

West of England Economic Briefing on Covid-19 Business Impacts

20 August 2020

Monitoring the economic impact of coronavirus

The West of England Combined Authority is working with partners and bringing the region together to tackle some of the urgent issues caused by coronavirus. We are taking our businesses' concerns back to government and influencing national decisions. While in this difficult time, we are already planning for the future and adapting our work and looking for new ways to help the West of England recover - to benefit all our residents and businesses.

We have set up a new West of England Economic Recovery Board, a partnership between the West of England Combined Authority, the Local Enterprise Partnership, business, universities and the region's councils (westofengland-ca.gov.uk/support-for-business-through-coronavirus-covid-19)

We are building a regional picture of the specific industrial and labour market challenges we're facing:

- We're talking to businesses of all sizes, answering their queries and helping them to find the support they need;
- We have set up a Covid-19 Business Insight Panel, chaired by West of England Mayor Tim Bowles and including regional leads from across the business support and banking sector;
- The Local Enterprise Partnership Board is providing further intelligence and strategic support.

This briefing summarises this business intelligence, and WECA's economic analysis so far of the pandemic. The intention is to update it as intelligence and analysis develops. Comments are sought on what should be expanded.

- A. State of the economy (emerging data)
- B. Impact on the region's sectors
- C. Government Support
- D. Details of the government's lockdown exit strategy

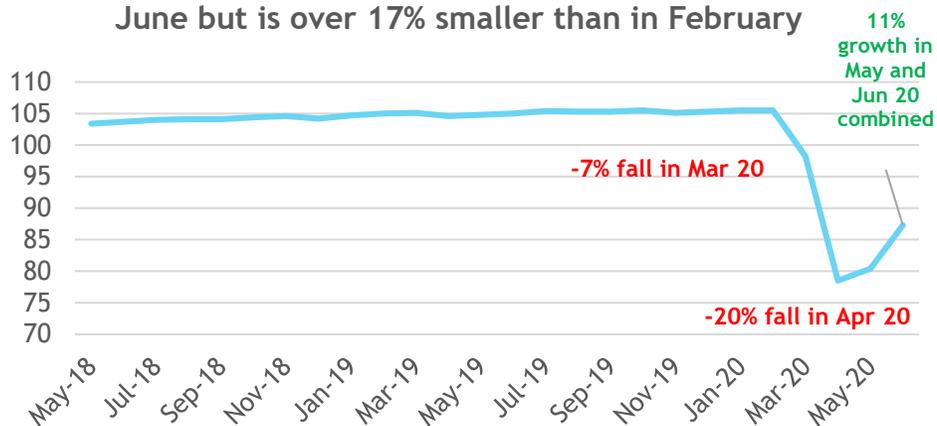
Updates this week

Intelligence from businesses and available data are developing each week. For ease of reference, this brief collates material from over the past few months (while it remains current). The key updates this week are:

Section	Updates	Pages
A	<ul style="list-style-type: none">• Business Impacts: UK quarterly GDP was estimated to have fallen by over 20% in the second quarter of 2020• As of 13 August, 217 businesses based in the West of England have appointed liquidators since 16 March, including 18 so far in August. This appears stable and is a similar amount to this time last year.• Labour Market: 5.2% of the region's workforce claimed out of work benefits in July 2020 (38,800 residents). This is similar to the 5% reported for June 2020.• Mobility: Footfall in the UK is around 50% of normal levels and is gradually rising in retail and leisure outlets. Public transport patronage is increasing though less so in Bristol.• Local authorities in the region are distributing grants to support businesses. As of 16 August, 16,703 grants have been distributed, amounting to £209.4 million in the West of England.	4-17
B	<ul style="list-style-type: none">• Key sectors of the economy will be impacted differently, depending on changes in demand; ability to open; and ability to work from home, but national GDP data reveals a drop in economic output across almost all sectors.• Accommodation and food services experience the largest negative growth in March to May 2020, followed by services; education; and transport and storage.• The 2020 A-Level results were published on 13 August	18-20
C	<ul style="list-style-type: none">• The second round of applications for the government's Self-Employment Income Support Scheme was launched on 17 August• Local Authorities will receive a share of £4 million in funding to provide dedicated school and college transport networks• The deadline for farmers to apply for funding under the Dairy Response Fund has been extended to 11 September	21
D	<ul style="list-style-type: none">• From 15th August, more restrictions were lifted: indoor theatres reopened; wedding receptions for up to 30 guests were permitted; close contact beauty services resumed; and casinos, bowling alleys and soft play centres reopened.• The government continues to update its "Air Bridges" guidance to reflect international infection rates. Andorra, Belgium and The Bahamas are to be removed from travel corridors and exemptions list. People arriving in England from Andorra, Belgium and The Bahamas from 4am Saturday 8 August 2020 will need to self-isolate for 2 weeks.	22

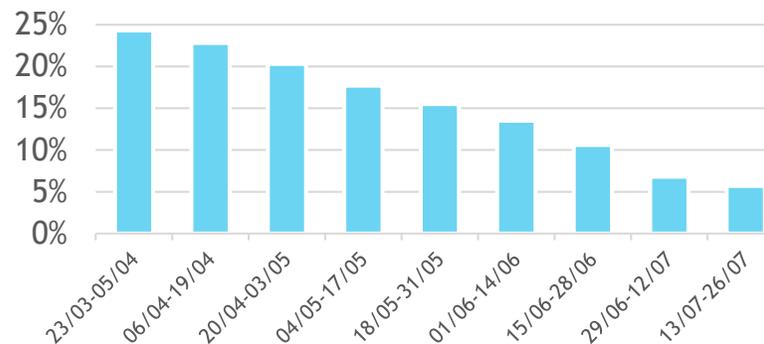
Business impacts are significant: GDP has fallen dramatically, and many businesses are closed and facing financial pressures

UK monthly GDP returned to growth in May and June but is over 17% smaller than in February



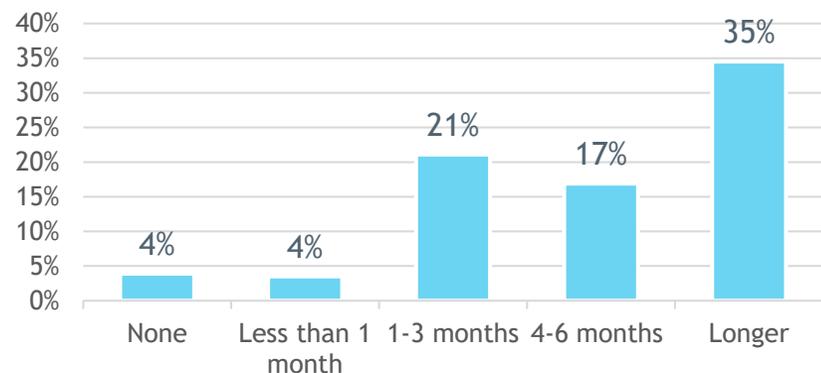
Source: [ONS GDP estimates, June 2020](#)

