Dijk, 2022

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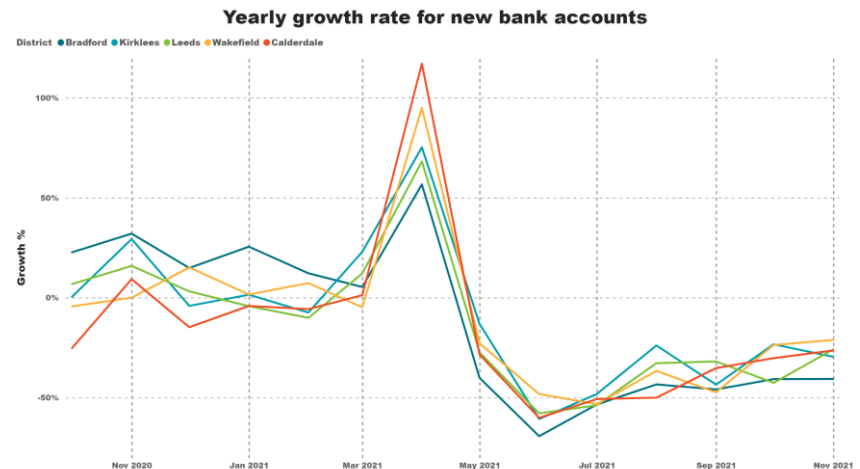
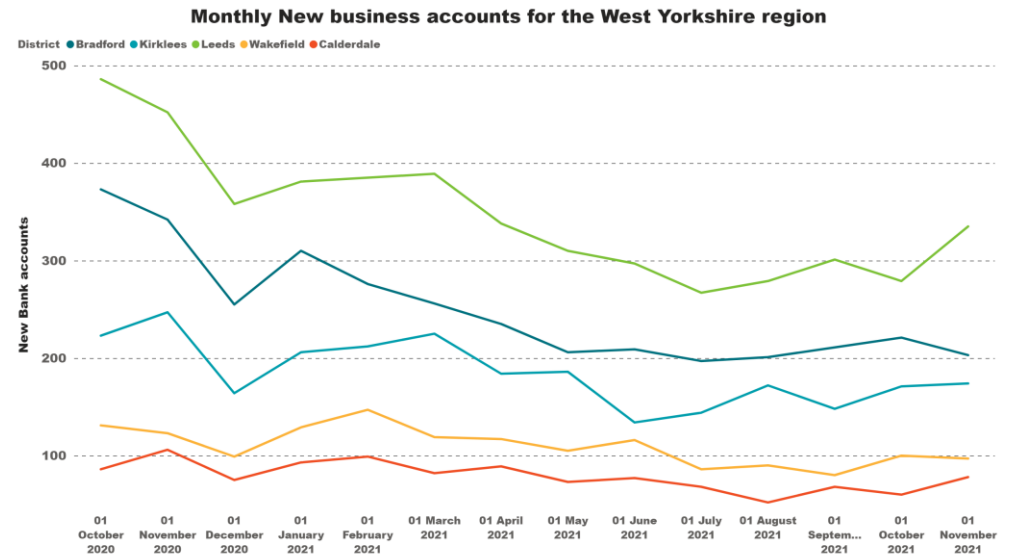
\*Source: FAME, Bureau van Dijk, 2022. Analysis based on company registration address, location of activity may differ in some cases.

# Strong Growth in new business bank accounts across West Yorkshire

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

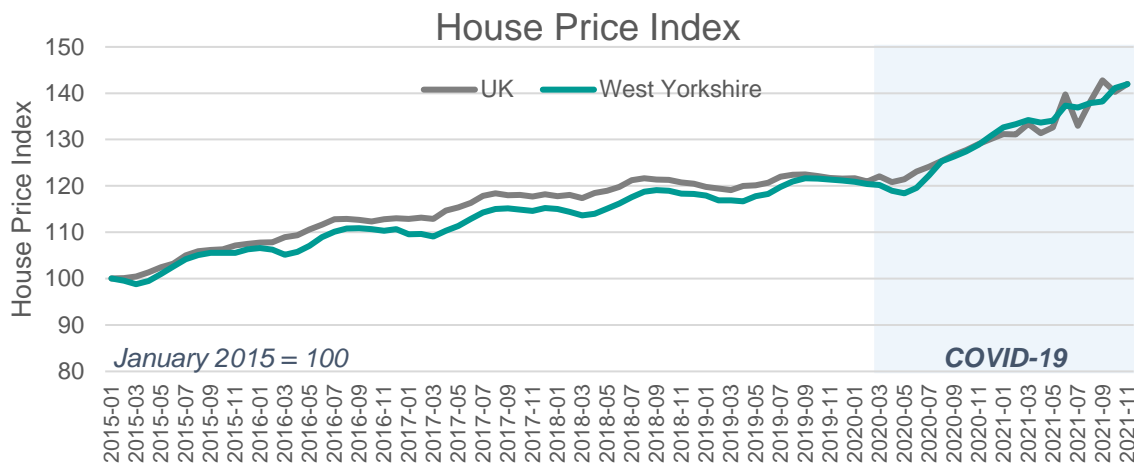
In November, 887 new bank accounts were opened in West Yorkshire, which represents a 7% increase relative to the previous month. Leeds was the district with the most new accounts (335). Calderdale and Leeds have seen the strongest growth from September of 30% and 20% respectively. Calderdale growing to 78 from 60 new business bank accounts.

