COVID-19 Fortnightly Insights Report

Research & Intelligence
28th August 2020

Executive Summary – social and economic

- The number of **positive COVID-19 cases has fallen in the areas with local restrictions** in the past week, most notably in Bradford and Calderdale. However, the rate remains higher than the national average in all West Yorkshire council areas and in more deprived areas.

- **There were 320,000 jobs furloughed by the end of June in West Yorkshire according to data from HMRC, which includes returns made in July. This is a 16,000 increase numbers reported last month.** This is 31% of all jobs, compared to 32% nationally. This increases to 34% in Leeds West, Bradford East and three Kirklees constituencies.

- **80% of eligible jobs in the accommodation sector were furloughed** nationally at the end of June according to HMRC. There are 7,500 jobs in this sector in West Yorkshire. However perhaps more significantly there were **77% of jobs in food & drink services furloughed, employing 62,500 people in West Yorkshire.**

- A separate Office for National Statistics (ONS) survey presents different data on furlough take up and shows the proportion of jobs furloughed nationally is falling, down to 13% in mid-August. However, the pace of fall has plateaued and home working has remained consistently around 39%, suggesting **half of all workers are still away from their usual workplace.**

- In other sectors, although take up of the furlough scheme is low, **20% of staff or fewer in professional services, education and information & comms were back in their normal workplace by 9th August** as homeworking continued in these sectors that employ 227,000 people in West Yorkshire.

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Executive Summary – transport

- Bus use is generally recovering faster than rail, and **weekend travel recovering faster than weekday**. The **pace of recovery of bus use slowed slightly in August**, potentially a result of summer holidays. Weekday MCard and concessionary travel use is currently around 35% of the level in early March 2020.

- Ticket machine data indicates that **senior, disabled & companion concessionary card usage has recovered more successfully** than that of adult pre-paid MCard products. **Younger people are the slowest to return to bus use**, but this is likely to change when term restarts.

- **Demand for travel information is gradually increasing**. METRO website page views have increased week on week and are now more than twice as high as they were at the lowest point during lockdown.

- Traffic around Leeds is steadily returning to pre-lockdown levels and **weekend city centre footfall is at its highest level since the start of lockdown.**

- Generally for air quality monitoring sites with long-term data available, **NO_2 levels continue to remain below pre-lockdown levels**, but there is considerable site-specific variation. Notably, the A58 New Bank on the approach to Halifax Town Centre and Huddersfield Town Centre have seen steady rises in NO_2 levels.

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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.

Structure:

Virus prevalence in West Yorkshire/LCR
National and Local Economic Insights
Transport Insights
Public Perceptions

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Virus prevalence

Area	Total cases per 100k people (13-19 Aug) - Most recent data week	Total cases per 100k people (6-12 Aug) - Previous week	Change in cases, past 7 days	National LA rank – cases per 100k, past 7 days (n=149)
Bradford	42.8	57.4	-25.5%	6
Calderdale	31.2	43.0	-27.5%	11
Kirklees	33	33.7	-2.0%	9
Leeds	17.8	16.1	10.2%	21
Wakefield	17.2	19.8	-13.0%	22
West Yorkshire	27.6	32	-12.3%	-
England	10.9	11.8	-8.1%	-

In the week to 19th August, there was a 12% decrease COVID-19 cases across West Yorkshire, greater than the 8% decrease nationally though there are variations in trend across the area.

Those areas that have local restrictions in place have seen a decrease in cases. In the case of Bradford and Calderdale there has been a significant decrease in COVID-19 cases, dropping by 25% and 27% respectively. While Kirklees has seen a slight 2% decrease. However all three areas are still in the top 15 in terms of infection rates nationally. The case rates in Leeds and Wakefield have remained more steady over the last few weeks, only increasing or decreasing by 1-2 cases per 100,000 per week.

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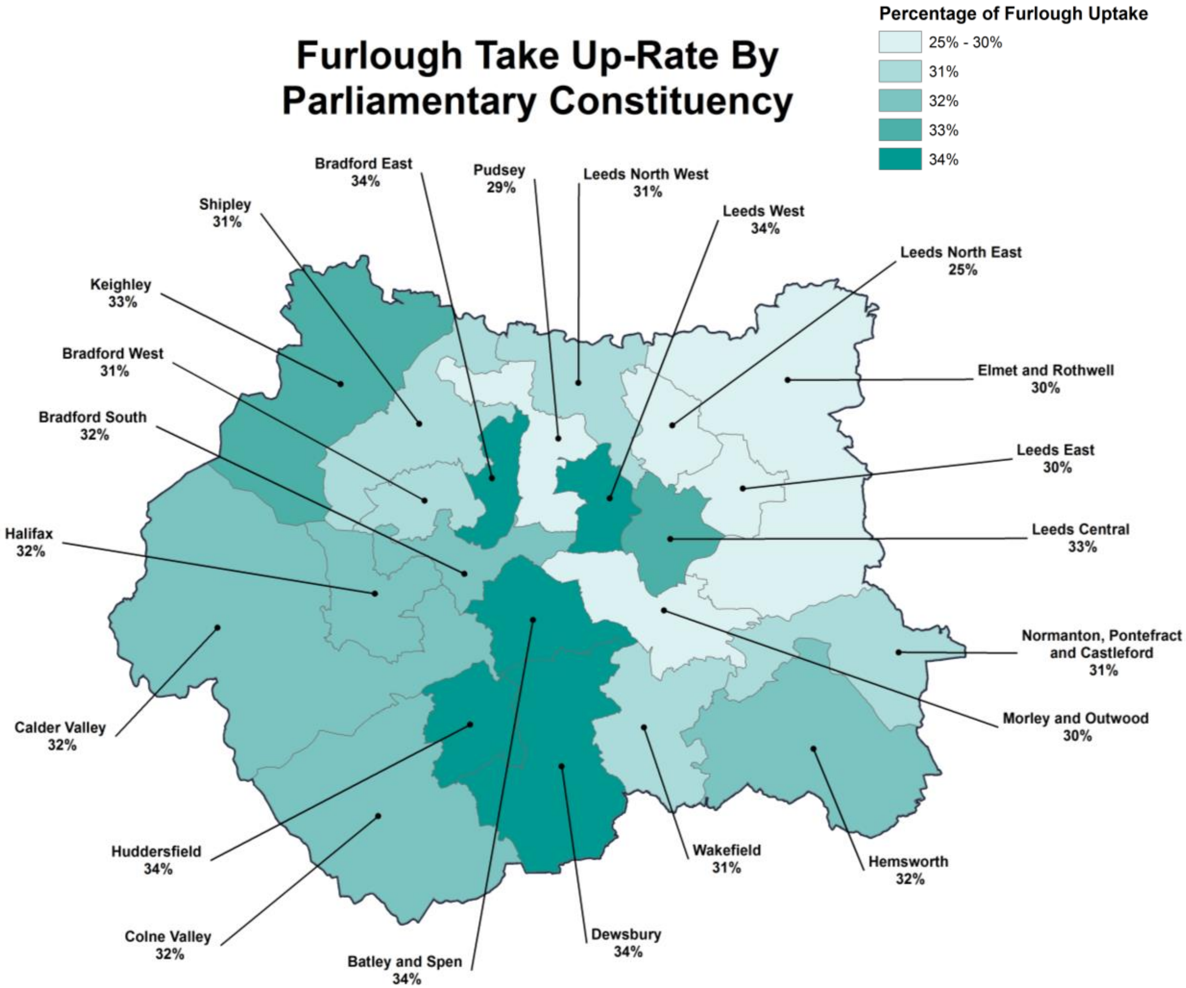
Economic Insights