6% of UK businesses have temporarily paused trading, down from 24% during lockdown



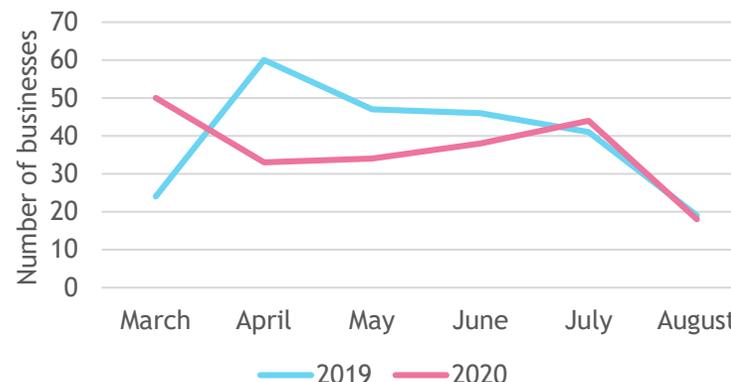
Source: [ONS Business Impact Survey](#), 13 July to 26 July 2020

29% of UK businesses have cash reserves to last three months or less



Source: [ONS Business Impact Survey](#), 13 July to 26 July 2020

217 West of England businesses have appointed liquidators since lockdown - this appears fairly stable



Source: [London Gazette, Insolvency Notices](#)

As of 9 August:

16,703 grants, totalling £209.4 million distributed by West of England local authorities (as of 16 Aug)

£35 billion lent across the UK in Bounce-Back loans

£13.4 bn lent to UK SMEs in Business Interruption Loans

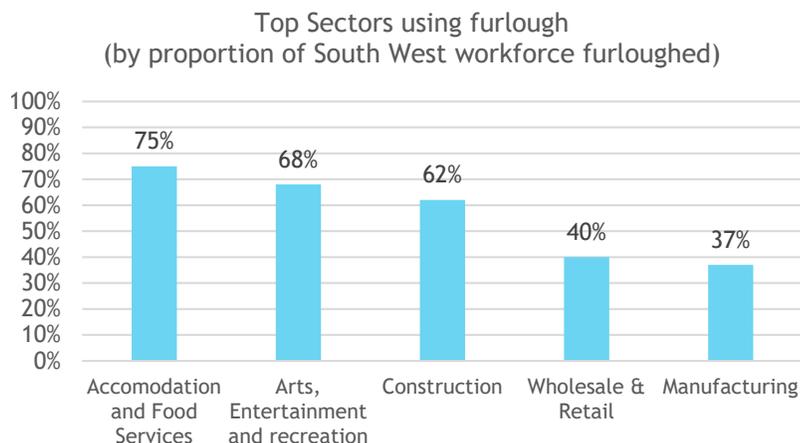
9.6 million UK workers furloughed by 1.2 million employers - costing £34.7 bn

2.7 million UK claims for Self-Employment Income Support, totalling £7.8 bn (as of 19 July)

Source: [HMRC Coronavirus Support Statistics](#)

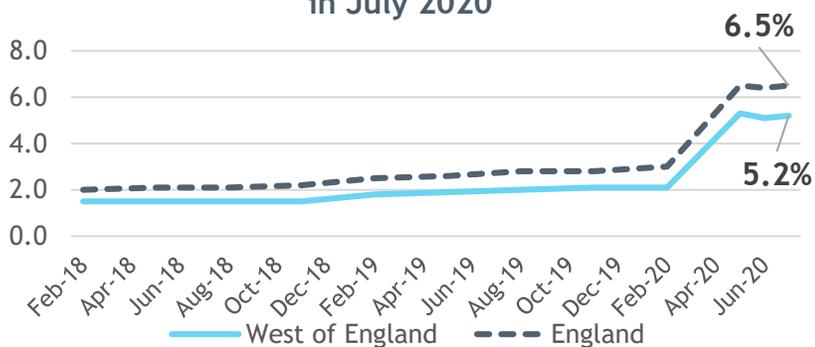
The labour market is severely affected: 29% of the region's workforce are furloughed; unemployment benefit claims have risen; and vacancies fell sharply

161,000 West of England employees have been furloughed (29% of the eligible workforce) as of 30 June



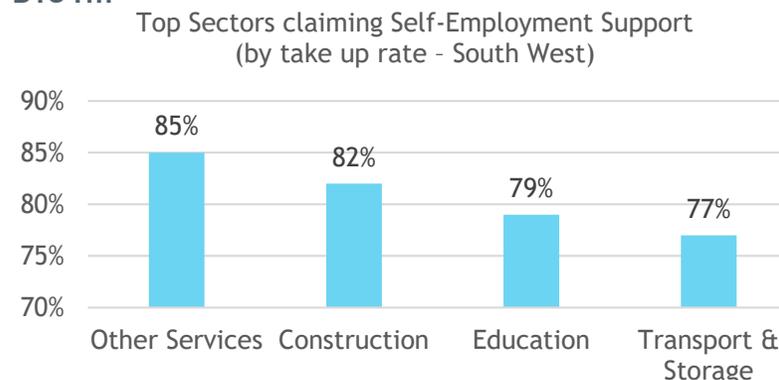
Source: [HMRC Coronavirus Job Retention Scheme Statistics](#)

5.2% of the West of England's working age population claimed unemployment benefits in July 2020



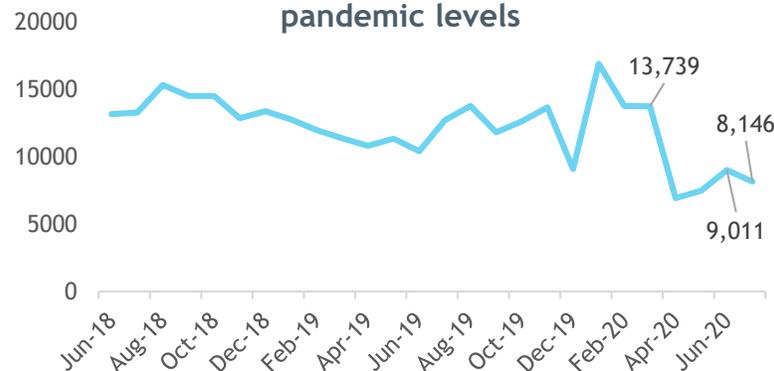
Source: [Nomis Labour Market Profile](#)

43,500 West of England residents have claimed Self-Employment Income Support, and claims amounting to £131m



Source: [HMRC Coronavirus Job Retention Scheme Statistics](#)

Vacancies in the WoE fell sharply in April 2020, but now appear stable, although below pre-pandemic levels



Source: Labour Insight

As of 26 July, at a UK level:

40% of people said their well-being was being affected by the pandemic - through stress, anxiety, boredom and loneliness