However the number of new business bank accounts in November 2021 is still significantly down from the year previous. With a 30% decline between November 2021 and November 2020.



# House prices locally and nationally reach another record high and the trend looks set to continue

In November 2021 the average house price in West Yorkshire was £188,751, compared to the UK average of £270,708; both record highs. House prices, locally and nationally rose by 10% in the last year.



Annual house price growth was strongest in Wales (12.1%), and within England growth was greatest in the South West. London remains the region with the weakest annual house price growth. West Yorkshire experienced stronger growth than Yorkshire and The Humber as a whole (10% vs 7.2%).

Country/Region	Average House Price (£)	Monthly change (%)	Annual change (%)
England	£288,130	1.40%	9.8%
Scotland	£182,755	1.00%	11.4%
Wales	£199,877	-0.70%	12.1%
London	£519,934	0.20%	5.1%
South East	£369,093	0.50%	9.6%
East of England	£336,937	2.10%	12.3%
South West	£308,497	2.50%	12.9%
West Midlands Region	£230,888	1.90%	9.8%
East Midlands	£229,277	0.40%	10.7%
North West	£197,797	2.30%	10.8%
Yorkshire and The Humber	£191,036	1.00%	7.2%
North East	£149,249	1.80%	8.7%

The latest [UK Residential Market Survey](#) reports that new buyer enquiries have risen modestly, but lack of new listings remains a challenge and the stock shortage continues to underpin price growth. Sales expectations remain modestly positive in the near term and for the year ahead.