320,000 jobs furloughed in West Yorkshire by the end of June



There were 320,000 jobs furloughed by the end of June in West Yorkshire according to data from HMRC, which includes returns made in July. This is a 16,000 increase numbers reported last month. Note this is total jobs furloughed since March, not a live count. National data shows the number of furloughs reducing since then (see slide 9 for more on this from a different source).

31% of eligible jobs have been furloughed in West Yorkshire, slightly below the 32% national rate. The rate is highest in Kirklees (34%) and lowest in Leeds (30%). At constituency level, 34% of jobs were furloughed in Leeds West, Bradford East and three constituencies in Kirklees. It was below 30% in Pudsey and Leeds North East.

Source: HMRC Coronavirus Statitistics

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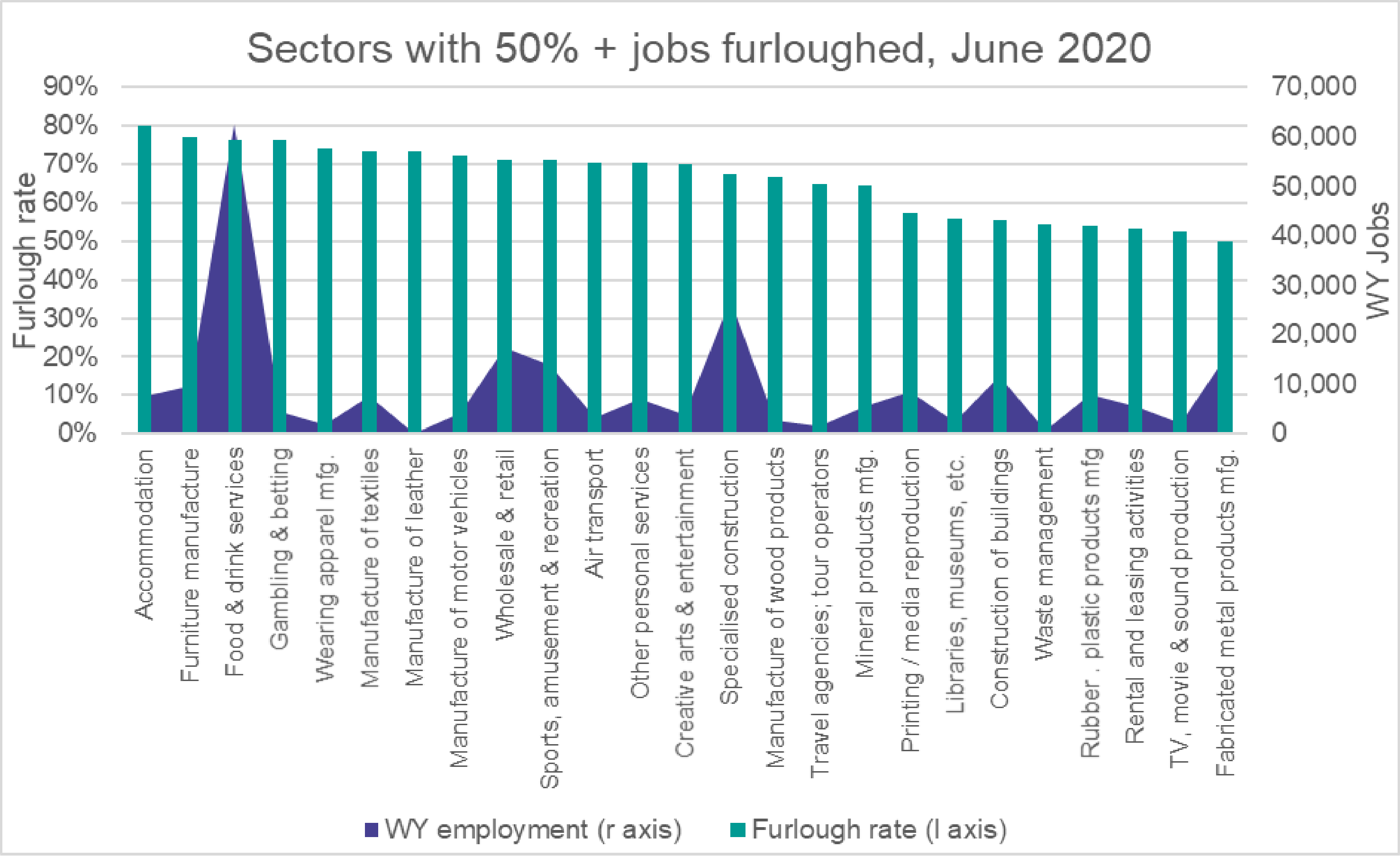
Sectors with 50%+ staff furloughed nationally employ 234,000 people in West Yorkshire

80% of jobs in the accommodation sector were furloughed nationally at the end of June, more than any other sector according to HMRC. This sector is a relatively small employer in West Yorkshire with 7,500 jobs. However, the national furlough rate was 77% in food & drink services, which employs 62,500 locally. Two thirds of jobs were furloughed in specialised construction, which employs 27,000 people.



