

# **COVID-19 Fortnightly Insights Report**

Research & Intelligence  
27<sup>th</sup> November 2020

# Executive Summary – social and economic

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- COVID-19 infection rates have been falling consistently across West Yorkshire following the introduction of national lockdown measures. Despite this, parts of the area still have some of the highest rates of infection in the country.
- Activity in the main urban centres in West Yorkshire increased slightly in the 2<sup>nd</sup> full week of lockdown, but is still down by 50% compared to late October in most places.
- Anecdotal evidence from local businesses suggests that some have returned workers to furlough to cope with lower demand during lockdown, and many are making use of the additional support on offer to survive through this period.
- Whilst some are also successfully digitising their businesses, some companies are also having to make redundancies. However, it would appear that the anticipated end of the furlough scheme in October (prior to its extension) did not lead to a significant spike in redundancies.
- The number of vacancies advertised has also increased, following three consecutive weekly falls, though it remains well below its recent October peak.
- Company liquidations have stabilised but remain elevated compared to earlier in the year, and this month the share of liquidations has increased in consumer facing sectors as well as in manufacturing and business administration. ONS survey data suggests 1 in 7 businesses have little or no confidence in surviving the next three months.

# Executive Summary – transport

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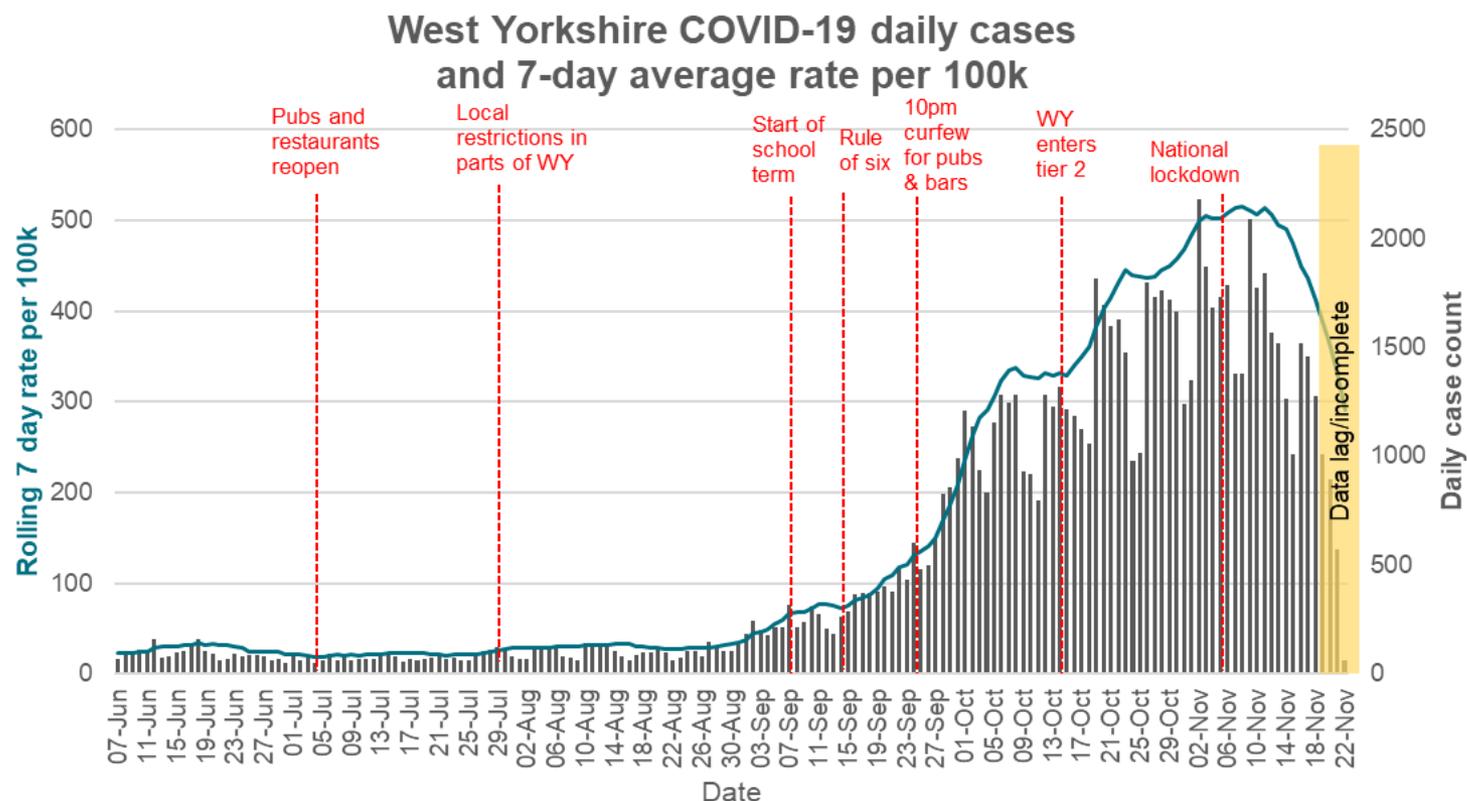
- Local levels of bus and rail use fell markedly following the reintroduction of national lockdown restrictions in England, but notably not to same degree as in March/April, a trend observed in the national data too. Overall, since the 2<sup>nd</sup> lockdown, local bus use has remained stronger than rail.
- In the week commencing 16<sup>th</sup> November, levels of combined MCard and concessionary fare use on bus were 62% lower than the pre-COVID-19 baseline (early March). There had been a general declining trend before the 2<sup>nd</sup> lockdown, driven mostly by reduced use of concession and Young Person cards.
- National transport surveys reveal a decline in all travel modes (except walking) following the second lockdown. Notably a higher proportion of respondents declared they are currently avoiding public transport, compared to pre-lockdown.
- Leeds City Centre footfall fell following the national lockdown with total footfall for the first three weeks of November being only 28% same period in 2019. This decrease is less severe than observed in the 1<sup>st</sup> lockdown.
- Traffic levels on four Leeds radial routes show a decline following the 2<sup>nd</sup> lockdown, however, levels remain considerably higher than those seen in the spring lockdown.
- NO<sub>2</sub> concentrations have not fallen in response to the introduction of the second lockdown indicating that the restrictions have had minimal impact on private car use.

# Introduction

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- 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](mailto: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 18<sup>th</sup> November, the 7-day moving average **West Yorkshire COVID-19 rate was 412.1 cases per 100k, still higher than the Yorkshire & the Humber rate (358.5 per 100k) and the England rate (241 per 100k).** Regionally, Yorkshire & the Humber currently has the highest rates in England.

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.

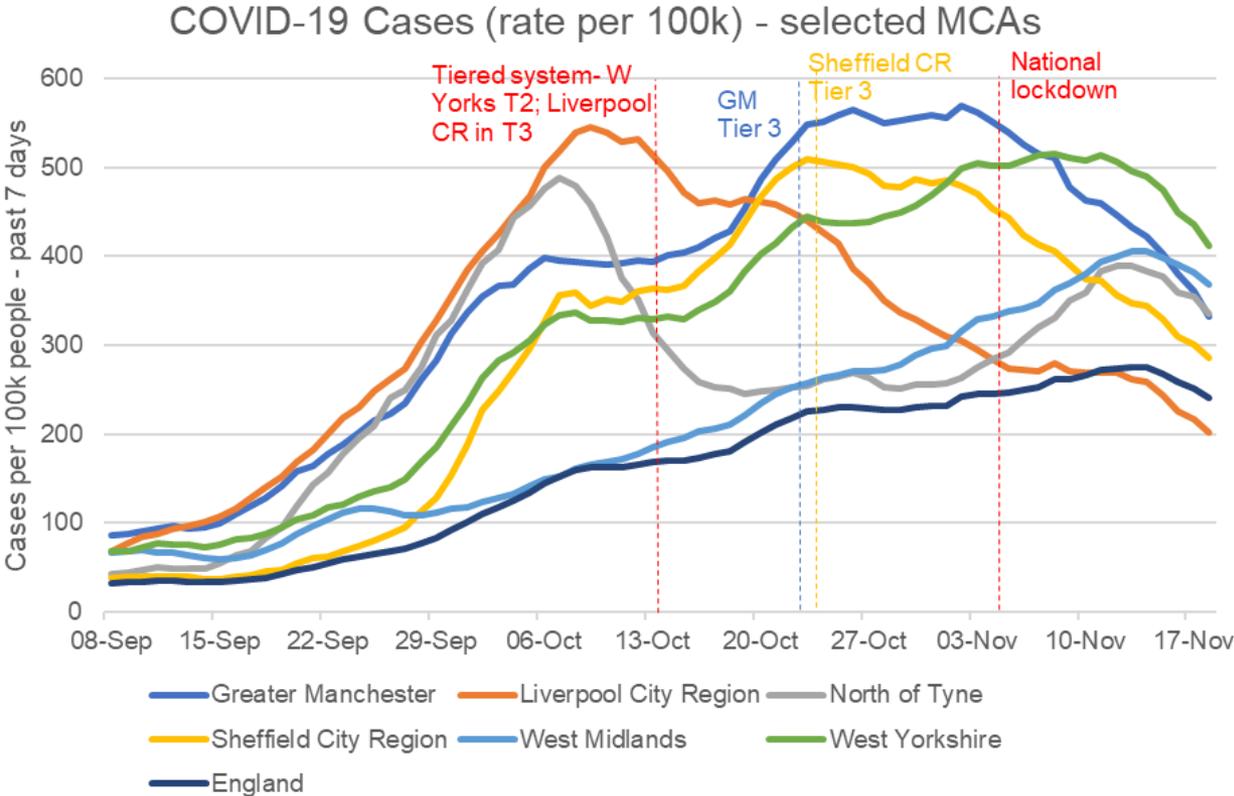
# Virus prevalence – West Yorkshire

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 (12 – 18 Nov) Most recent data week	Total cases per 100k people (5 – 11 Nov) Previous week	Absolute Difference
Bradford	468.3	552.1	-83.7 
Calderdale	401	489.5	-88.4 
Kirklees	478.2	586.6	-108.5 
Leeds	351.5	451.7	-100.2 
Wakefield	385.9	518.2	-132.4 
West Yorkshire	412.1	513.7	-101.7 
Yorkshire & the Humber	358.5	451.2	-92.7 