Source: HM Land Registry & The Royal Institution of Chartered Surveyors

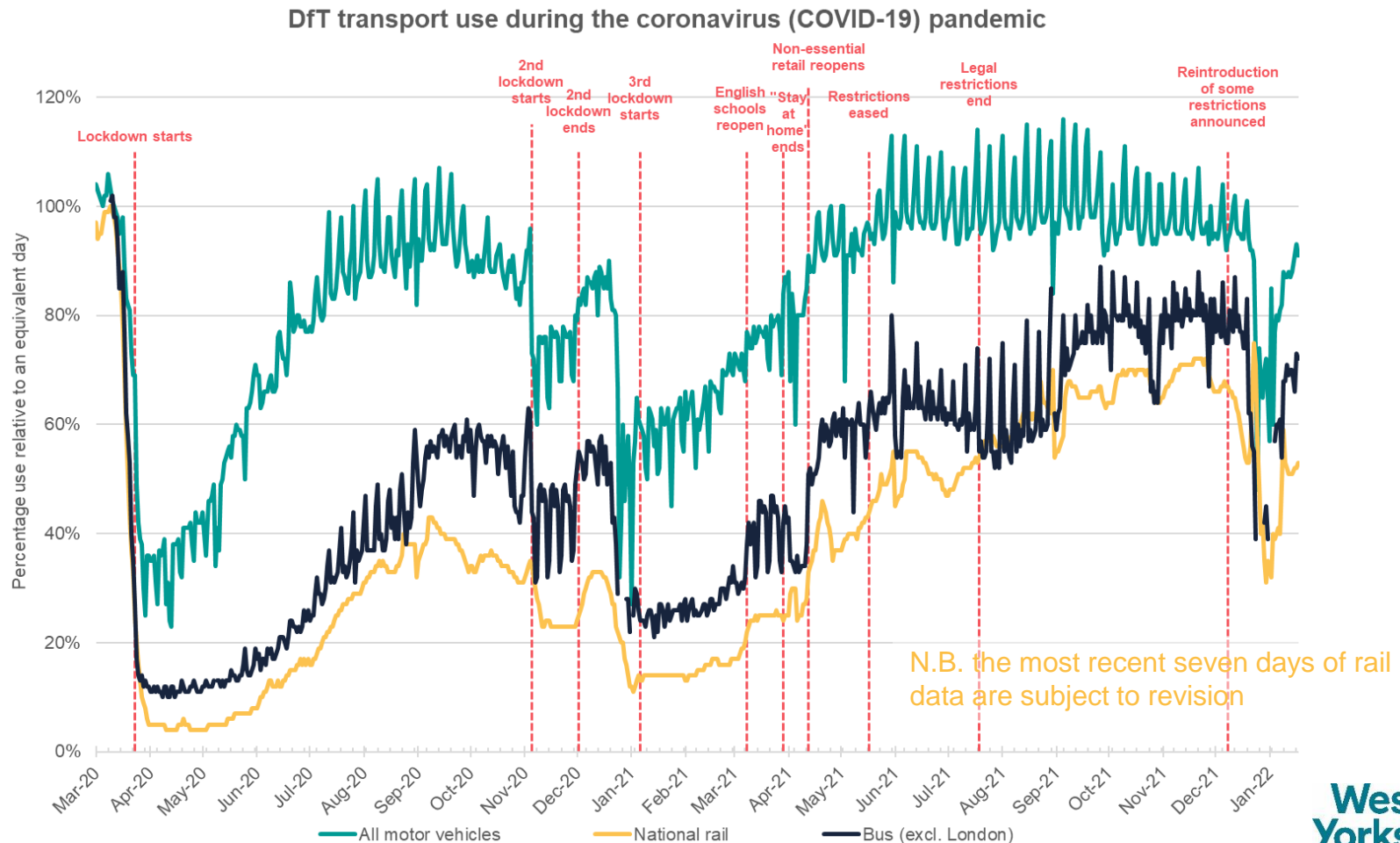
# Transport Insights





# Nationally, transport use declined over the festive period and remains low during Omicron restrictions

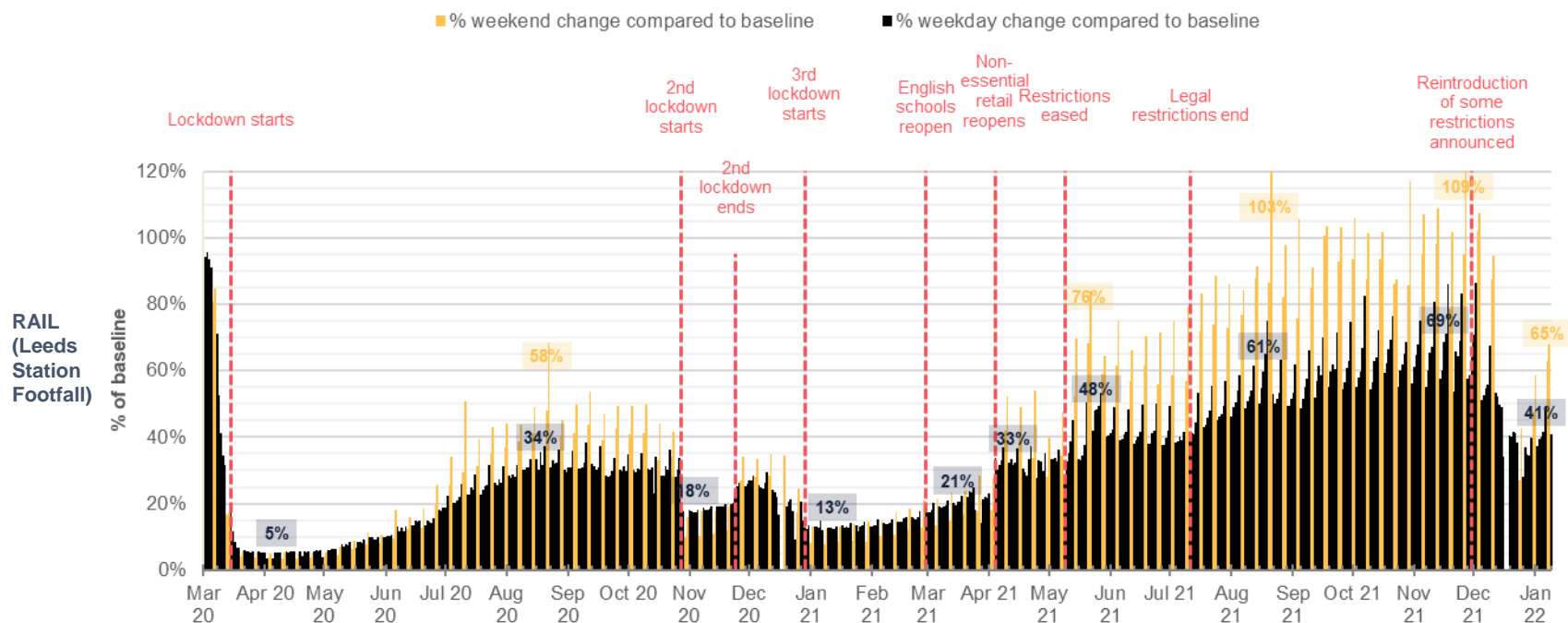
All modes saw declines over the festive period however public transport was affected more than road transport. Usage has increased into January but remains below levels seen before the introduction of Plan B restrictions. Motor vehicle use shows the fullest recovery.