Source: HMRC Coronavirus Statitistics

Most workers were still either furloughed or working from home in mid-August

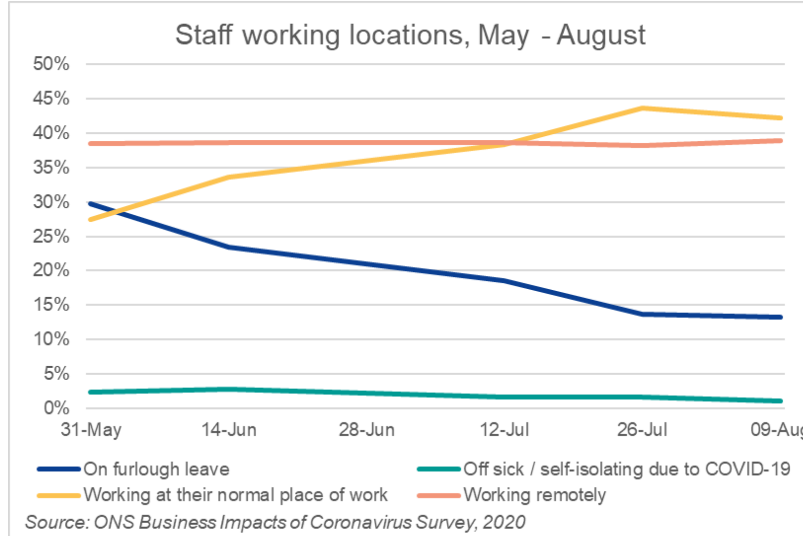
Furlough use is decreasing, homeworking stable

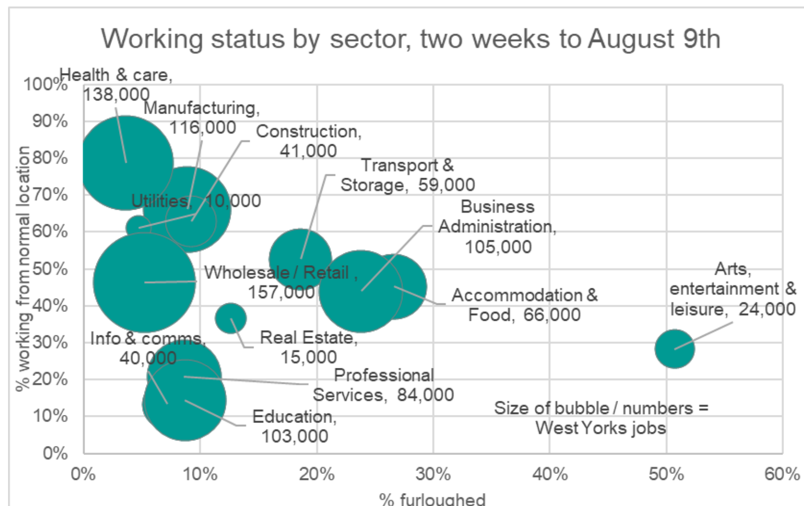
The ONS Business Impacts of Coronavirus Survey provides separate data to HMRC on the return to work. This survey suggests the proportion of workers furloughed nationally fell from 30% in the 2 weeks to May 31st to 13% by August 9th. There was a concurrent increase in people going to their normal place of work, up from 27.5% in May to 42% on August 9th. However, this may have plateaued and the proportion working remotely has been consistently around 39%, suggesting 52% were still either working from home or on furlough in mid-August.

Return to work is playing out differently across sectors

As of August 9th, most workers nationally in sectors such as health, manufacturing, construction and transport / storage were working from their usual location, with fewer than 20% of workers furloughed in these sectors according to ONS. Sectors in this position employ a total of 364,000 people in West Yorkshire. 46% of retail workers are in their usual workplace, with 5% on furlough (157,000 WY jobs).

However, over a quarter of workers remain furloughed in arts & leisure (50%) and accommodation & food (27%). Along with business administration (24%) these sectors employ 195,000 workers locally. 20% or fewer workers are back in their normal workplace in professional services, information & comms and education, with a collective 227,000 workers.





Source: ONS Business Impacts of Coronavirus survey

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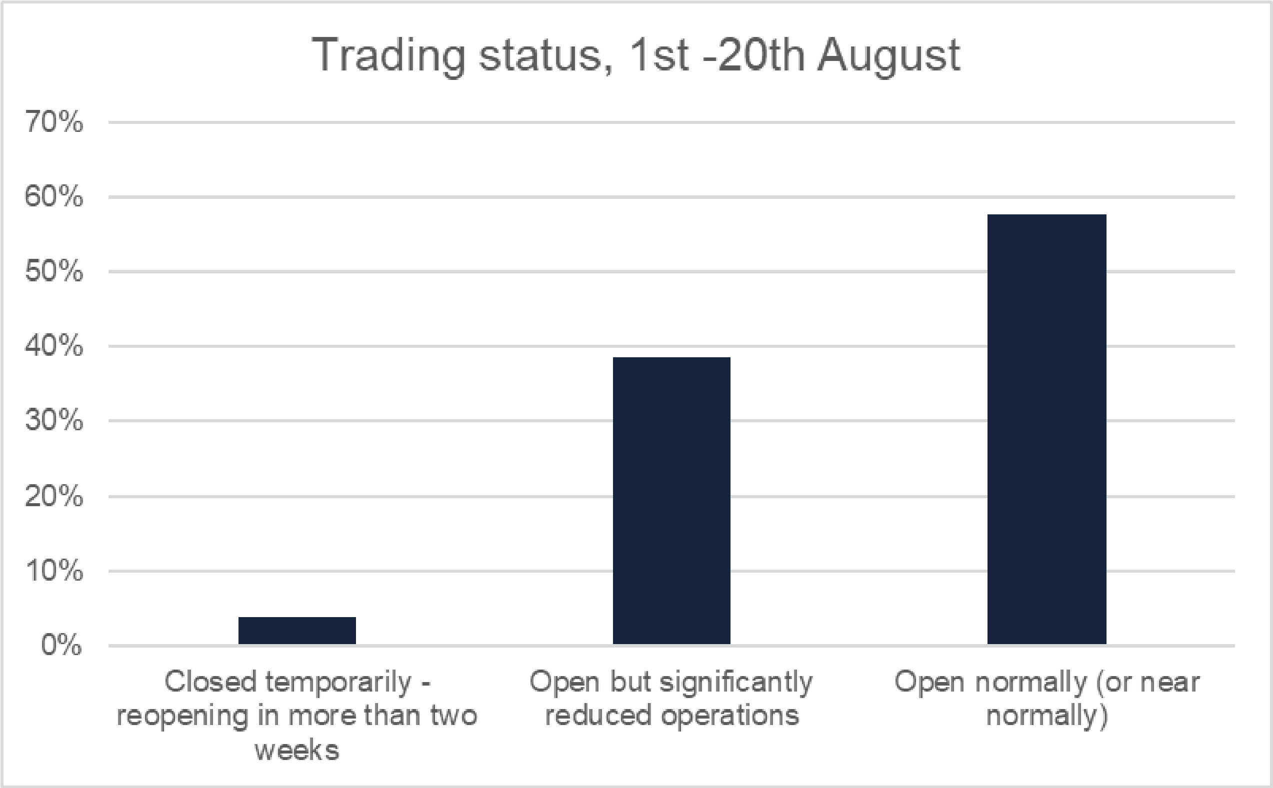
Businesses continue to operate below capacity

