

COVID-19 Fortnightly Insights Report

Research & Intelligence
9th July 2021



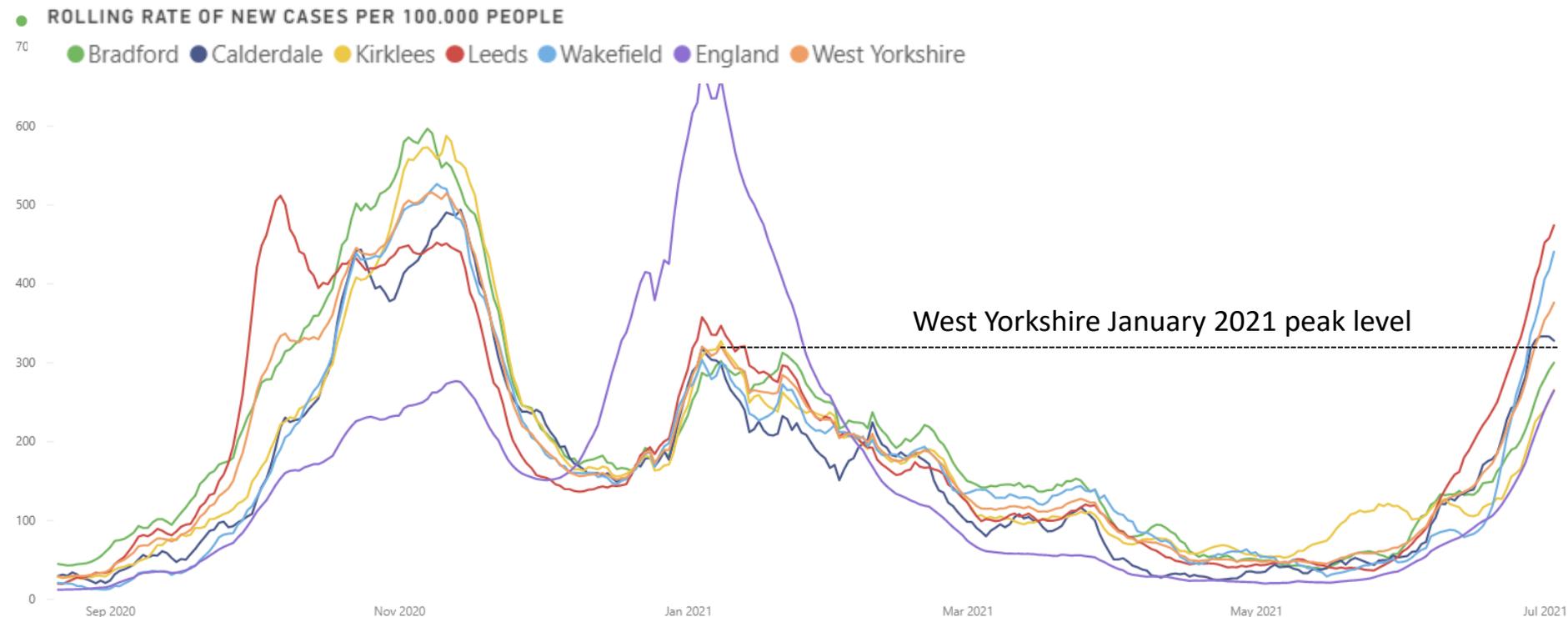
Executive Summary – Economic Impact

- Vacancies advertised online in West Yorkshire increased by 17% in the week to 3rd July, taking it to its highest level since the pandemic began.
- Official data from HMRC shows that furlough use fell to 8% in May in West Yorkshire, and more recent data from the Office for National Statistics (ONS) suggests a further fall in furlough use nationally to 6% in late June. The same ONS survey suggests 64% of workers are now in their usual workplace – higher than at any point in the pandemic.
- The Quarterly Economic Survey (QES) with the Chambers of Commerce in Leeds City Region shows a rebound in business confidence in Q2 driven by strong domestic sales. Businesses face significant cost pressures however which are likely to lead to price rises.
- There remain significant challenges, however. The HMRC furlough data shows 72,000 jobs still furloughed in May in West Yorkshire – with particular concentrations in hospitality, arts and entertainment.
- Business liquidations have increased by 20% in West Yorkshire after a period of recent stability.
- Town centre activity has levelled off after a peak in early June, and the QES suggests a majority of businesses anticipate staff will continue to work from home to some degree in the future.

Executive Summary – Transport Impact

- Nationally, motor vehicle use over recent weeks remained mostly stable, with weekday values near baseline levels and weekend peaks appearing to decline. Bus use shows a recent slight decline while rail shows a notable drop (but the most recent week of rail data is subject to revision), with similar trends occurring locally.
- In May weekend footfall in Leeds City Centre recovered to 2019 levels, while weekday footfall recovered less quickly, reaching 61% of pre-pandemic levels.
- Levels of walking / running (recorded via Strava app) have fallen following the surge in the height of lockdown at the start of 2021, but remain higher than 2019.
- The headlines from the latest [COVID-19 Transport Recovery Survey results](#) include:
 - Falling concern about using public transport overall
 - Tentative signs of a transition back towards pre-pandemic usage for some modes although significant differences remain, some of which are likely to be permanent
 - Growth in the number of people walking or running for a range of journey purposes the results indicate these changes are likely to be sustained in the future.
 - Home working sentiments remain positive with the expectation of more home-working long-term (relative to pre-pandemic)
 - In the long term, a 17% reduction in commuting trips –relative to pre-pandemic– is expected, a drop that is significantly higher (29%) among rail commuters.
 - A substantial reduction in the 5-day a week commute in the long term is anticipated, with more people commuting between 1-3 days a week.

Virus prevalence – West Yorkshire trend



As of the 3rd July 2021, the 7-day moving average **West Yorkshire COVID-19 rate was 375.7 per 100k, exceeding the January 2021 peak.** There were 8,762 new cases recorded in West Yorkshire in the week to the 3rd July, an increase of 47% compared to the week before. In the same period, the rate in Yorkshire and the Humber increased by 69% to 333.2 per 100k and the rate in England increased by 65% to 263.9 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.

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.

West Yorkshire COVID-19 Dashboard

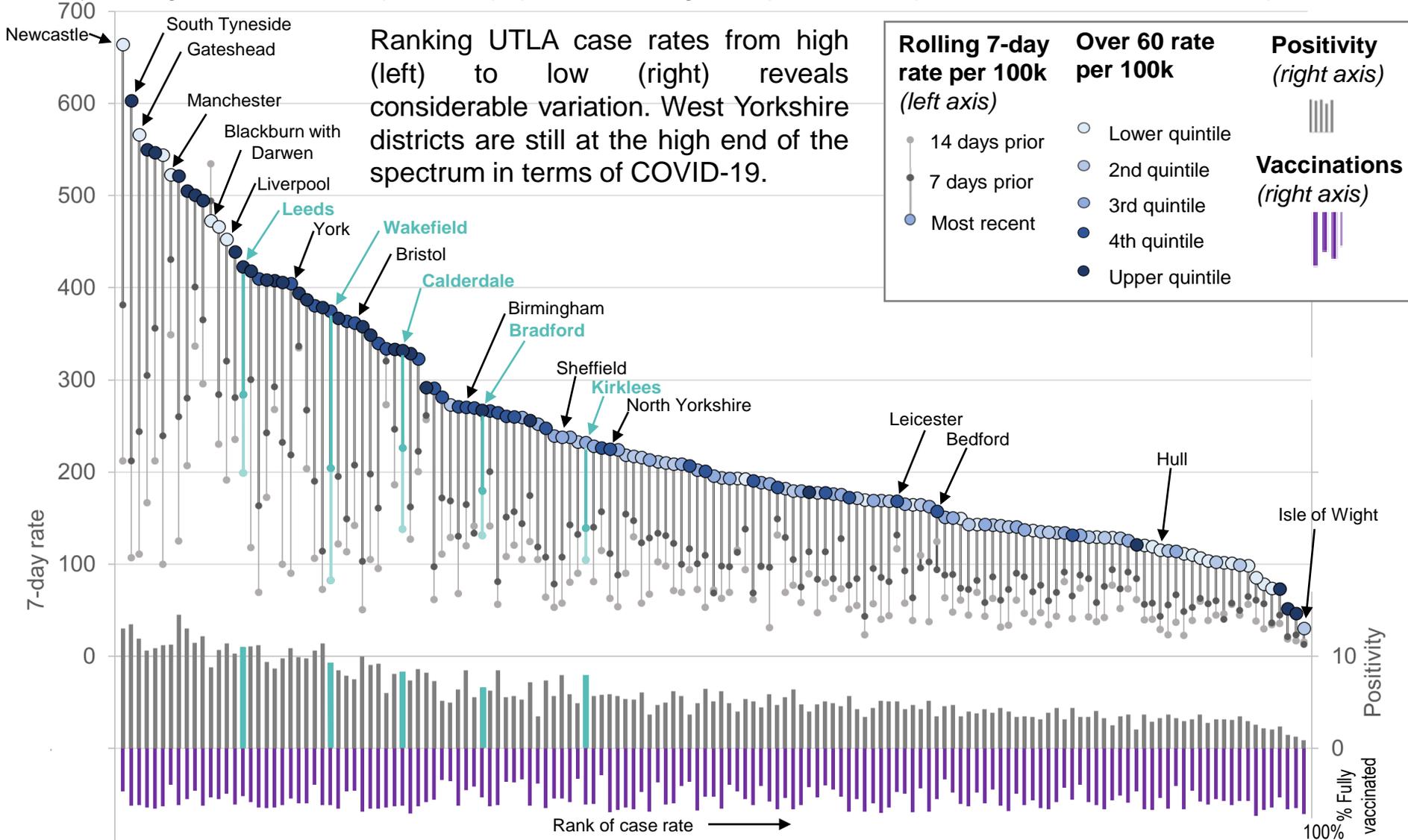
Case rate data up to:
03/07/2021

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	50	299.4	↑ 49	1616	56326	10435	1097	203
Calderdale	41	327.3	↑ 24	692	17331	8196	312	148
Kirklees	61	264.9	↑ 60	1165	39942	9082	811	184
Leeds	18	473.6	↑ 43	3756	76378	9630	1335	168
Wakefield	23	440.1	↑ 58	1533	30787	8839	770	221
West Yorkshire		375.7	↑ 47	8762	220764	9515	4325	186
England		263.9	↑ 65	148555	4362481	7750	112858	201

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

COVID-19 Rates for Upper Tier Local Authorities (UTLAs)