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

# Leeds rail station weekday footfall remains low into January

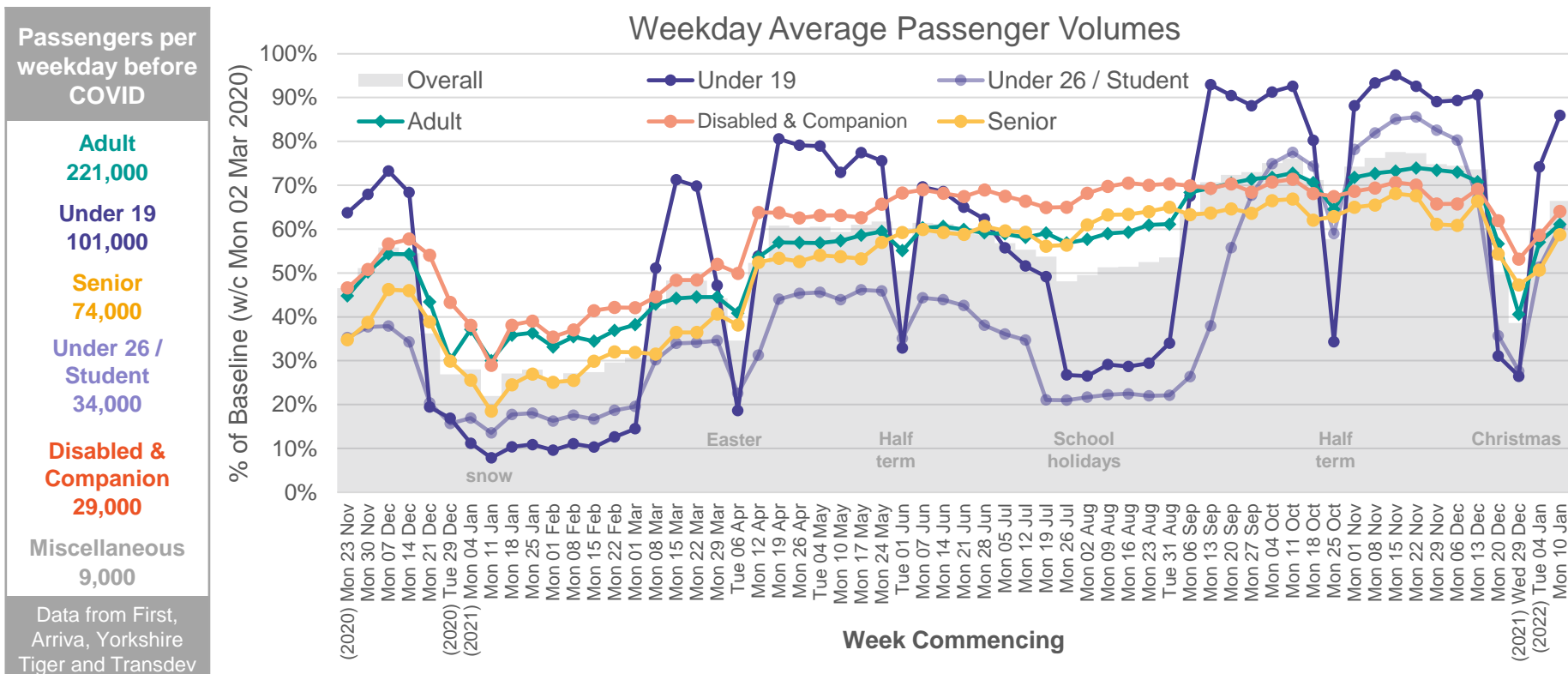
The level of footfall at Leeds rail station in the festive period was higher than in 2020. Following a dip over the new year some recovery can be seen, however levels remain low compared to the weeks before Plan B. The most recent full week of data shows levels similar to those last seen in the summer of 2021, with early indications of an increasing trajectory.