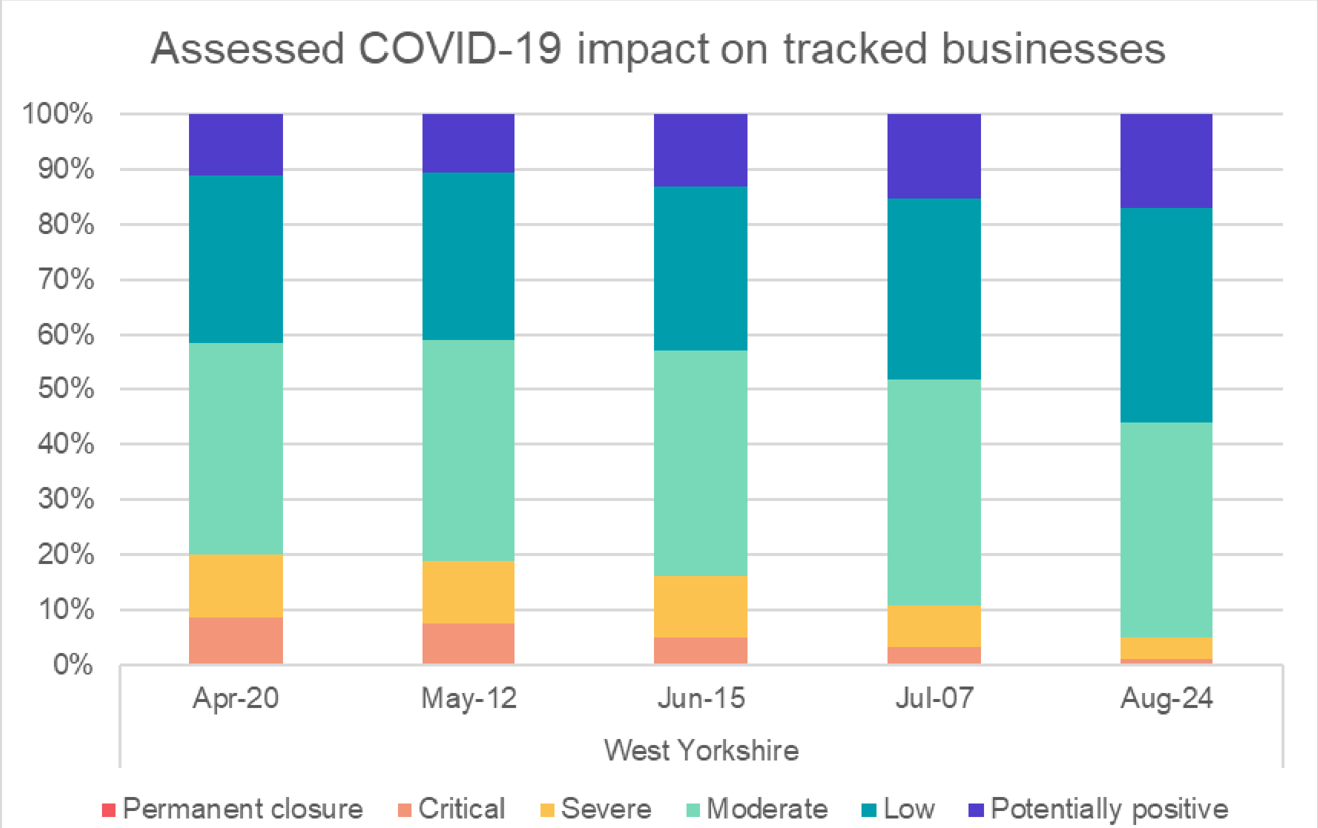
Whilst the number of businesses spoken to remains low during the summer period all spoken to this week were currently trading, though 5 (45%) reported operating significantly below capacity. This broadly mirrors the trends seen in previous weeks.

Typically, those most affected continue to be in the leisure and events industries, or those who supply them. Professional services continues to show signs of companies restructuring operations on the return to work.



Fewer businesses at severe / critical risk

Analysis by Beauhurst of their tracked companies shows the proportion of tracked companies in West Yorkshire who are facing a critical or severe risk from COVID-19 has fallen from 20% in mid-April to 6% in mid-August. The proportion seeing a potentially positive impact has risen from 11% to 16%. Companies tracked by Beauhurst tend to be higher growth, and are often tech-driven. As such they are not representative of the business community as a whole. Though this lower level or risk reflects some available data for the wider business community, it remains the case that businesses face very challenging circumstances particularly as various support schemes unwind in the coming months.