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

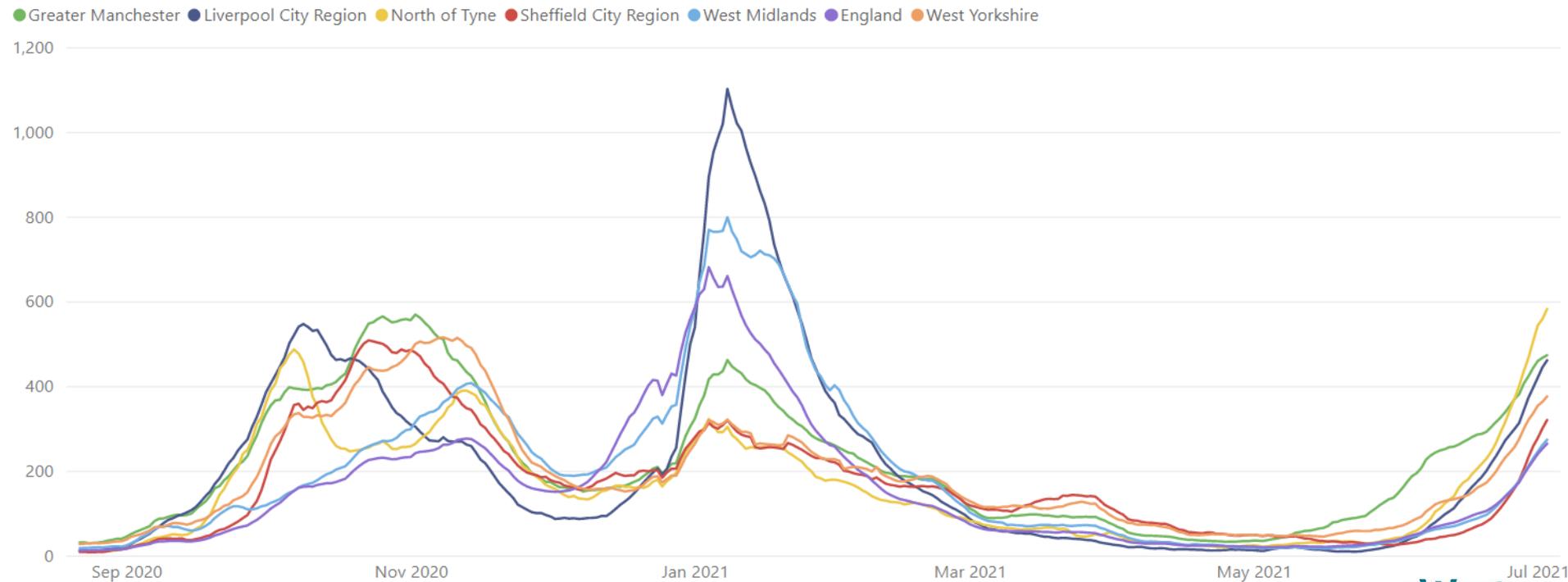


Blue points show latest COVID-19 case rate per 100k across UTLAs as of the 30th June (left Y-axis). Vertical bars connected to these points denote rate last week (dark grey) and the week before (light grey). Point colour denotes the COVID-19 rate per 100k in the over 60s. Grey bars at the bottom denote positivity (%) up to the 30th June (right Y-axis). Purple bars at the bottom denote the percentage of adults who are fully vaccinated up to 4th July (right axis). Interactive, alternative version here: [COVID-19 West Yorkshire Dashboard - Power BI](#)

Cases continuing to increase in MCAs

North of Tyne, Greater Manchester and West Yorkshire now have higher case rates than during the January peak. In comparison MCAs, in the week to the 3rd July, case rates increased most in Sheffield City Region (by 102%), and case rates are currently highest in North of Tyne (582 per 100k), Greater Manchester (472 per 100k) and Liverpool City Region (460 per 100k).

Rolling Rate of new cases per 100,000 people

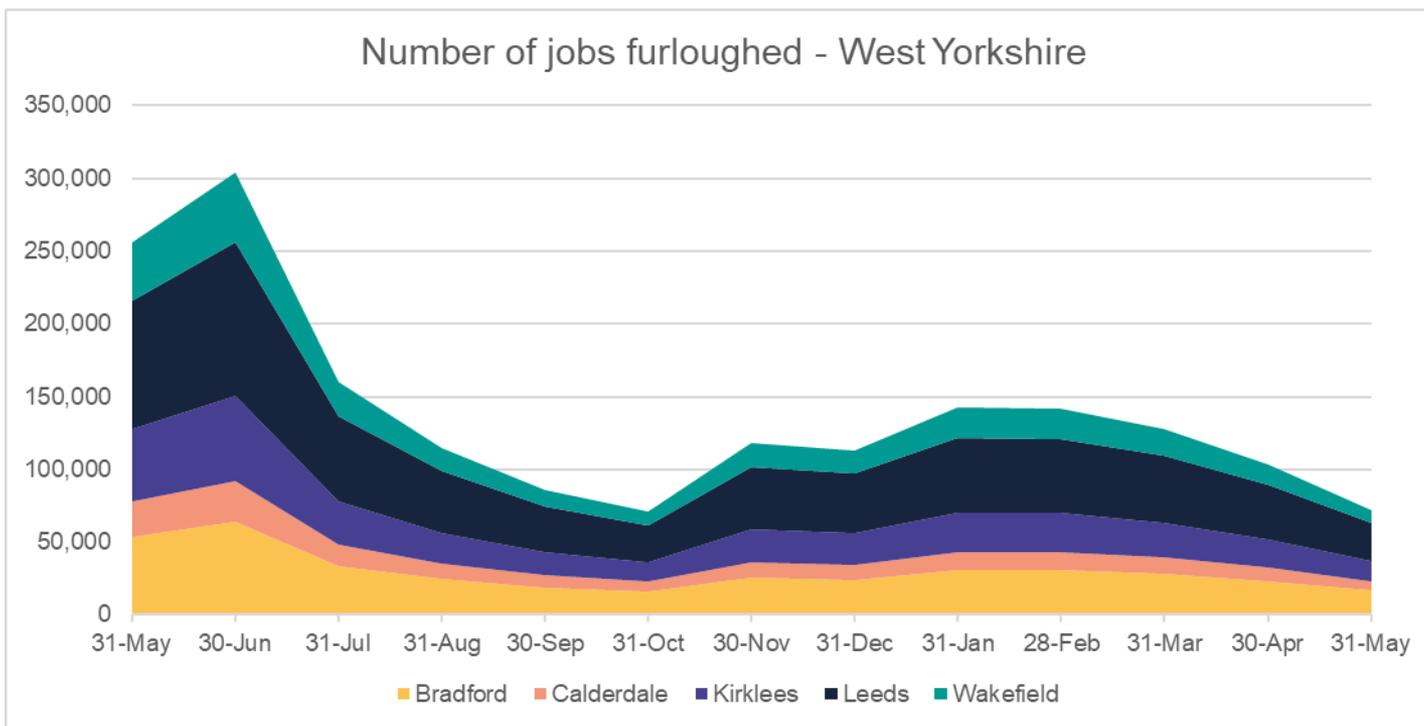


Economic Insights



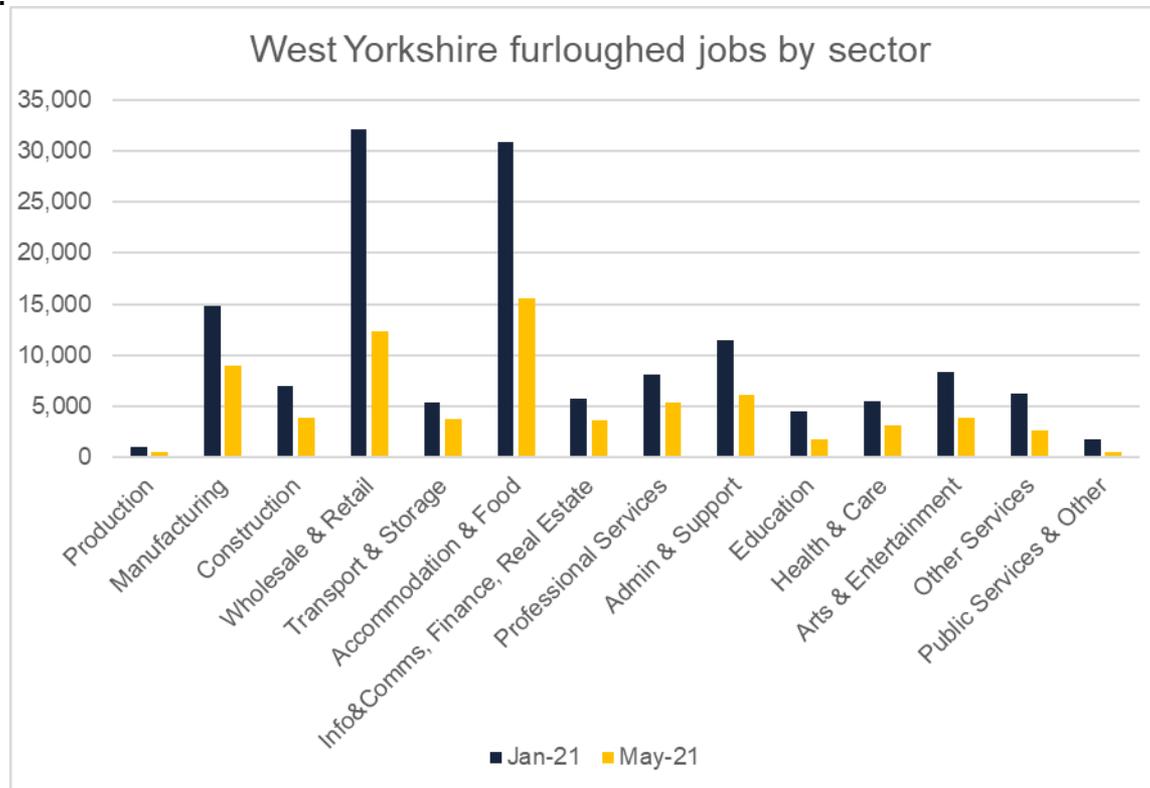
West Yorkshire furlough use in May at lowest level since scheme began

72,000 jobs were furloughed in West Yorkshire at the end of May, according to data from HMRC. This is the lowest level in the Job Retention Scheme's existence, and is 76% lower than its peak of 304,000 in June 2020. It is down from 103,000 the previous month. 8% of eligible jobs were still on furlough at the end of May in West Yorkshire, in line with the figure for England and for comparator areas such as Greater Manchester. The furlough rate is similarly consistent across West Yorkshire local authorities, though it is slightly lower in Wakefield at 6%.