19% of people report their household finances have been affected by the pandemic

28% of people say they feel unsafe outside of their homes due to COVID-19

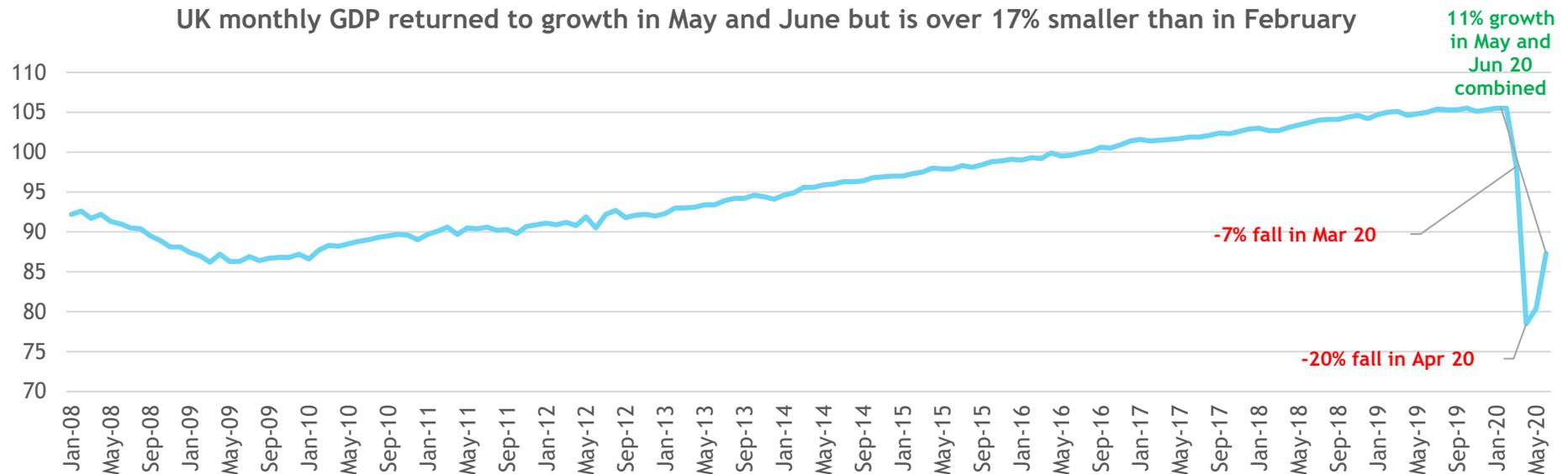
40% of people would feel comfortable eating at a restaurant indoors; 14% visiting an indoor swimming pool; and 21% attending an indoor concert with a socially distanced audience

Source: [ONS Opinions and Lifestyle Survey \(22-26 July\)](#)

A. Overview: The economic impacts are significant and we are in recession

The pandemic will have a significant impact on economic output, particularly in the short term:

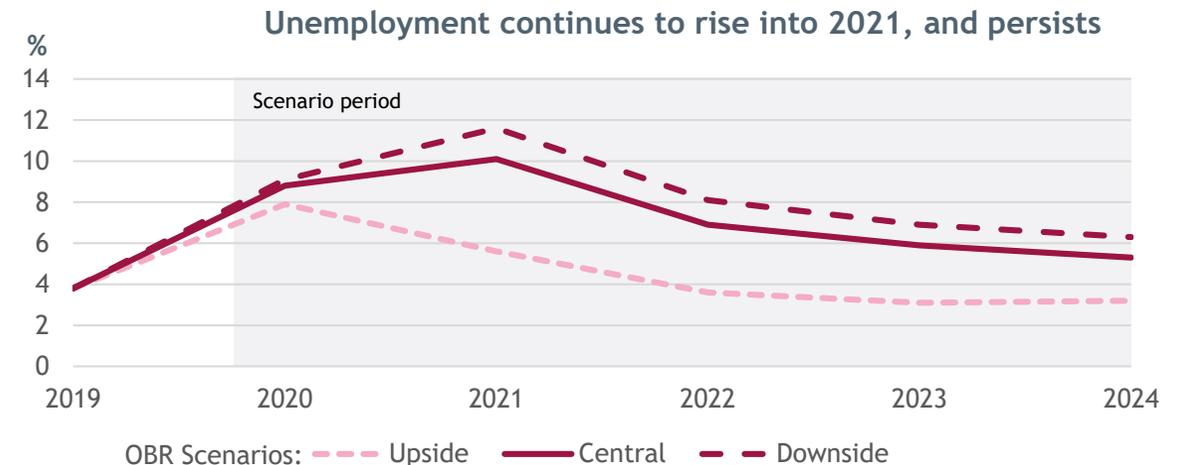
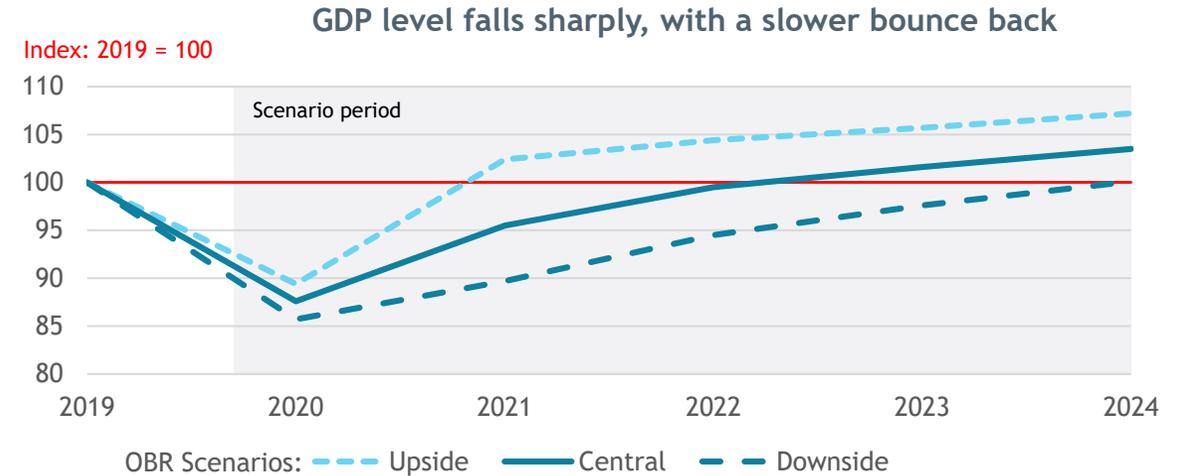
- **UK quarterly GDP was estimated to have fallen by over 20% in the second quarter of 2020 (ONS).** This is the second consecutive quarterly fall and means the UK is in recession.
- Since the end of February, the services sector has fallen by an estimated 17.6%, production by 11.6% and construction by 24.8%.
- **An increase of monthly GDP levels has been recorded, as growth was 11% over May and June combined after a 20% fall in April.** However real GDP is at a level last seen at the beginning of 2010.



A. A range of scenarios have been produced for bounce back of economy by 2022, modelling GDP and unemployment

The Office for Budget Responsibility has published three scenarios for the economy over the next five years in its [Fiscal Sustainability Report](#).

