

COVID-19 Fortnightly Insights Report

Research & Intelligence
13th November 2020



Executive Summary – social and economic

- Most economic data available here covers up to mid- to late-October, so presents a picture of activity prior to the second lockdown on November 5th.
- The number of people claiming out of work benefits in West Yorkshire fell slightly (0.5%) in October, following small rises in recent months. This suggests no significant spike in unemployment in October, despite concerns this could occur as the expectation was that the furlough scheme would end this month. ONS survey data suggests 8% of workers were still furloughed in mid-October,
- However, the number of vacancies advertised online has fallen across West Yorkshire for the third consecutive week, suggesting businesses are more hesitant to recruit in light of further restrictions.
- Business liquidations have fallen from over 900 a week in late September / early October to just over 400 a week. However this is still 22% above pre-lockdown levels. Early data for November shows an increase in the share of liquidations in certain sectors, most notably wholesale & retail, business administration and other services (including personal services).
- Recently acquired data from Geolytix on movements within certain urban centres suggests that activity is still below 50% of pre-lockdown levels in Bradford, Leeds and Wakefield, but higher in Halifax (60%) and Huddersfield (80%). Recovery in activity has tailed off in most places but was still increasing in Halifax and Huddersfield in late-October.

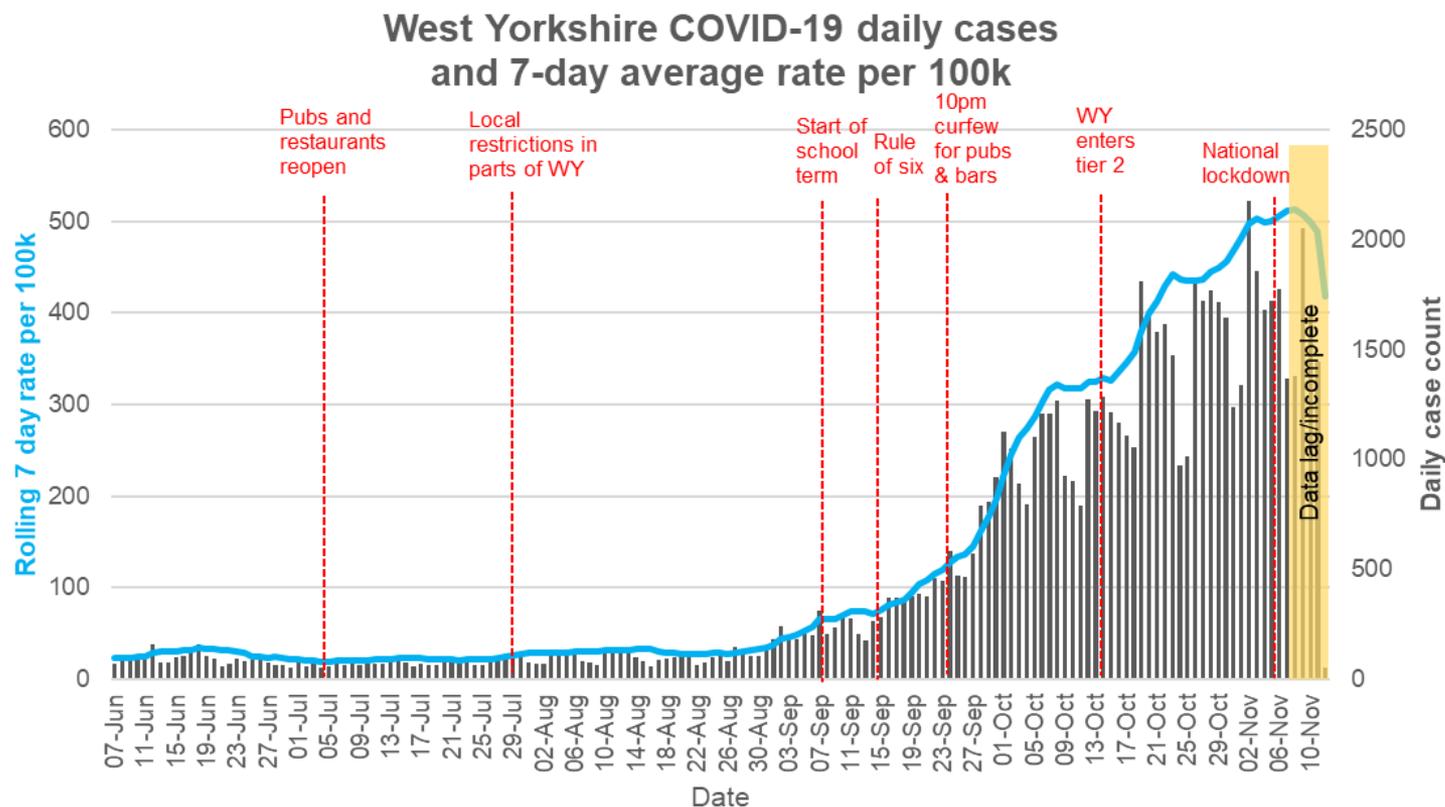
Executive Summary – transport

- Nationally, motor vehicle, bus and rail travel has gradually declined over recent weeks (even before the national lockdown). Initial data suggests, nationally and locally rail and bus patronage use declined sharply following the reintroduction of the England-wide lockdown, however the magnitude of this decline will only become apparent with more time-series data.
- Following the introduction of tiered local lockdowns, October footfall in Leeds City Centre fell to 51% of 2019 levels at weekends and 69% at weekdays, indicating that while some commuters continue to come to the city centre weekend leisure trips are decreasing.
- Traffic on the West Yorkshire strategic road network continues to track below 2019 levels; average traffic flows across selected points on the network were 14% below the same week in 2019.
- Cycle counters recorded notable increases in weekend cycling in October 2020 compared to the previous year and in some traffic-free cycle paths, counts more than doubled compared to the previous year (e.g. Wykebeck Way on the approach to Roundhay Park).
- October saw NO₂ concentrations increase to 2019 levels, whilst the number of hours where the lowest band of the DEFRA Air Quality Index was exceeded decreased. We can infer from this that while traffic volumes have increased overall (supported by direct measurement) congestion at traditional morning and evening peaks have become less pronounced.

Introduction

- This report presents the latest developments with regards to COVID-19 for West Yorkshire and Leeds City Region. It draws on a number of official and unofficial data sources to present the latest intelligence and is primarily focused on the **economic and transport** impacts.
- It includes analysis of anecdotal evidence from interactions with businesses, and it is recognised that this analysis is based upon subjective views from those businesses which may or may not reflect the views of the wider business community.
- In some cases, data is presented for a single authority or area. In those instances, further data is being sought to enable more comprehensive analysis of other areas. Please send any data to contribute for analysis or any comments on this report to Research@westyorks-ca.gov.uk.

Virus prevalence – West Yorkshire trend



The chart above reveals the trend in the number of daily COVID-19 cases in West Yorkshire and the 7-day rolling rate per 100k population. As of the 7th November, the 7-day moving average **West Yorkshire COVID-19 rate was 511.1 cases per 100k**, higher than the Yorkshire & the Humber rate (452.1 per 100k). Regionally, Yorkshire & the Humber currently has the highest rates, followed by the North West

Source: Secure 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.