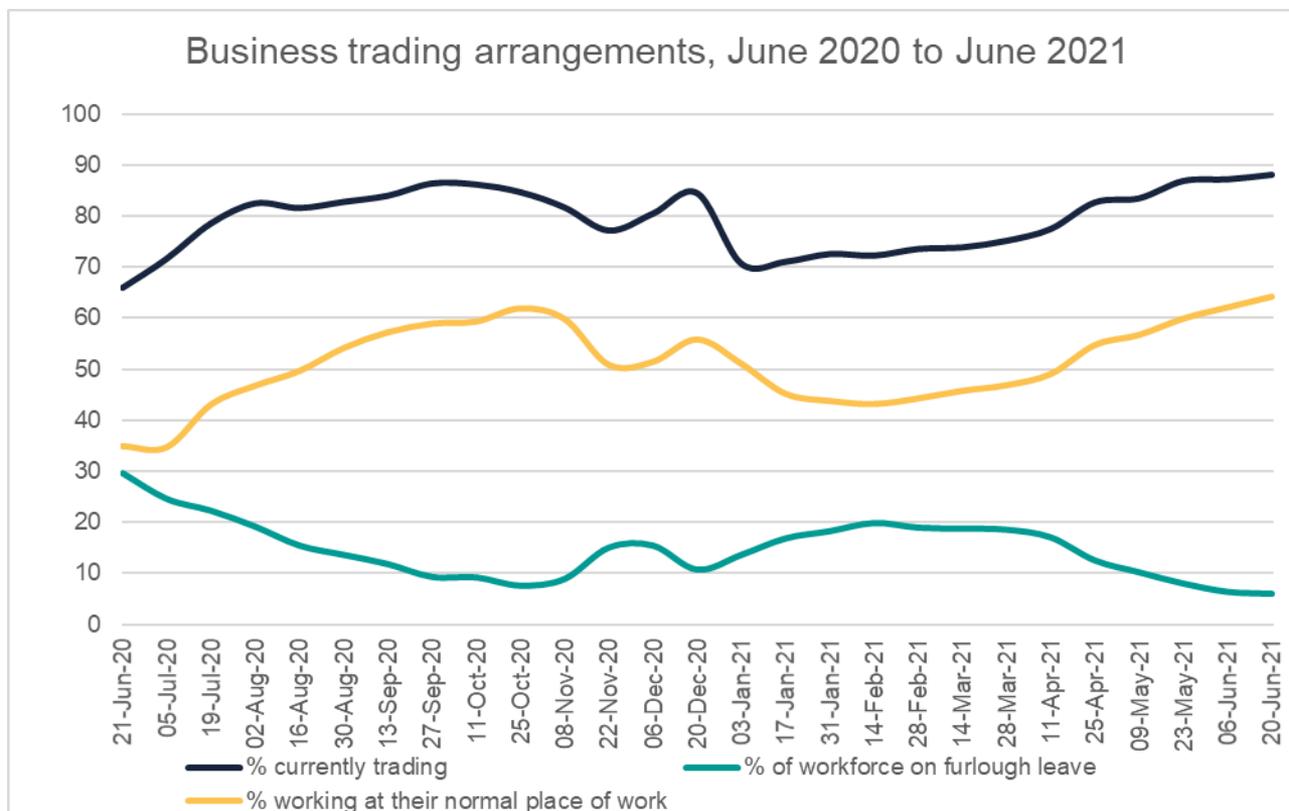
Furlough use falls across sectors, still disproportionately high in arts & hospitality

All sectors in West Yorkshire have seen furlough use fall substantially from its recent peak in January. The wholesale & retail sector has seen the biggest fall, down by 19,800 (62%) since January. The sector still had 12,300 jobs on furlough in May, the second highest total. This largely reflects the scale of the sector however – it accounts for 17% of furloughed jobs and 15% of total jobs. Despite a 50% fall, the accommodation & food sector still had most jobs furloughed at the end of May – 15,600, 21.7% of furloughed jobs, far higher than its 5.6% share of total employment. The arts & entertainment sector is also still over represented despite a 54% fall, with 3,800 jobs still on furlough – 5.3% of the total, more than double its 2.2% employment share.



Further slight increase in economic conditions in late June

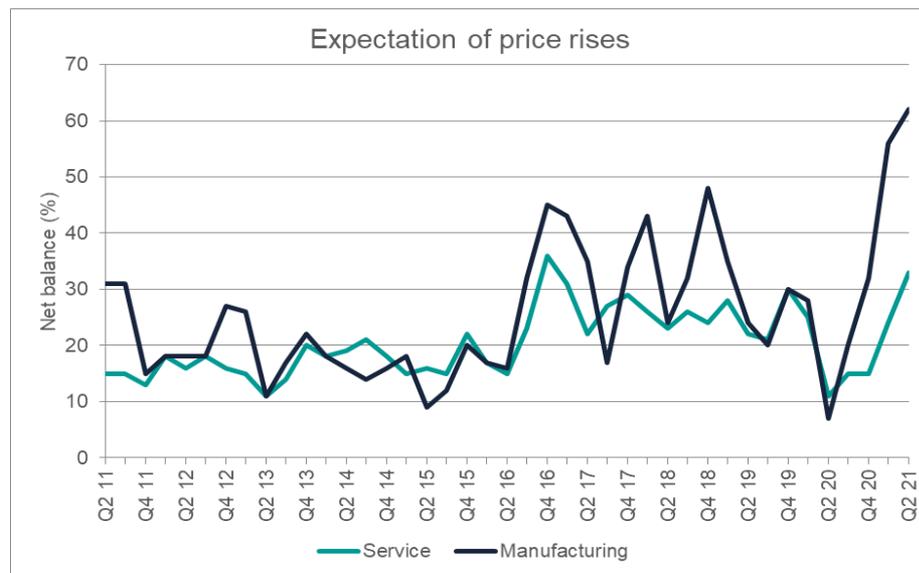
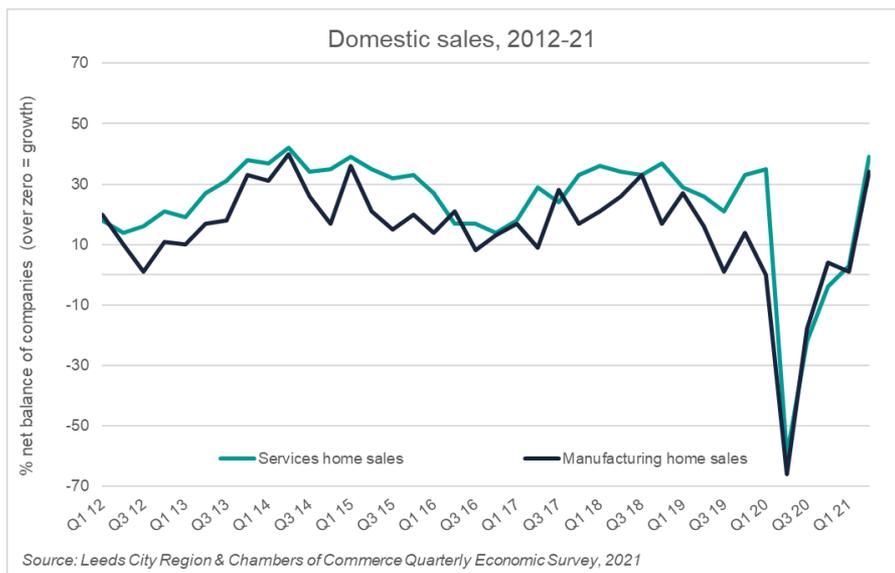
There were further slight increases in trading activity in late June according to the latest ONS Business Insights and Conditions Survey (BICS). The proportion of businesses currently trading increased from 87% to 88%, and furlough use dropped from 6.5% to 6%. The proportion of people in their usual workplace increased to 64%, up 2%. These increases reflect slight improvement on a fortnight earlier, which itself was the highest point since comparable data began in June 2020.



*Source: ONS Business Insights and Conditions Survey

Chambers' QES: Domestic recovery strengthening, but significant cost pressures

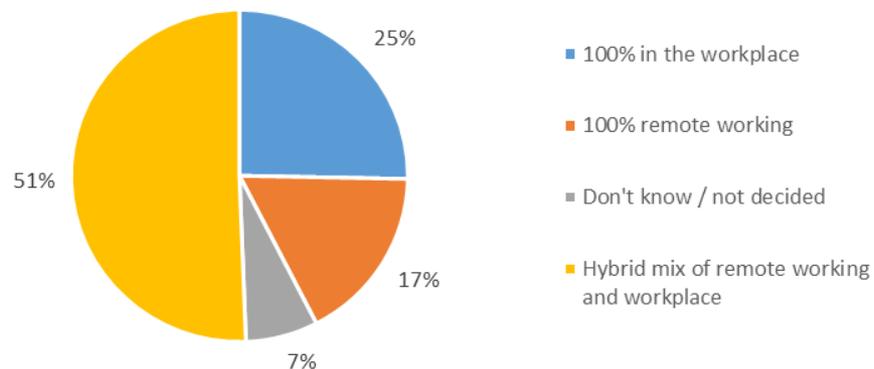
The Chambers of Commerce Quarterly Economic Survey for Q2 2021 generally shows a recovery in economic activity, particularly among domestic sales, as lockdown has eased. This appears to be feeding through into higher confidence, and positive impacts on employment and recruitment, though some report skills shortages. Businesses report significant cost pressures, however. Manufacturers in particular are reporting significant challenges securing components, raw materials and construction products, with further cost pressures being driven by rising shipping costs. This is feeding through into higher prices, with expectations of price increases at its highest level in this survey's 32 year history.



Source: Chambers of Commerce Quarterly Economic Survey, Q2 2021

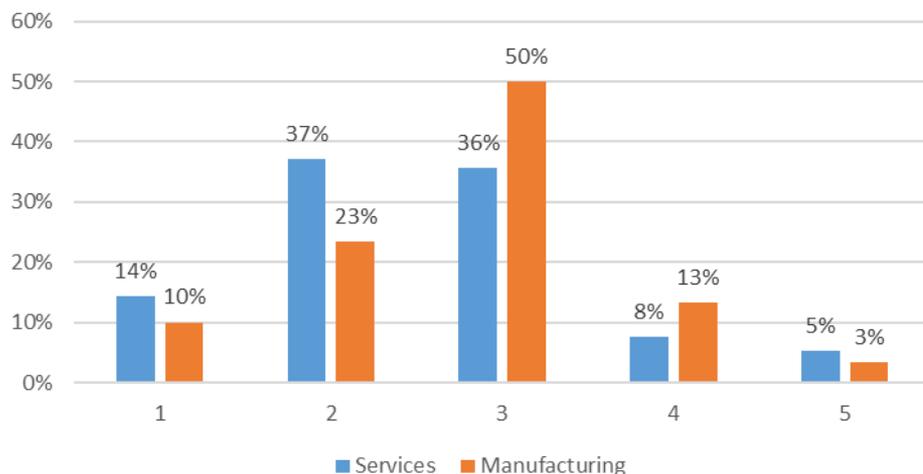
Chambers' QES: Most businesses not going back to 5 days a week in the office

Services Future Working Arrangements



- The QES also asked questions about businesses' plans for returning to the workplace. As might be expected, a majority of manufacturers expect all or most of their staff to be on site in future.
- But among service sector companies, only a quarter expect a 100% return and 17% say they will be 100% remote working (though many of these are microbusinesses with 1-2 staff).
- Half of service sector companies expect to adopt a hybrid model – a mix of office and home working - and three quarters of these expect staff in only two or three days a week.