- In the central scenario, the economy returns to its peak before the pandemic by the end of 2022. Unemployment rises to 10% by 2021. This scenario is based on a vaccine or treatment in a year's time, or faster health progress but greater economic scarring.
- In the upside scenario, with a rapid decline in virus threat, the economy recovers its peak by early 2021, and unemployment peaks at 8% before falling to 2019 levels.
- In the downside scenario, recovery is delayed by continuing social distancing, and the 2019 level of GDP is not regained until 2024; unemployment rises to 11.6% and falls slowly.



A. Business activity and finance impacts are significant, but many businesses have reopened

Many businesses have reopened, with 6% of businesses closed nationally compared to 25% when lockdown restrictions were first imposed in late March.

Trading Status: The latest [ONS Business Impact Survey](#) (data from 13 to 26 July) reports that 6% of businesses across the UK were temporarily closed or had paused trading in the period 13 July to 26 July.

- The sectors reporting the largest percentages of closures were arts, entertainment and recreation; and accommodation and food, reporting 34% and 16% respectively.
- 4% of businesses said did not intend to restart trading in the next two weeks. The vast majority of these businesses belong to the arts, entertainment and recreation, or accommodation and food services, industries.

Business Closures: 3% of businesses intend to permanently close at least one of their sites in the next 3 months; 86% do not; 10% are unsure.

- This is most common in education, and wholesale, retail and motor trades (5% of businesses)
- Of those intending to close sites, two thirds say this will result in redundancies and the remainder will result in relocation or remote working.

Financial performance: Of businesses continuing to trade between 13 to 26 July, 53% reported their turnover had decreased outside of normal range in this period (down from 67% at the height of lockdown); 30% said financial performance had not been affected; and 11% reported an increase in turnover.

- Sectors appearing to be worst hit are accommodation and food (82% reporting decreased turnover); and arts and entertainment (79%)
- The main sectors reporting increased turnover were wholesale and retail (20% of businesses); and transport and storage (13%)

Business Resilience and Confidence: All businesses were asked about their cash reserves. 4% reported their cash reserves will last less than 1 month; 21% will last between 1 and 3 months; 17% between 4 and 6 months; and 35% more than 6 months.

- 4% of businesses have no cash reserves; and 20% are unsure of their financial position. The accommodation and food service sector reported the largest proportion of businesses with no cash reserves, with 7% of businesses in the sector reporting this.

A. Business activity: bankruptcies have not risen to date

Some businesses have entered administration or liquidation but so far this appears no higher than the same time period in 2019. The small numbers of businesses in these categories makes it difficult to draw conclusions, but it is possible that the combination of government support schemes and bans on evictions and winding-up petitions are temporarily protecting firms.

Administration

- As of 13 August, 29 businesses based in the West of England have appointed administrators since 16 March¹. 35 businesses appointed administrators in the same time period last year.

Liquidations

- As of 13 August, 217 businesses based in the West of England have appointed liquidators since 16 March¹, including 18 so far in August. 237 businesses appointed liquidators in the same time period last year.

Table 1: Businesses entering administration in recent months compared to 2019

Unitary Authority	Mar 20	Apr 20	May 20	Jun 20	Jul 20	Aug 20	Mar - Aug 20	Mar-Aug 2019
Bath and North East Somerset	1	0	0	0	3	0	4	1
Bristol City	3	3	3	5	4	3	21	27
North Somerset	0	0	0	1	2	1	4	4
South Gloucestershire	0	0	0	0	0	0	0	3
West of England Total	4	3	3	6	9	4	29	35

Table 2: Businesses entering liquidation in recent months compared to 2019

Unitary Authority	Mar 20	Apr 20	May 20	Jun 20	Jul 20	Aug 20	Mar - Aug 20	Mar-Aug 2019
Bath and North East Somerset	9	4	6	6	7	4	36	40
Bristol City	25	17	19	20	30	10	121	140
North Somerset	9	7	6	6	5	1	34	36
South Gloucestershire	7	5	3	6	2	3	26	21
West of England Total	50	33	34	38	44	18	217	237

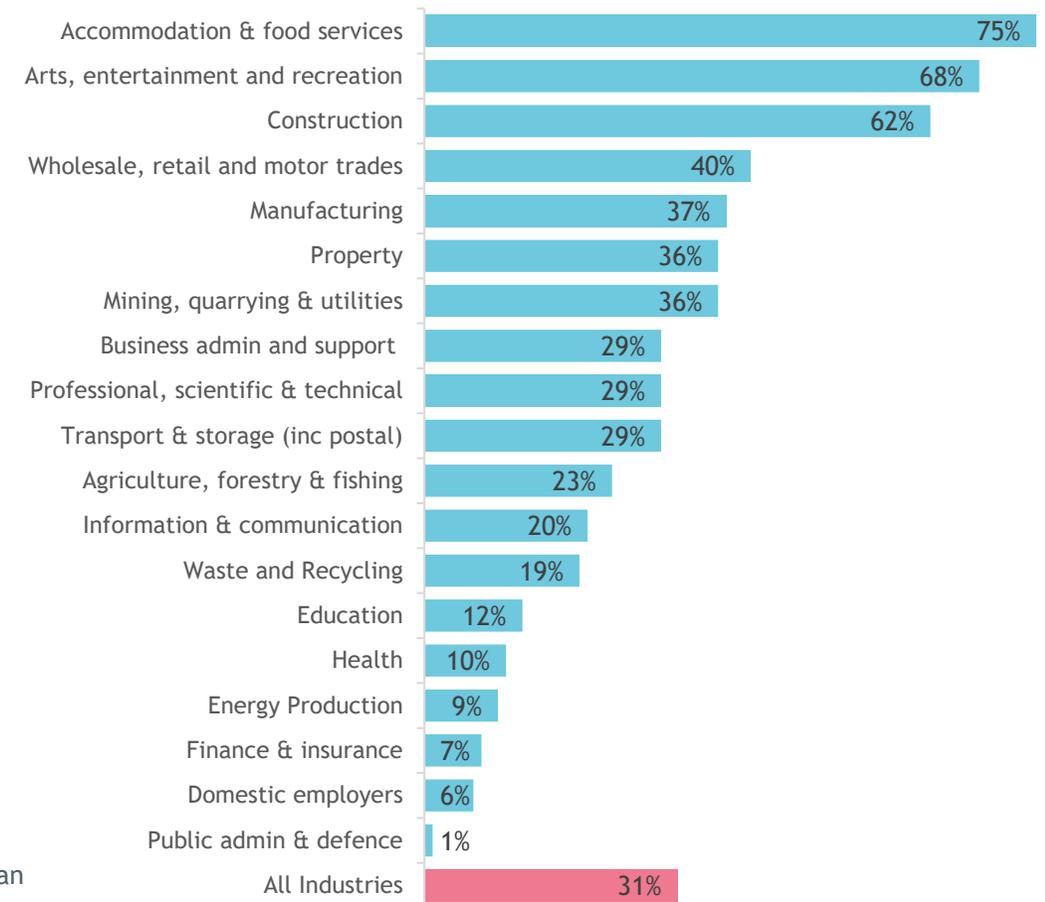
1) 16 March being the date the Government first advised people to work from home and avoid pubs, clubs, theatres and other social venues.