# Rates falling in all MCAs since the start of 2<sup>nd</sup> lockdown

COVID-19 infection rates have fallen in the past week in all of the MCAs tracked here, suggesting the national restrictions are having an impact. Areas where rates were falling prior to November 5<sup>th</sup> have continued to see falls at a similar pace. Areas where rates were not falling at that point, including West Yorkshire have seen rates begin to fall from around a week after lockdown began. Whilst the falls in West Yorkshire are substantial, the rate remains higher than in any other area analysed here.



Source: HMG / PHE Coronavirus in the UK data



# Virus prevalence – Selected MCAs

The table shows the most recent COVID-19 case data from Public Health England (PHE) published up 18<sup>th</sup> November. Infection rates are lower than a week earlier in all places, with only West Midlands seeing the rate fall by less than 10%. Other than Liverpool City Region, rates are still higher than the national average, though the gap to England is closing in most places – most significantly in West Yorkshire and Greater Manchester in recent days.

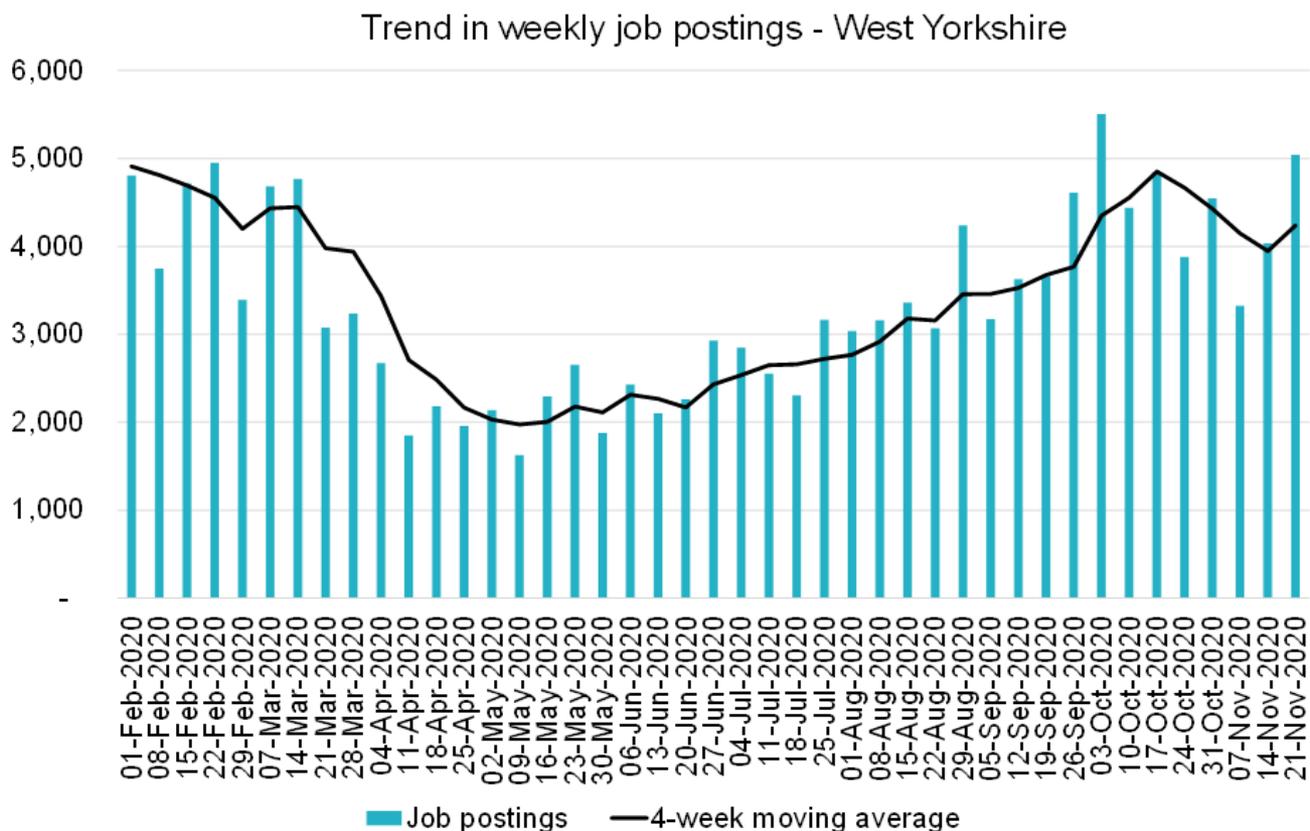
Area	Total cases per 100k people (12-18 Nov)	Total cases per 100k people (5-11 Nov)	Absolute Difference
	Most recent data week	Previous week	
Gtr Manchester	332	460	-127 
Liverpool CR	201	270	-68 
North of Tyne	335	383	-48 
Sheffield CR	285	372	-87 
West Mids CA	368	393	-25 
West Yorkshire	412	514	-102 
England	241	273	-32 

# **Economic Insights**



# West Yorkshire vacancies increased after 3 weeks of decline

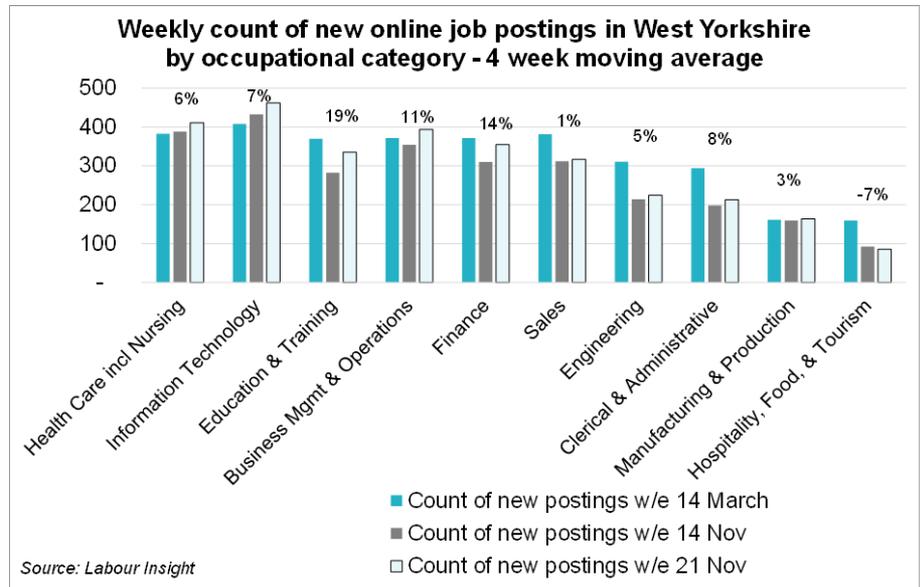
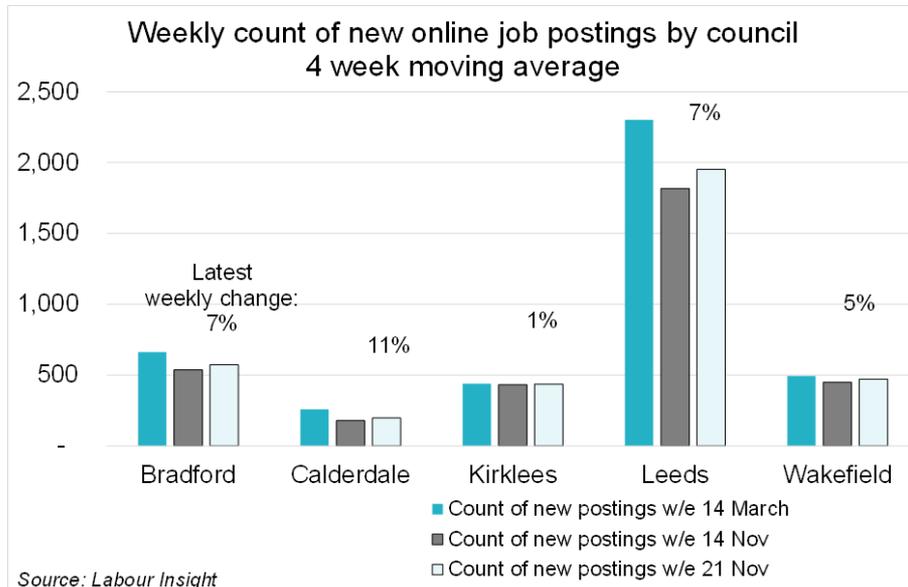
The number of vacancies for jobs in West Yorkshire posted online during week ending 21 November was 7% higher than in the previous week (based on a 4-week moving average). Nationally, the number of vacancies increased by 6%. The weekly vacancy count remains well below its recent peak in mid-October following the imposition of Covid restrictions.