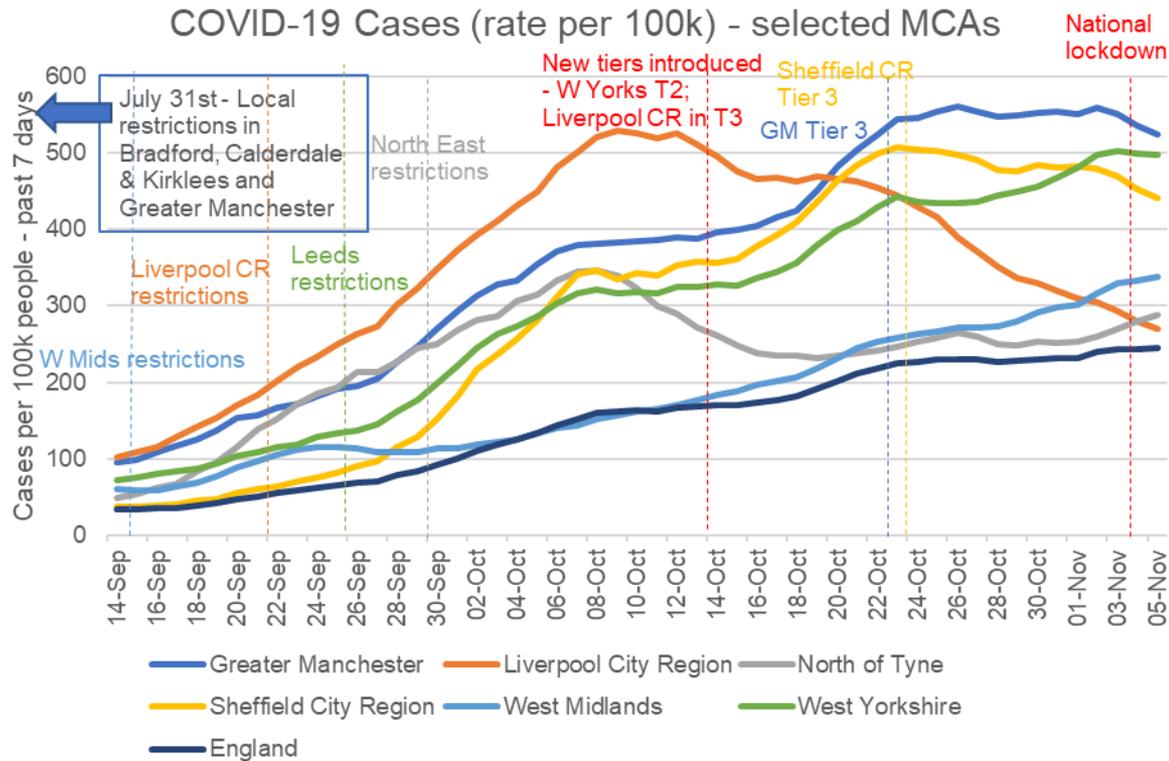
Virus prevalence – West Yorkshire

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 4 days are excluded from the calculations of rates and moving averages.

Area	Total cases per 100k people (01– 07 Nov)	Total cases per 100k people (25 - 31 Oct)	Absolute Difference
	Most recent data week	Previous week	
Bradford	596.2	531.3	64.9 
Calderdale	443.6	377.4	66.2 
Kirklees	571.6	489.3	82.3 
Leeds	437.8	434.0	3.8 
Wakefield	507.6	467.7	39.9 
West Yorkshire	511.1	467.9	43.3 
Yorkshire & the Humber	452.1	410.5	41.6 

COVID-19 infection rates falling in some MCA areas

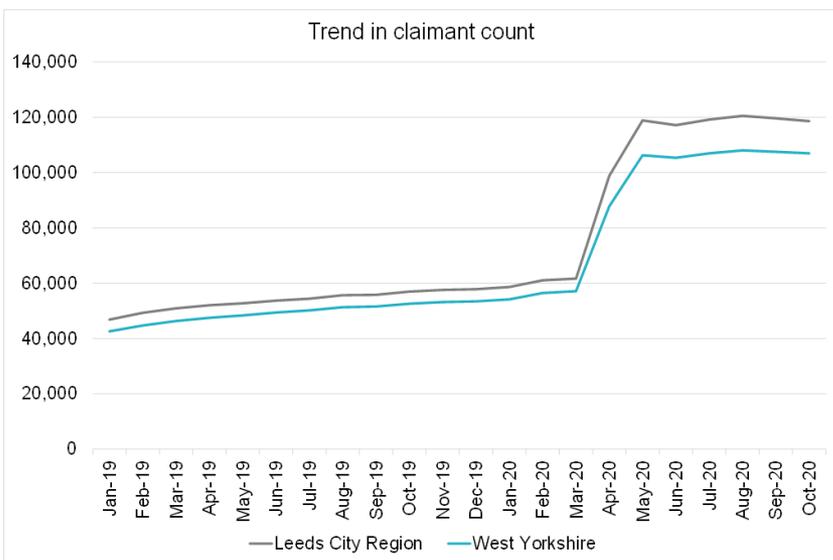
The rate of COVID-19 infections has seen a sustained fall over the past month in Liverpool City Region, persisting through to early November. North of Tyne also saw the rate fall through October but there are signs this may be rising again after reaching close to the national average. Whilst the rate has begun to fall in recent days in Sheffield City Region and Greater Manchester, it has continued to increase steadily in West Midlands. The rate in West Yorkshire may have stabilised but is not yet falling.



Economic Insights

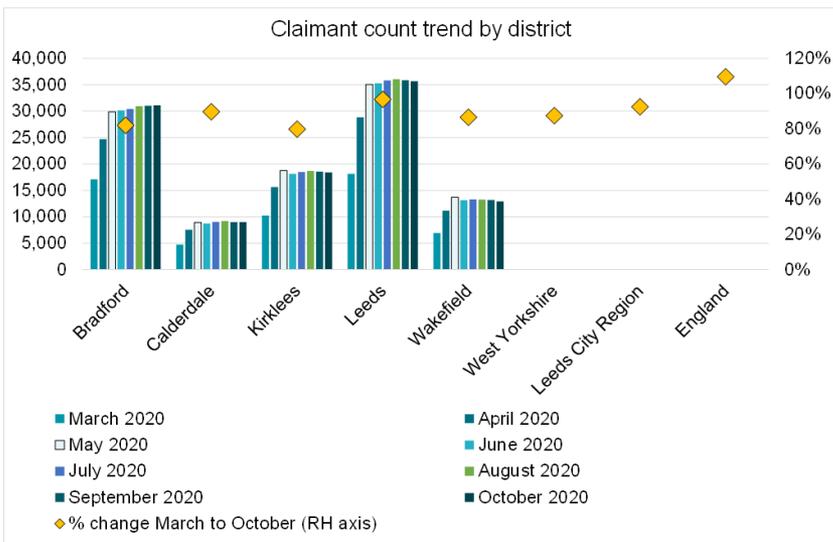


Out of work benefit claims fall slightly in October



West Yorkshire’s claimant count fell by 545 (-0.5%) between September and October whilst Leeds City Region saw a decline of 1,045 (-0.9%). Nationally, there was a fall of 34,360 (-1.5%). This is despite expectations that the furlough scheme would end on October 31st.

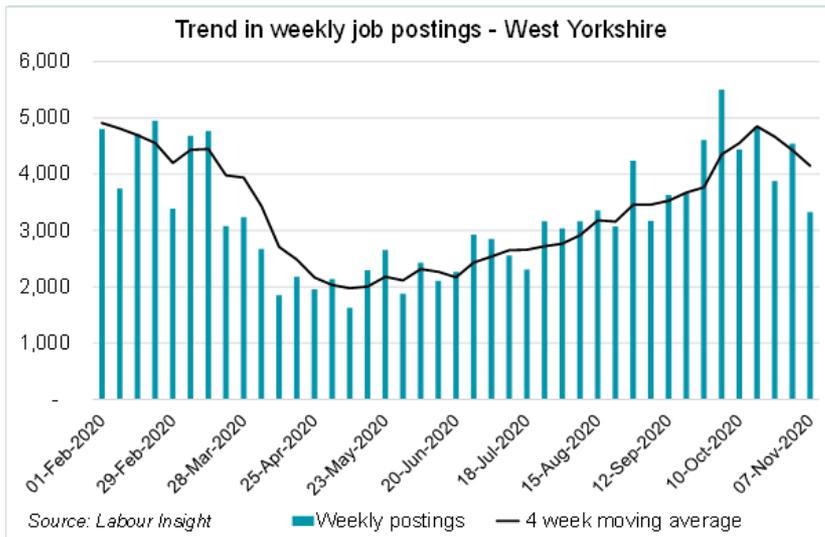
Comparing October 2020 with the pre-lockdown period in March 2020 the number of claimants is currently 49,885 (87%) higher in West Yorkshire and 56,970 (92%) higher across Leeds City Region. Across England the number of claimants is 110% higher than in March.



This means there are now 106,970 claimants in West Yorkshire and 118,595 claimants in Leeds City Region, compared with March figures of 57,085 and 61,625 respectively. The West Yorkshire claimant count rate was unchanged compared to September at 7.3%, but this is still up from 3.9% in March.