Sources: [London Gazette](#)

Labour Market: 29% of the West of England workforce has been furloughed at some point

- As of 9 August 2020, 9.6 million people in the UK have been furloughed, by 1.2 million employers, with claims amounting to £34.7 billion. Note that this is cumulative and some of these workers will now have returned from furlough.
- As of 30 June, 161,000 West of England employees have been furloughed, representing around 29% of those eligible for furlough.
- Nationally employees aged 16-21 are most likely to be furloughed with 50% of those eligible furloughed.
- Least likely to be furloughed are men in their forties (28%) and women aged 41-58 (23%).
- Nationally, at age 22 and above females were less likely to be furloughed than males. In part this reflects the sectors men and woman tend to work in - for example relatively more women work in education and health sectors, which have experienced a relatively low level of furloughing.
- In the South West, furlough levels are highest among the accommodation and food sector (75% of the eligible workforce); arts, entertainment and recreation (68%); and construction (62%). This information is not yet available at a local authority level.

% South West workforce furloughed by industry (30 June)

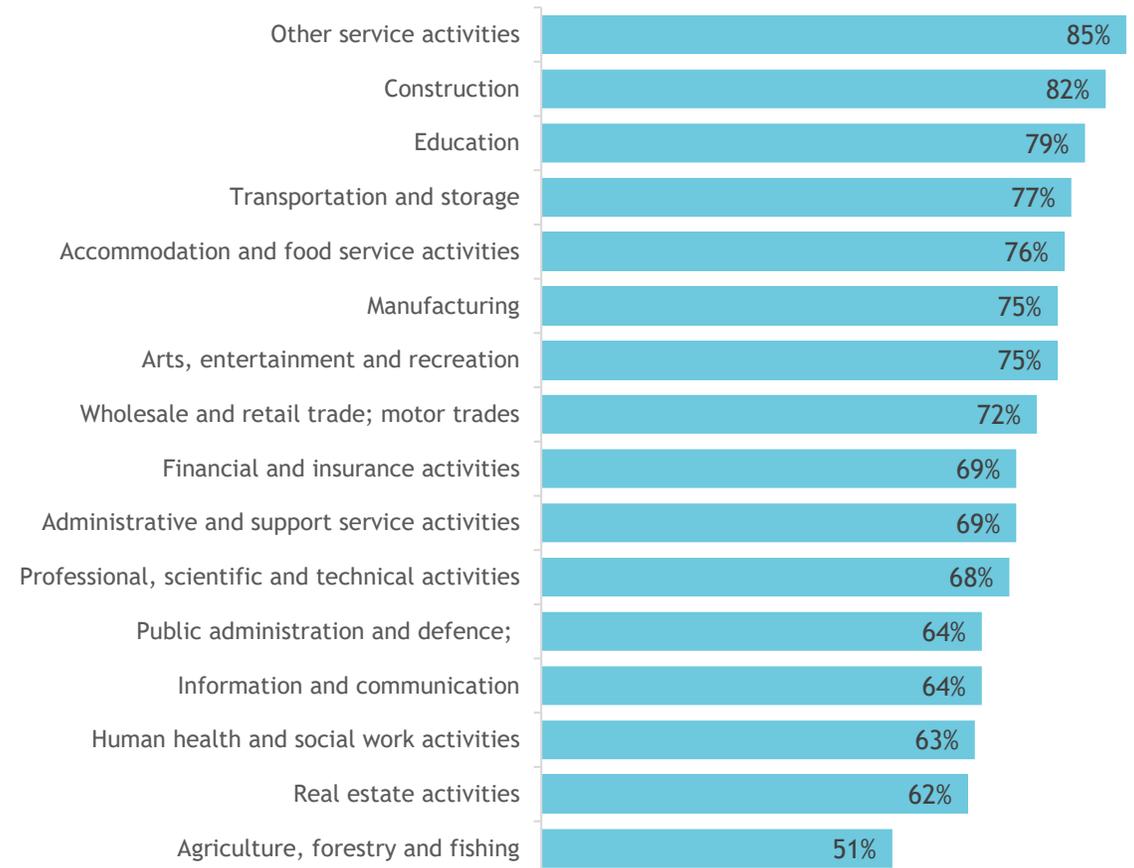


NB: Percentages are calculated based on number of employments eligible for furlough, which may be slightly less than the total workforce, due to a small number of people not eligible for furlough (e.g. new starters)

Labour Market Overview: 75% of West of England residents eligible for the Self-Employment Income Support Scheme have accessed support

- As of 30 June 2020, 43,600 claims have been made on the Self-employment Income Support scheme by West of England residents, amounting to £130.6 million.
- This represents 75% of people in the region eligible for the support and is in line with the national average.
- Across the South West, the take up rate for self employment support was highest amongst service activities (85%); construction (82%); and education (79%).
- Arts, entertainment and recreation accounted for the highest proportion of claims - 31% of total claims in the South West.
- Note that not all self-employed people were eligible for this support. Notable exceptions include new businesses, freelancers, and those set up as 1-person limited companies. These figures may therefore underestimate the true impact of the pandemic on the self-employed, and sectors with a high concentration of freelancers.

South West take-up rate by industry (30 June)