# Vacancies rebounded in all local authority areas and most sectors

All local authority areas saw an increase in job postings in the latest week following several weeks of decline, ranging from 1% in Kirklees to 11% in Calderdale. All local authority areas are currently below their pre-crisis level (week ending March 14) in terms of their current weekly vacancy count, with Calderdale 24% below and Leeds 15% lower.

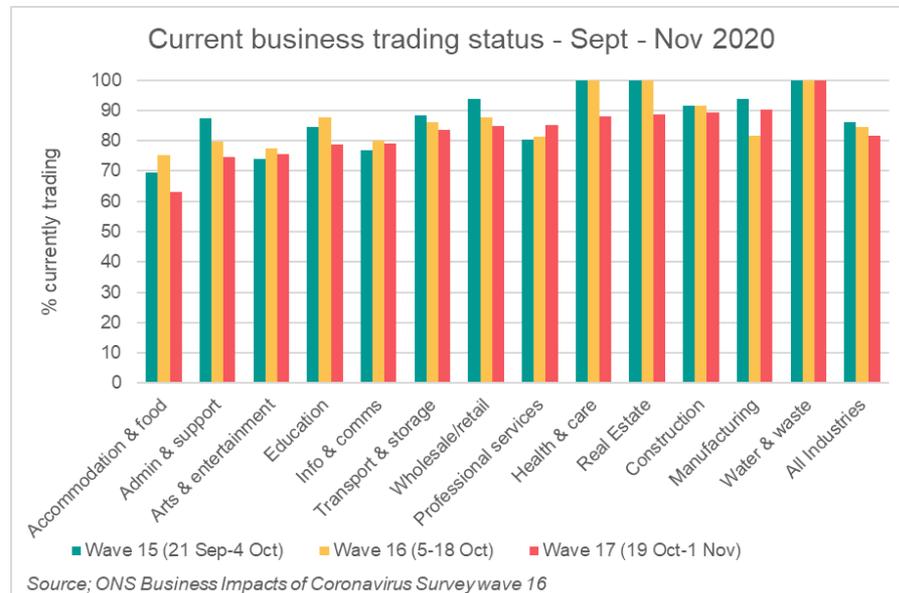
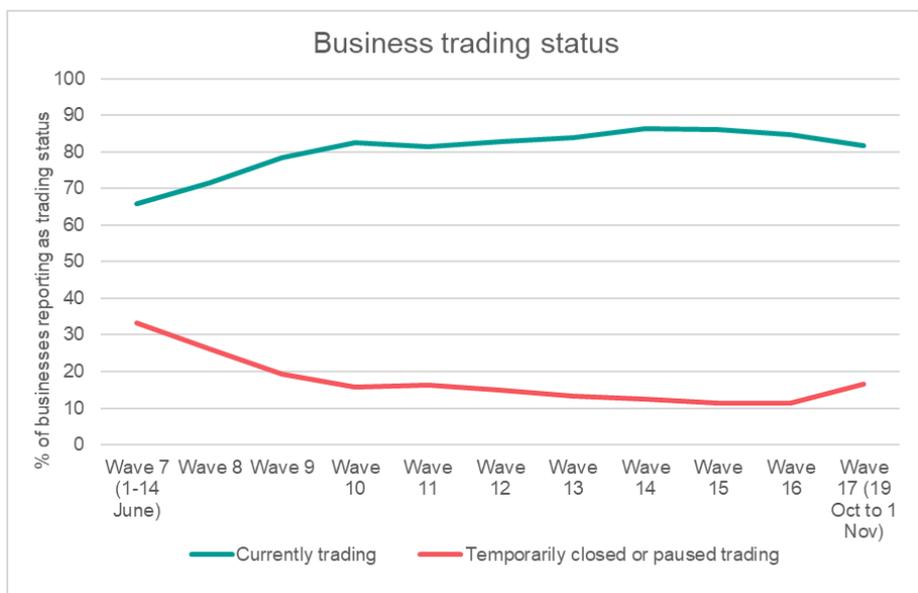
All occupational groups except Hospitality, food and tourism saw growth in job postings in the latest week (based on a 4-week moving average). The biggest increases were for Education and Training, Finance and Business Management and Operations. Engineering, Clerical & administrative and Hospitality, food and tourism have the most ground to make up to return to pre-crisis vacancy levels.



# Temporary businesses closures back to August levels

The proportion of businesses currently trading nationally fell from 84.5% to 81.5% in the latest ONS Business Impacts of Coronavirus Survey. The survey was conducted from 2<sup>nd</sup> to 15<sup>th</sup> November, and whilst the intention of the survey is to look back on the fortnight preceding their participation it is likely many answered based on their current situation as England re-entered lockdown.

The proportion currently trading was substantially lower in accommodation & food (63%), business administration (75%) and arts & entertainment (76%). Professional services and manufacturing both reported slightly higher proportions of businesses trading compared to two weeks earlier.

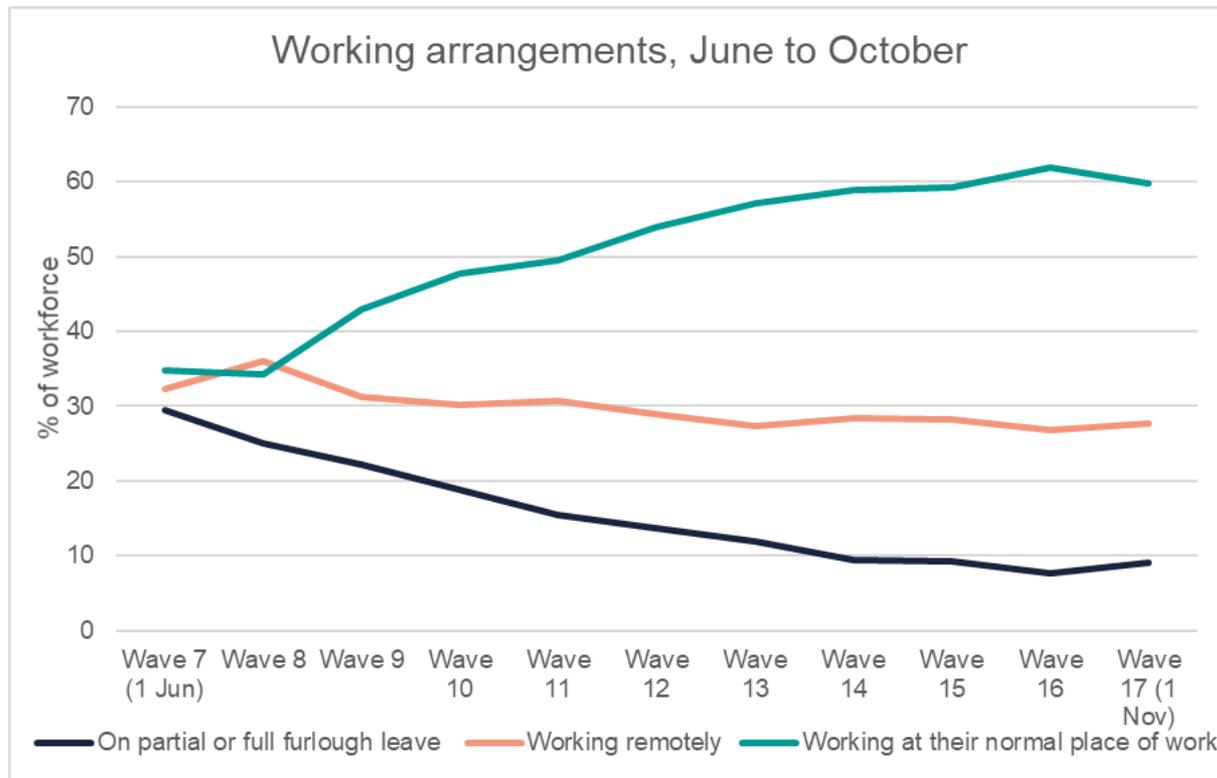


\*Source: ONS Business Impacts of Coronavirus Survey

# Slight increase in furlough use and homeworking as lockdown returns

There was a slight increase in staff on furlough in the most recent wave of the ONS BICS survey, rising from 7.7% to 9% in the fortnight to November 1<sup>st</sup>. This remains a long way below the 30% on furlough at the start of June, though it could rise further as more data covering the second lockdown in England is released.

1 in 3 people are on furlough in the arts & entertainment sector (34%), and more than 1 in 5 (22%) in the accommodation & food sector.

