

COVID-19 Fortnightly Insights Report

Research & Intelligence
8th January 2021



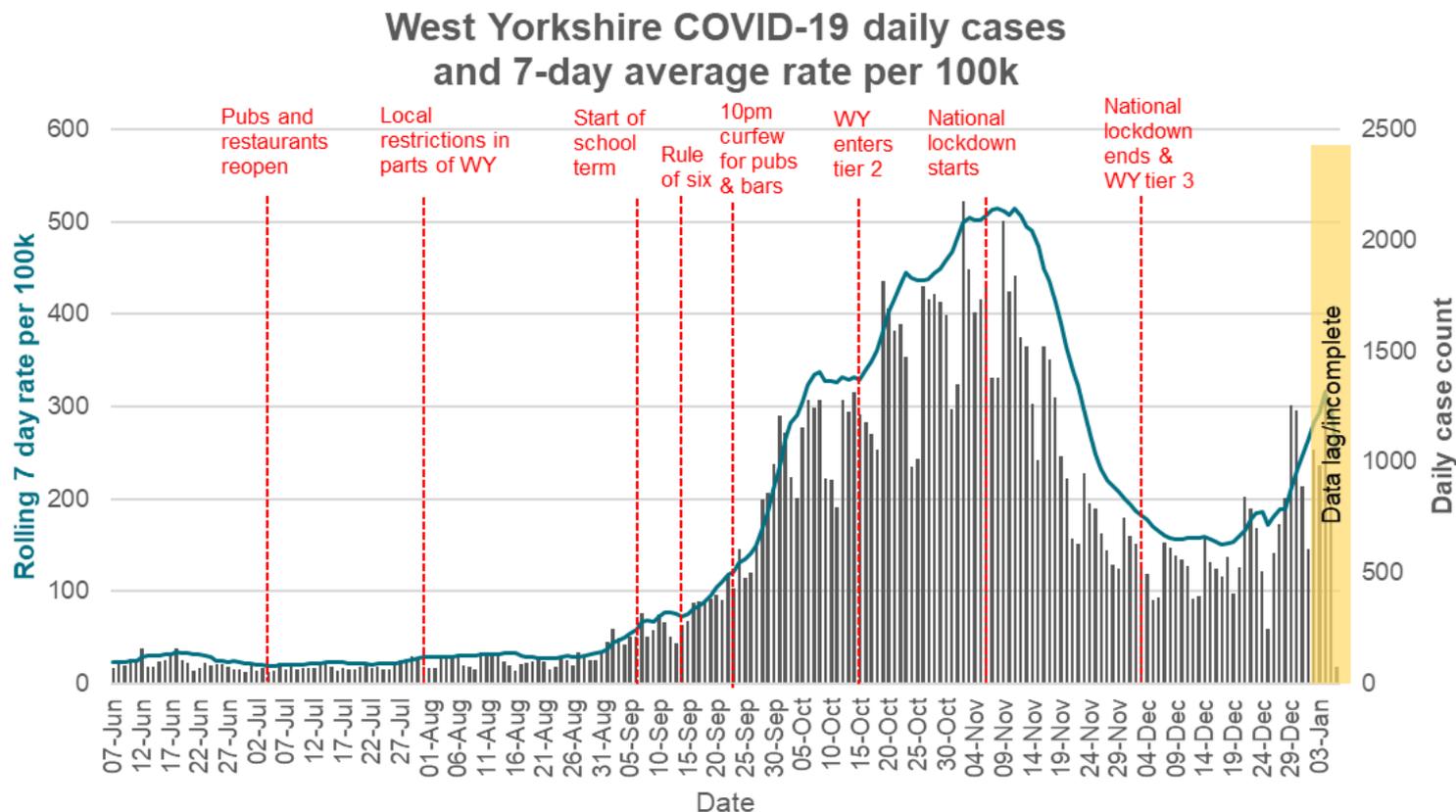
Executive Summary – social and economic

- Little data is yet available to understand the period following the end of November's lockdown, or the enhanced restrictions in place from late December / early January. However, conversations between Growth Managers and local businesses show concerns among retail and hospitality businesses and those who supply them such as food & drink suppliers and bar / shop fitters. Some of these businesses report further slowdown in orders, and now anticipate it may be the summer before activity returns.
- Data on footfall in West Yorkshire's town and city centres does not suggest a sharp upturn in activity in the run up to Christmas. Whilst there was some recovery in activity after November's lockdown ended, this was relatively slight and activity throughout December remained below that seen in late October in many places.
- Between October and November, the claimant count for West Yorkshire increased by 1,385 or 1.3%, compared with a bigger national average increase of 2.7% (59,786). Since the start of the pandemic, the number of people claiming out of work benefits in West Yorkshire has increased by 87% higher (+49,620). This was largely driven by a significant increase in April and May. The picture over the past six months has been more static.
- The number of businesses being dissolved / liquidated has continued to fall from its September peak, when around 1,000 West Yorkshire businesses were dissolved / liquidated per week to under 200 per week throughout December. Across 2020 as a whole, 12,800 businesses were liquidated in West Yorkshire, down 17% on 2019.

Executive Summary – transport

- The national picture of transport use reveals a modest recovery over the transition from the second lockdown to the reintroduced tier system, followed by a decline over the Christmas and new year period. A similar trend occurred in West Yorkshire.
- As a result of the second lockdown, November footfall in Leeds City Centre fell to 28% of the equivalent levels in 2019. Following Leeds post-lockdown move to Tier 3, December footfall increased, but only to 56% of 2019 levels.
- The 4th wave of the COVID-19 transport survey was conducted between 25 November – 1 December (just before the 2nd Lockdown ended), and collected the views of a statistically representative sample of the West Yorkshire population. The survey results reveal:
 - compared to pre-COVID, more than half of respondents expect to travel by public transport less in the short term, consistent across all survey waves.
 - a shift to car and away from public transport for travel into city centres (excludes commuting).
 - a reluctance to use public transport by non-users although those who do use it are generally comfortable doing so.
 - a growth in confidence in using public transport compared to at the start of the pandemic.
 - as in previous waves, respondents reported walking & cycling more than pre-COVID-19
 - further evidence of a sustained preference for more home working in the long term; 62% of respondents said that in the long term, they are likely to work at home more often than before COVID-19.