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

# Weekday bus use at two-thirds of baseline levels in the week commencing 10<sup>th</sup> January

In the first 9 working days of 2022, bus patronage was lower in every cohort compared to recent highs in November 2021. The latest weekday average was 66% of baseline, compared to the recent peak of 78% in mid-November, before the Omicron variant was discovered. Bus patronage was lower than the first week of 'plan B' restrictions indicating that 'plan B' did not cause a direct immediate reduction in bus use.

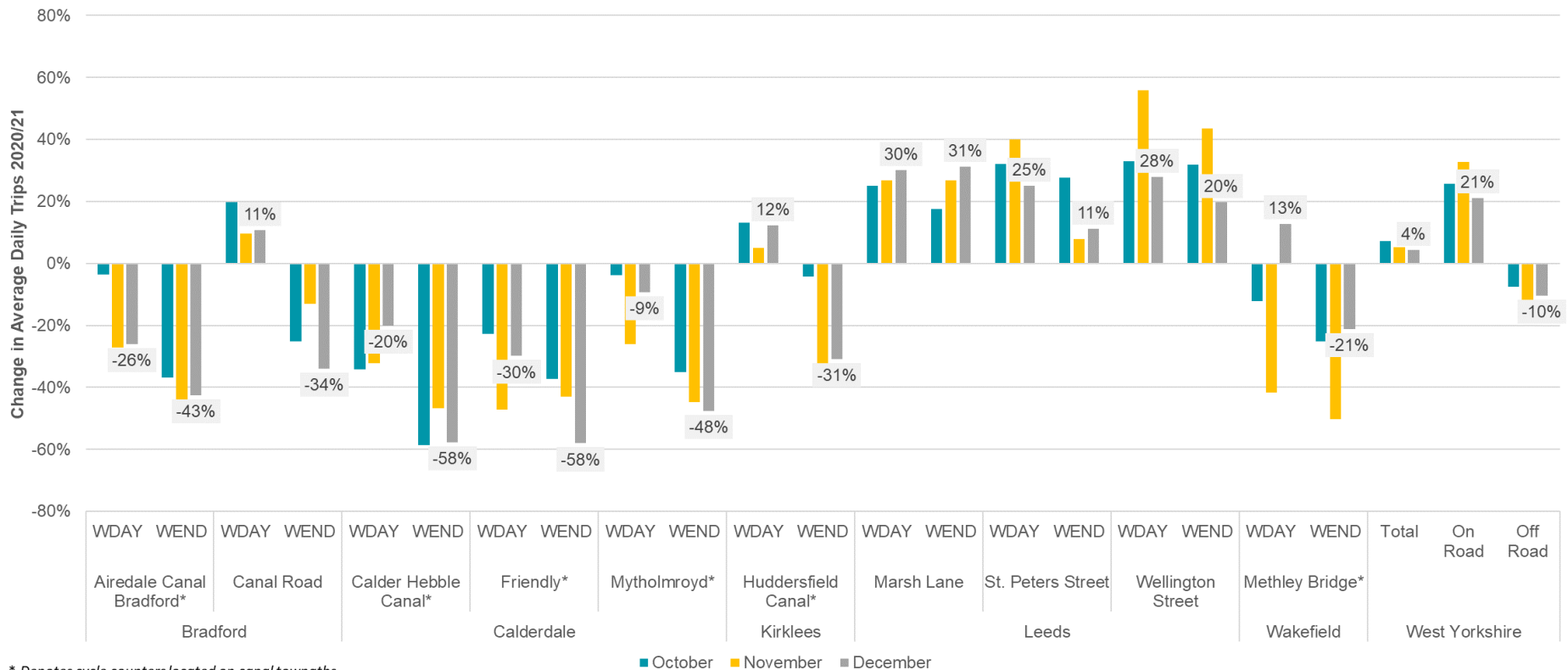


Baseline period is w/c Mon 02 Mar. Source: Bus operators electronic ticket machine data, passenger boarding locations in West Yorkshire. First, Arriva, Yorkshire Tiger and Transdev account for over 90% of bus services in West Yorkshire. Graph shows First, Transdev and Yorkshire Tiger data. Data is for weekdays excluding bank holidays, with ticket types assigned to broad cohorts.