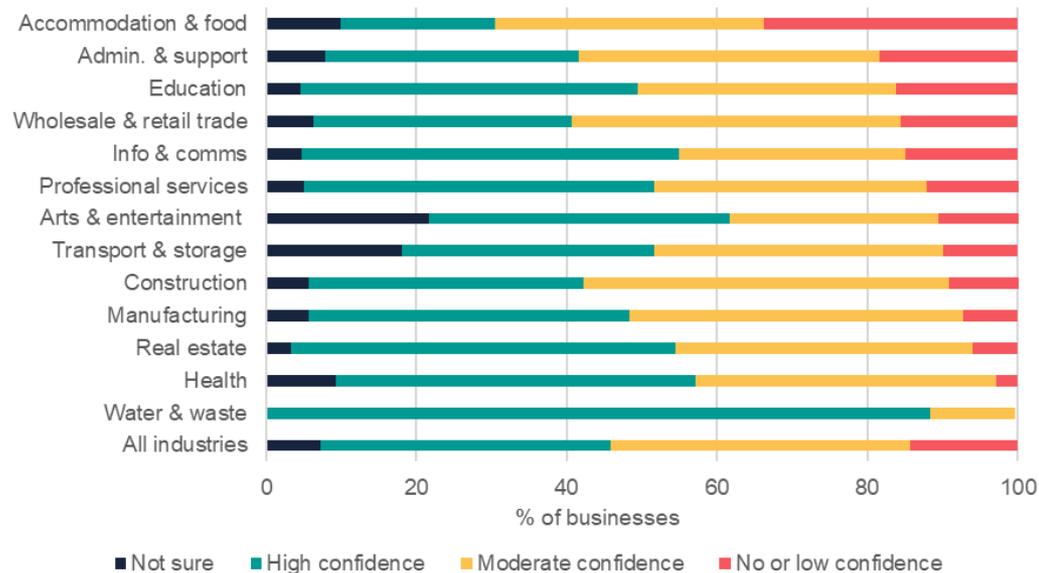


\*Source: ONS Business Impacts of Coronavirus Survey

# Half of businesses see turnover fall, confidence is very low in some sectors

Half of businesses surveyed by ONS in the first half of November said they had seen a fall in turnover in the previous fortnight, though this increased to 79% in accommodation & food and 72% in arts & entertainment.

Confidence in surviving the next three months

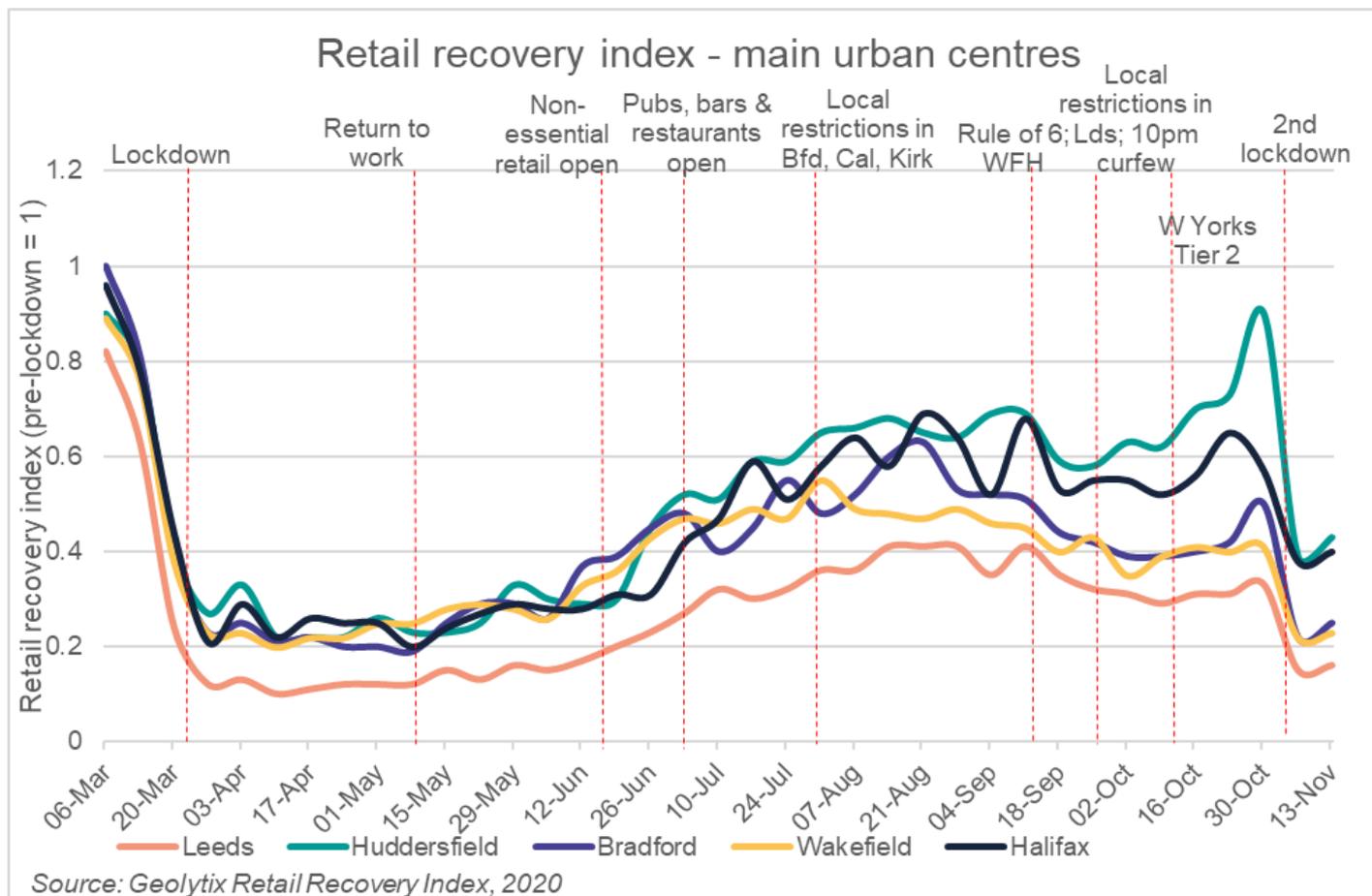


Over a third (34%) of businesses in accommodation & food said they had little or no confidence that they would survive the next three months. If reflected in West Yorkshire, this would mean around 2,300 businesses unsure of their survival in this sector alone. 18% of those in business administration and 15.5% of wholesalers and retailers are equally pessimistic about the short-term outlook which would equate to 1,400 and 2,700 businesses in West Yorkshire respectively. 1 in 7 (14%) businesses across all sectors had no or low confidence in surviving the next three months. The arts & entertainment sector also displayed a high degree of uncertainty, with a fifth of businesses unsure of the outlook.

\*Source: ONS Business Impacts of Coronavirus Survey

# Activity up slightly in urban centres, but still down substantially on pre-lockdown 1 and 2

Activity in West Yorkshire's main urban centres increased slightly in the week commencing 13<sup>th</sup> November, according to Geolytix's retail recovery index. Despite this slight rebound in the second full week of lockdown, Leeds, Bradford and Huddersfield have all seen activity at 50% of the level seen in w/c October 30<sup>th</sup>. Falls compared to pre-first lockdown are greater still, ranging from 84% in Leeds to 60% in Halifax.