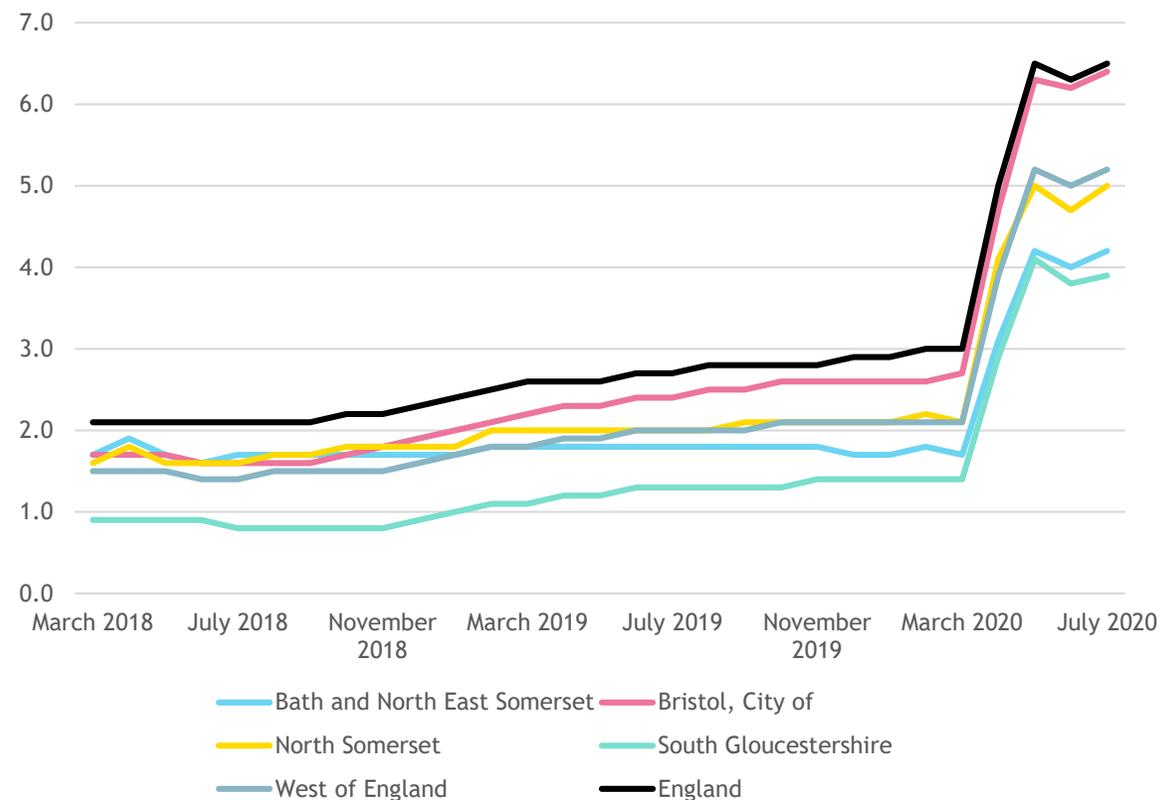
A. Labour market: unemployment rose sharply in May 2020 but now appears more stable

- Table 3 shows the number of people claiming out of work benefits. 5.2% of the region's workforce claimed out of work benefits in July 2020 (38,800 residents). This is similar to the 5% reported for June 2020.
- All four unitary authorities in the West of England saw a spike in the number of claimants in April and May 2020 primarily due to the Covid-19 pandemic.
- This appears relatively stable in July 2020, however, there are now 23,025 more claimants in the West of England than there were in February 2020, before the effects of the pandemic hit.

Table 3: Claimant Count

	June 2020		July 2020	
	Number	% workforce	Number	% workforce
Bath and North East Somerset	5,035	4.1	5,220	4.2
Bristol City	19,950	6.3	20,470	6.4
North Somerset	5,970	4.8	6,180	5.0
South Gloucestershire	6,870	3.9	6,930	3.9
West of England Total	37,825	5.1	38,800	5.2

Percentage of Working Age Residents Claiming Unemployment Related Benefits

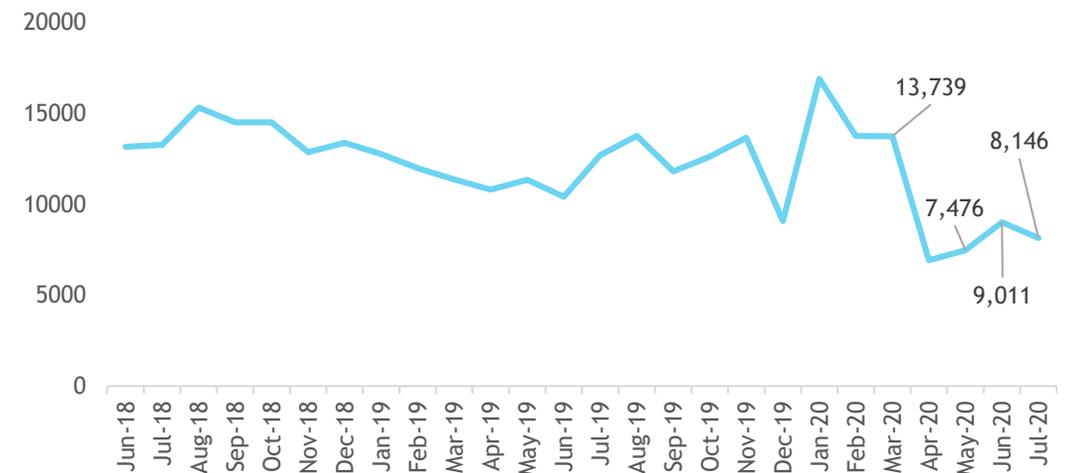


Sources: [Nomis Labour Market Profile](#)

A. Labour market: the number of jobs advertised has declined sharply in April but now appears stable

- There were 8,146 jobs advertised in the West of England in June 2020, down 10% from June 2019. This is 36% lower than the level of jobs advertised in July 2019.
- The impact of changes in demand as a result of lockdown measures and social distancing became visible in April, with significantly fewer jobs advertised. This has risen in last few months but remains stable.
- Comparing the type of jobs advertised by industry:
 - Although the total number of jobs advertised remains relatively lower than it was pre-pandemic, some industries saw a rise in demand in July 2020. **Advertisements increased in accommodation and food services; and finance and insurance.**
- Comparing the occupations in demand:
 - Demand for most occupations has fallen since March although there has been an **increase in demand in the last month for road transport drivers and vehicle trades.**

Vacancies Over Time (WoE)



Top Occupations in July 2020 (WoE)

- Software developer/engineer (540)
- Nurse (288)
- Caregiver/personal care aide (221)
- Project Manager (178)
- Office/Administrative Assistant (163)

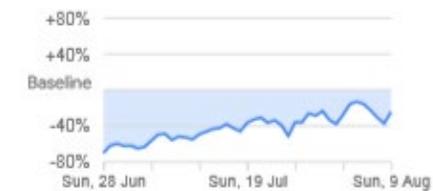
A. Mobility: Regional mobility fell dramatically but activity is gradually rising in retail and leisure outlets

- People’s mobility initially reduced dramatically compared to a pre-lockdown baseline of Jan-Feb 2020 but is now rising steadily (see charts for UAs, right).
- Retail and leisure facilities have been hit hard but activity has risen following the reopening of non-essential retail from 15 June and some leisure from 4 July. This varies by local authority, with activity in North Somerset almost back at pre-lockdown levels, and Bristol furthest away.
 - This could be linked to workplace activity and types of employment in these areas. Although activity has risen in all UAs, workplace activity in North Somerset is now just 3% less than the pre-lockdown baseline, whereas Bristol’s activity is 13% lower.
 - Bristol will have a higher concentration of office workers who are continuing to work remotely, and much of its student population has been absent.
 - This could also be due to the seasonal nature of North Somerset’s visitor market.
- **Footfall:** Overall UK footfall on high streets has returned to around [50% of pre-lockdown levels](#). This is reflected in the region. Intelligence from local Improvement Districts suggests footfall for the year to date is [down 46% on normal levels in Broadmead, Bristol](#). However, national data compiled by Kantar [suggests that shoppers had made two million fewer trips to the supermarket](#) in August 2020, compared to August 2019, since the introduction of mandatory face coverings on 24 July
- **The Eat Out to Help Out Scheme, which launched on Monday 3rd August and has seen over 83,000 businesses register, appears to have increased footfall. As of 9 August it has been used 10.5 million times**, with an average claim of £5.
 - [Early indicators from Springboard report that](#) between Monday 3rd and Wednesday 5th August, **footfall rose by 19% after 6pm** across the UK’s high streets and shopping centres. **Footfall rose 10% between 12pm and 2pm.**
 - Smaller market towns benefited the most in this time, with footfall up 25%, while regional cities recorded increases of 19%.