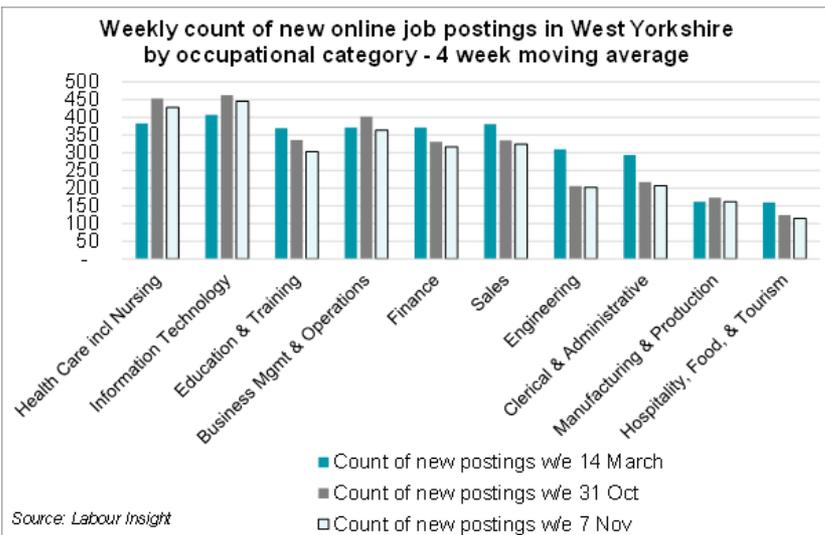
At local authority level, Bradford and Calderdale saw little change in their claimant numbers between September and October, whilst Kirklees and Leeds saw small declines of 0.8% and 0.6% respectively. Wakefield saw a larger decline of 1.9% (250 claimants in absolute terms).

Job vacancies fell in all WY council areas & the number of vacancies declined for most occupations



West Yorkshire vacancies down for 3rd consecutive week

The number of vacancies for jobs in West Yorkshire posted online during week ending 7 November was 6% lower than in the previous week (based on a 4-week moving average). Nationally, the number of vacancies posted fell by 20%. The imposition of restrictions appears to be negatively impacting on recruitment activity, with current weekly vacancies 7% below pre-crisis levels (w/e March 14).



Vacancies fell in all council areas for the second consecutive week

All local authority areas saw vacancy declines in the last week, ranging from 4% in Kirklees to 12% in Bradford. Current vacancies are 25% below pre-crisis level (w/e 14 March) in Calderdale and 17% lower in Leeds.

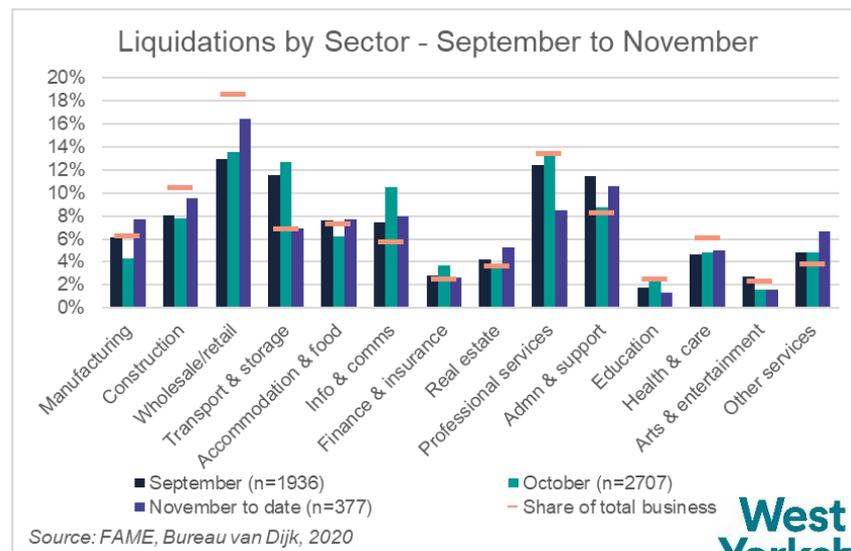
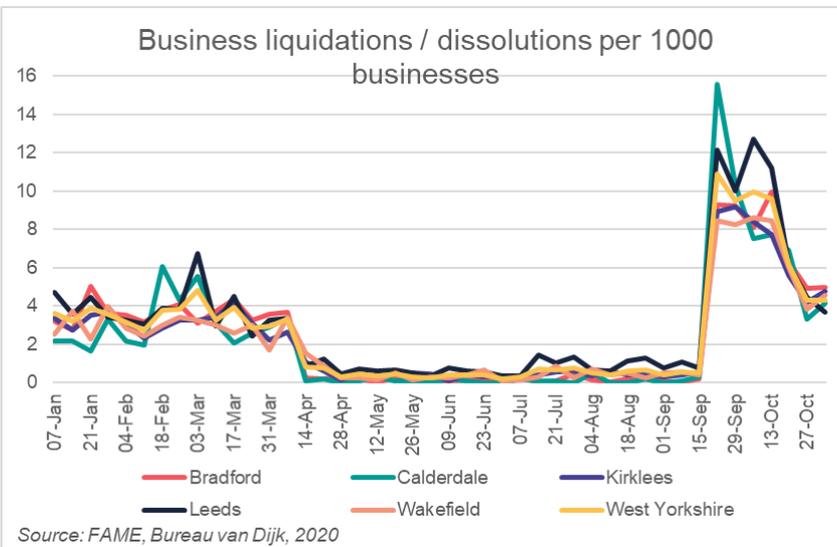
For the second consecutive week all occupational categories saw a decline in vacancies posted online. Education and Training and Business Management and Operations saw the biggest percentage falls, followed by Hospitality, food and tourism. Engineering, Clerical & administrative and Hospitality, food and tourism have the most ground to make up on pre-crisis vacancy levels.

Business failures falling from peak, but still higher than pre-lockdown

Just over 400 businesses were dissolved / liquidated in West Yorkshire in the week to November 3rd, the same as the previous week. This is down from over 900 per week in late September / early October, suggesting that spike was likely caused by a backlog of activity over the spring/summer. The number of liquidations remains 23% higher than in the first quarter of 2020, however.

4.3 businesses per 1,000 were liquidated in the week to November 3rd, in line with the UK average. This is relatively consistent across districts, ranging from 3.7 in Leeds to 5 in Bradford.

Although data is only available for 377 companies so far in November, the data that is available suggests an increase in the share of company failures in the wholesale & retail sector, as well as accommodation & food, manufacturing, construction, business administration and other services (which includes personal services amongst other things). The transport & logistics and information & comms sectors have seen their share of liquidations fall so far this month, though in the case of the latter its share remains higher than would be expected given its share of the business base. Other services companies and business administration are also over represented.



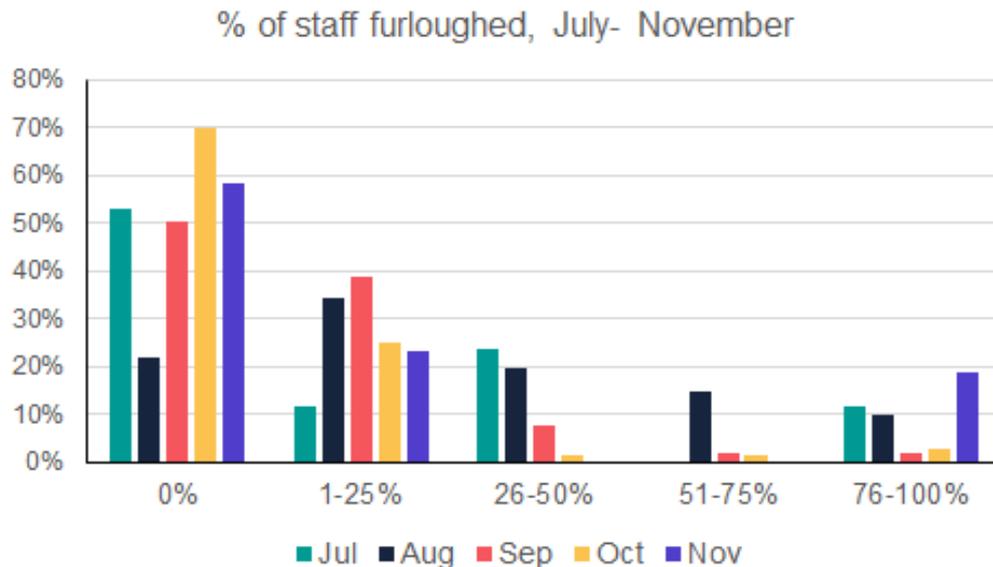
*Data includes companies whose registered office is in West Yorkshire, but whose physical location may be elsewhere