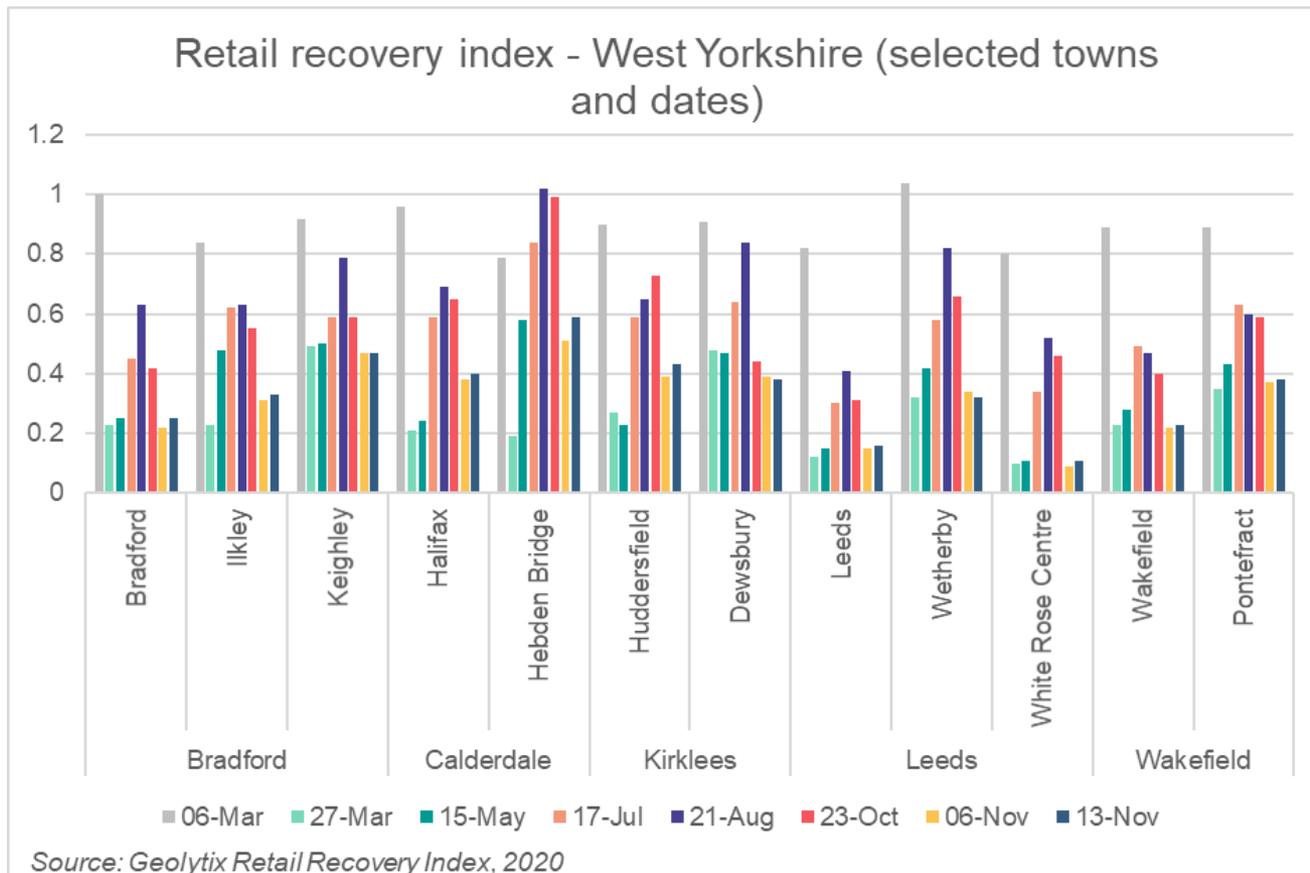


Source: Geolytix Retail Recovery Index, 2020

Source: Geolytix Retail Recovery Index

# Activity remains slightly higher away from main urban centres

In most West Yorkshire districts, activity is higher in towns away from the main urban centre, most notably in Hebden Bridge, where activity is 59% of baseline compared to 40% in Halifax, and in Keighley, where activity is 47% of baseline compared to 25% in Bradford. The exception is Kirklees, where activity in Huddersfield is slightly higher than in Dewsbury. Most places have seen little change in the past week.

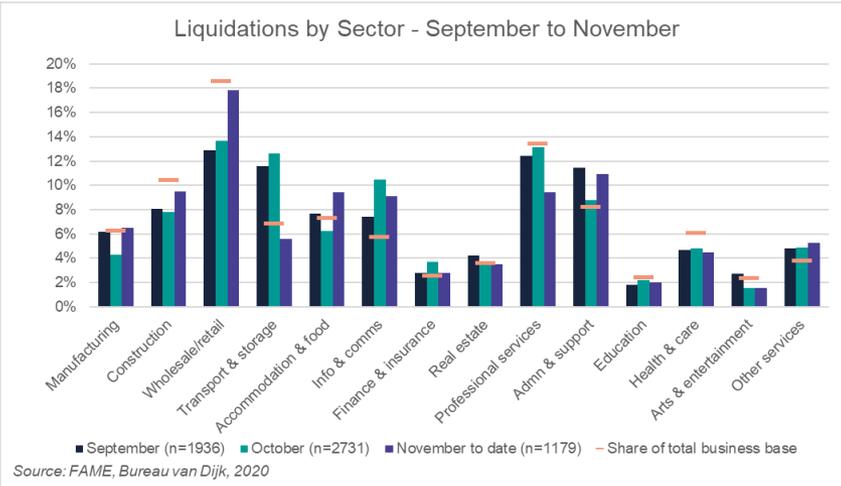
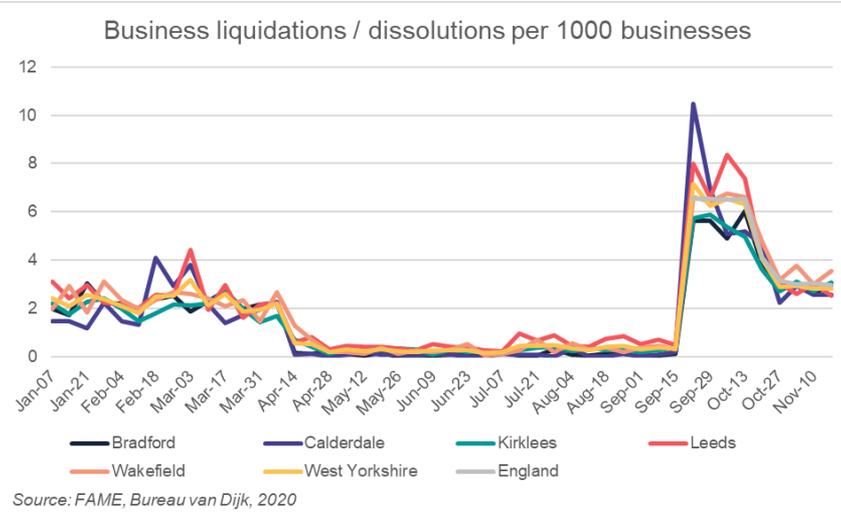


# Business failures falling from peak, but still higher than pre-lockdown

The number of businesses being dissolved / liquidated in West Yorkshire has remained stable at around 400 a week in each of the past four weeks.

In the week to 17<sup>th</sup> November, 407 businesses were liquidated, unchanged from the previous week. This equates to 2.8 businesses per 1,000 being liquidated across West Yorkshire, slightly below the 3.0 per 1,000 across England. Differences at district level range from 2.5 per 1,000 in Leeds to 3.6 in Wakefield. These districts also saw the biggest change week on week, having both had rates of 3.0 last week.

Sectorally, wholesale & retail has seen an increase in its share of liquidations this month, up from 13.7% to 17.8%. Accommodation & food has seen a 3.2% increase and now accounts for a greater share of liquidations than its share of businesses, indicating the difficult conditions facing the sector. Business administration and manufacturing have seen 2.2% increases in their share of liquidations, though transport & storage and professional services have seen sharp falls.



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

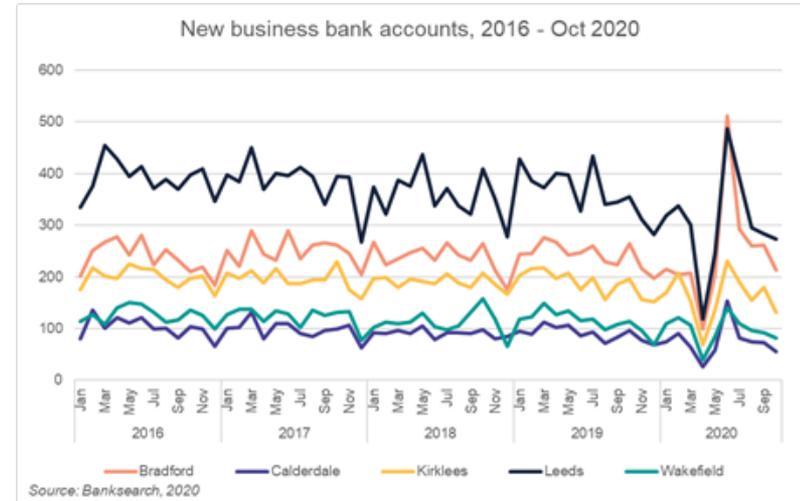
Source: FAME, Bureau van Dijk, 2020

# The number of new business bank accounts dropped from September

Across West Yorkshire there has been a 15% decrease in new business bank account openings in October compared to September. This is only marginally higher than the England wide drop of 14%. Compared to October 2019 West Yorkshire has seen a 26% decrease in new accounts. This is a lot higher than the England wide figure, which dropped by 16% when comparing October 2020 to October 2019.

All districts in West Yorkshire have seen a decrease in new bank accounts in October. The decrease varies considerably with Kirklees having the largest decrease of 27% whilst Leeds has seen the lowest drop of 4%.

Sectors hardest hit by COVID-19 have seen the biggest decrease in new bank accounts. The recreational, personal and community services sector has seen the biggest drop of 29% compared to September and 39% compared to October 2019. Transport, storage & communication has dropped by 27% compared to September and 23% when compared to October 2019. Real Estate has dropped by 21% from September and 45% compared to October 2019.