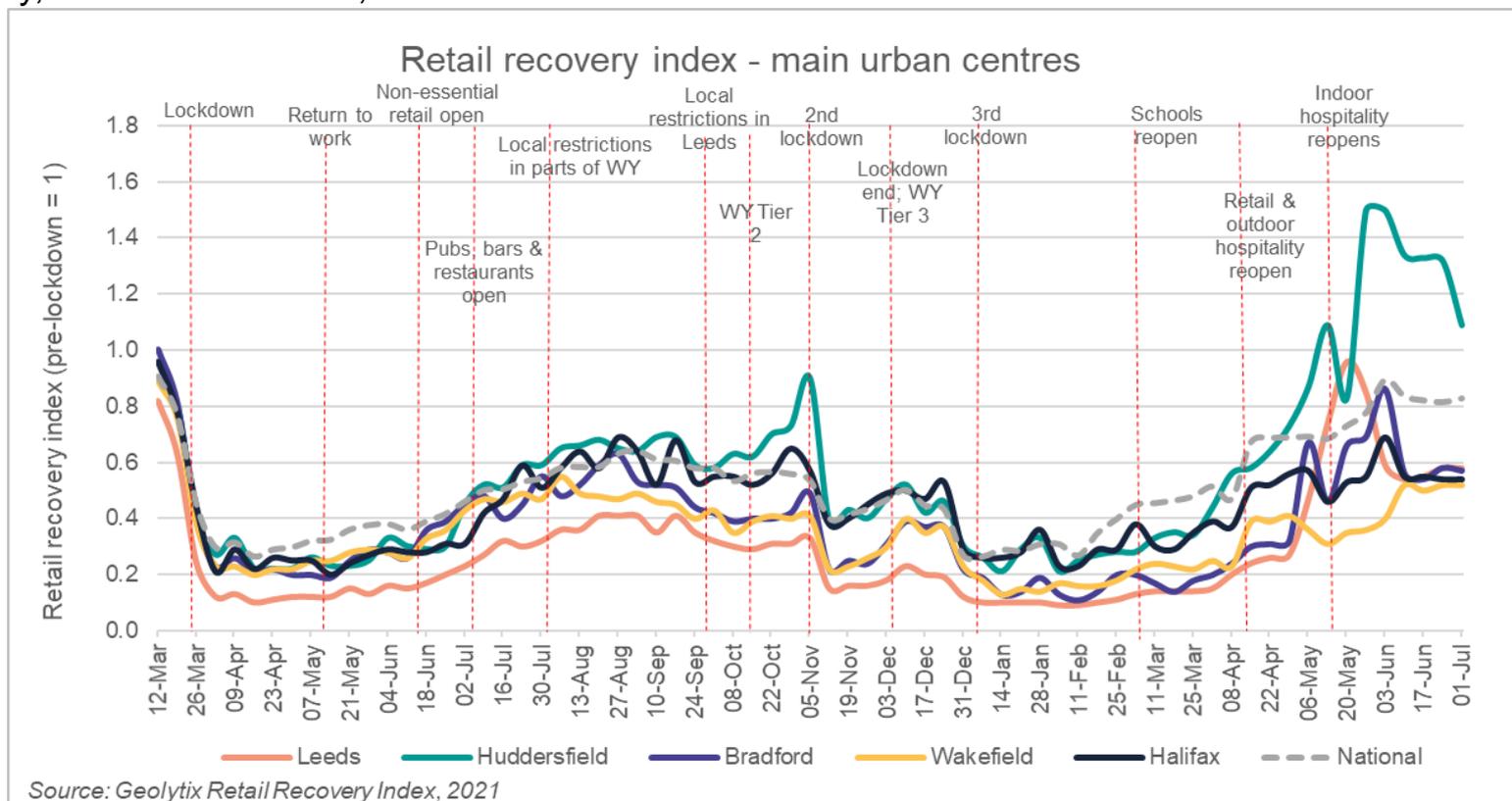
Number of days employees expected to be in the workplace



Source: Chambers of Commerce Quarterly Economic Survey, Q2 2021

Town and city centre activity stabilises below recent peak

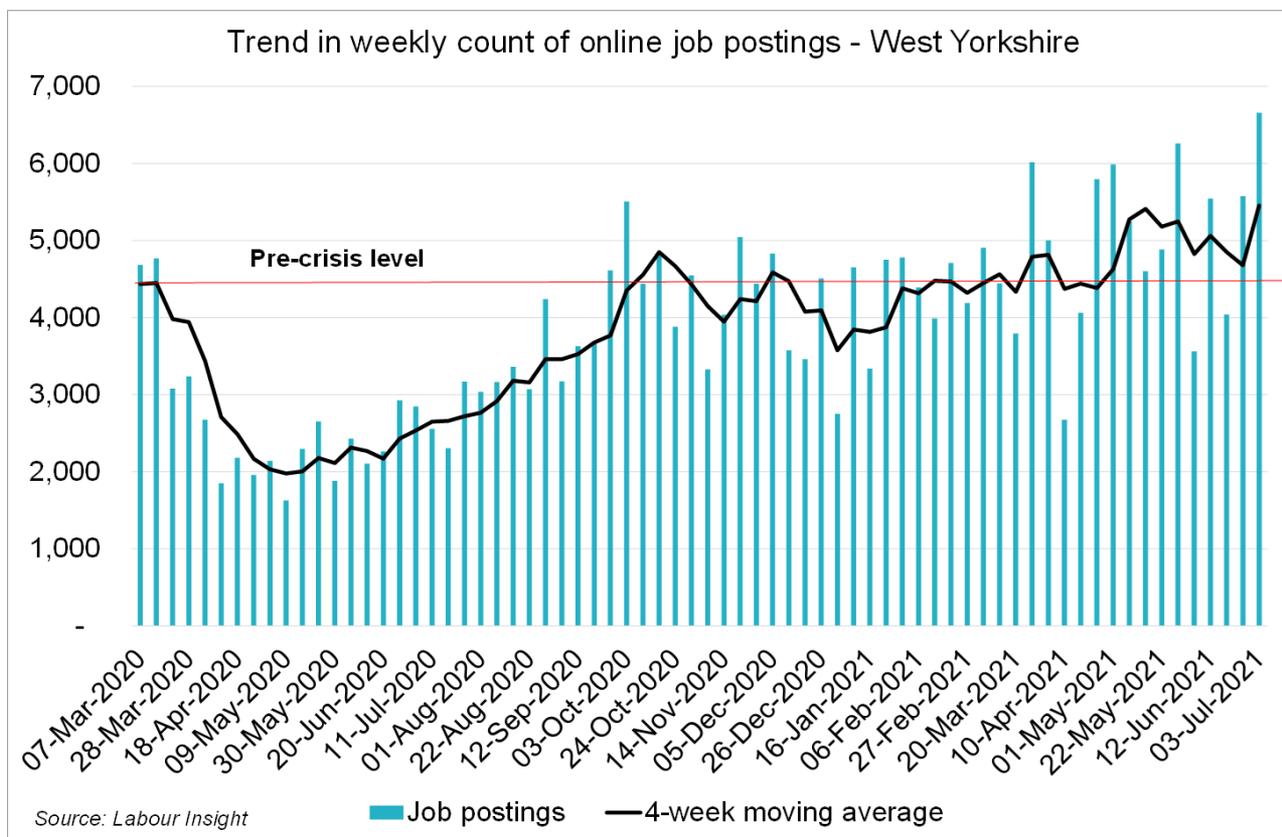
Activity in four of West Yorkshire's five main urban centres remained stable in the week to July 1st, according to Geolytix's retail recovery index. The exception was Huddersfield where activity dipped from 32% above its pre-pandemic baseline to 9% above. The other centres saw little change in the past week, and are all between 52% (Wakefield) and 58% (Leeds) of their respective baselines. The picture is similarly stable nationally, at 83% of baseline, and in West Yorkshire's smaller centres.



Source: Geolytix Retail Recovery Index, 2021

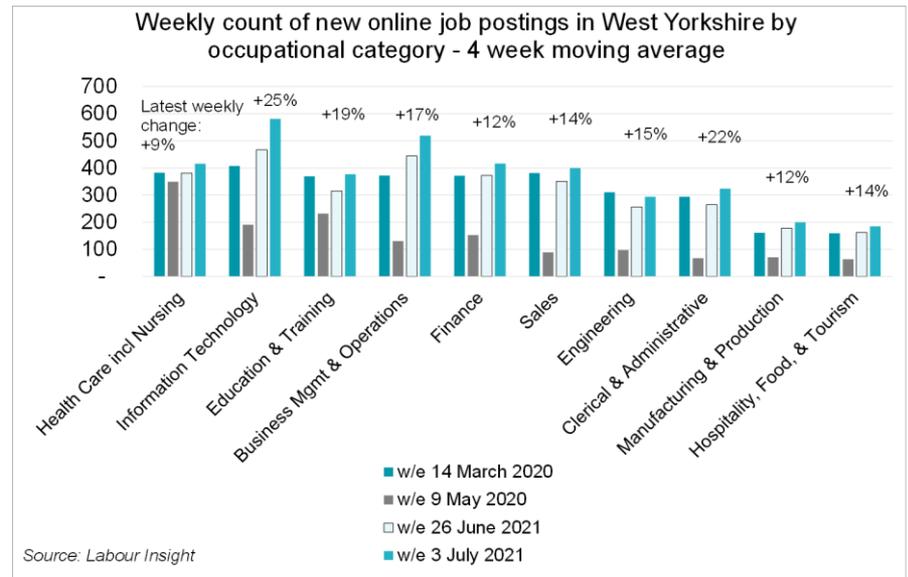
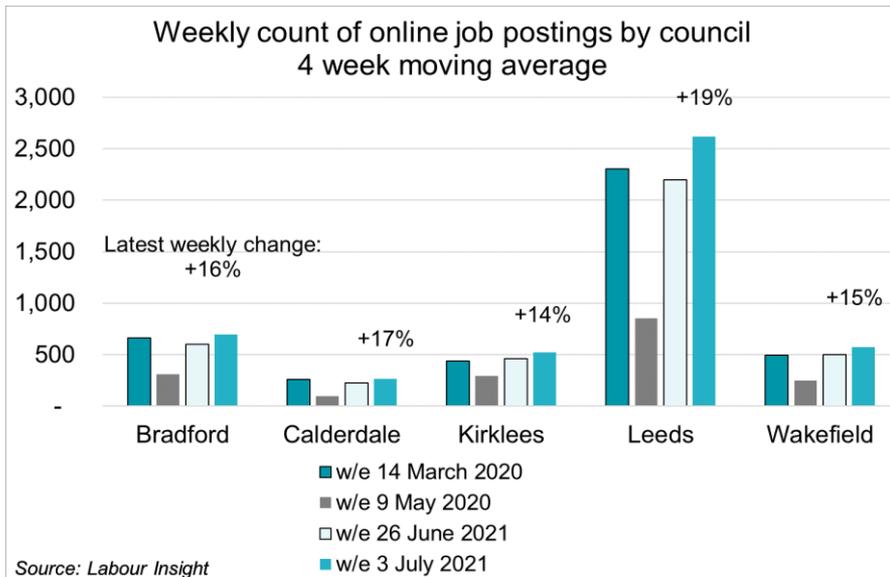
Big rise in the vacancy count

The number of vacancies for jobs in West Yorkshire posted online during week ending 3 July grew by 17% compared with the previous week, based on a 4-week moving average (national average growth: also 17%). The unadjusted weekly count was the highest since the pandemic began, although this in the context of considerable volatility in recent weeks. The moving average has now been above its pre-crisis level (week ending March 14 2020) for 11 straight weeks, pointing towards a sustained recovery in the labour market.