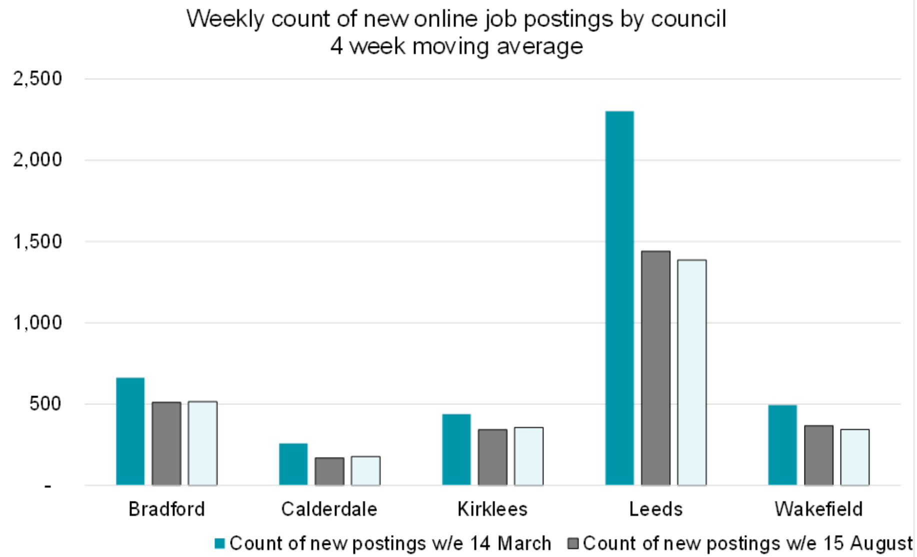


Source: Beauhurst, 2020

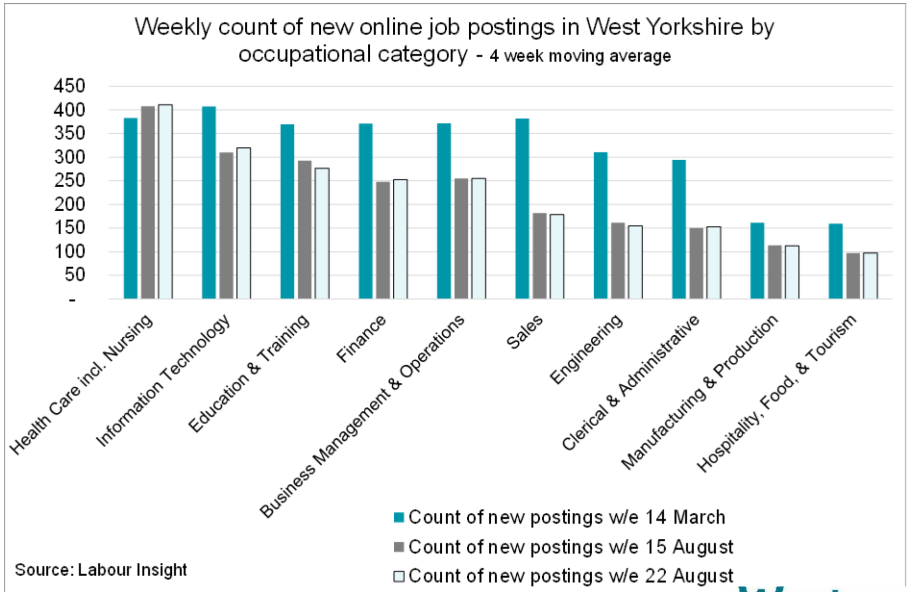
Little change in number of new vacancies

After several weeks of modest growth, the number of new vacancies posted online in West Yorkshire saw little change (-1%) in week ending 22nd August compared with the previous week. The picture at council level was mixed with a small amount of growth in Calderdale and Kirklees but small declines in Leeds and Wakefield, while Bradford saw no change. The weekly count of new vacancies in West Yorkshire was 29% below its pre-crisis level (based on week ending 14 March).

There are around 7 jobless claimants for every live vacancy in West Yorkshire currently, compared with an UK average of 5. However, this ratio varies considerably at local level, from 4 claimants per vacancy in Leeds to 14 in Bradford. The overall static position for West Yorkshire was also reflected in the performance at occupational level, with all categories seeing little change.



Source: Labour Insight



Source: Labour Insight

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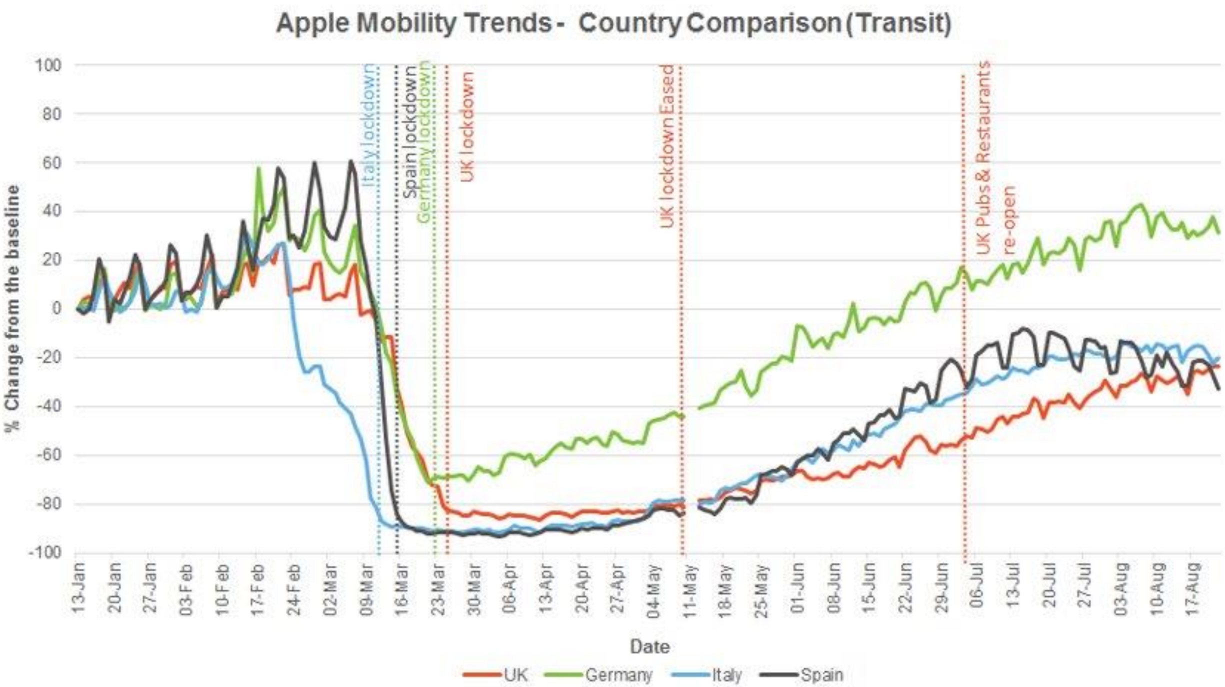
Transport Insights

Mobility trends: UK has slower recovery than other EU countries

Mobility data from Apple maps (for driving, public transport and walking) allows comparisons to be made for countries and major cities. Note that data is expressed relative to a baseline of the 13th January. The chart below shows public transport requests over time and reveals the UK has had a slower recovery than some other EU Countries. Where data exists for UK cities (table below), Leeds is on par with the UK city average for maps requests for public transport and driving. In contrast, data from Bradford indicates a slightly stronger recovery for maps requests for both public transport and driving compared to other UK cities.



	Last 14 days	
CITY	**TRANSIT**	**DRIVING**
Birmingham	-27	10
Bradford	-24	18
Bristol	-36	8
Leeds	-32	12
Liverpool	-34	18
London	-28	9
Manchester	-34	1
Newcastle upon Tyne	-29	24
Nottingham	-36	3
Portsmouth	-14	28
Reading	-32	3
Sheffield	-40	14

Source: Apple have released data which reveals the number of requests for directions in Apple Maps. The data shows relative volume of directions requests per country/region or city compared to a baseline volume from January 13th, 2020.