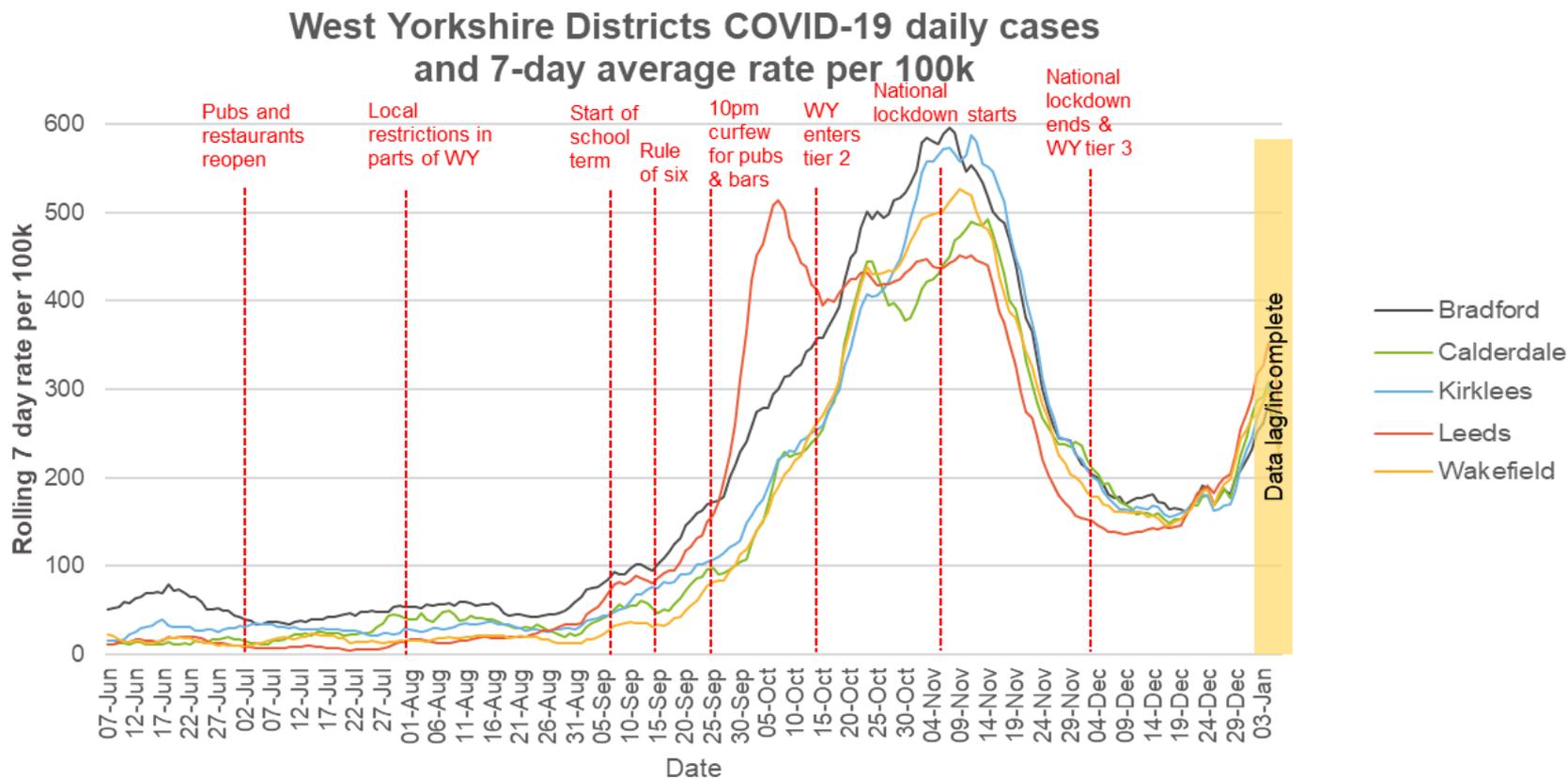
Virus prevalence – West Yorkshire trend



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 1st January, the 7-day moving average **West Yorkshire COVID-19 rate was 263 cases per 100k**, up from 172.5 per 100k the week before. These rates are below the Yorkshire and the Humber rate (281.1 per 100k) and England rate (583.3 per 100k).

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 – District overall trend



The chart shows the trends in the 7-day rolling COVID-19 rate per 100k population at district level. Within West Yorkshire, as of the 1st January rates are lowest in Bradford (232.5 per 100k) and highest in Leeds (290.2 per 100k respectively). There now clear signs of a rapidly increasing case rate trend as already seen in other parts of the country.

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.

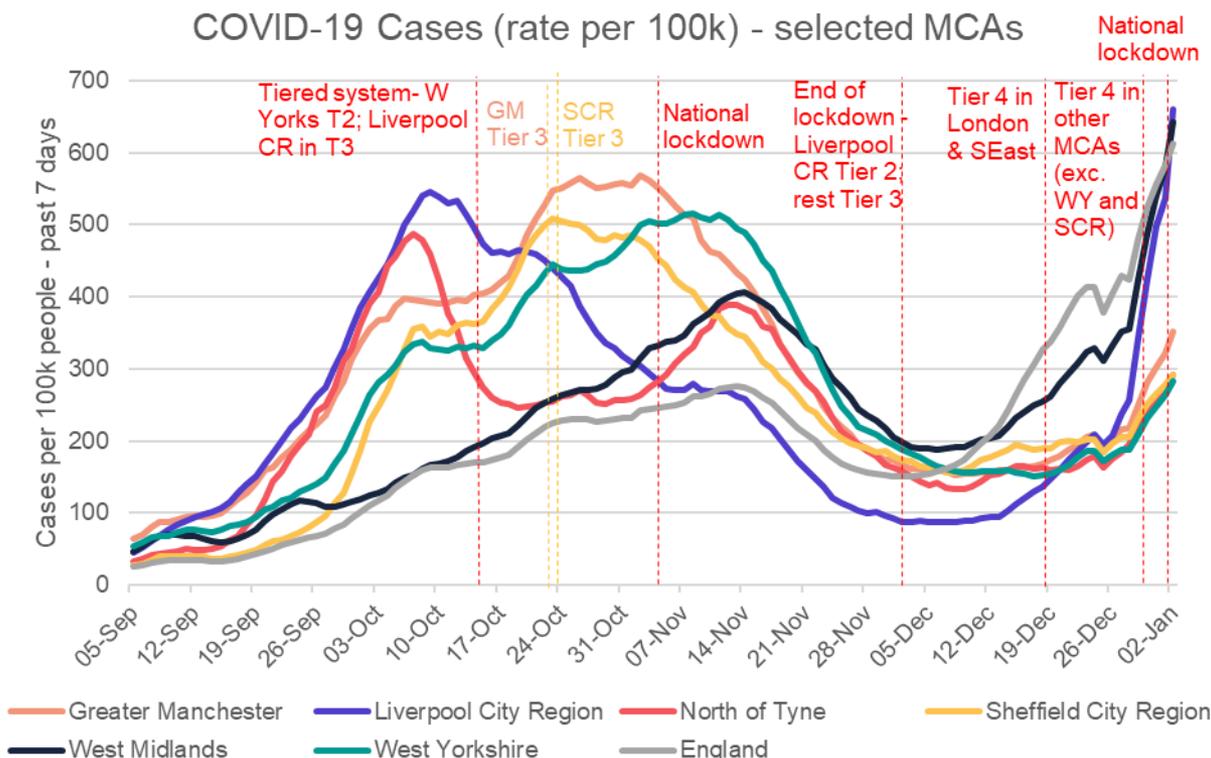
Virus prevalence – West Yorkshire

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

Area	Total cases per 100k people (26 Dec – 1 Jan) Most recent data week	Total cases per 100k people (19 Dec – 25 Dec) Previous week	Absolute Difference
Bradford	232.5	169.9	62.6 
Calderdale	270.5	167.9	102.6 
Kirklees	244.0	162.6	81.4 
Leeds	290.2	182.9	107.3 
Wakefield	267.6	168.0	99.6 
West Yorkshire	263.0	172.5	90.5 
Yorkshire & the Humber	281.1	177	104.1 

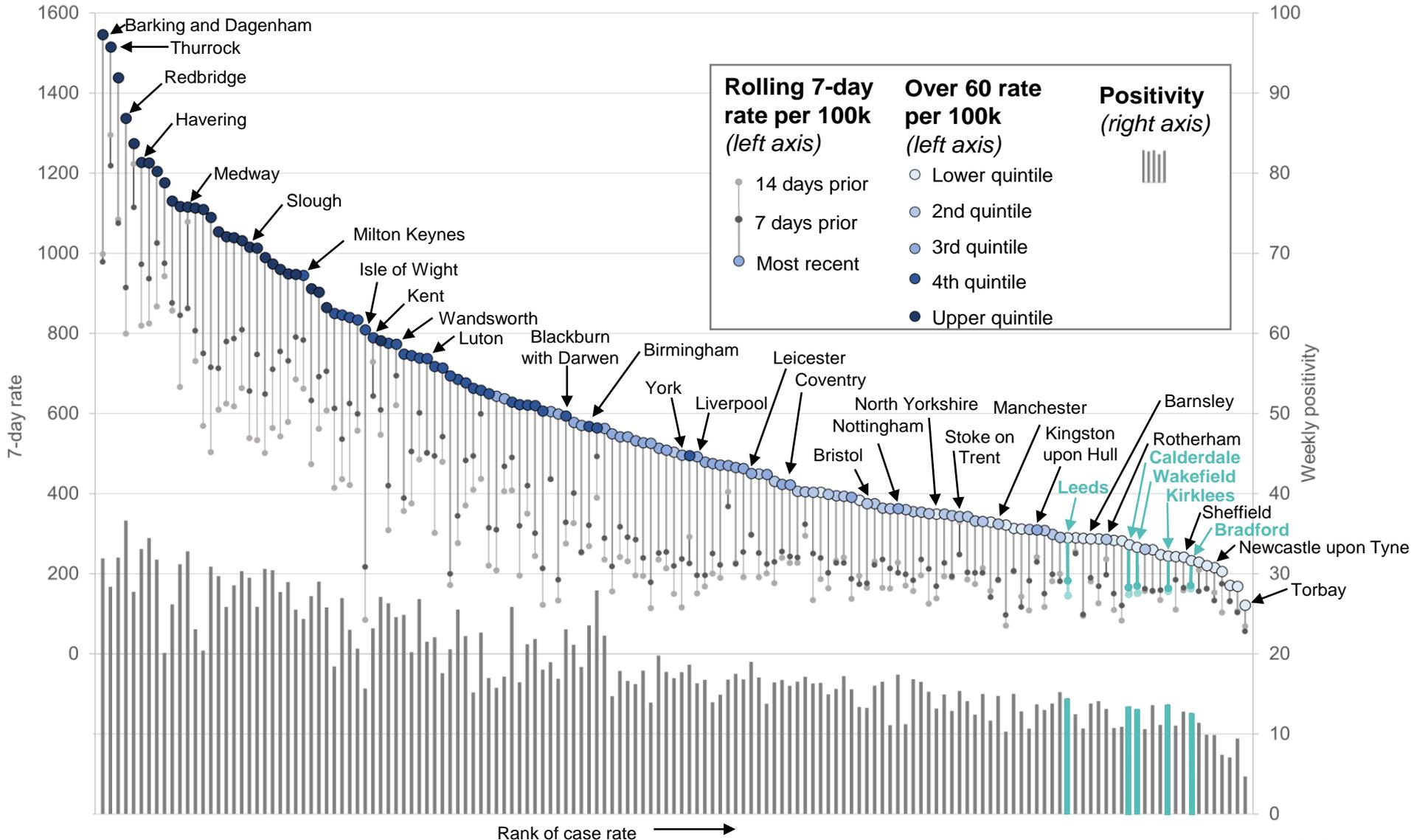
Rates rising in all comparator MCAs, but below half national levels in Yorks & NE