Source: FAME, Bureau van Dijk, 2020

Growth manager interactions suggests companies may be returning to furlough

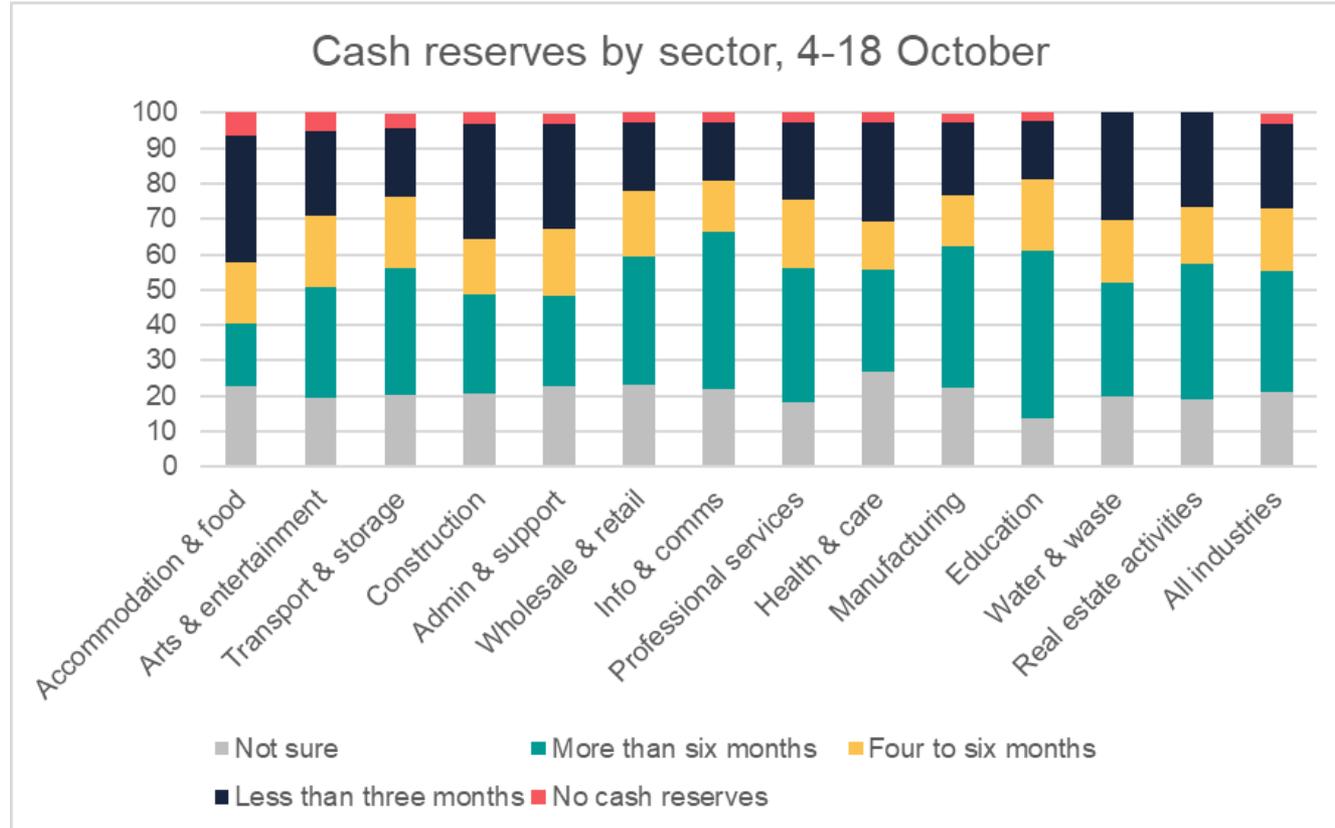
There is evidence this week that the new national restrictions, and lead up to them, is having an impact on businesses. Around 42% of businesses spoken to this week said they were using the furlough scheme, up from 30% during October. This is also reflected in the anecdotal evidence, with some businesses confirming they are returning to the scheme following the Chancellor's announcement last week. This includes business in sectors in and serving hospitality, and sectors supplying that industry.

Some of those using furlough say it will help to avoid redundancies for the time being at least, but there are others who are concerned that the support on offer in terms of grants will not be sufficient to meet costs during lockdown and may have no choice but to make redundancies. Again, this is particularly true for businesses whose trade has been most severely curtailed, and who have very little income. These companies are relying on cash reserves to get through the next few weeks/months.



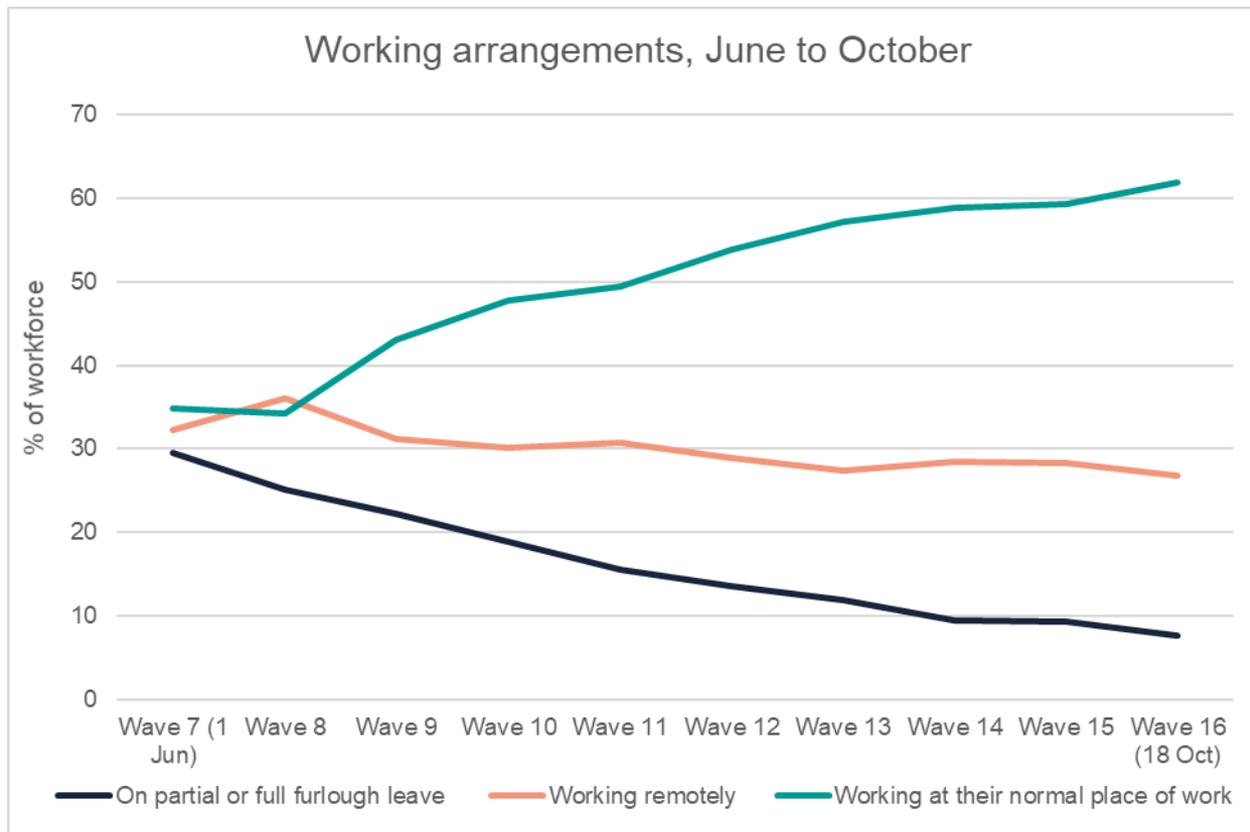
More than a quarter of businesses have less than three months of cash reserves

The latest ONS BICS survey shows 24% of businesses say they have less than three months of cash reserves available, and a further 3% have no cash reserves at all. In accommodation & food, double this number (6.4%) have no cash reserves, and 36% have less than three months reserves. 5% of businesses in arts & entertainment have no reserves, and a further 24% have less than three months. Given the introduction of further restrictions on these sectors shortly after this survey, it would appear that this will pose a particular risk to those with low or no cash reserves.