Double-digit percentage increases in job postings for all local authorities

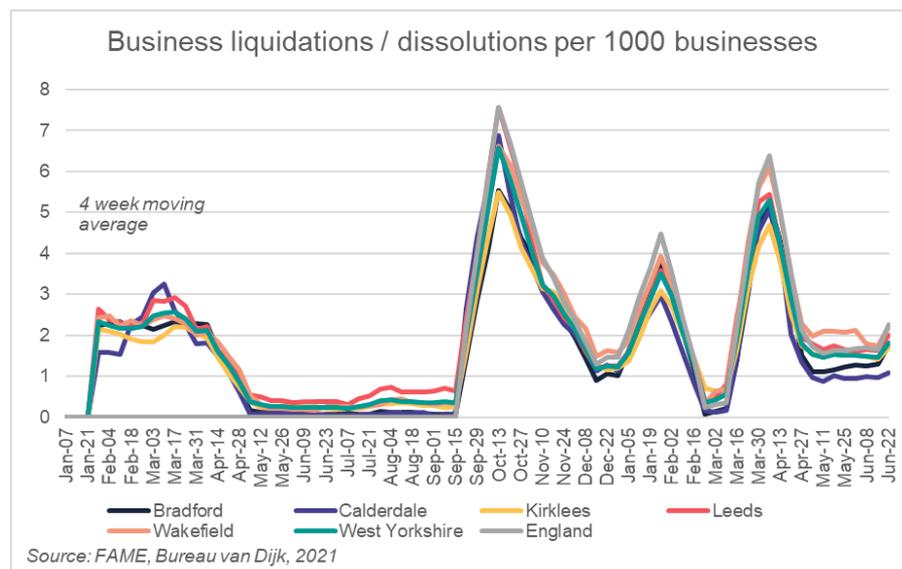
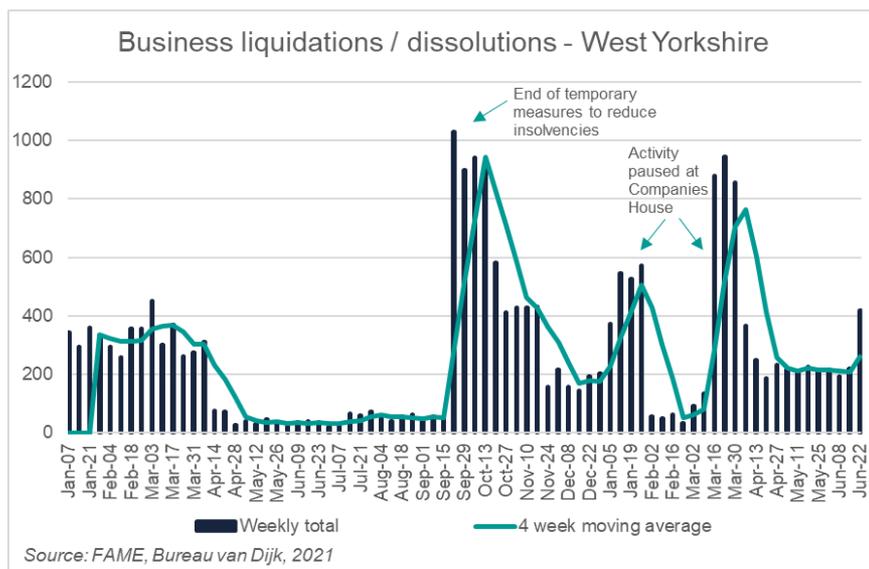
All local authority areas saw a substantial increase in job postings in the latest week, based on the moving average, ranging from 15% in Wakefield to 19% in Leeds. All local authorities registered vacancy counts above their pre-crisis levels in the latest week, with Kirklees, Leeds and Wakefield substantially higher.



All occupations, except Health Care recorded an increase of more than 10% in their postings count for the latest week, based on a 4-week moving average. All categories except Engineering have at least returned to their pre-crisis level and some are significantly higher, including Information Technology and Business Management and Operations.

Business liquidations increase in mid-June

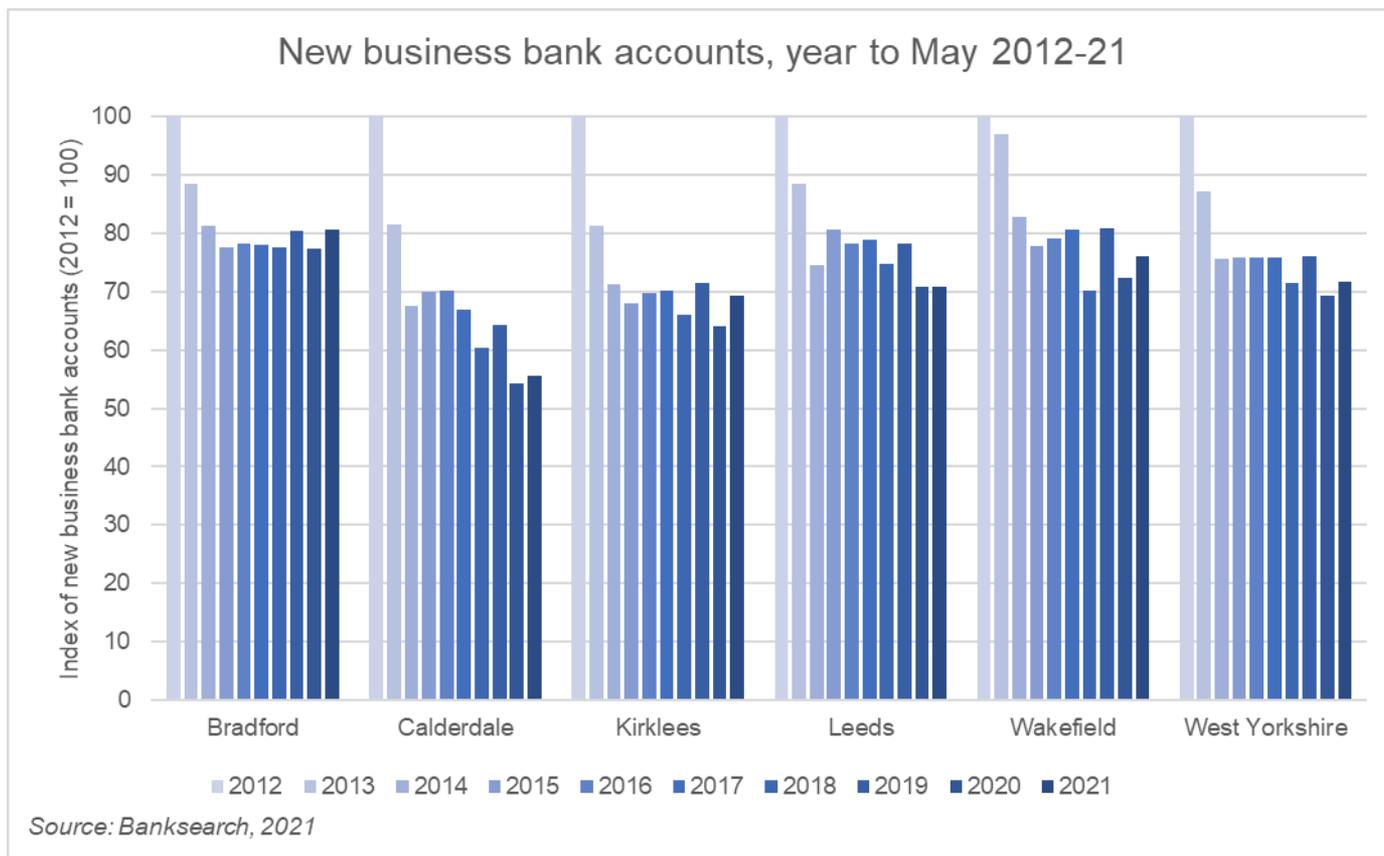
There were 262 business liquidations in West Yorkshire up to the week ending 22nd June, based on a four week moving average, according to data from Bureau van Dijk's Fame database. This is up 21 % from the preceding four week period and was driven by a single week increase to 418 liquidations between 16-22 June, compared to 219 the preceding week. The sector breakdown of liquidations remains similar to in recent weeks, suggesting the increase is not due to sector specific issues. There has been an 40% increase in the national four week moving average over the same period. At local authority level, the latest four week moving average is up 45% in Bradford but up just 7% in Wakefield. Most West Yorkshire local authorities have seen around 2 liquidations per 1,000 businesses in the week to 22nd June though it is lower in Calderdale (1.1).



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

New business bank accounts up slightly on 2020

There have been 5,140 new business bank accounts opened in West Yorkshire in the first five months of 2021, according to data from Banksearch. This is up 3.4% on the corresponding period of 2020, but down 5.9% on 2019. Kirklees has seen the biggest increase compared to 2020, up 8%. At the other end of the scale, the number of new accounts opened in Leeds is unchanged.