Infection rates are currently rising in all MCAs analysed here, though the pace of increase varies. Increases are sharpest in the West Midlands and Liverpool City Regions, both of which saw rates begin to increase rapidly around the same time as England as a whole in mid-December. Rates in these areas are now higher than the English average, which itself is more than double the November peak. Increases are slower but still significant in West and South Yorkshire, North of Tyne and Greater Manchester. With the exception of Greater Manchester, these areas now have rates less than half the English average.



COVID-19 Rates for Upper Tier Local Authorities

7-day average COVID-19 rate per 100k population, change compared to the previous week, over 60 rate & positivity



Blue points show latest COVID-19 case rate per 100k across UTLAs as of the 1st January (left Y-axis). Vertical bars connected to these points denote rate last week (dark grey) and the week before (light grey). Point colour denotes the COVID-19 rate per 100k in the over 60s. Grey bars at the bottom denote positivity (%) up to the 30th Dec (right Y-axis).

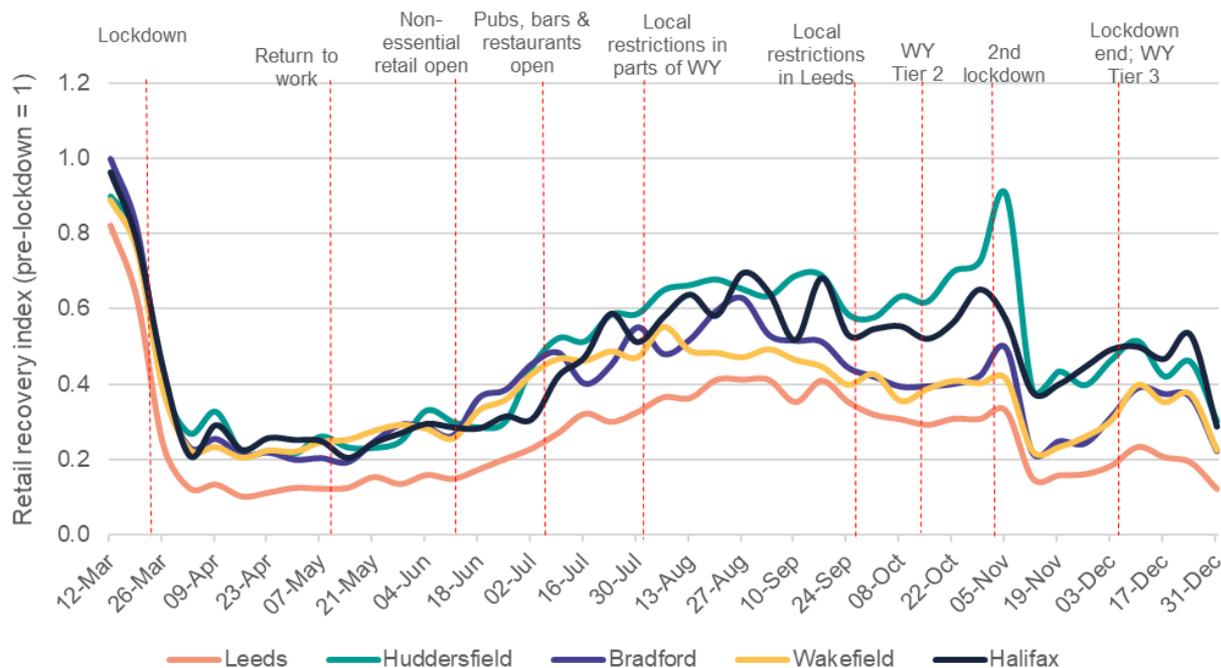
Economic Insights



Activity in urban centres increased after November's lockdown, but no Christmas spike

Activity in West Yorkshire's main urban centres increased in early December as England's national restrictions eased. However this increase was only slight, and did not accelerate in the run up to Christmas. Activity in the week to 10th December represented the monthly high point in most places, but remained substantially lower than before the measures were introduced in early November in Leeds (-29%), Huddersfield (-43%) and Bradford (-22%). Activity in Halifax and Wakefield was closer to late October levels but still down slightly. Levels remained fairly static in the run up to Christmas in most places, before falling sharply in the week between Christmas and New Year.

Retail recovery index - main urban centres



Source: Geolytix Retail Recovery Index, 2020

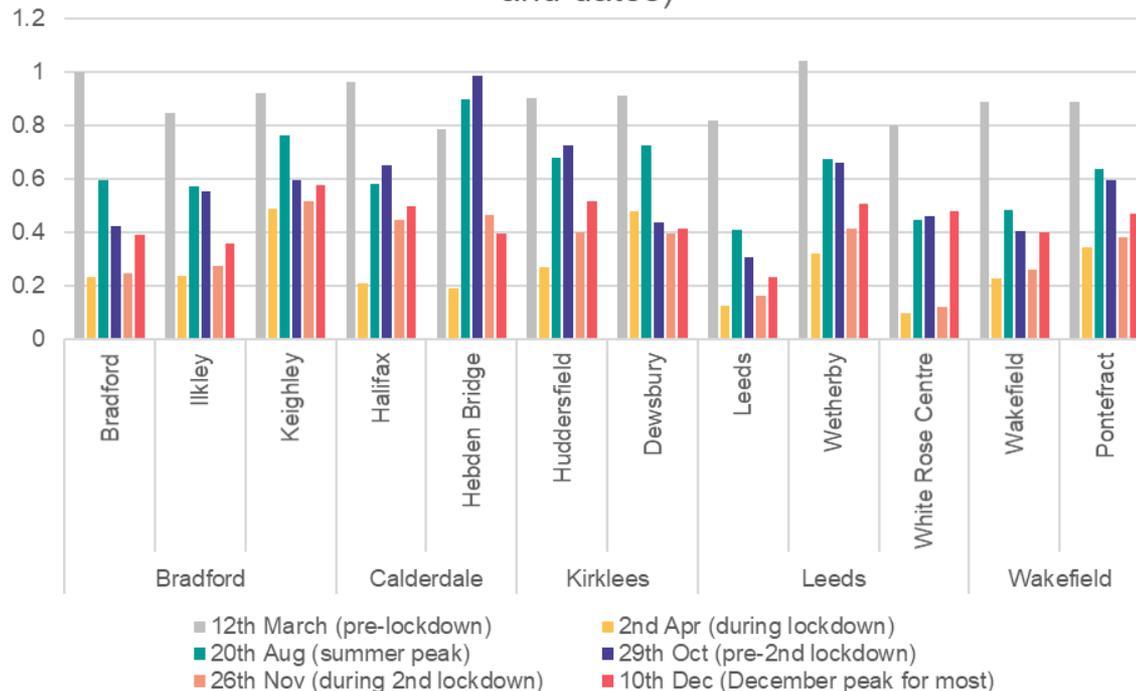
Source: Geolytix Retail Recovery Index

Smaller town centres see limited increase in activity in the run up to Christmas

The patterns described on the previous slide were similar in other town centres across West Yorkshire, with most seeing a peak in the week to December 10th but this remaining below October levels, and not increasing in the run up to Christmas. The White Rose Centre was a notable exception with activity increasing sharply in the week after lockdown to its highest level since August. However, this was still only around half the baseline level.

Some other town centres, particularly Keighley, Halifax and Pontefract did see activity exceed 50% of pre-March levels in the week before Christmas but clearly this is still well below usual activity for the time of year.