Visits and length of stay at retail and leisure facilities and are rising. Source: [Google Community Mobility Reports](#), 9 Aug

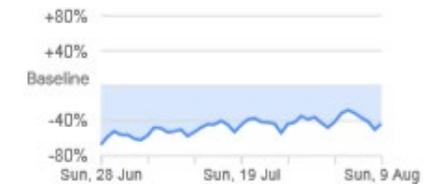
Bath and NE Somerset

-24% compared to baseline



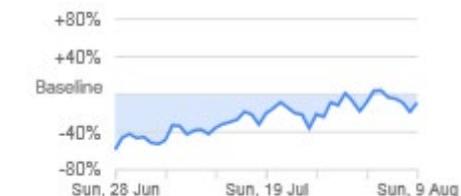
Bristol

-43% compared to baseline



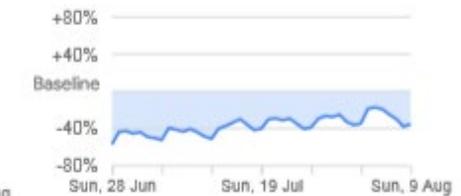
North Somerset

-9% compared to baseline



South Gloucestershire

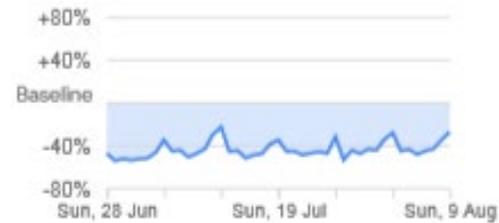
-35% compared to baseline



A. Mobility: Public transport usage is beginning to rise, although patronage varies across the region

Bath and North East Somerset

-27% compared to baseline



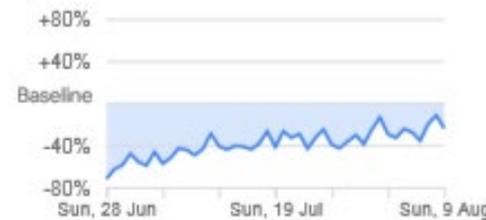
Bristol

-44% compared to baseline



North Somerset

-23% compared to baseline



South Gloucestershire

-26% compared to baseline



- Public transport usage initially declined sharply but is gradually rising. Patronage in Bristol is noticeably lower than other areas of the region.
- The charts above represent all modes of public transport. [Department for Transport data](#) shows that nationally, rail usage is around 30% of pre-pandemic levels; bus use is around 37%. Car usage is around 90% of normal levels during the week and 100% at weekends
- Travel to work baseline information:
 - Data on pre-pandemic travel patterns provides context to travel planning issues facing the country. **The 2011 Census found that 62% of the West of England workforce travelled to work by car or van; 13% on foot; 6% by bus; 5% cycled; and 3% by train. 10% mainly worked from home.**
 - Car was the most common method of travel across all industries.
 - Some industries are more dependent on public transport than others - those most likely to use the bus work in retail (12% of the workforce); accommodation and food services (11%) ; and finance and insurance (11%).**
 - Those most likely to use the train work in information and communication, finance and insurance; professional services; and public administration.**

A. Infrastructure: The reduction in mobility is contributing to a decrease in air pollution and shift in energy use

- The effect of this reduction in mobility is reflected in air quality data for the period immediately after lockdown:
 - [Air pollution in Bristol](#) initially fell by more than half compared with last year and [effects were seen globally](#), with global carbon emissions per day in April 17 percent lower than the average daily emissions in 2019.
 - One analysis suggested the [UK's total daily carbon emissions have decreased 36% since lockdown began](#), with a 60% drop in emissions from road transport. Emissions from residential addresses have however risen by 20%.
- However, as lockdown restrictions ease around the world this effect is being diminished. [Daily carbon emissions are still down on 2019, but only by 5% on average globally](#).
- Energy use is shifting as workplace activity reduces:
 - National Grid forecasted a 20% drop in electricity demand, as use shifts from commercial property to homes.
 - [Data from the International Energy Agency](#) (IEA) shows global electricity demand decreased by 2.5% in Q1 2020. Full lockdown measures introduced in March 2020 reduced electricity demand by at least 15% in the UK, France, Italy and Spain.
 - The IEA predicts global electricity demand will fall by 5% in 2020
- Internet usage has risen during lockdown [according to Ofcom](#):
 - Adults spent an average of four hours a day online, up from three and a half in September 2019, as people seek new ways to keep connected, informed and entertained. Younger adults (18 to 24 years) spend an average of 5 hours online each day.
 - 70% of adults made video calls at least once a week in April 2020, compared to 35% in February. Consumption of news sites; communications tools such as WhatsApp; video platforms; and online games have all risen.
 - This highlights the importance of digital access for all

A. Businesses are taking up available Government support, but some remain ineligible for assistance

Local authorities in the region are distributing grants to support businesses. As of 7 August, 16,597 grants have been distributed, amounting to £207.9 million in the West of England. Local authorities estimate that 17,582 businesses in the region are eligible for these grants.