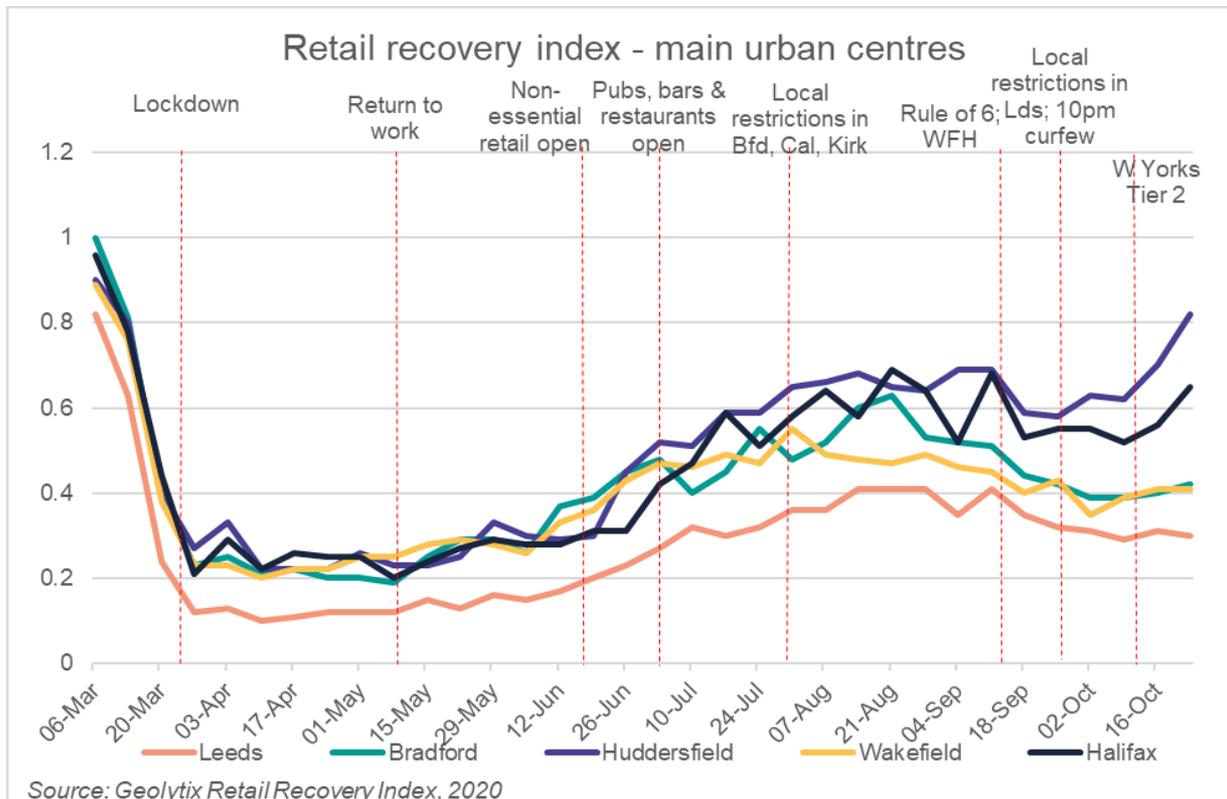
8% of workers still furloughed in mid-October, with home working still high

The patterns of people's working places remained similar in the fortnight to October 18th, with the proportion of people working in their usual place increasing to 62%, up slightly from 59% a fortnightly earlier. 7.8% of workers were still furloughed in the fortnight to 18th October, down 1.5 percentage points from 9.3%, with a similar percentage point fall in home working from 28.3% to 26.8%. This suggests little change in peoples' approach to home working from the changing advice, with the increase in normal working likely related to declining furlough use, with these jobs largely focused on consumer service and leisure industries.



Retail activity / footfall is below March levels in urban centres, but trends vary

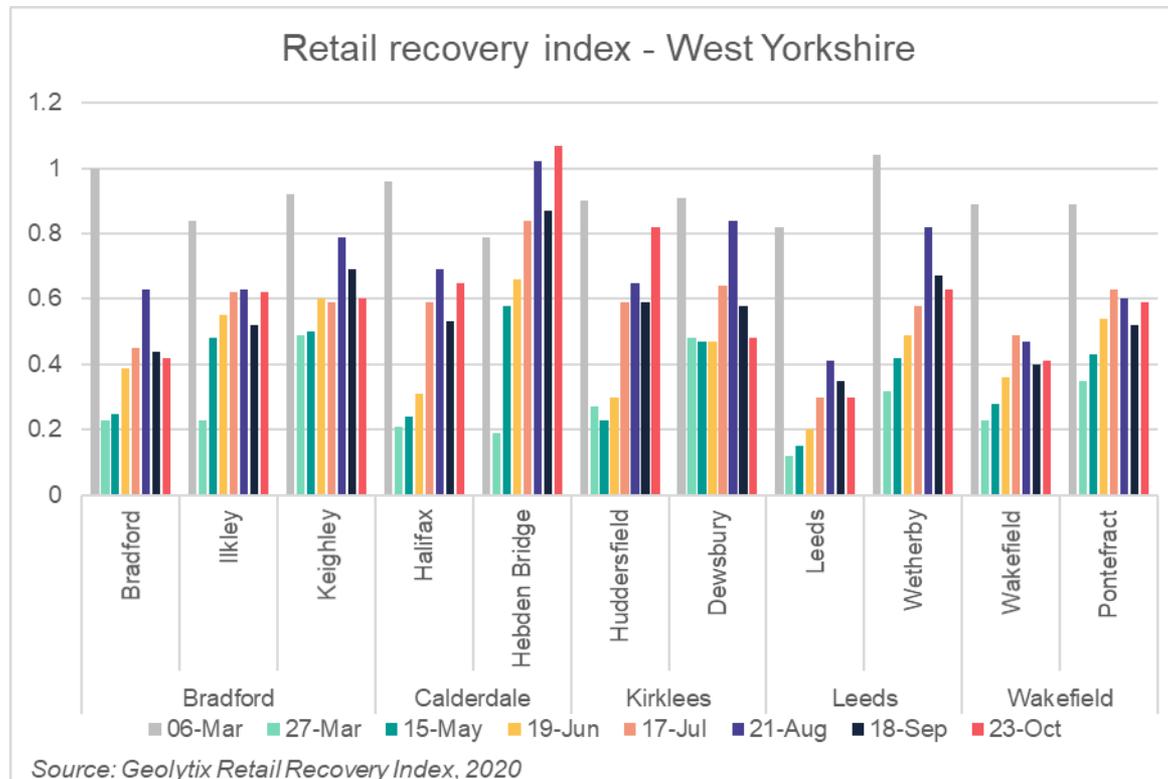
Location intelligence company Geolytix have created a retail recovery index, using anonymised, aggregated mobile phone data to understand trends in people movements since the start of lockdown since March. The index creates a composite baseline score for each place using data from January and February and assigns this a score of 1. The index then tracks changes in the volume of movements on a weekly basis. Broad trends are shown for this week, but will be tracked on a weekly basis in the coming months.



Footfall fell to around a quarter of usual levels at the start of lockdown in 4 of the main urban centres, and further still (12%) in Leeds. A gradual increase began from the easing of restrictions in May, and accelerated with the reopening of non-essential retail in June. This levelled off and began to fall in some places from mid-August, though has remained higher and continued to increase through October in Halifax and Huddersfield. Suggesting relatively little impact on movement as a result of local restrictions.

Many places saw a spike in activity in August, but this has since changed

The Geolytix data also looks at a range of other places across West Yorkshire, to understand how activity in retail centres varies across places. This shows that smaller towns have generally seen faster recovery than the main urban centre in each district, with the exception of Huddersfield / Kirklees. In some places, most notably, Bradford, Keighley, Dewsbury and Wetherby, activity peaked in August around the Eat out to Help Out scheme, but has fallen back since. Hebden Bridge is the only place tracked where activity was above March levels in the w/e 23rd October. In most places, activity is between 40% and 60% of baseline, though it is lower in Leeds (30%) and higher in Huddersfield (82%).