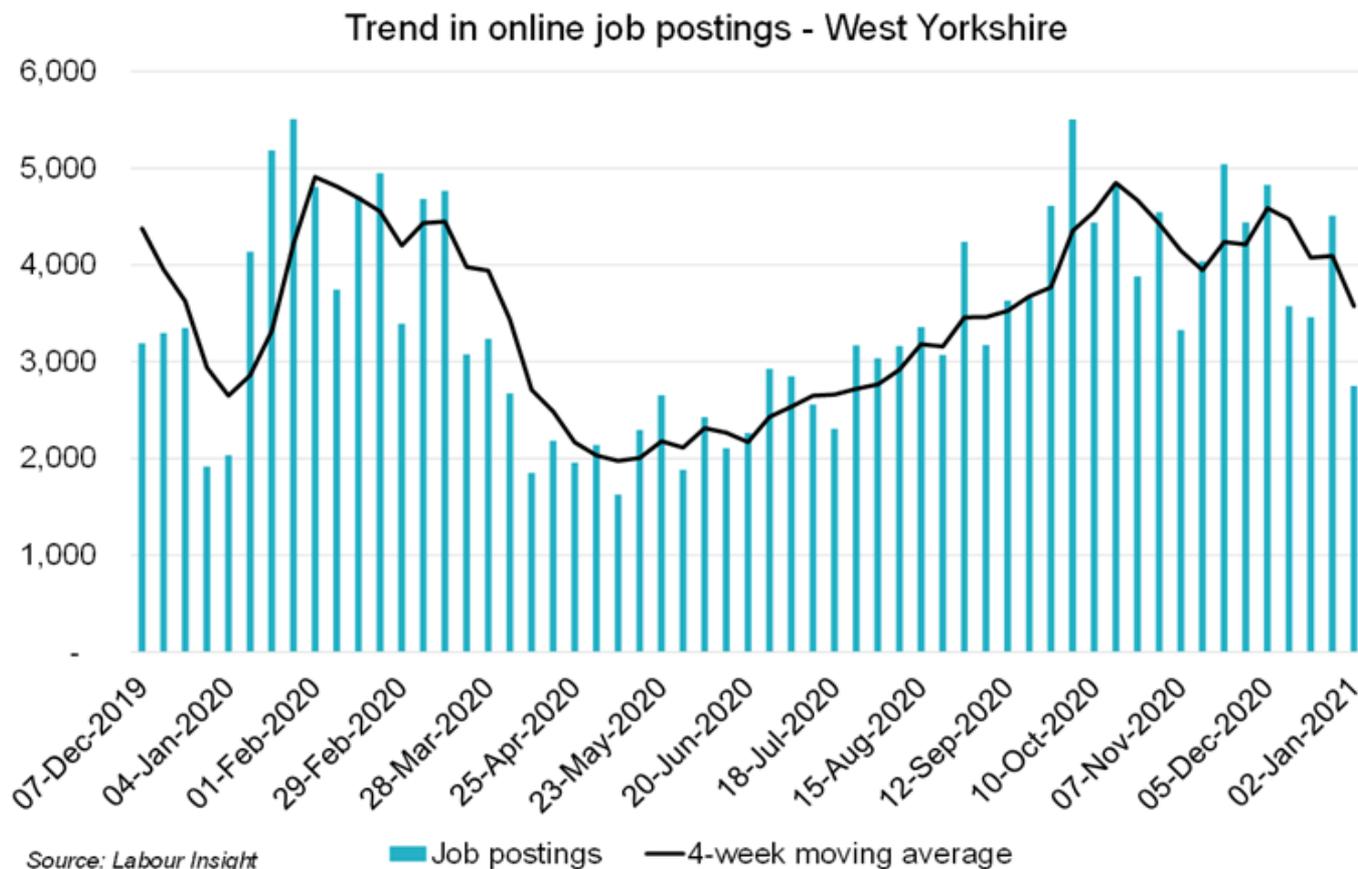
Retail recovery index - West Yorkshire (selected towns and dates)



Source: Geolytix Retail Recovery Index, 2020

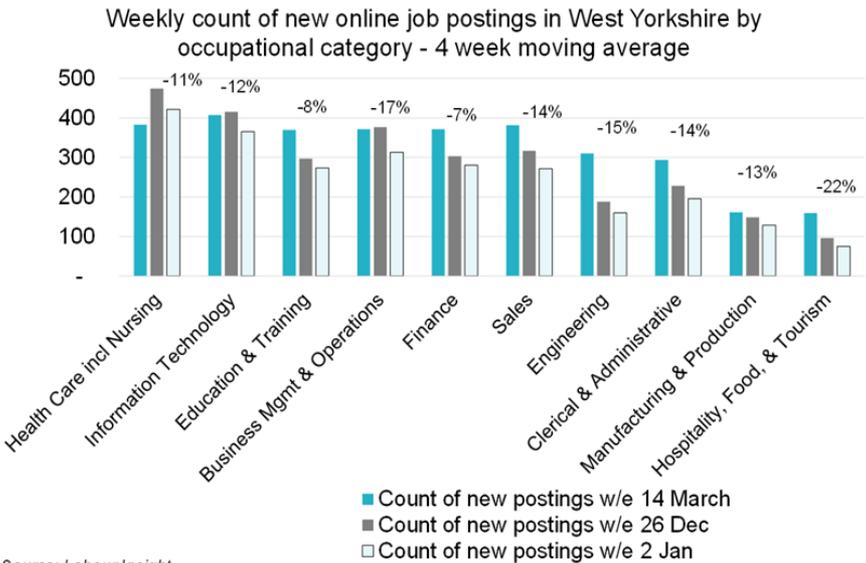
Vacancies declined but seasonal factors play a part

The number of vacancies for jobs in West Yorkshire posted online during week ending 5 December was 9% higher than in the previous week (based on a 4-week moving average). Nationally, the number of vacancies increased by 6%. The weekly vacancy count remains below its recent peak in mid-October, which was achieved prior to the imposition of COVID-19 restrictions in November.

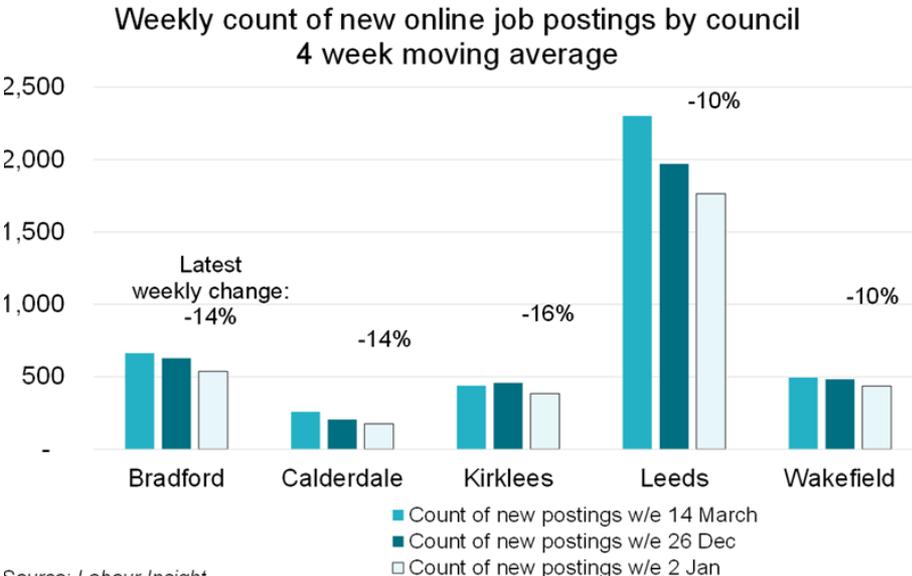


Decrease in vacancies for all local authorities but with seasonal factors to consider

All local authority areas saw decrease in postings in the latest week and all are currently below pre-crisis levels but again seasonal factors need to be taken into account. Similarly, all occupational groups saw decline in job postings in the latest week (based on a 4-week moving average) – again seasonal factors should be considered.



Source: Labour Insight



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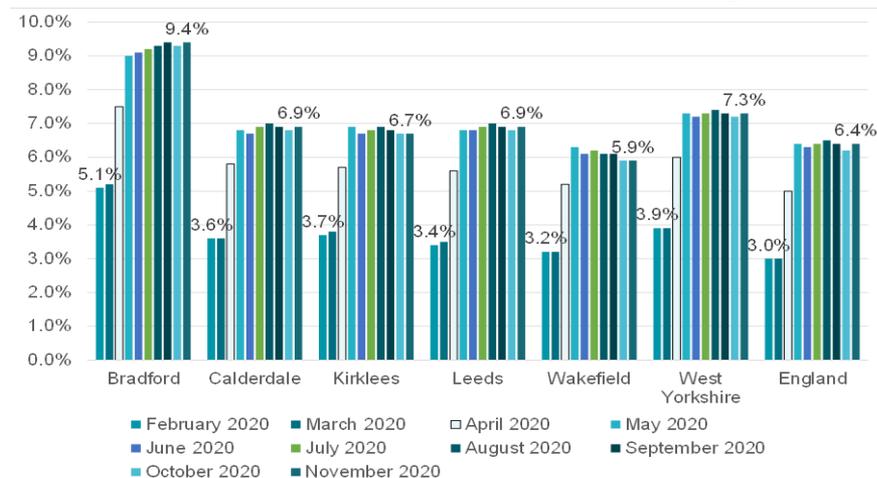
Further small increase in out of work benefit claims in November

Claimant unemployment figures for November show little change locally compared with October, making it six months during which the count has remained fairly flat following the big increases in April and May.