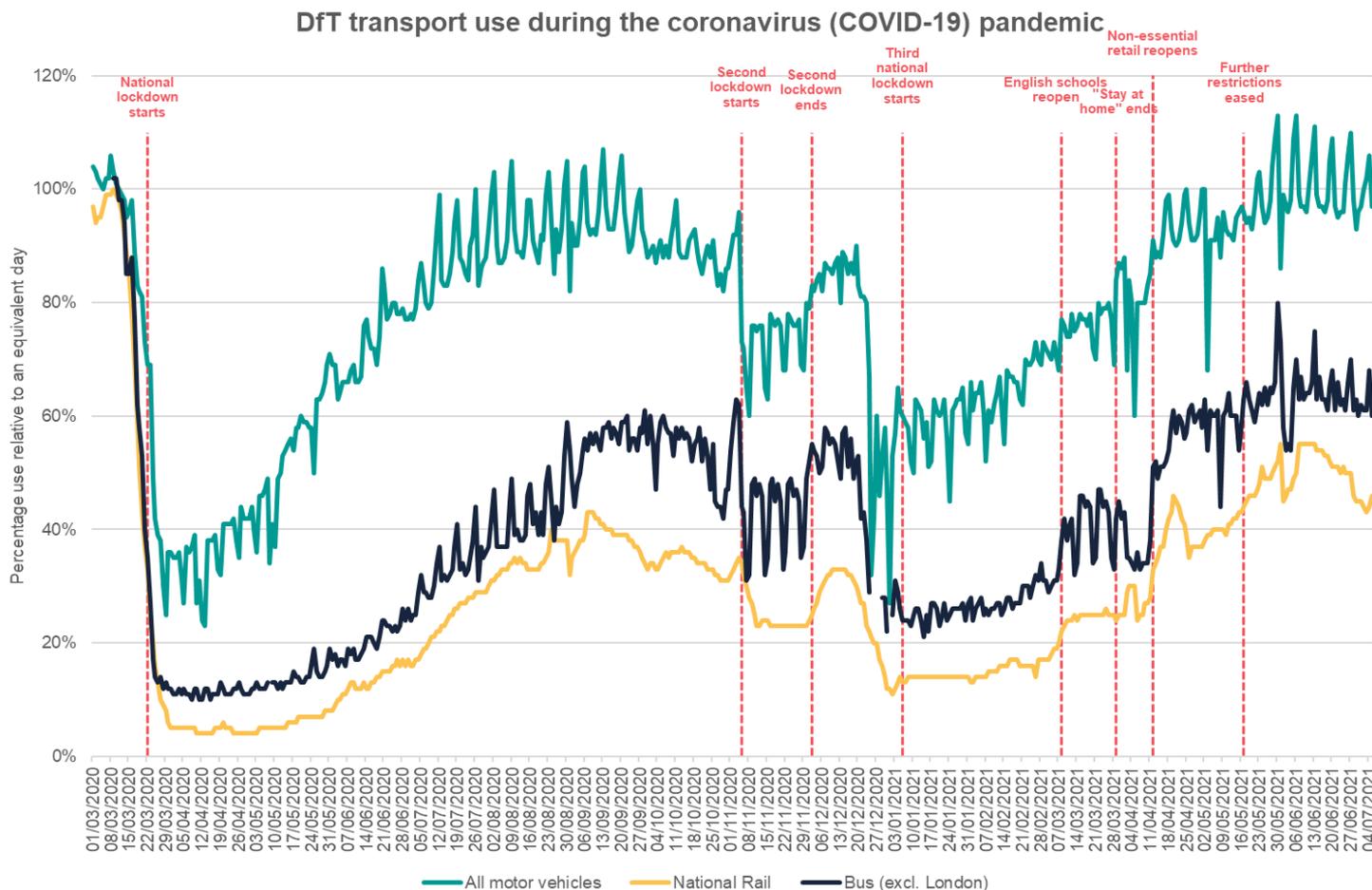


Transport Insights



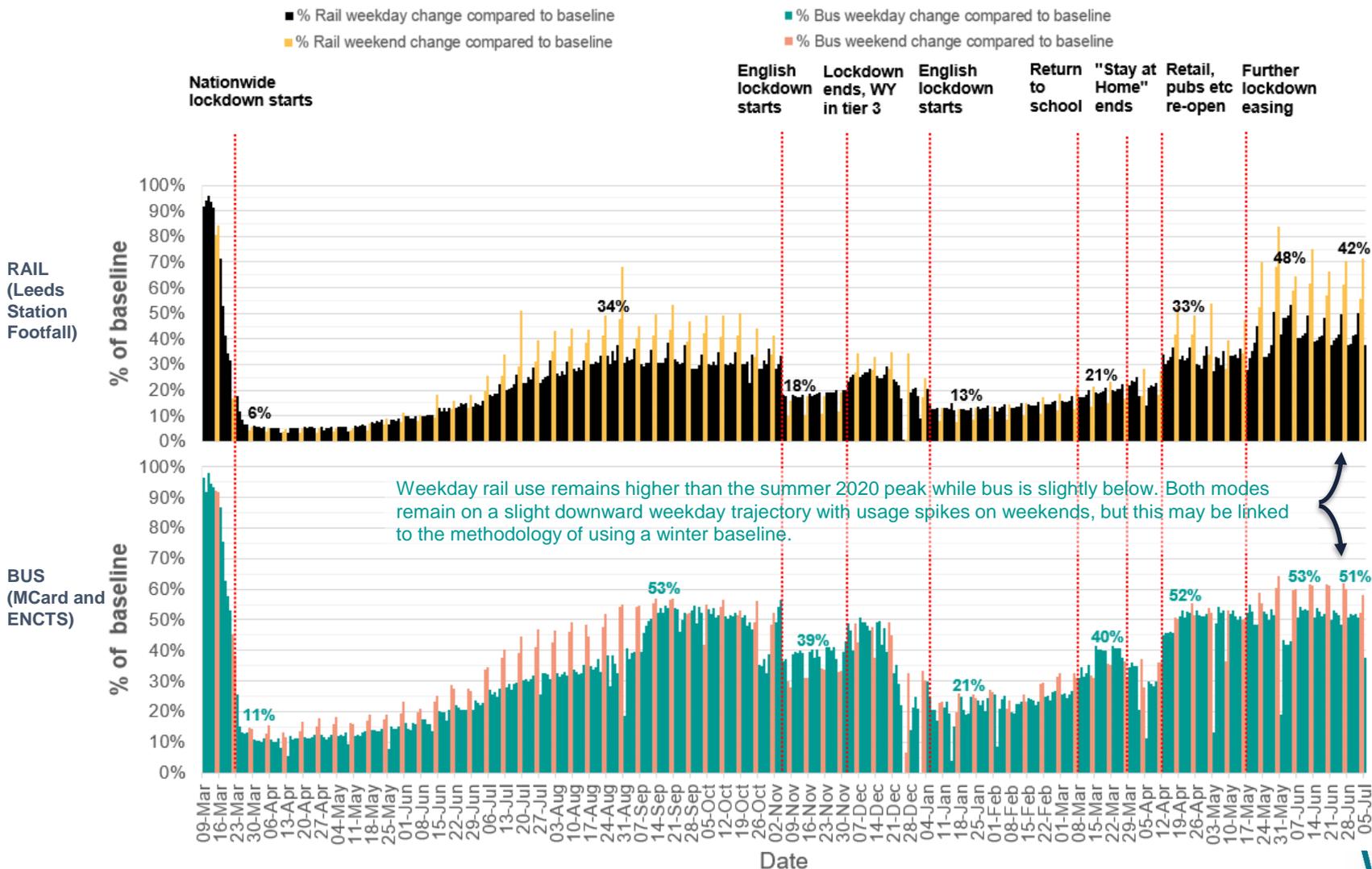
National transport use declines slightly over recent weeks

Motor vehicle use over recent weeks remained mostly stable, with weekday values near baseline levels and weekend peaks appearing to decline. Bus use shows a recent slight decline while rail shows a notable drop, but the most recent week of rail data is subject to revision. Similar trends occur locally.



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

Local bus and rail proxies show slight weekday declines over recent weeks



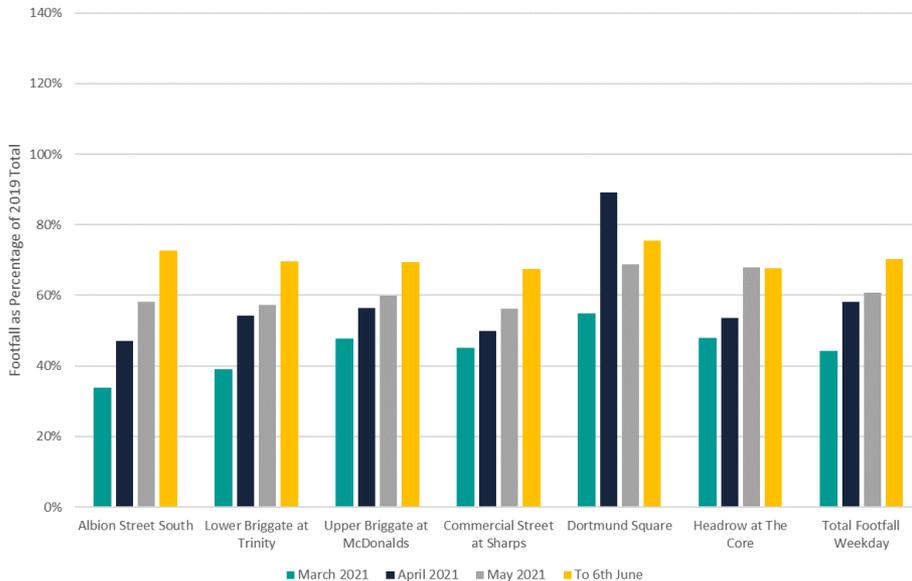
Baseline period is Monday 2nd - Friday 6th March 2020 (weekdays) and 29th Feb -1st March and 6th-7th March (weekends)

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

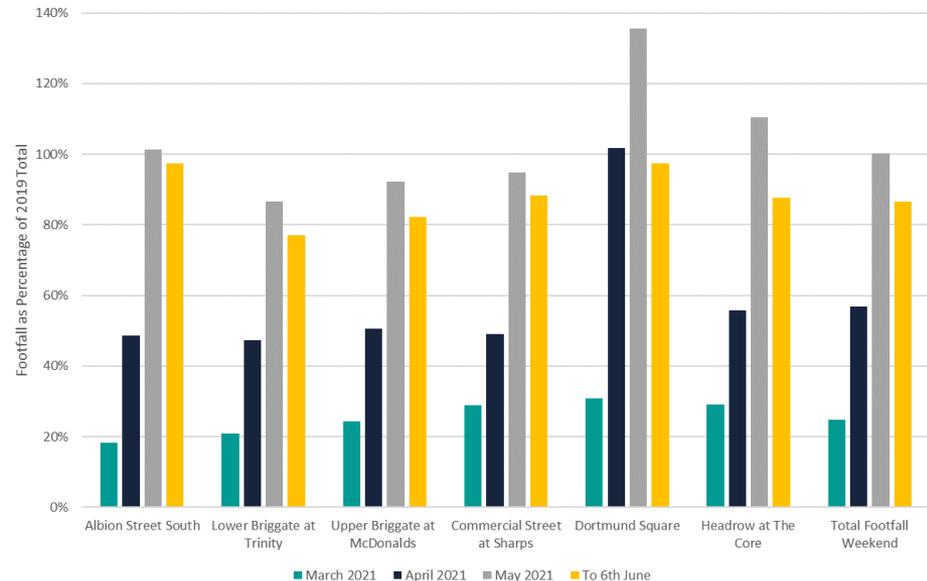
Increased Leeds City Centre Footfall Driven by Weekend Visitors

- While total weekday footfall in Leeds City Centre remains below pre-pandemic levels, May saw weekend total footfall exceed to 2019 levels for the first time.
- Weekday total footfall was 61% of the May 2019 total, a slight increase on April where footfall reached 58% of pre-pandemic levels.
- The rise weekend footfall is no doubt in response to non-essential shops reopening on 17th May and shows that people are wanting to return to city centre retail and leisure.