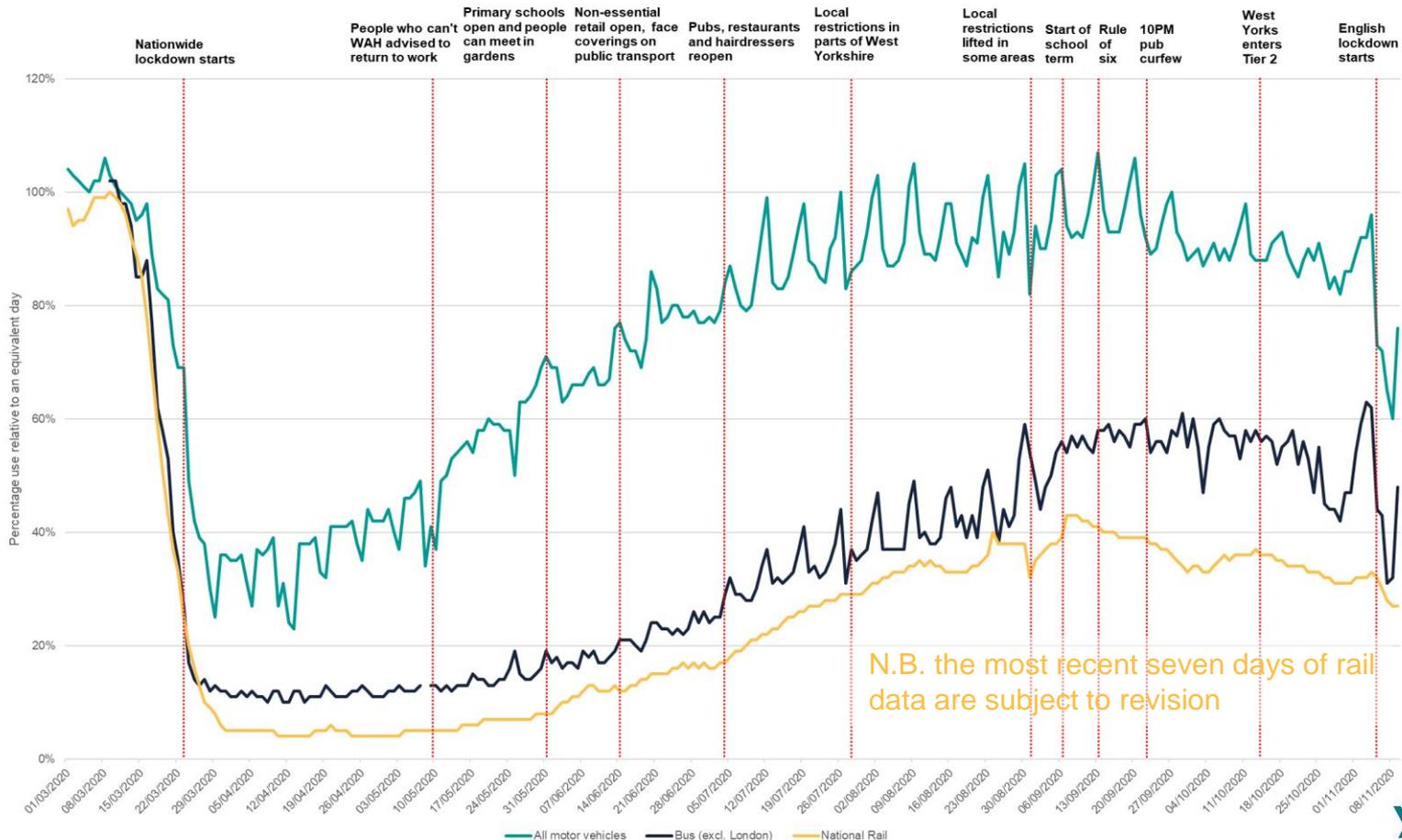
Transport Insights



National DfT data shows reduced transport use after English lockdown

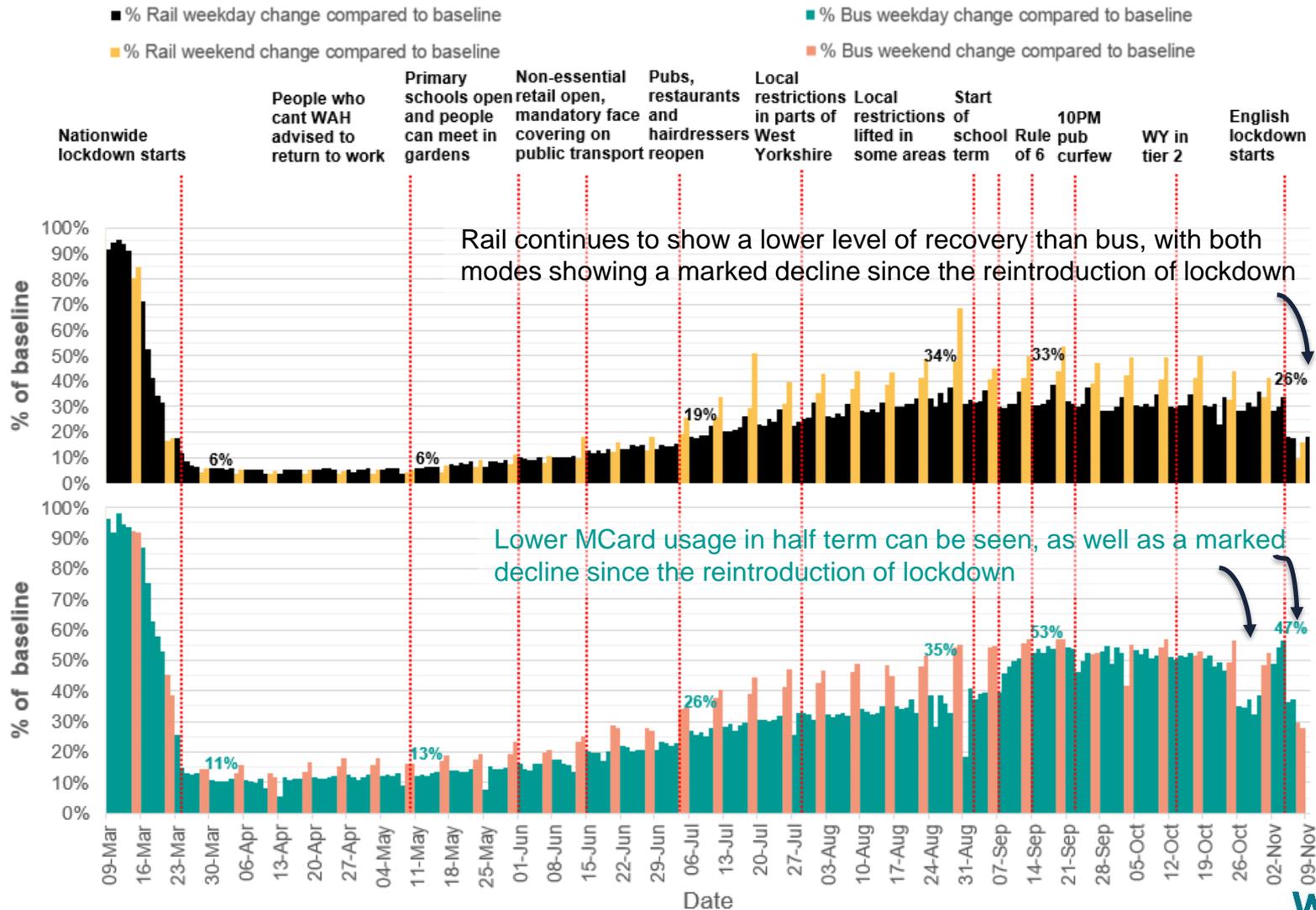
Data for Great Britain shows that motor vehicle, bus and rail travel declined following the reintroduction of restrictions on 5th November, with rail being the least impacted although this mode had struggled the most to recover. The level of use across all modes remains higher than was seen in the national restrictions in March, likely due to schools and more businesses remaining open. Interpretation should be cautious as the restrictions were imposed recently and rail data may be subject to revision. Similar trends occur locally.

DfT transport use during the coronavirus (COVID-19) pandemic



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

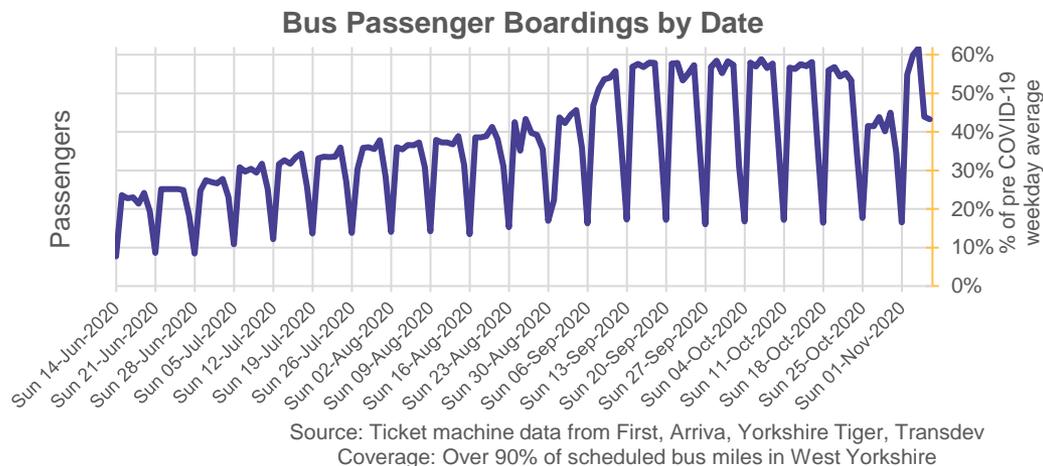
Local rail and bus proxies show notably lower levels since the reintroduction of restrictions in England