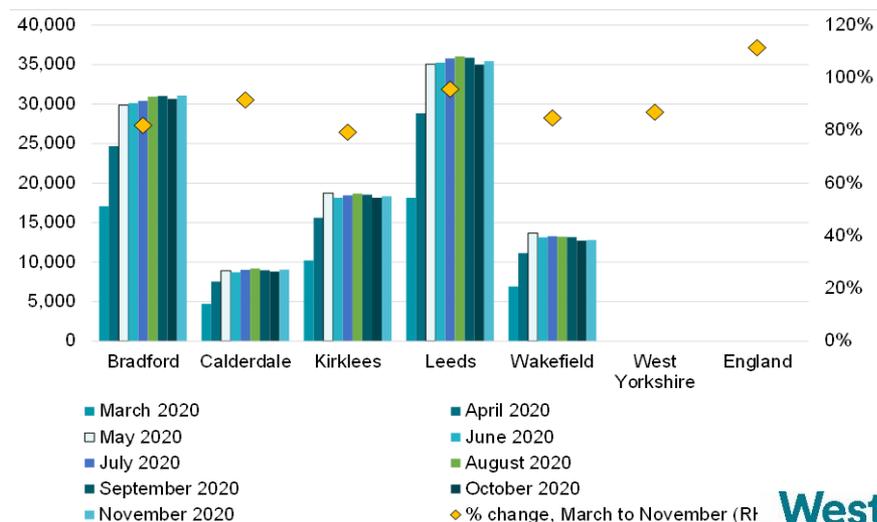
Between October and November, the claimant count for West Yorkshire increased by 1,385 or 1.3% to 106,705, compared with a bigger national average increase of 2.7%. The current claimant count is 87% higher (+49,620) than in March of this year.

The claimant rate for West Yorkshire (claimants expressed as a proportion of the population aged 16-64) increased from 3.9% in March to 7.3% in November, well above the national average of 6.4%. All districts are above the national average claimant rate except Wakefield with Bradford significantly higher than other districts at 9.4%.

Claimant rate trend by district (claimants as a proportion of residents aged 16-64)



Claimant count trend by district

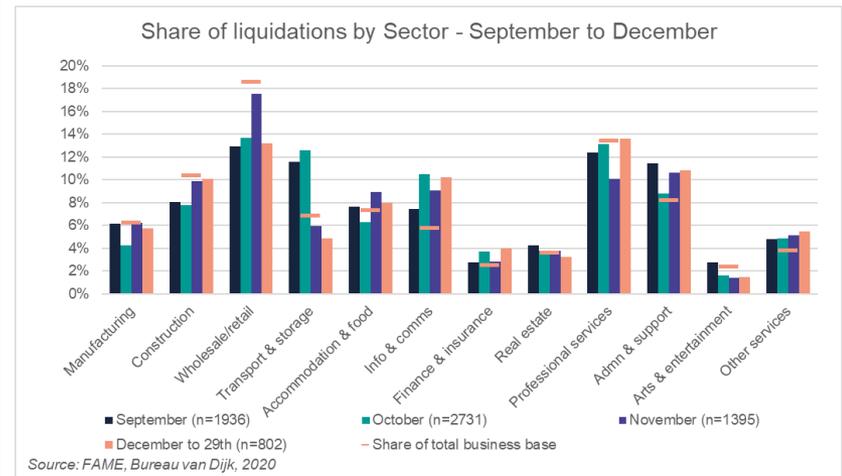
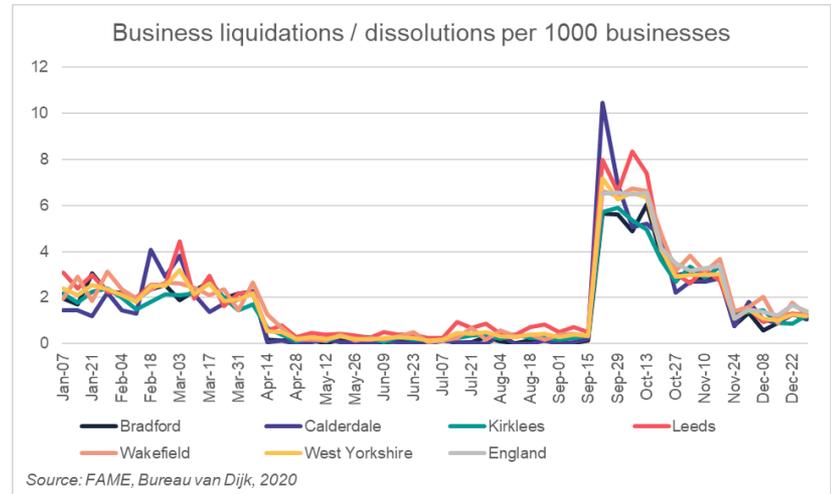


Business failures fall in December, and lower than 2019 across the year

The number of businesses being dissolved / liquidated has continued to fall from its September peak, when around 1,000 West Yorkshire businesses were dissolved / liquidated per week. This was due in some part to the moratorium on liquidations in the spring and summer, and fell to around 400 per week in late October / early November, and remained under 200 per week throughout December. These patterns were the same across West Yorkshire council areas and England as a whole.

Across 2020 as a whole, 12,800 businesses were liquidated in West Yorkshire. This is down 17% on 2019, which is a lower fall than the 22% seen across England as a whole. The reasons for this are not entirely clear but may reflect the support measures in place for businesses enabling them to survive as well general disruption to the normal operation of business.

The absolute number of liquidations / dissolutions fell in all major sectors of the economy in December compared to November. However, the share of liquidations remained elevated in accommodation & food, information & comms, business administration and other services.



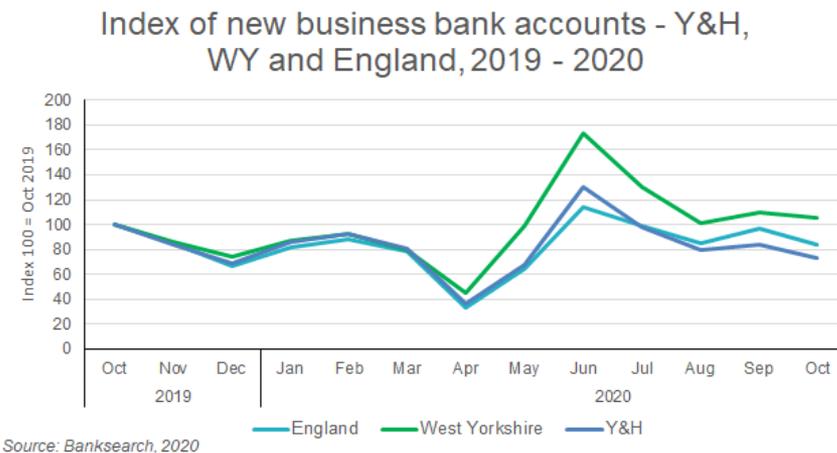
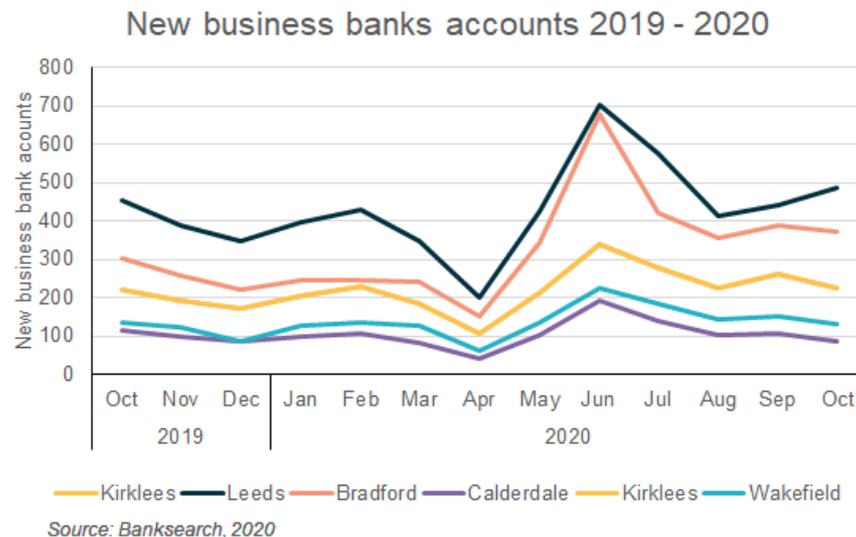
*Data includes companies whose registered office is in West Yorkshire, but whose physical location may be elsewhere
 Source: FAME, Bureau van Dijk, 2021

New business bank accounts has increased leading up to Christmas 2020

Banksearch looks at the number of new business bank accounts opened within a given month. It's a proxy for new businesses openings but can give a good indicator for that amount of new business activity that is happening in the area. The data has recently been updated to include new accounts opened in fintech & other neobanking organisations (backdated to October 2019).