# Off-road cycle counts fall while on-road trips increase

Off-road cycle counts, often attributed to leisure trips, in the last 3 months of 2021 were overall lower than the comparable period in 2020. Conversely, on-road counts during this period recorded greater use than 2020, although levels fell in December, which could be linked to Omicron restrictions including working from home guidance. 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



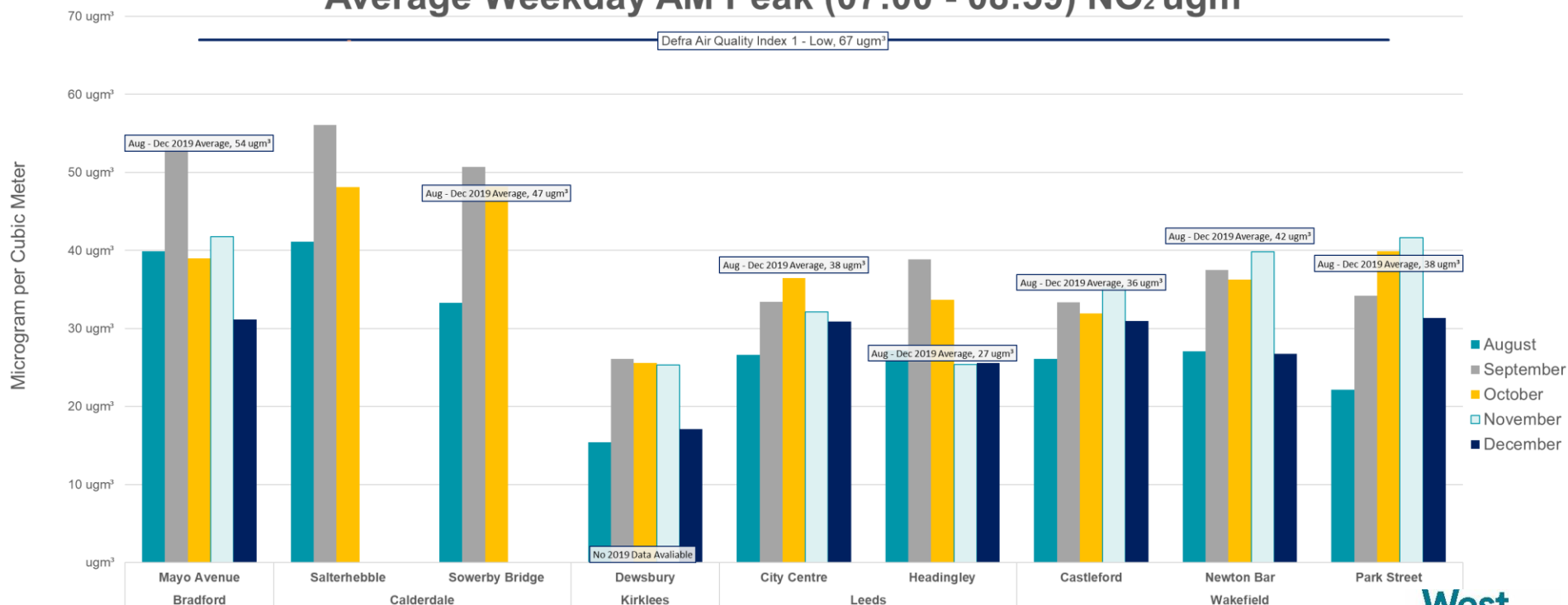
\* Denotes cycle counters located on canal towpaths

Source: Leeds City Council

# Nitrogen Dioxide emissions increased over the autumn in 2021, but remain at or near pre-pandemic levels

Weekday morning peak Nitrogen Dioxide (NO<sub>2</sub>) levels increased in September and October 2021 following the summer holidays, then fell again across all sites in December. Over the last five months (August-December 2021), although Nitrogen Dioxide levels at monitoring sites increased, they have typically been at or near pre-pandemic levels and remain below the lowest point on the DEFRA air quality index.

## Average Weekday AM Peak (07:00 - 08:59) NO<sub>2</sub> ug<sup>m</sup><sup>3</sup>



Source: Air Quality England, Calderdale Data Works