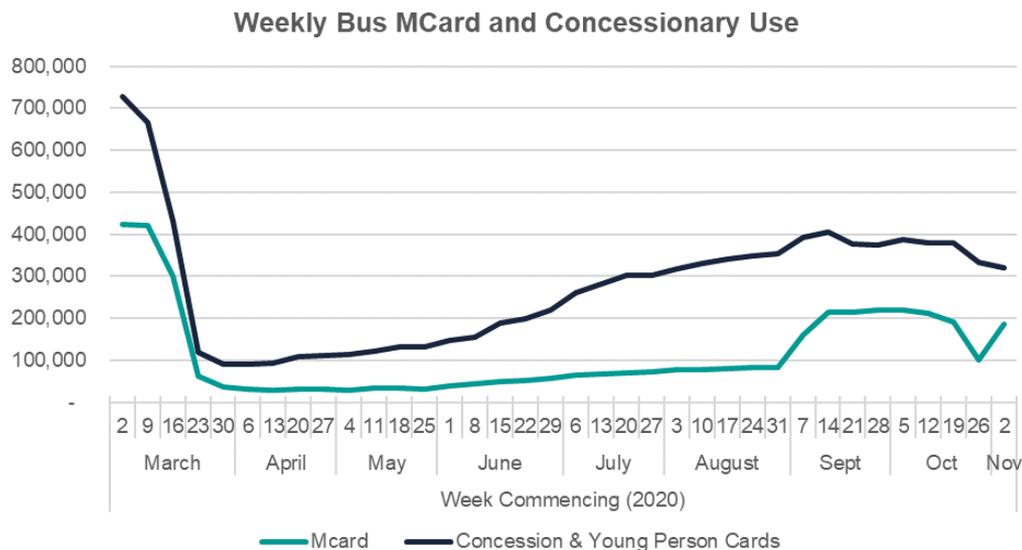
Baseline period is Monday 2nd - Friday 6th March 2020 (weekdays) and 29th Feb -1st March and 6th-7th March (weekends)

Source: Leeds Rail Station Footfall - Network Rail (top) and MCard and English National Concessionary Travel Scheme (ENCTS)

Bus use in West Yorkshire showing impacts of half-term and the introduction of the new lockdown



Bus patronage including operators' own tickets shows a marginal downward trend from mid-September, then half-term, a pre-lockdown surge, and then the effects of the new lockdown. 4th November was the busiest day since 18th March. The data available is up to 6th November. The next slide reveals differences within the overall trends.



For the week beginning Monday 2nd November 2020, the combined level of MCard and concessionary fare use shows a reduction of 56% against the week beginning 2nd March 2020, an increase of 17% against the previous week. This shows a bounce back from half term levels in the previous week despite the English lockdown measures imposed on 5th November – but new rules may not have fed through to weekly totals yet.

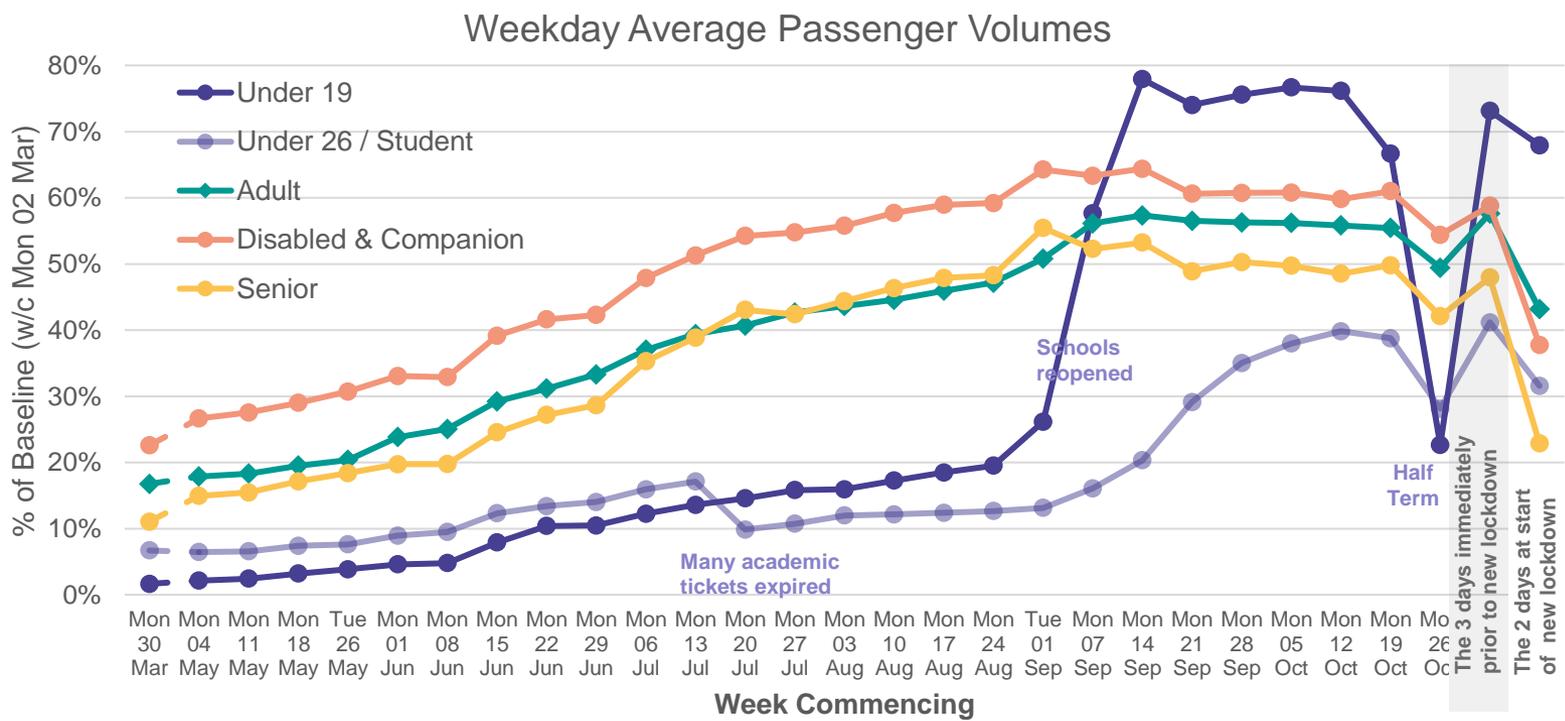
Bus use: Use reduced at start of new lockdown but under 19s more affected by half term

Data from bus ticket machines reveals a drop in use by all cohorts during half-term, especially by under 19s. There was a surge in use in all cohorts in the days before the new lockdown, then a marked reduction in use as lockdown started. Use by senior and disabled passes reduced to a level similar to that seen at the start of June and use by adults similar to late July / early August. The reduction in use by younger cohorts was not as large. Data is for weekdays excluding bank holidays, with ticket types assigned to broad cohorts.

Thousand 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 and Transdev.

Cycling: Seasonal Reduction in Daily Trips

Cycle counters recorded notable increases in weekend cycling in October 2020 compared to the previous year. Two of the sites where counts doubled are on traffic free routes, Wykebeck Way, located on the National Cycle Network approaching Roundhay Park, and Methley Bridge, which now connects to a new 1.3km cycle lane opened in October 2020. The Regent Street at Gower Street counter on the approach to Leeds City Centre, now connects to improved cycle infrastructure at Eastgate delivered as part of the Connecting Leeds programme, also saw weekend counts double.

This indicates that improved infrastructure and traffic free cycle routes encourages leisure cycling, even during darker months.