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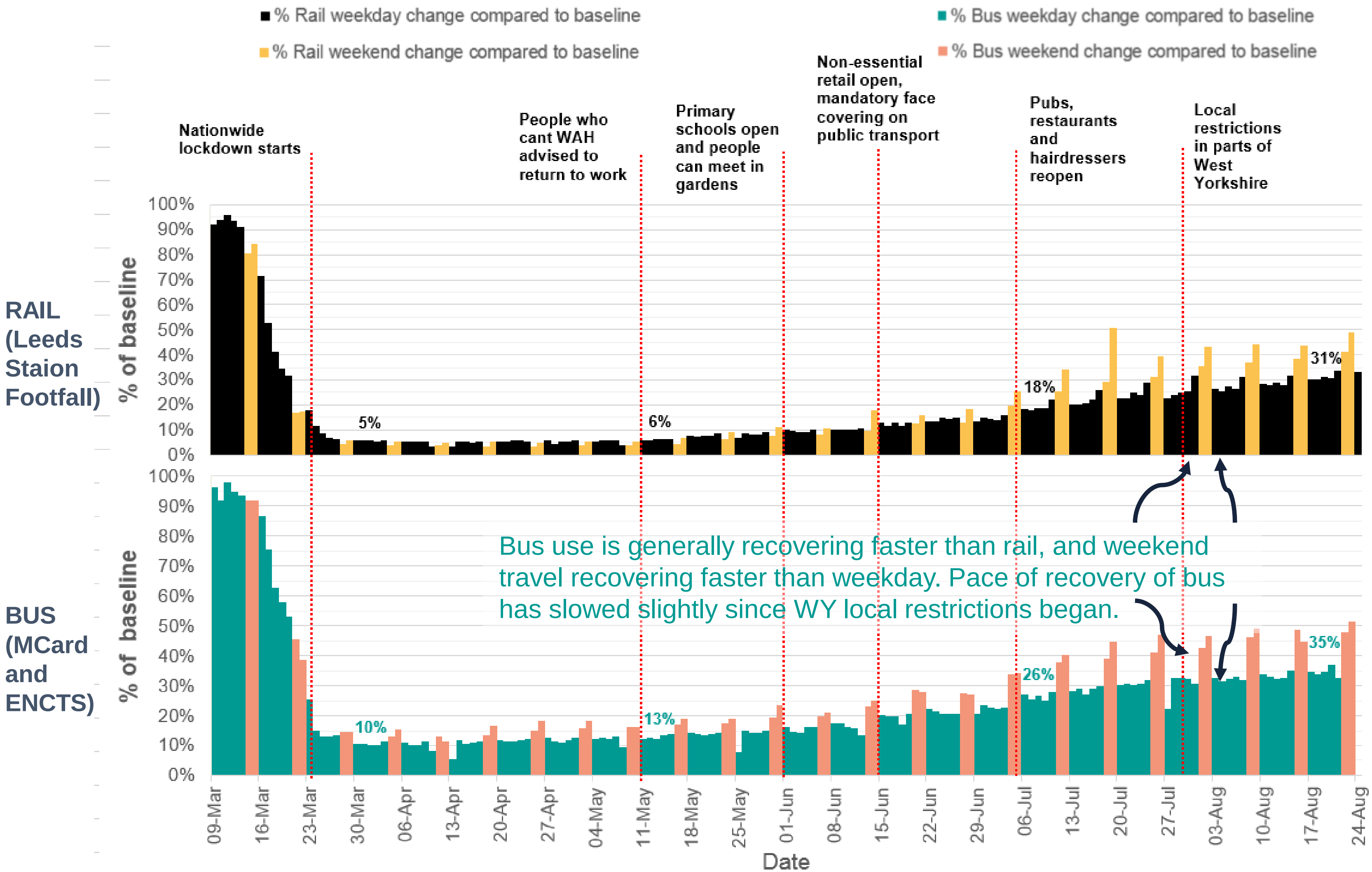
Weekend bus and rail travel is recovering faster than weekday travel

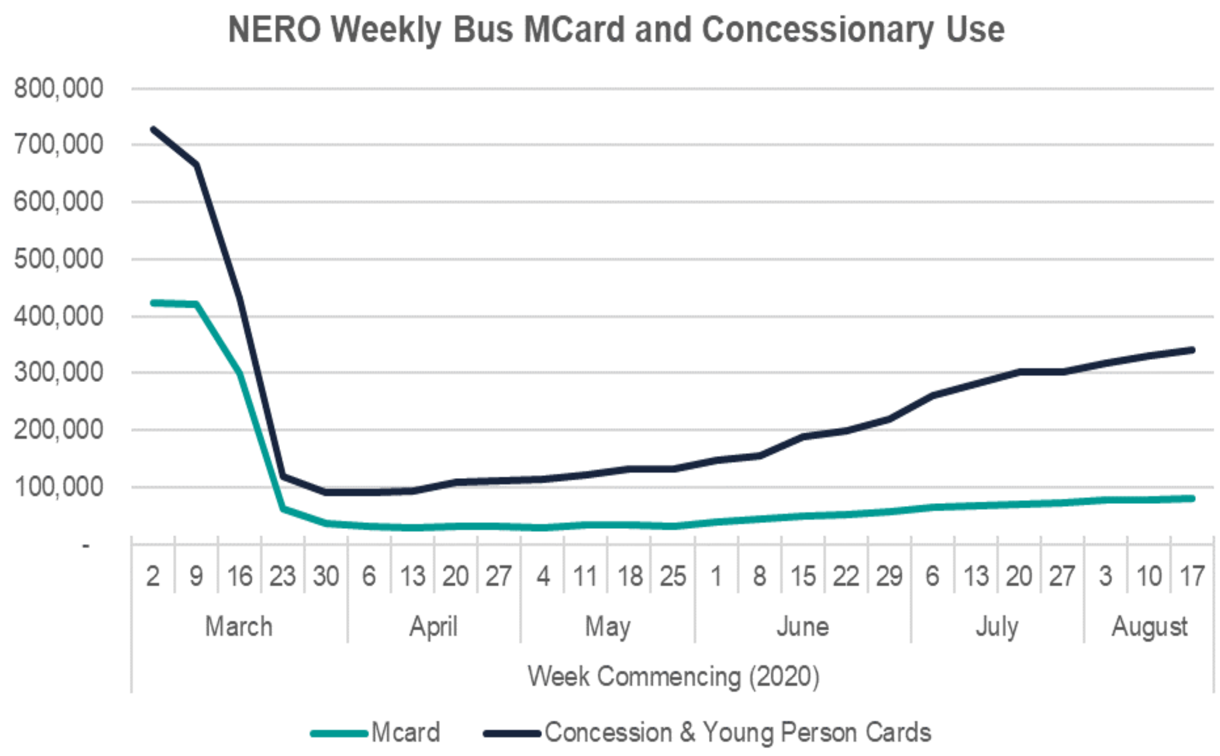


Baseline period is Monday 2nd - Friday 6th March 2020 (weekdays) and 29th Feb -1st March and 6th-7th March (weekends)

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

Bus use recovery continues in August but at a slower pace than July & August and ENCTS recovery faster than pre-paid MCard

For the week beginning Monday 17th August 2020, the combined level of MCard and concessionary fare use shows a reduction of 63% against the week beginning 2nd March 2020, an increase of 3% against the previous week. The chart (left) reveals that senior, disabled and young person concessionary card usage has recovered more successfully than that of pre-paid MCard products.