The number of new business accounts in West Yorkshire was 1267 in November 2020 which is a 20% increase from November 2019. The biggest increase was in Bradford which had 342 new business accounts opened in November an increase of 32% from November 2019.

Within the West Yorkshire region there was a sharp fall in new business accounts being opened in April 2020. This was then followed by a sharp increase in Jun after the first lockdown ended. Since this peak, there has been slightly increase in the levels of new business bank accounts being opened than in previous months (pre-April 2020).

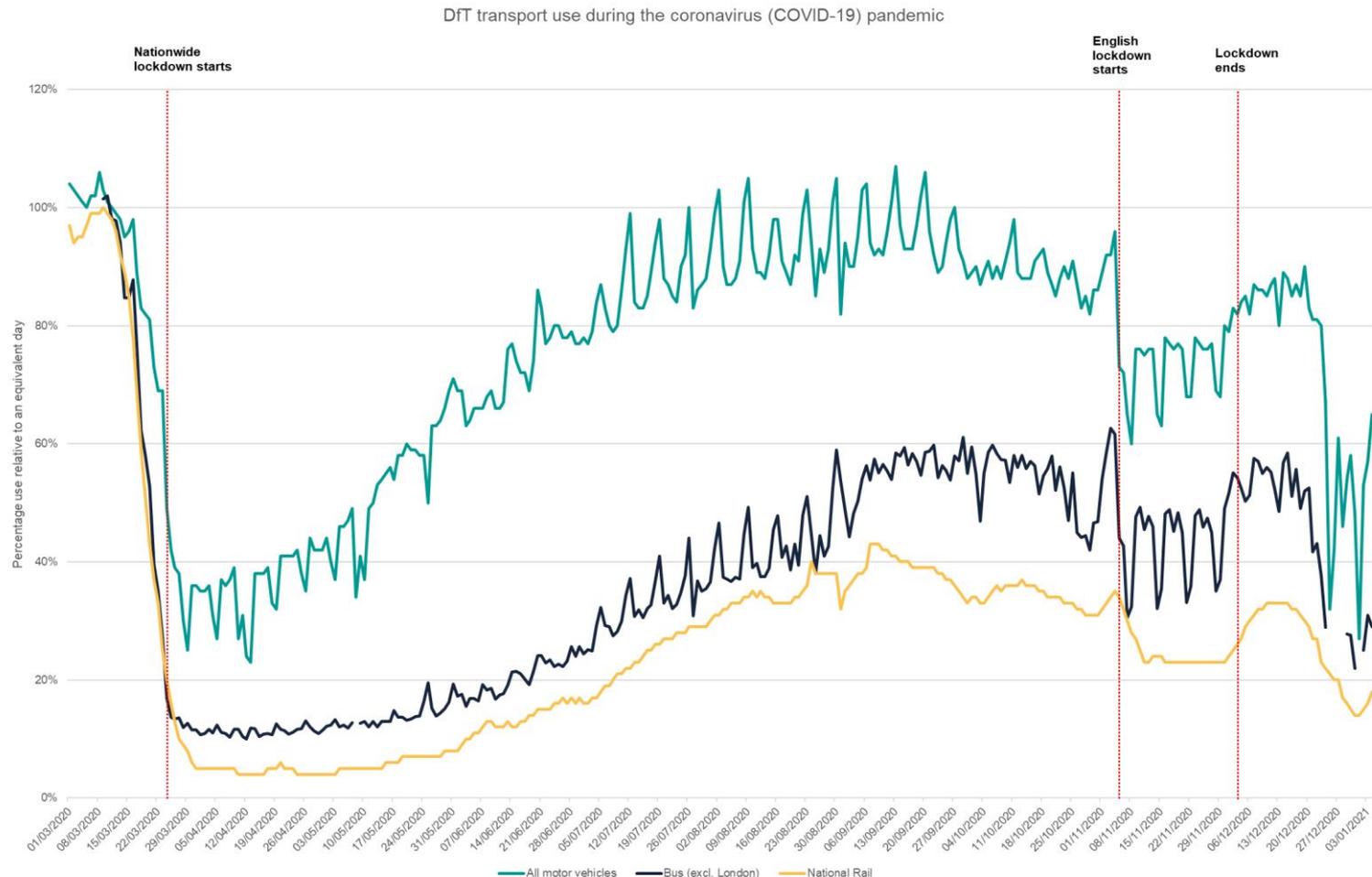


Transport Insights



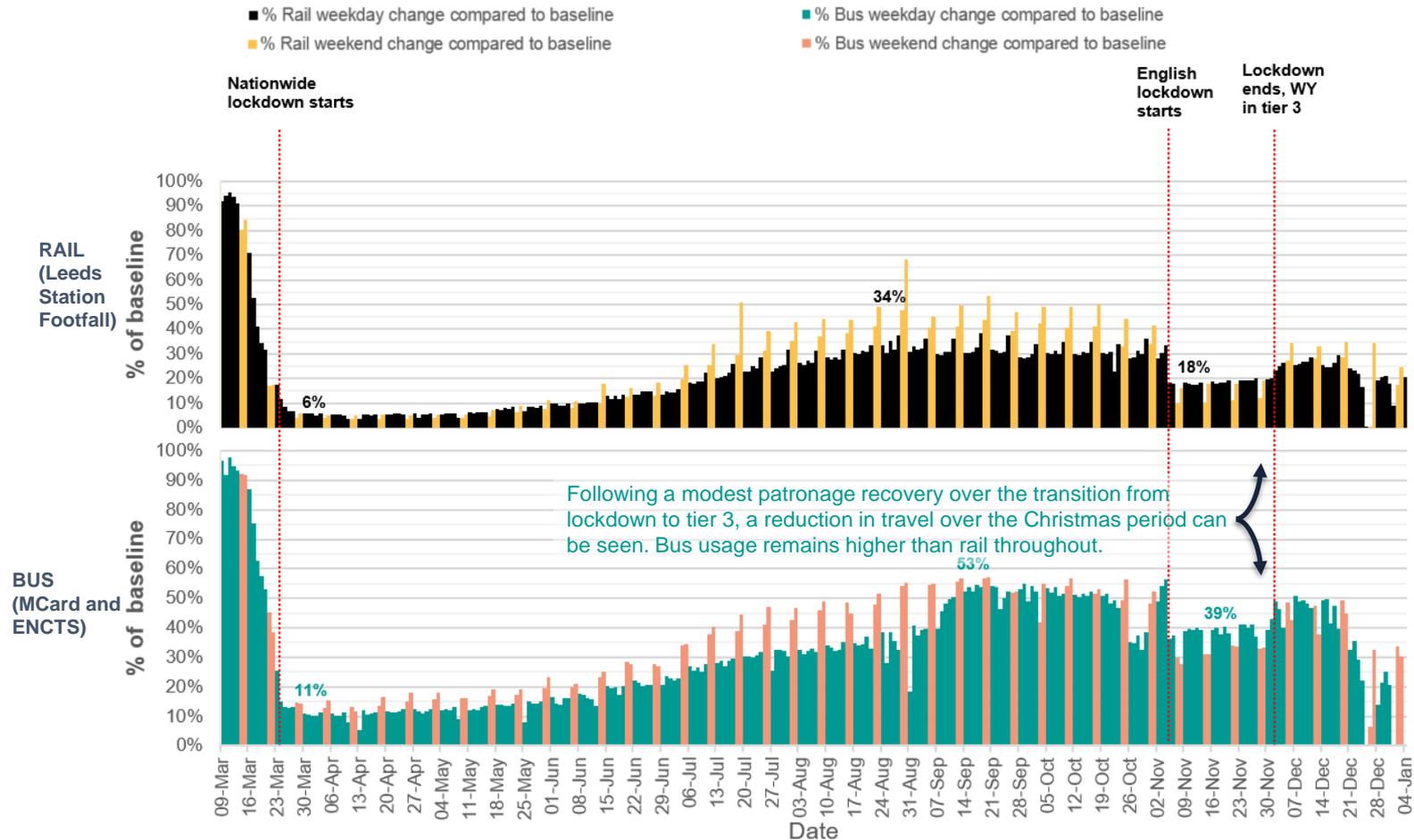
National DfT data shows transport activity recovered slightly after the 2nd lockdown then decreased over Christmas

Data for Great Britain shows that, following a modest recovery over the transition from the second lockdown to the reintroduced tier system, transport use declined over the Christmas and new year period. Similar trends occur in West Yorkshire. This data does not cover the current lockdown.