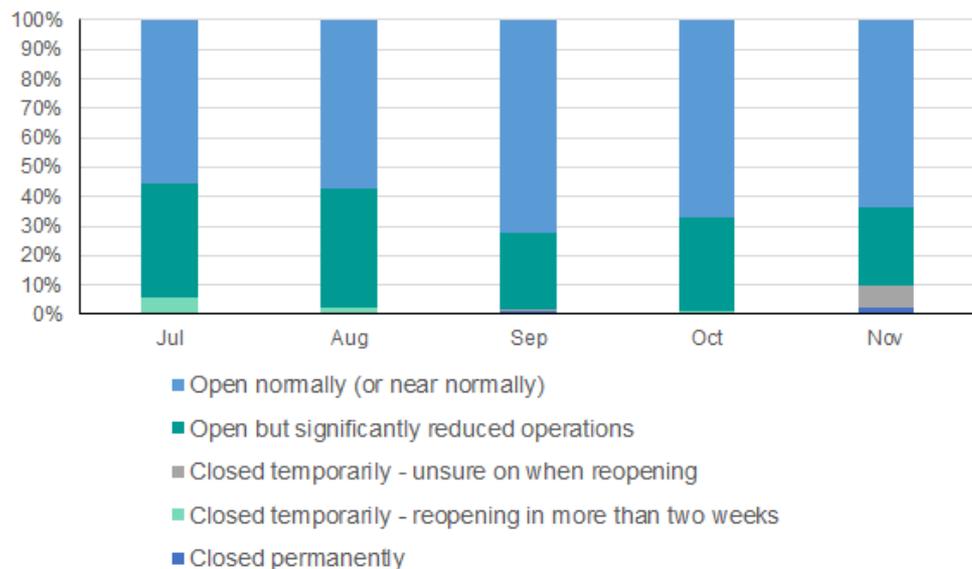


# Growth manager interactions suggests companies are drawing heavily on government support

Businesses this week have been continued to report varied success in managing with the COVID-19 restrictions in their recent interactions with Growth Managers. Often business have been very reactive to the COVID-19 support that is available to them. Either making cuts or investing in changes to their business model depending on what type grant, support loan or furlough scheme that they have access to. Despite the support available, some businesses continue to make necessary redundancies, including in manufacturing industries.

Some businesses have continued to create jobs despite the restrictions in place. The digital sector has continued to show strong growth in the region, with three companies spoken to reporting a collective of 52 new jobs created in recent times.

Businesses trading status



During the lockdown period in November there has been a noticeable increase in business reporting they are closed either temporarily or potentially permanently. Combined 10% of business who gave feedback stated they were closed either temporarily and unsure when they will open or permanently.

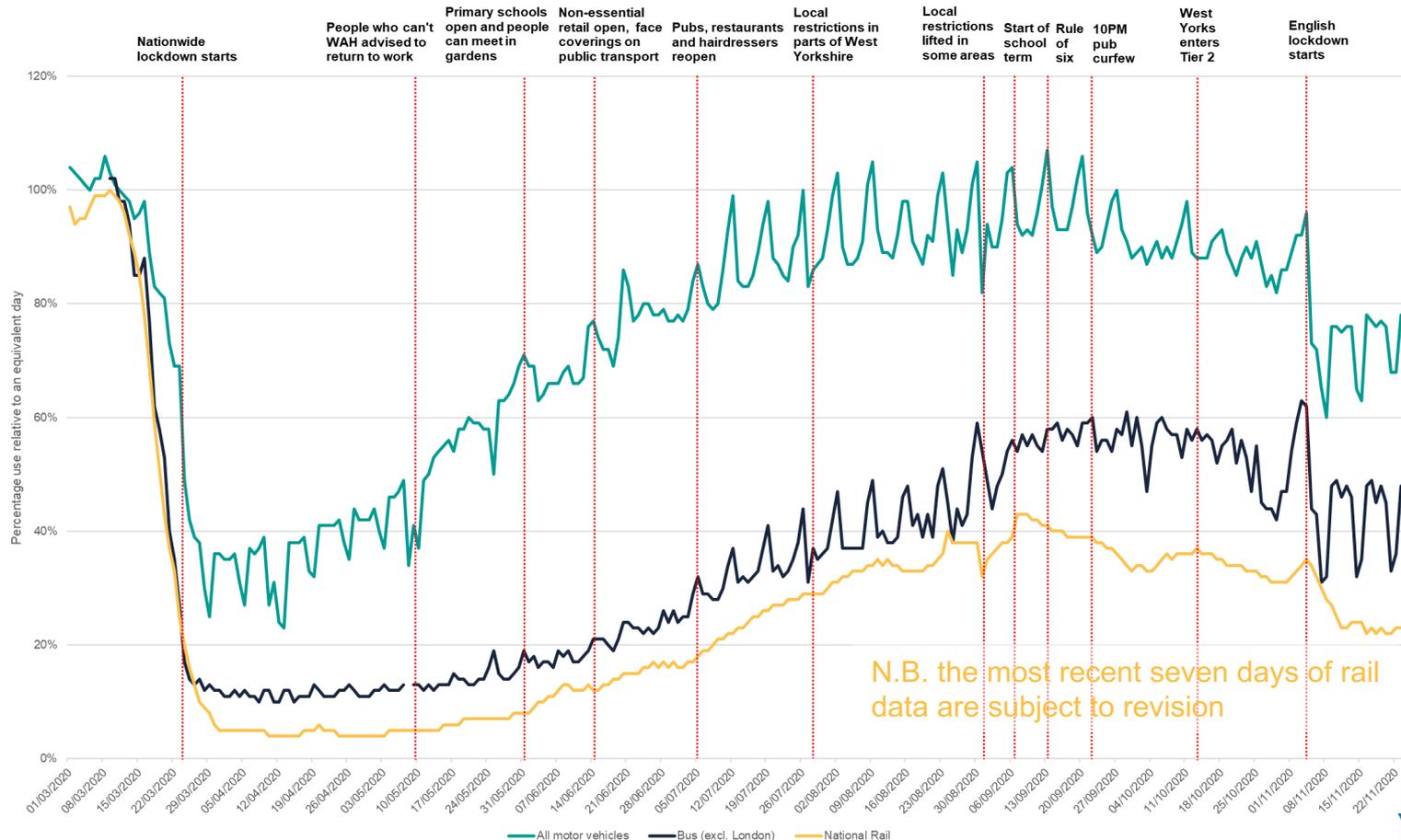
# Transport Insights



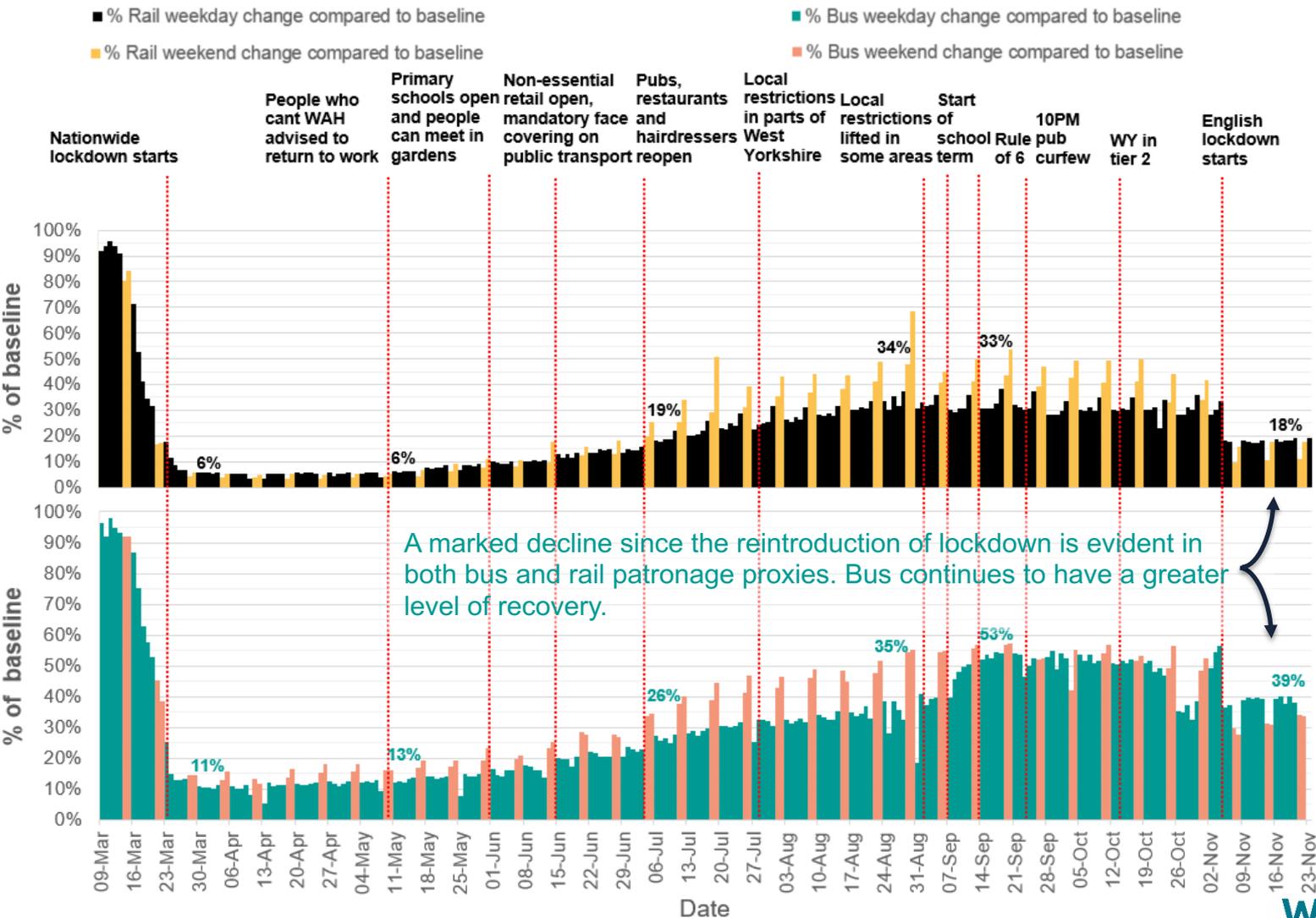
# National DfT data shows reduced transport use after English lockdown

Data for Great Britain shows that motor vehicle, bus and rail travel declined following the reintroduction of restrictions in England on 5<sup>th</sup> November. 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. Compared to the first full week of lockdown, motor vehicle use gradually increased in the second week, while public transport has remained mostly consistent. Similar trends occur locally.