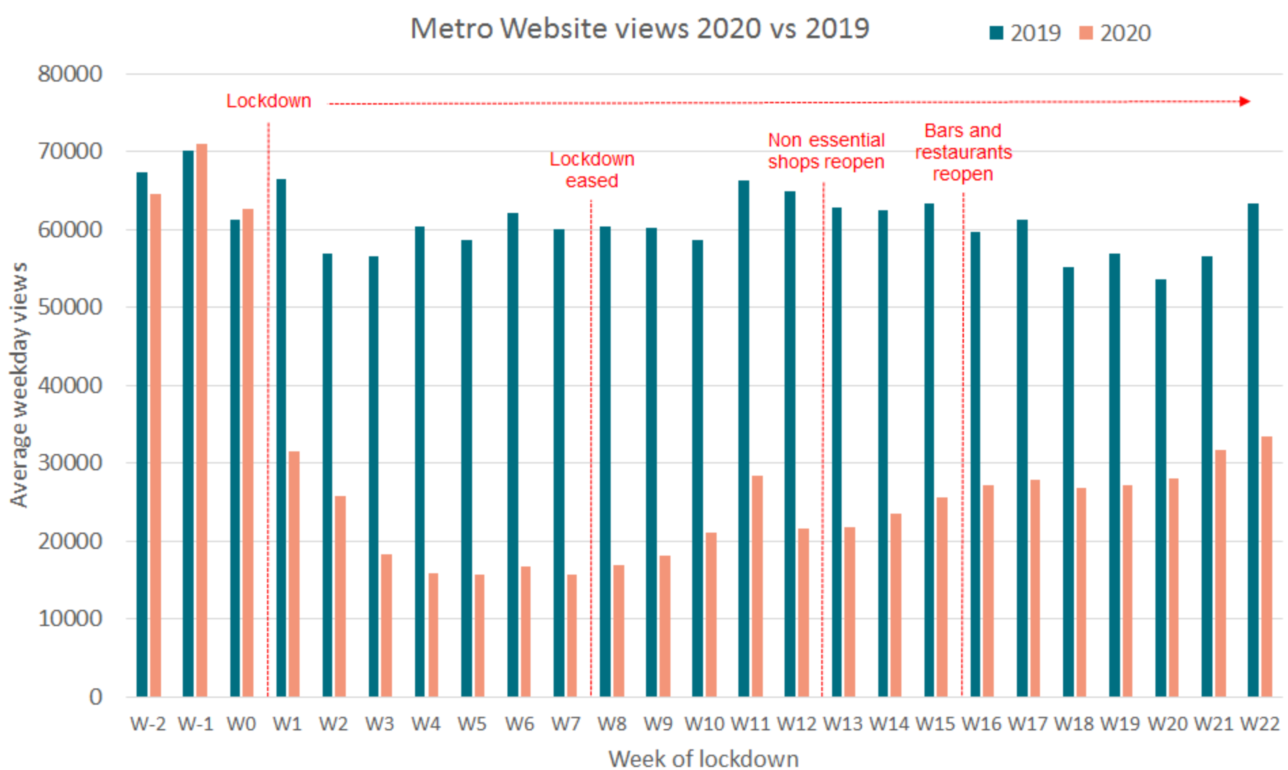


Source: WYCA NERO reports

Demand for travel information is gradually increasing

The number of page views to the various pages on the Metro website are available through Google Analytics. For the week commencing 17th August, average weekday page views were 53% of the level in the same week of 2019 (chart below). Page views increased by 6% from the previous week and were more than twice as high as they were in week 4 of lockdown (week commencing 13th April), indicating increasing demand for travel information.

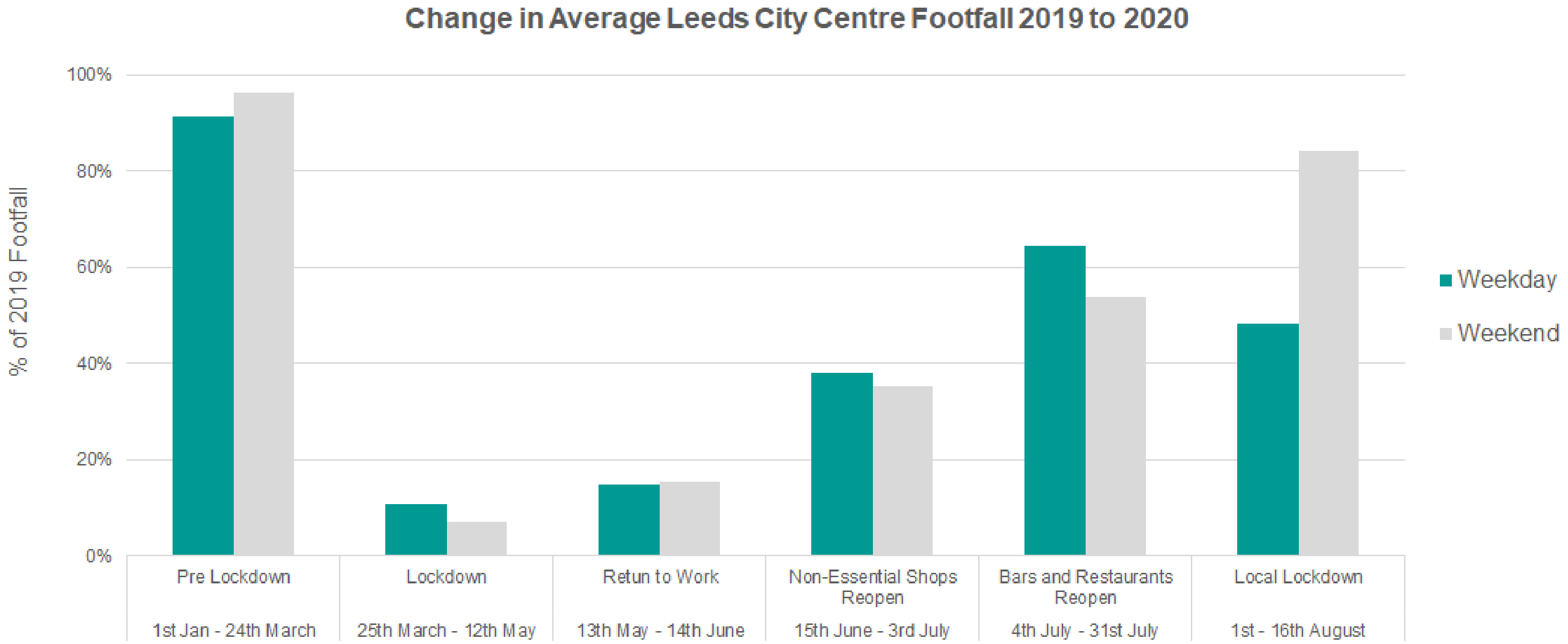
Calls to the Metroline call centre (which provides general travel information, including timetable, pass and disruption information) are currently around 70% of levels at the start of March 2020.