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

Local rail and bus proxies show a similar pattern to the national trend



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

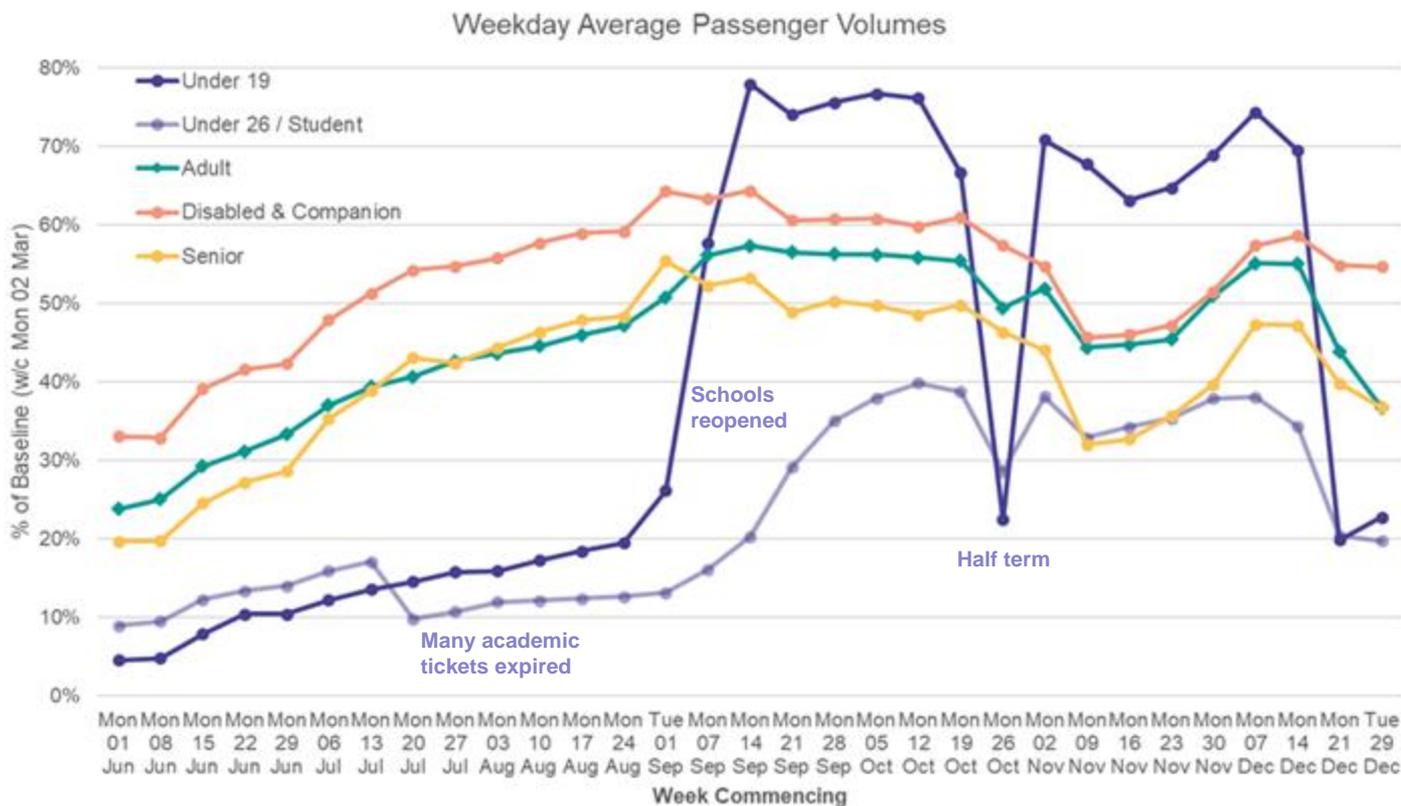
Source: Leeds Rail Station Footfall - Network Rail (top) and MCard and English National Concessionary Travel Scheme (ENCTS)

Bus use increased among all cohorts before the end of the 2nd lockdown then fell over the Christmas period

Data from bus ticket machines reveals that bus use in each cohort increased towards the end of the 2nd lockdown and continued in the run up to Christmas, followed by the expected drop over the Christmas and new year holiday period. Data is for weekdays excluding bank holidays, with ticket types assigned to broad cohorts and is available up to the week commencing 31st December.

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

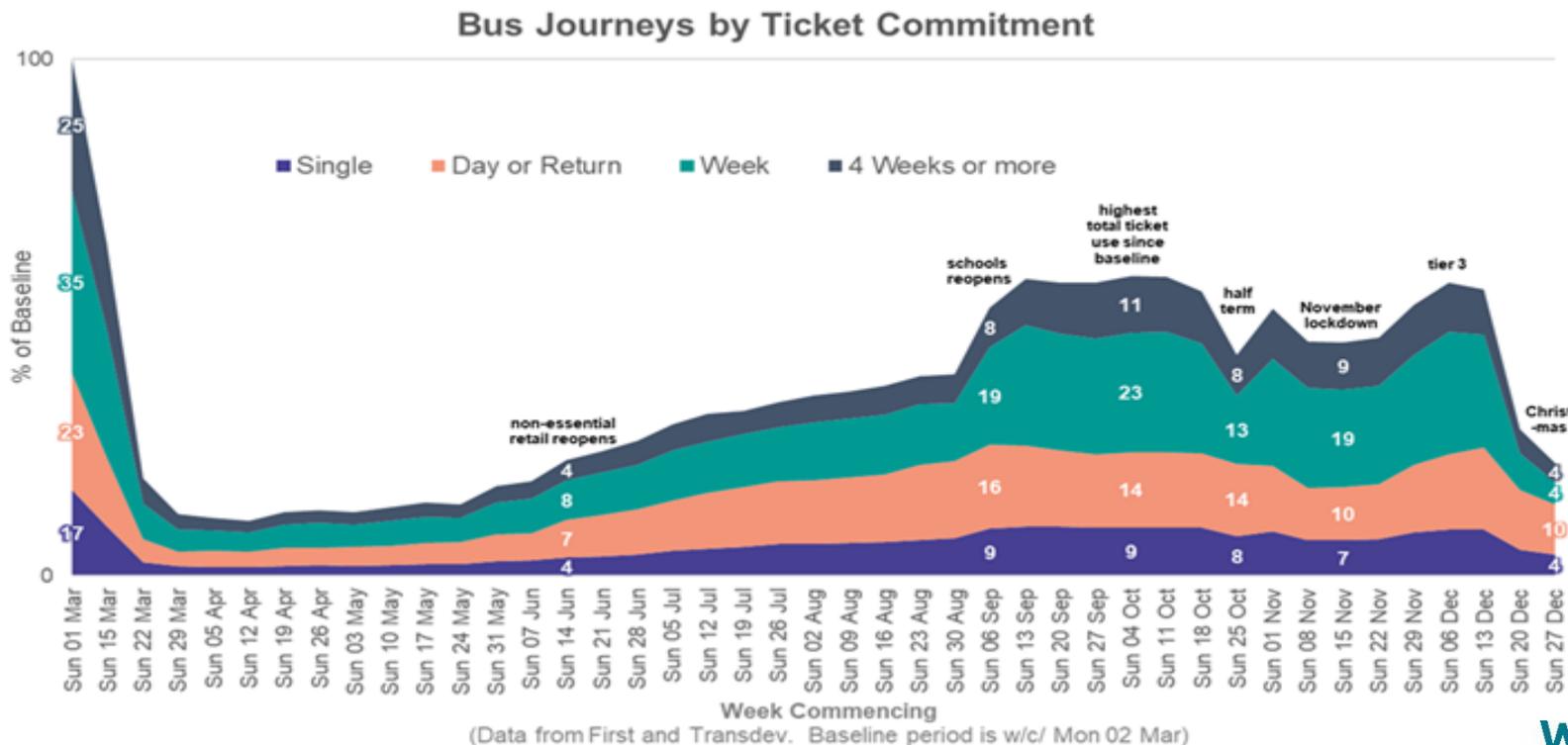
Data from First, Arriva, Yorkshire Tiger and Transdev



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.