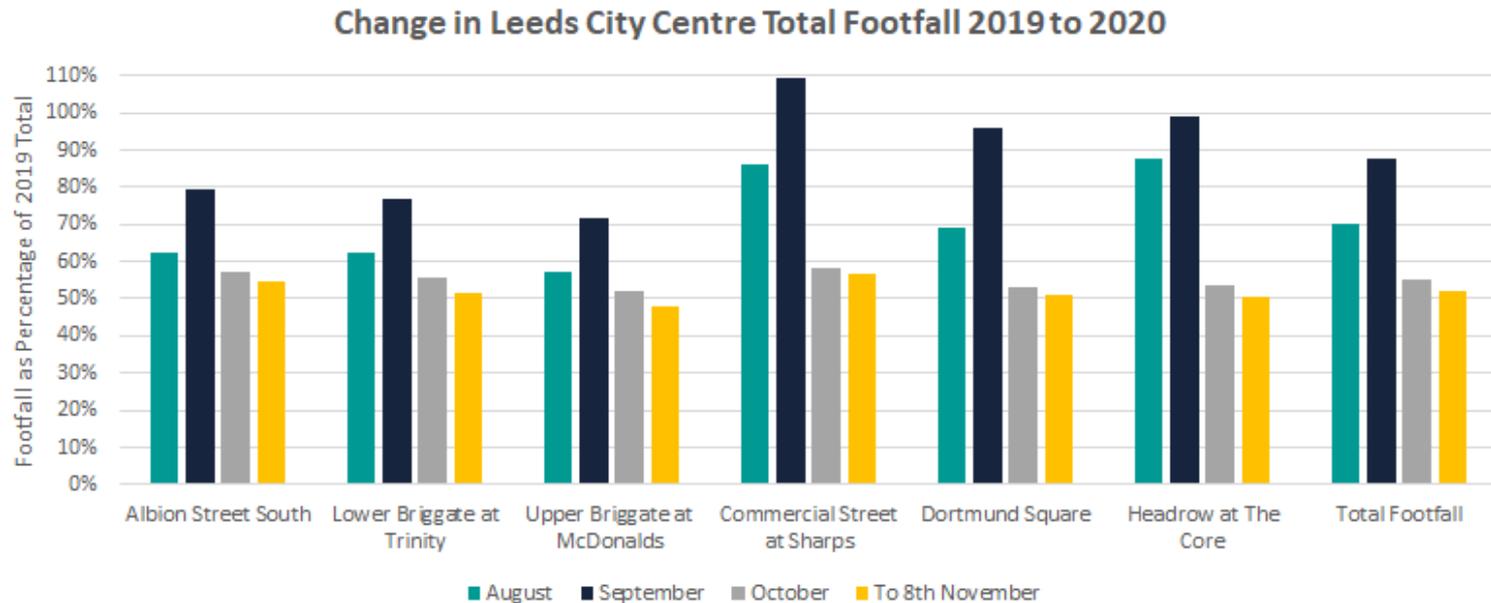
Change in Total Cycle Count October 2019 to 2020

Counter Location	Weekday	Weekend	Total
Valley Road, Bradford	91%	183%	103%
Cardigan Lane, Leeds	52%	117%	60%
March Lane, Leeds	103%	172%	111%
Meanwood Road, Leeds	52%	60%	53%
Regent Street at Gower Street, Leeds	59%	92%	64%
Regent Street at Hope Road, Leeds	141%	210%	150%
Sheepscar Junction, Leeds	76%	162%	84%
St Peter's Street, Leeds	110%	189%	119%
Wellington Road, Leeds	68%	123%	75%
Wykebeck Way, Leeds	101%	228%	131%
Methley Bridge, Wakefield	153%	231%	175%

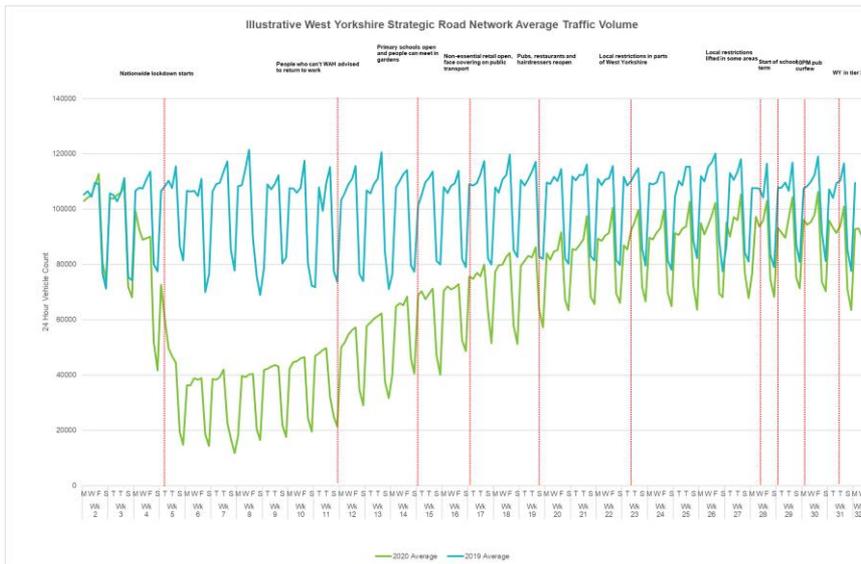
Footfall

October saw city centre footfall drop 88% from September in response to tiered local lockdowns. Weekday total footfall fell to 69% of the October 2019 total and weekend footfall to 51%, indicating a marked decrease in city centre leisure trips.

Having only four days of footfall data following the start of the second lockdown available it is too soon to draw conclusion on the impacts of the latest restrictions.

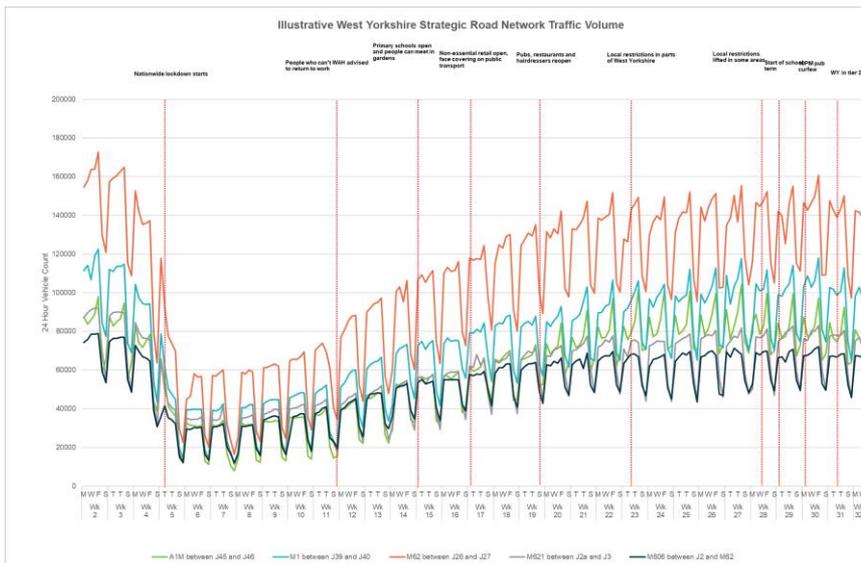


Traffic on West Yorkshire's strategic road network remains below 2019 levels



Traffic volumes were taken at a point on each strategic road in West Yorkshire to show change.

Traffic on the West Yorkshire strategic road network continues to track below 2019 levels. For the latest full week with comparable data (w/c 21st September) average traffic flows across selected points on the network were 14% below the same week in 2019.



Comparing routes through 2020, the A1(M) showed the greatest level of recovery with the latest full week flow (w/c 21st September) being 6% below the week commencing 2nd March 2020.

The M621 shows the lowest level of recovery with the latest full week flow (w/c 21st September) being 14% below the week commencing 2nd March 2020.

Air Quality – NO₂ Concentrations Rising but Peak Hours Decreasing

While October saw NO₂ concentrations begin to exceed levels recorded in 2019, the number of hours in which they exceed the lowest band of the DEFRA Air Quality Index decreased compared to 2019. This shows that while car volumes have recovered, fewer trips take place during the traditional AM and PM peaks, resulting in less congestion and therefore fewer spikes in NO₂ concentrations.

This reduction in congestion now means that at a number of sites, highlighted green in the chart below, there are now no hours where the lowest band of the DEFRA Air Quality Index is exceeded in the given time period.

Change in Average NO₂ µg/m³ October 2019 to 2020

Monitoring Site	Morning 00:00 - 07:59	Midday 08:00 - 15:59	Evening 16:00 - 23:59
Mayo Avenue, Bradford	68%	91%	88%
City Centre, Leeds	78%	99%	98%
Headingley, Leeds	89%	109%	109%
Castleford, Wakefield	69%	91%	93%
Newton Bar, Wakefield	73%	99%	97%
Park Street, Wakefield	70%	140%	122%

Change in Hours Exceeding Lowest Point of NO₂ DEFRA Air Quality Index (67 µg/m³) October 2019 to 2020

Monitoring Site	Morning 00:00 - 07:59	Midday 08:00 - 15:59	Evening 16:00 - 23:59
Mayo Avenue, Bradford	-133	-440	-497
City Centre, Leeds	-20	-38	-63
Headingley, Leeds	-4	-7	-13
Castleford, Wakefield	-6	-37	-42
Newton Bar, Wakefield	-32	-81	-113
Park Street, Wakefield	-3	1	-8