Source: Google Analytics Metro Website page views

Traffic around Leeds is steadily returning to pre-lockdown levels and weekend city centre footfall is at its highest level since the start of lockdown

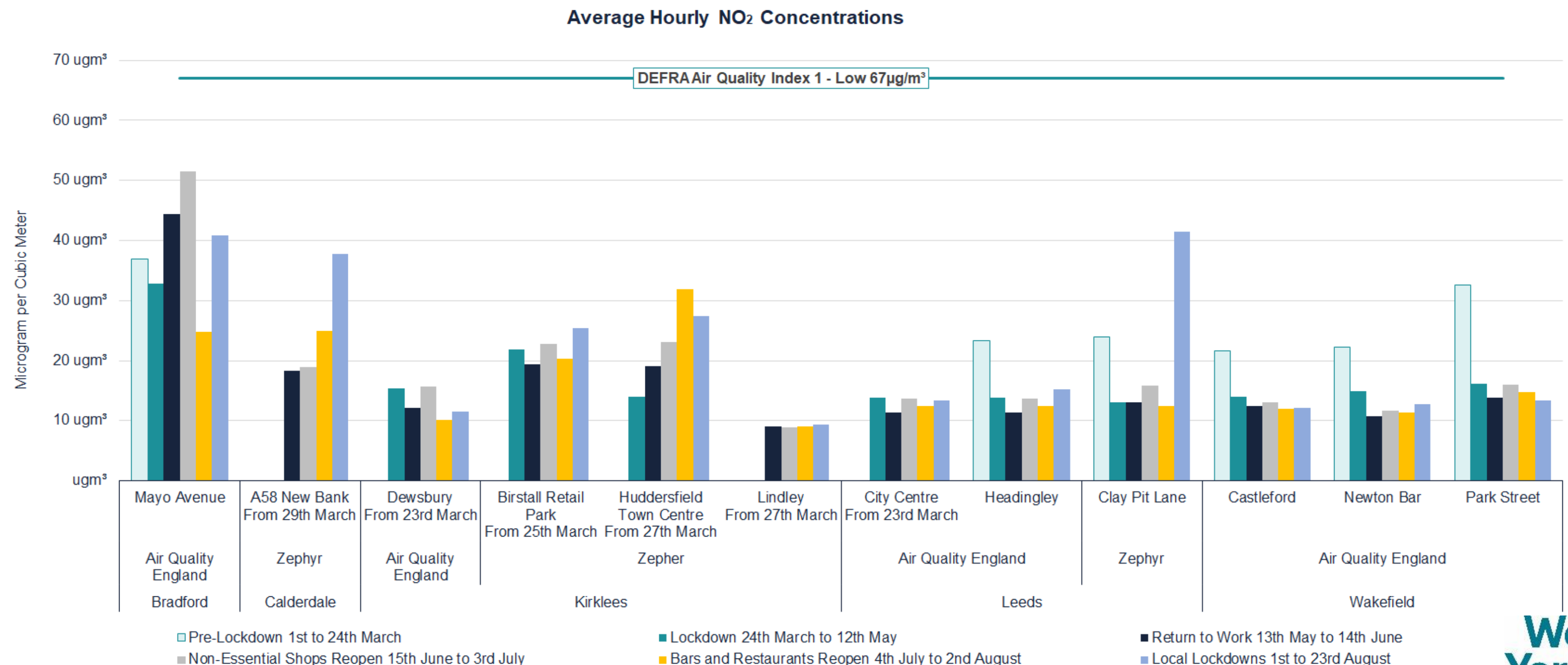
Weekday footfall in Leeds City Centre has fallen in August compared to the period following the reopening of bars and restaurants. In contrast, average weekend footfall has increased to its highest levels since lockdown began. These changes may be the result of the start of the summer holiday, with fewer commuters travelling to the city centre during the week and more people shopping at weekends.



Source: Leeds City Council CORONAVIRUS TRAFFIC UPDATE 24-8-20 (top), Leeds City Council Footfall data (bottom)

Generally for sites with long-term data available, NO_2 levels remain below pre-lockdown levels

For the majority of air quality monitoring sites, average hourly NO_2 concentrations haven't returned to pre-lockdown levels and all West Yorkshire sites are within the lowest band of the DEFRA Air Quality Index. However, Since the start of August, when advice on office working changed and local restrictions were introduced, average hourly NO_2 concentrations have tripled at Clay Pit Lane, peaking between 6pm and 7pm on weekdays and 10pm and 11pm on weekends, suggesting increased post work and Saturday night car use. NO_2 concentrations continue to increase at car-centric sites such as Mayo Avenue and Birstall, both located at the entrance to retail parks, A58 New Bank on the approach to Halifax Town Centre and Huddersfield Town Centre.



Source: Air Quality England, Earth Sense 2020

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Public Perceptions (recent survey results)

Source	Key Insights
WYCA COVID-19 Transport Survey – Telephone Survey Wave 2 (23-28 June)	• 46% and 54% of respondents said they would use bus and train less, respectively. • 42% are walking and running more, 39% are cycling more. • A greater proportion of public transport (PT) users said they will travel by car more (20% compared to 14% non-PT user). • Non-commuting travel to city centres showed a notable move away from PT and towards car use.
Transport Focus – Travel during COVID-19 Tracking research – week 16 (21/8/20)	• PT use is increasing in Great Britain, with 18% saying they used PT in the last 7 days compared to 15% previously. Road use is consistent with previous weeks. • 47% made journeys on foot, with 7% cycling – consistent with previous weeks. • Trips for work and other personal business are gradually increasing (to 32% and 25% respectively over the past week). • Journeys for social or leisure activities continue to increase. • 24% will cycle instead of using PT; 43% will walk (both decreased from previous week).
Transport Focus – Journey satisfaction during COVID-19 (21/8/20)	• Overall satisfaction constant on train (80%), declining on bus (82% to 80%) averaged over the past 3 weeks results. • Satisfaction with cleanliness is decreasing on train (81% to 78%) and bus (81% to 79%). • Satisfaction with face covering use is constant at 69% on train and 75% on bus. • Satisfaction with social distancing is decreasing on train (79% to 77%) and bus (77% to 74%).

For more information please contact the Research & Intelligence team
Research@westyorks-ca.gov.uk

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