Weekday Change in Leeds City Centre Total Footfall 2019 to 2021



Weekend Change in Leeds City Centre Total Footfall 2019 to 2021

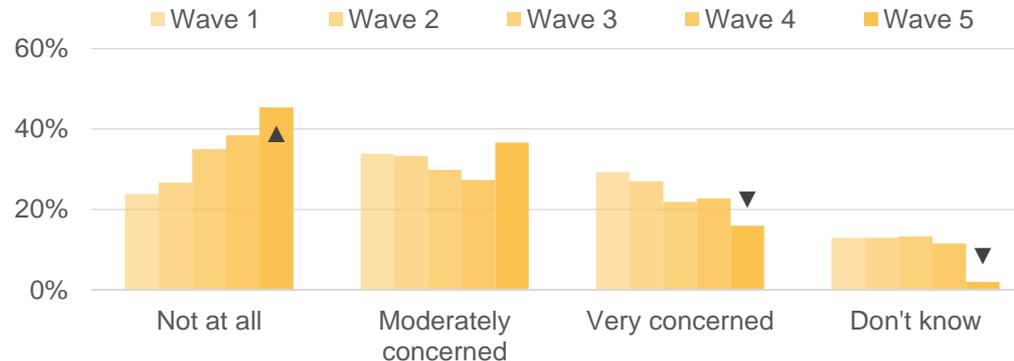


COVID-19 Transport Recovery Survey – Public Transport Concern falling

In response to the COVID-19 pandemic, we have been running a COVID-19 Transport Recovery Survey series since last June, and this week we published the latest results (wave 5). Fieldwork was conducted between 7th -18th June 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](#)) and headlines include:

- Concerns about using public transport have eased during the pandemic, although some differences by age groups remain; those aged under 34 are 64% more likely than those aged over 65 to be 'not at all concerned' about using public transport.

Concern about using public transport



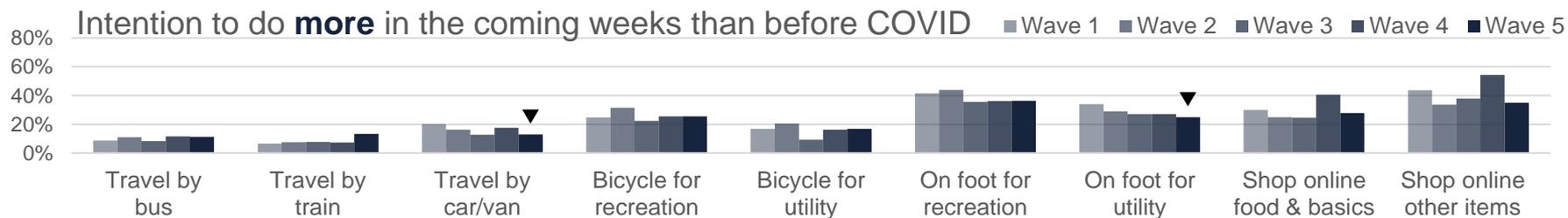
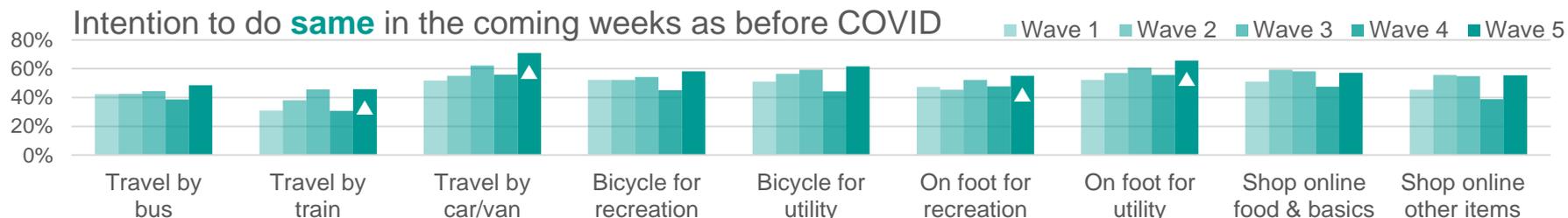
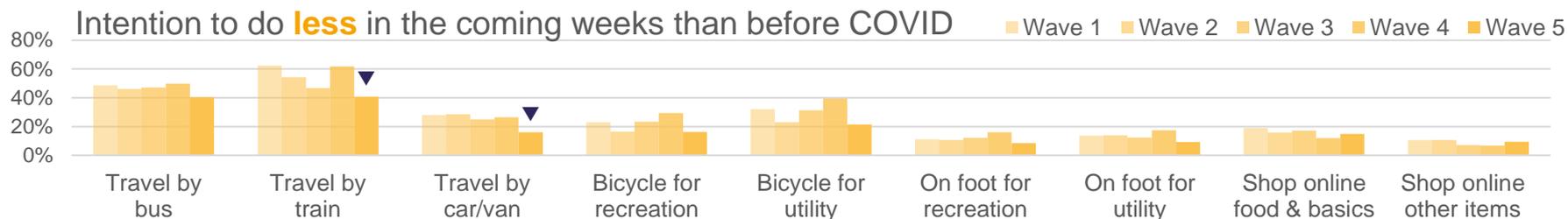
For further information about this survey, please contact Research@westyorks-ca.gov.uk

▲ / ▼ 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

COVID-19 Transport Recovery Survey – tentative signs of recovery for car and train use

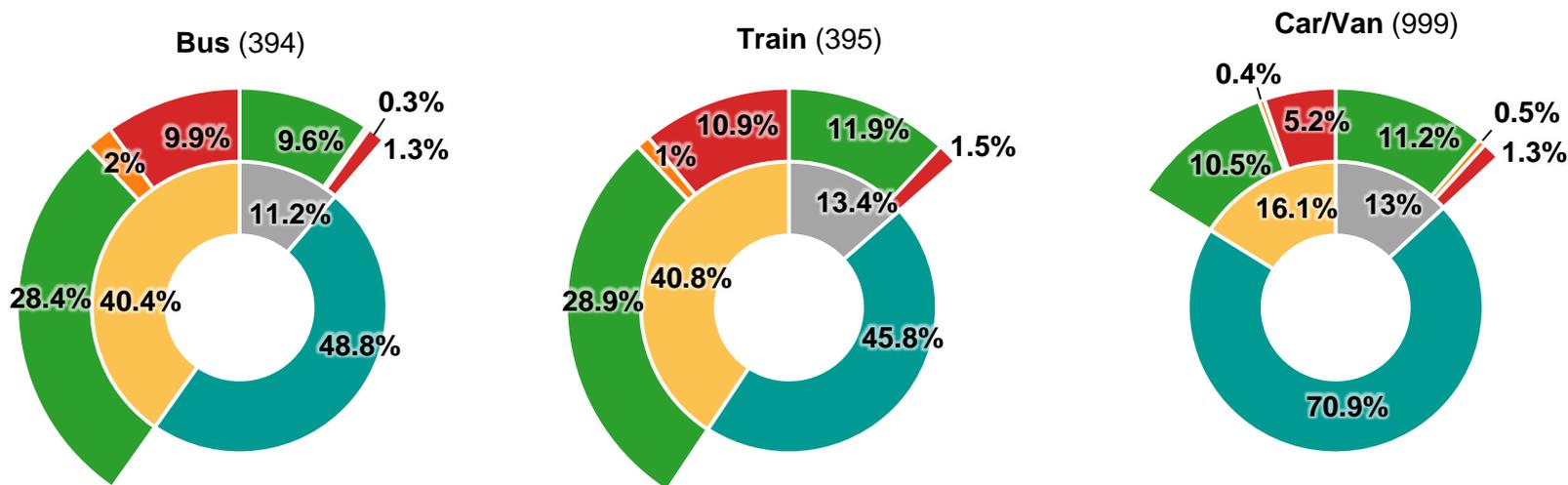
- For travel by train and car, there are tentative signs of a transition back towards pre-pandemic usage; compared to survey results from last summer, a *significantly* greater proportion of respondents said they would use train and car ‘the same’ as before COVID-19.



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

COVID-19 Transport Recovery Survey results – some travel changes likely to become permanent

- 40% of respondents said they will travel by bus less in the coming weeks than before COVID-19, and 41% will travel by train less. Importantly, 28% said they expect these changes to be permanent.



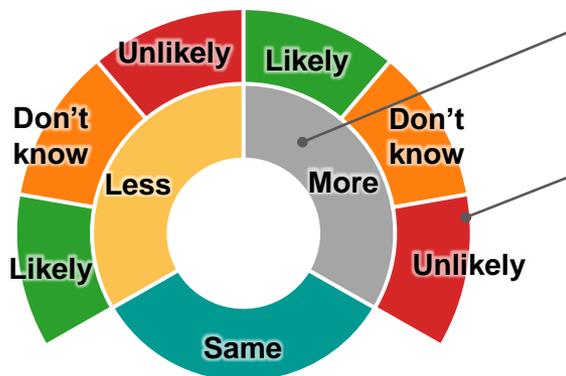
How to read these charts

Intentions in the coming weeks

- More than before COVID-19
- Same as before COVID-19
- Less than as before COVID-19

Will this be a Permanent change

- Likely
- Don't know
- Unlikely

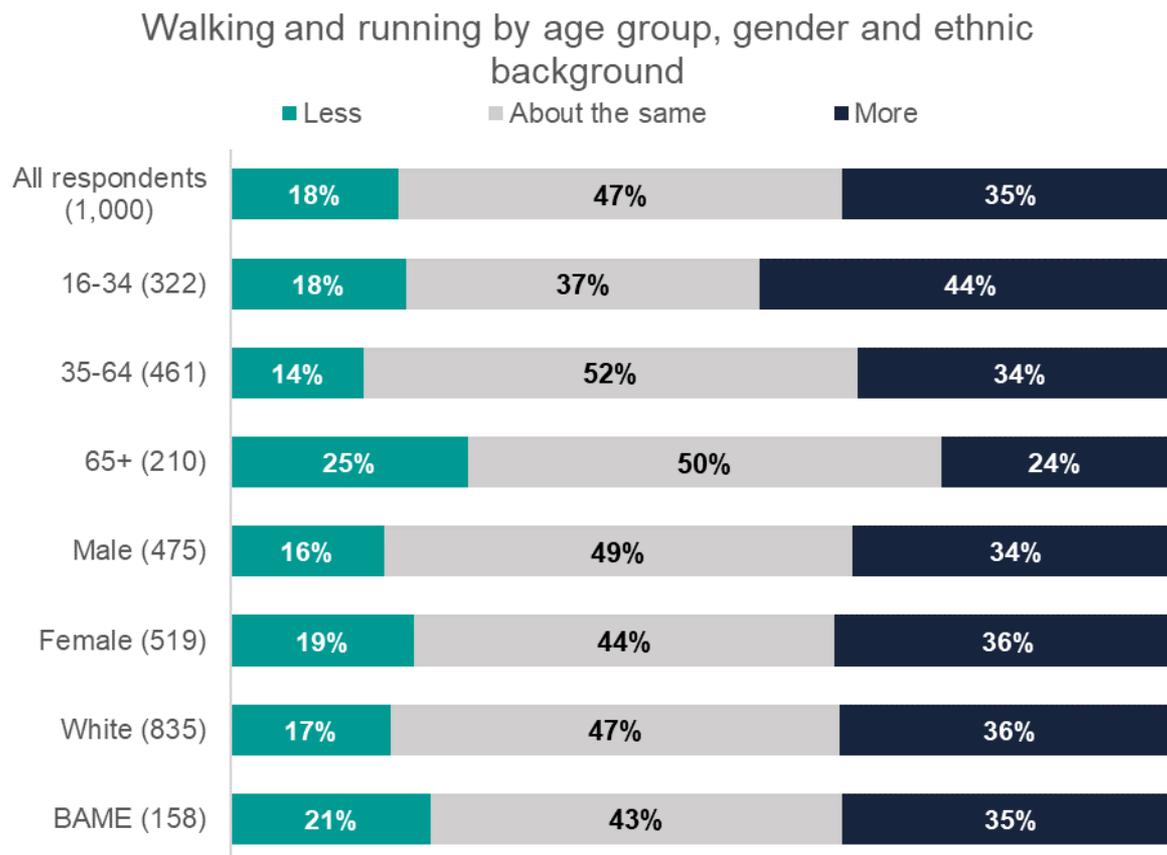


Inner circle – Change in activity/travel choices in the coming weeks, relative to pre-COVID-19

Outer circle – to what extent respondents think these changes will become permanent. Percentages in each section of the outer circle total parent values in the inner circle.