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



# Local rail and bus proxies show lower use since the reintroduction of restrictions in England, but not to the same levels as March/April



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)

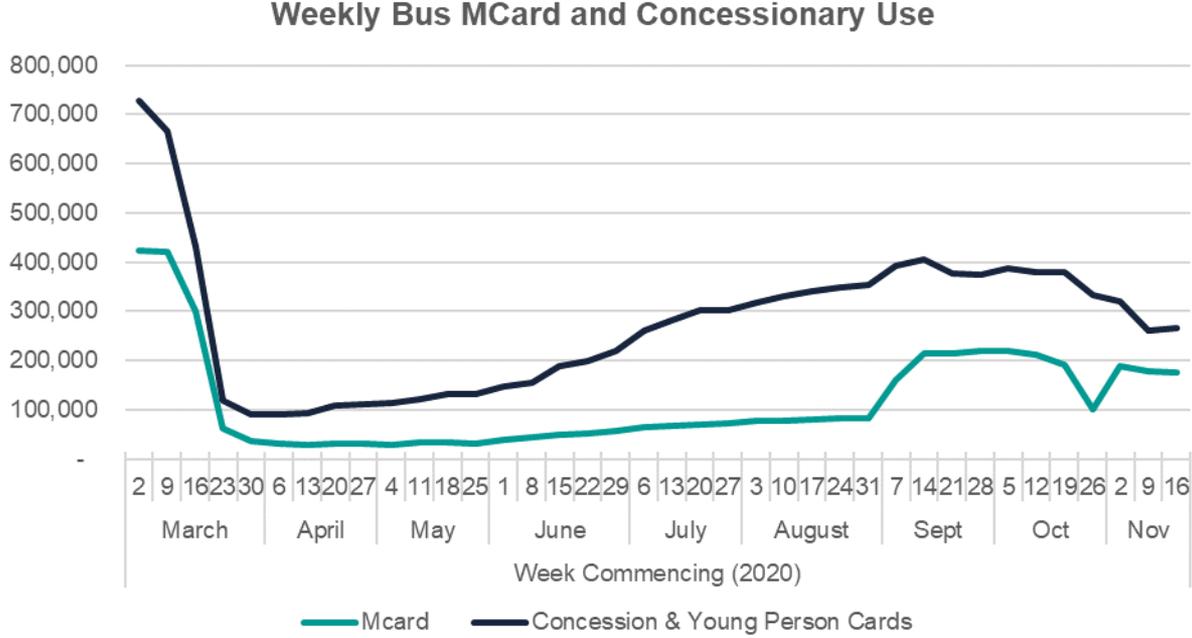


RAIL  
(Leeds  
Station  
Footfall)

BUS  
(MCard  
and  
ENCTS)

# Bus use in West Yorkshire showing impacts of the new lockdown

For the week beginning Monday 16<sup>th</sup> November 2020, the combined level of MCard and concessionary fare use shows a reduction of 62% against the week beginning 2<sup>nd</sup> March 2020, a 1% increase against the previous week. This shows a decline in usage during lockdown, with Concession and Young Person cards driving the trend. Note that levels remain higher than those seen in the national lockdown in spring.



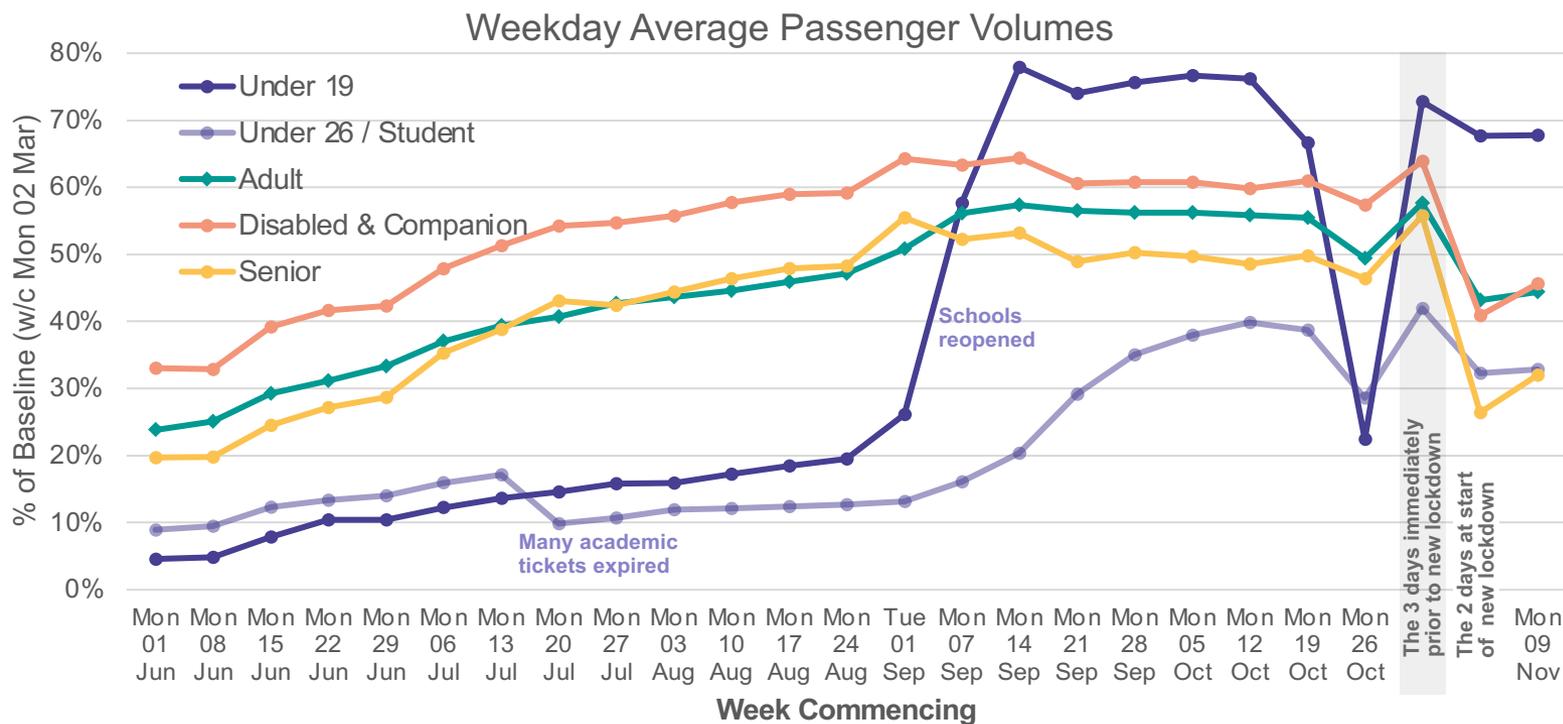
Source: WYCA NERO reports

# Bus use by ENCTS holders has rebounded slightly since start of new lockdown

Data from bus ticket machines reveals a drop in use by all cohorts in the first 2 days of the new lockdown. There was then a rebound in the first full week of lockdown by senior and disabled cohorts while other cohorts appear to have levelled off. Data is for weekdays excluding bank holidays, with ticket types assigned to broad cohorts and is available up to the week commencing 9<sup>th</sup> November.

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

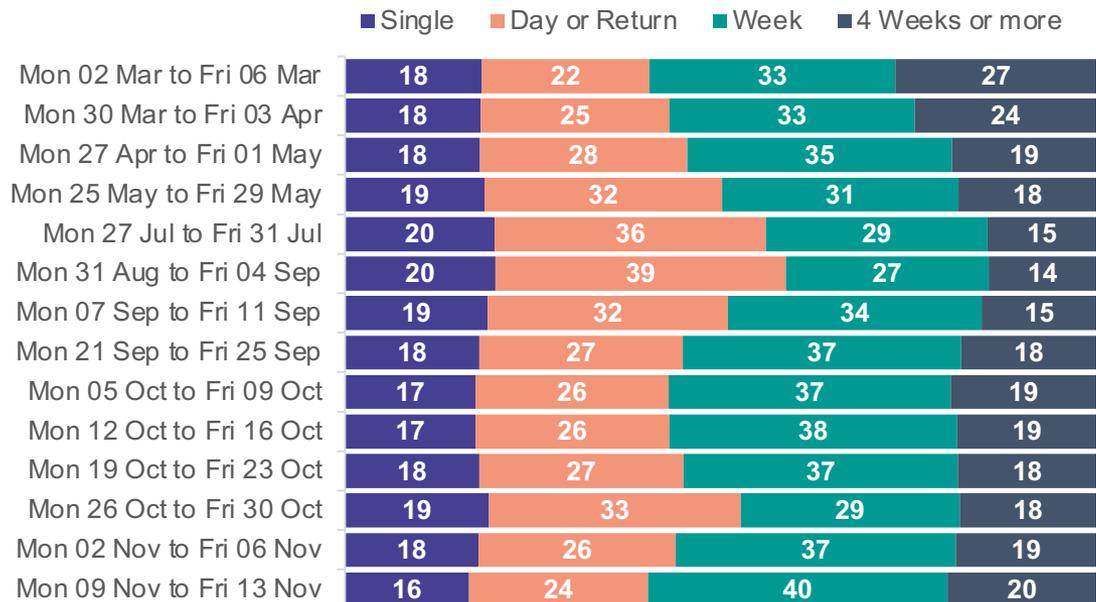


Baseline period is w/c Mon 02 Mar. Source: Bus operators electronic ticket machine data, passenger boarding locations in West Yorkshire. First, Arriva, Yorkshire Tiger and Transdev account for over 90% of bus services in West Yorkshire. Graph shows First and Transdev.