On the approach to Christmas, the share bus journeys by ticket commitment shifted to shorter duration tickets (as expected)

The use of weekly tickets surged when schools reopened, dipped during half term, and slowly began recovering before the end of lockdown 2. On the approach and during the Christmas/New Year holiday period the share of bus journeys by ticket commitment shifted to shorter duration tickets (daily's or returns), reflecting a typical change in festive travel patterns.

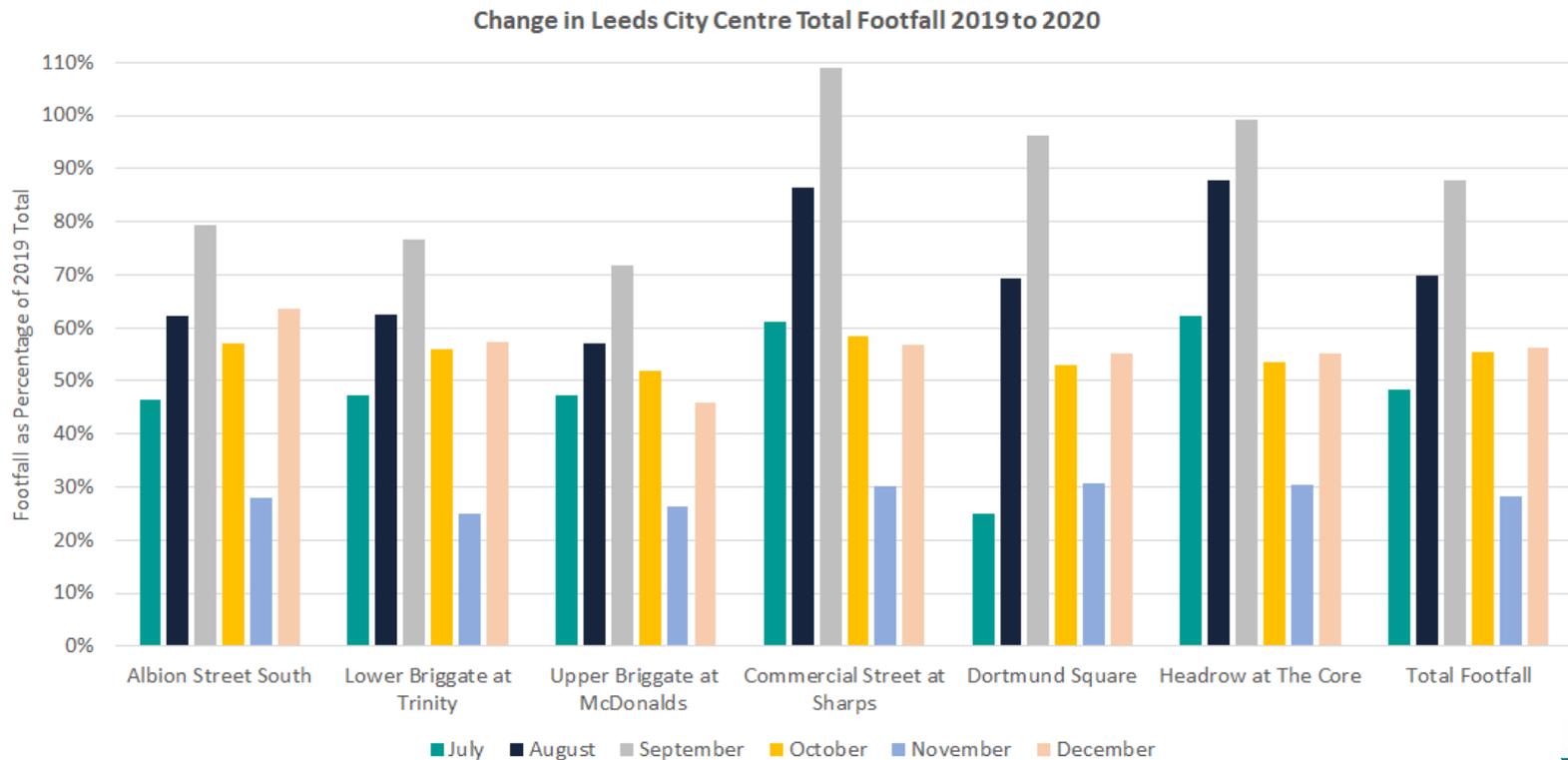


Baseline period is w/c Mon 02 Mar. Source: Bus operators electronic ticket machine data, passenger boarding locations in West Yorkshire. Graph shows First and Transdev.

Leeds City Centre footfall increased to 56% of equivalent 2019 levels following the end of Lockdown 2, but not as high level in Aug/Sept

As a result of the second national lockdown November footfall in Leeds City Centre fell to 28% of the levels at the same period in 2019. Following Leeds post-lockdown move to Tier 3, December footfall increased to 56% of 2019 levels.

When comparing equivalent periods in 2019, a higher proportion of people continued to visit the city centre during the second lockdown (35% of 2019 levels) than during the first lockdown (24% of 2019 levels).



Combined Authority COVID-19 Transport Survey Summary I

About the survey

The CA conducted 4 waves of telephone surveys of West Yorkshire residents during the summer, autumn and winter of 2020, aimed at exploring attitudes and impacts of COVID-19 on transport. The most recent survey was conducted between 25 November – 1 December (just before the 2nd Lockdown ended), and collected the views of a statistically representative sample of the West Yorkshire population (each wave involved 700 respondents with quotas for age, gender, ethnicity and district). The full report is available [here](#). Some headlines include:

Work and employment

- Compared to before COVID-19, around 40% of those in employment have seen their working hours altered; 17% are working more hours than pre-COVID-19, whereas 23% are working fewer hours (including 12% currently on furlough).

Travel Behaviour (compared to pre-COVID-19)

- Consistent avoidance of public transport for commuting over the four survey waves
- A shift to car (60% to 69%) for 'other travel into city centres', moving significantly away from bus (27% to 17%) and train (21% to 12%).

Walking and Cycling

- 1 in 3 respondents reported walking or running more than before COVID-19 (38% said about the same), and 1 in 3 reported cycling more than before COVID-19 (41% said about the same). The main reason cited for increased walking/running and cycling was for leisure or exercise, consistent across all waves.

Short term travel intentions (in the coming weeks compared to pre-COVID)

- 50% of respondents will travel by bus less, consistent across waves 1-4.
- 62% will travel by train less, which represents a significant increase compared to wave 3 (47%).
- 27% will walk more for utility purposes and 36% will walk more for recreation.
- Overall, 27% expect to travel by private car less (for any purpose); in contrast, 18% say they will do so more

Combined Authority COVID-19 Transport Survey Summary II

Short term travel intentions (in the coming weeks compared to pre-COVID) continued...

- The most common alternative to public transport is staying at home more instead (62%), consistent with previous survey waves.
- Over a third of respondents reported being very concerned about COVID-19 in general and over a fifth would be very concerned about using public transport over the coming weeks.
- Notably, the proportion of respondents most concerned about using public transport has reduced significantly since wave 1 (from 29% to 23%), whilst those not at all concerned has increased significantly (from 24% to 38%). The relative increase is greater from wave 3, signalling that people are becoming more comfortable with using public transport.
- Respondents intending to use public transport in the coming weeks are significantly less concerned about public transport usage than those not travelling by public transport in the near future and non-users.
- The majority of public transport users with an opinion (i.e., excluding 'don't know' answers) think the bus and rail networks are being managed well (63% and 58% respectively).
- The majority of respondents (58%) said they are unlikely to change their commuting times in the coming weeks; public transport users appear more inclined to change their times than other commuters.

Home working

- Significantly fewer respondents reported working at home (33%, compared with 47% in wave 1). Overall, significantly fewer women reported they were now working at home compared to wave 1, and fewer younger people (aged 16-34) reported home working.
- Consistently with previous waves, a significantly greater proportion of respondents (61%) found home working to be a positive experience, compared to only 12% who saw it negatively. Interestingly, in this latest survey, significantly fewer people aged 16-34 reported a positive home working experience (45%, compared to 69% in the 35-64 age group).
- The latest survey provides further evidence of a sustained preference for more home working in the long term; 62% of respondents said that in the long term, they are likely to work at home more often than before COVID-19.