COVID-19 Transport Recovery Survey results – walking & running boom continues

- 35% of respondents said they have been walking and running more than pre-COVID-19, whilst 18% said they have been doing less, an overall net gain.
- The most commonly cited reason for walking and running more was for leisure or exercise (39%), likewise for cycling (45%). Having more time available was the second most common response for both modes.



Q: Are you walking/running any more or any less than you did before COVID? (1,000)

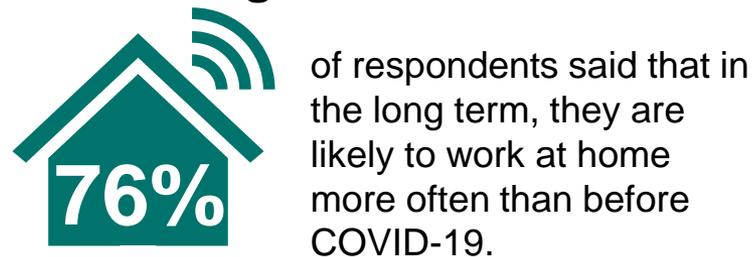
COVID-19 Transport Recovery Survey results – overall positive views on home working

- 30% of people are currently working from home, a significant fall from June 2020 (47%).
- Home working sentiments remain positive and over three quarters of respondents said that, in the long term, they are likely to work from home more often than before COVID-19.

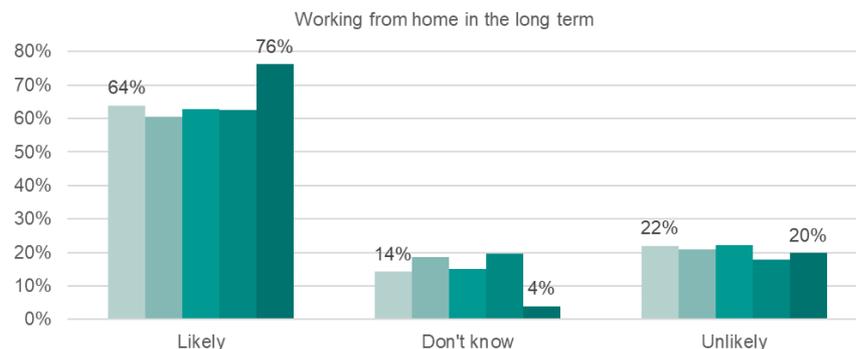
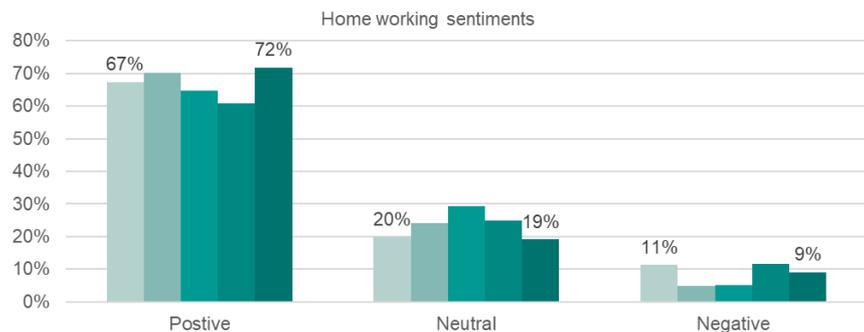
Sentiments



A long term trend?



Wave 1 Wave 2 Wave 3 Wave 4 Wave 5

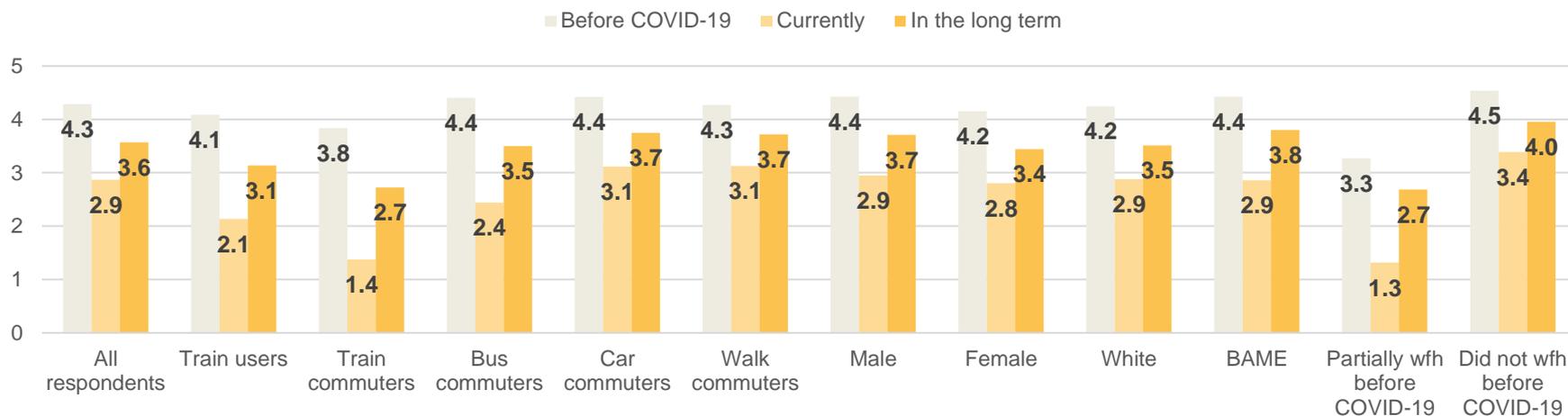


Q. In the long term, how likely are you to work from home more often than you did before the lockdown? Base = 252

COVID-19 Transport Recovery Survey results – 17% drop in commuting expected

- Before COVID-19, West Yorkshire residents travelled to work 4.3 days a week on average. The current figure is substantially lower at 2.9 commuting days per week, reflecting the 30% of respondents who are working from home at present.
- There are expectations to reduce commuting in the long term, relative to pre-pandemic, with figures suggesting a 17% reduction in trips to work on average. Rail users and rail commuters expect a *significantly* greater drop in the number of commuting trips in the long term than the general sample.

Average number of days travelled to work per week, by group



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? | Q. 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)

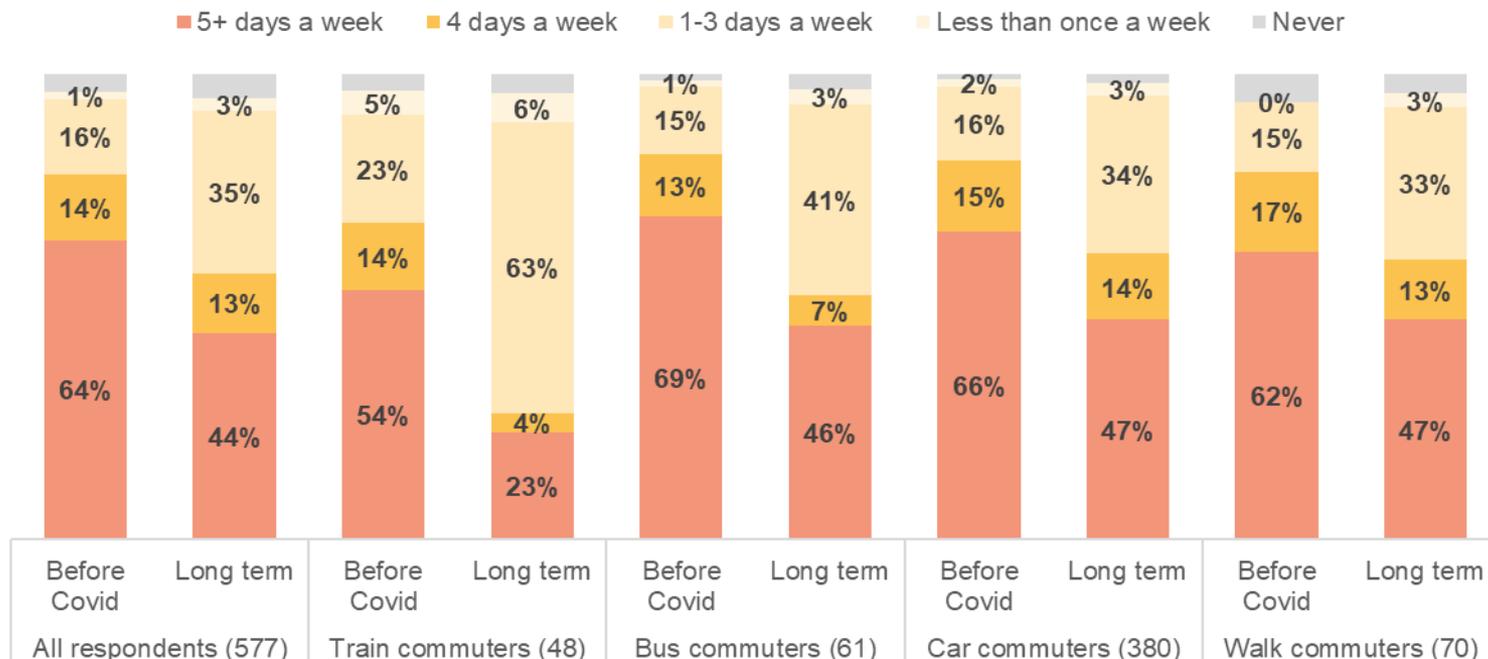
Note: For the obtention of an average 'less than once a week' was assigned a numerical value of 0.25 days/week

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

COVID-19 Transport Recovery Survey results – a shift to a 1-3 day a week commute likely

- There is expected to be a notable reduction in the 5 or more day a week commute in the long term, in parallel with an increase in the share of people expecting to do a 1-3 day commute.
- Although the majority of respondents largely intend to stick to their previous commuting habits, for those who expect a change, the 1-3 days a week is the most popular option.

Frequency of commuting, before COVID-19 vs long term



Q. Before COVID how many days a week did you normally travel to work? | Q. 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: The cycling commuting sub-base was too small for results to be significant (12 responses)