# Trends in passenger ticket preferences indicate a return to longer validity tickets

The use of weekly tickets has increased to 40% of all journeys while the use of day, return, and single journey tickets has reduced to 40%, with a dip in the use of weekly tickets during half term. There is also a slight increase in the use of tickets valid for 4 weeks that does not appear to have been impacted on by the second lockdown.

## Ticket Commitment (% of Bus Journeys)



Source: Ticket machine data from First, Arriva, Yorkshire Tiger, Transdev  
 Coverage: Over 90% of scheduled bus miles in West Yorkshire

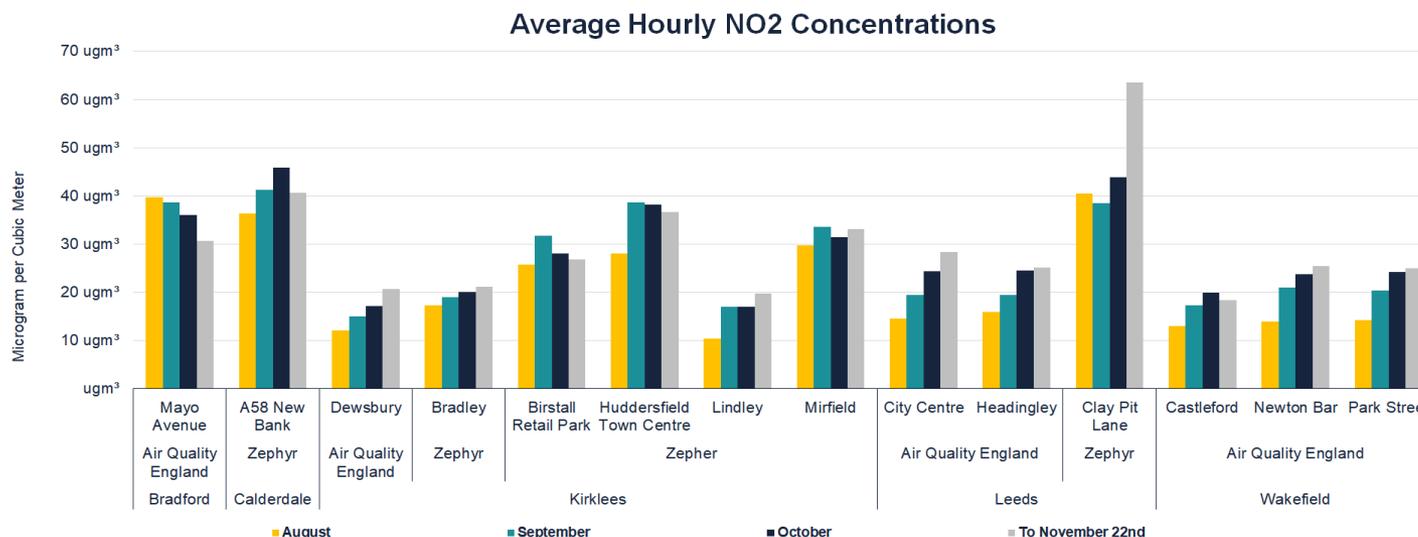
Baseline period is w/c Mon 02 Mar. Source: Bus operators electronic ticket machine data, passenger boarding locations in West Yorkshire. First, Arriva, Yorkshire Tiger and Transdev account for over 90% of bus services in West Yorkshire. Graph shows First and Transdev.

# Air Quality – No notable reduction in NO<sub>2</sub> concentration following second lockdown

There are minimal changes to NO<sub>2</sub> concentrations in response to the second lockdown with most monitoring sites reporting increases or decreases within 5ug/m<sup>3</sup>, indicating little change in driving behaviour.

Clay Pit Lane Average November NO <sub>2</sub> ug/m <sup>3</sup>	Week 45	Week 46	Week 47
	2nd - 8th November	9th - 15th November	16th - 22nd November
Morning 00:00 - 07:59	30ug/m <sup>3</sup>	31ug/m <sup>3</sup>	23ug/m <sup>3</sup>
<b>Midday 08:00 - 15:59</b>	<b>63ug/m<sup>3</sup></b>	<b>76ug/m<sup>3</sup></b>	<b>125ug/m<sup>3</sup></b>
Evening 16:00 - 25:59	70ug/m <sup>3</sup>	67ug/m <sup>3</sup>	89ug/m <sup>3</sup>

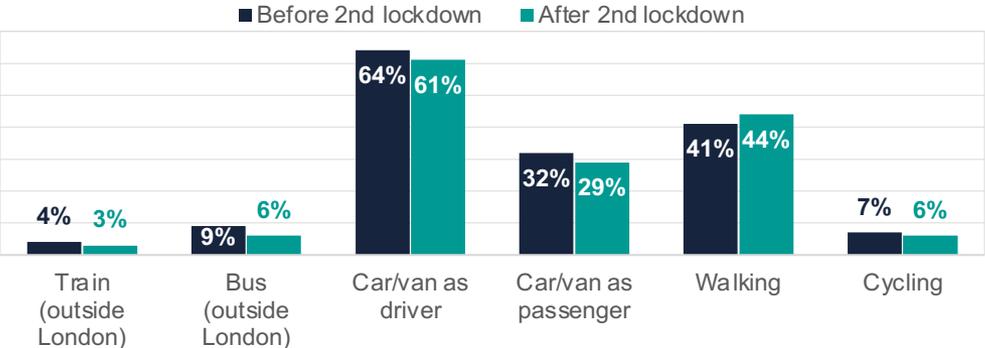
Clay Pit Lane in Leeds however is an exception, with a 20% increase in overall NO<sub>2</sub> concentrations and considerable week on week variation. These high recordings are an anomaly caused by resurfacing works and road closures taking place on Clay Pit Lane from 9th November onwards, resulting in parked vehicles, and not an indicator of increase congestion.



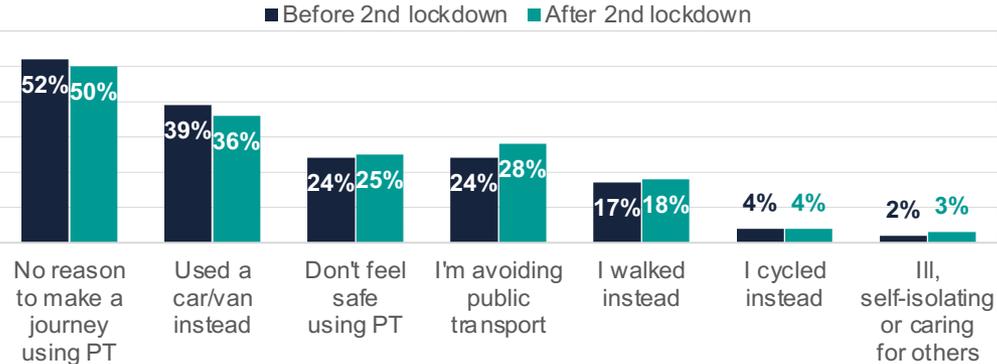
Source: Air Quality England, Earth Sense 2020

# National survey shows a decline in public transport usage in recent weeks, as concerns increase

Travel by different modes in the last 7 days (GB)  
(% of respondents)



Reasons to not use public transport in the last 7 days (GB)  
(% respondents)



Transport Focus’s Travel during Covid-19 Survey shows a decline in public transport usage in recent weeks, which has been more noticeable after the second lockdown, in parallel with an increase in the proportion of respondents walking.

This increase in walking is partly explained by concerns about using public transport, with a higher proportion of respondents declaring they are currently avoiding it, compared to pre-lockdown.

The main reason for travelling is shopping for essentials (cited by 78% of respondents in the most recent survey), followed by commuting (cited by 35%). The lockdown has been effective in reducing the number of socialising and leisure trips, with the proportion of respondents making trips for these reasons falling by 40% and 60%, respectively, with respect to pre-lockdown.

Source: Transport Focus, Travel during COVID-19 Survey.  
Before lockdown data based on survey conducted 13 Oct (week 26); After lockdown data based on survey conducted 13 Nov (week 29).