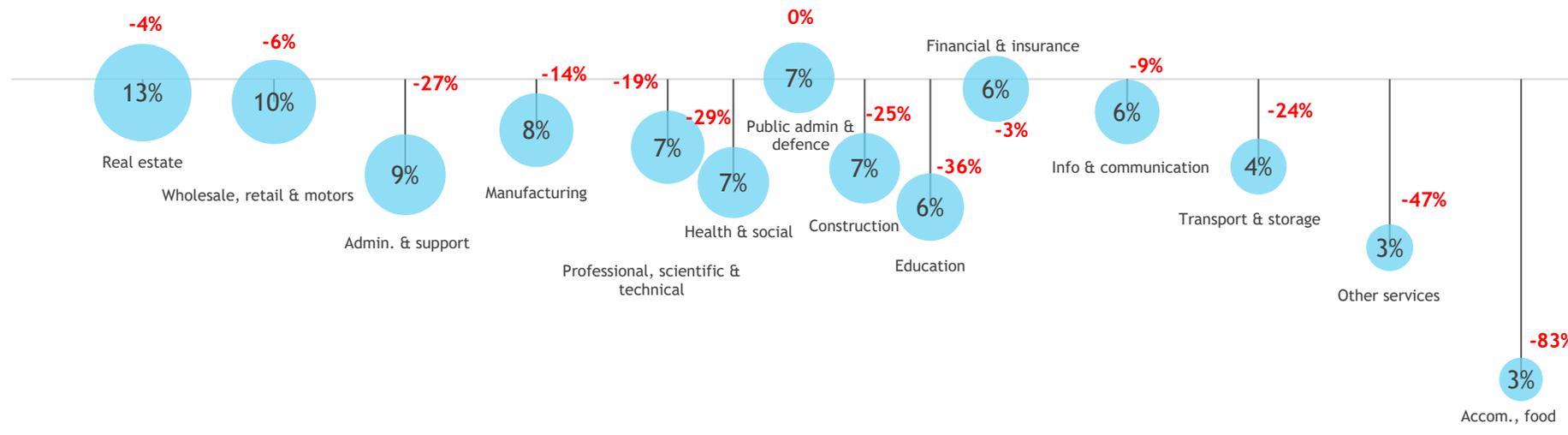
- As of 9 August: nationally £35bn has been lent in Bounce Back loans of up to £50,000 each; £13.4bn to SMEs under the Coronavirus Business Interruption Loan Scheme; and £3.4bn in loans to larger companies.
- As of 19 July, nationally 2.7 million people have claimed Self-Employment Income Support, with claims amounting to £7.8 billion; and as of 9 August, 9.6 million people have been furloughed by 1.2 million employers, at a cost of £34.7 billion.
- The ONS Business Impact Survey found that **nationally, 22% of businesses have applied for a Government backed loan or finance agreement; and 19% applied for a Government grant.**
 - Sectors most commonly applying for loans are accommodation & food services (38% of businesses); construction (29%); and admin and support services (28%)
 - Sectors most commonly applying for grants are accommodation & food services (34%); arts and entertainment (32%); and retail (28%)

Growth Hub and Unitary Authorities are taking a low number of calls for business support from businesses seeking support to deal with issues relating to the pandemic. These are primarily from businesses struggling financially and ineligible for government support schemes, including the discretionary top-up grant scheme.

B. Key sectors of the economy will be impacted differently, depending on changes in demand; ability to open; and ability to work from home

- The chart below shows the recent impact on GVA of key sectors of the economy, at a national level.
- Whilst almost all sectors have experienced a drop in economic output, some are clearly more negatively impacted than others, with the largest negative growth evident in accommodation and food services.

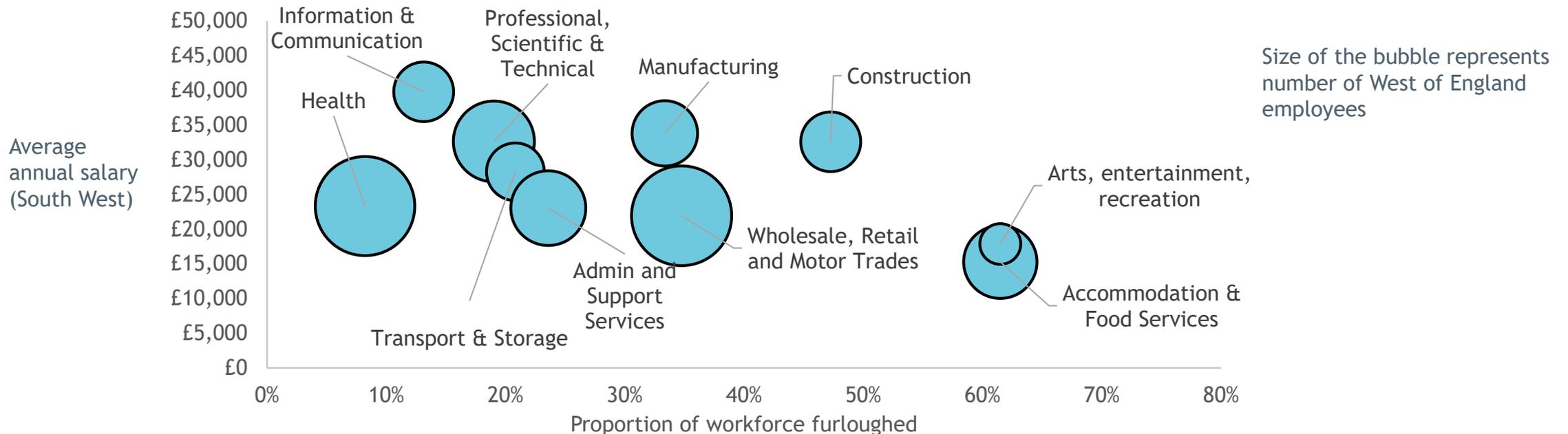
Size of bubble represents % of regional GVA in 2018 and red figure is national change in activity from February to June 2020
NB Figures do not sum to 100% due to the exclusion of agriculture, mining, utilities and waste



- We will develop our understanding of how sectors of our economy are affected by gathering business intelligence and identifying support needs through our Economic Recovery Taskforce.

B. Employees in some sectors may be disproportionately affected by the pandemic: many furloughed were lower income workers

- Those with lower average annual earnings may be most impacted - nationally 61% of the accommodation and food services workforce, and 61% of the arts, entertainment and recreation workforce have been furloughed. In the South West, average annual earnings for these workers in these workers is £15,300 and £17,900 respectively, compared to an average salary of £26,700 across all industries.
- Conversely the information and communication sector, and professional, scientific and technical sectors have each furloughed 13% and 19% of their workforces respectively. Average annual South West earnings for these sectors are £39,800 and £32,600 respectively.



B. A Level results have been published in England

- A Level results were published on 13 August. Overall results across England were higher at grade A and above compared to 2019 (27.6% in 2020 compared with 25.2% in 2019). While regional results are currently unavailable, local media outlets have provided a breakdown of results by school for Bath & North East Somerset, Bristol and South Gloucestershire.
- The government confirmed on 17 August that A-level and GCSE students in England would receive grades based on the estimates submitted by teachers.
- Both the University of Bristol and the University of the West of England have confirmed that they will honour student offers to all those who have met their grade criteria, in line with revised government guidance.
- Ofqual has issued guidance confirming that vocational and technical qualifications (VTQs) such as the BTEC and International Baccalaureate are not generally marked using the statistical standardisation approach that was used for A levels. Instead, VTQs were marked taking into account work that learners had already completed in the course of their study. Where VTQs were marked using the statistical standardisation approach, Ofqual has advised awarding organisations to review their approach, meaning that a small proportion of VTQ results may be reissued.
- GCSE results are set to be published on 20 August.

C. In the past fortnight, the Government has announced further support for businesses and workers

- The second round of the **Self Employment Income Support Scheme** launched on 17 August 2020. Those who are eligible will receive a government grant worth up to £6,570. Anyone whose self-employed business has been adversely affected by coronavirus since 14 July is eligible for the scheme.
- Local Authorities are to receive £40m of funding to help them provide pupils with a new dedicated school and college transport to get them to school or college in the autumn term. This funding will help them create extra capacity and allow more students to use alternatives to public transport, while social distancing measures remain in place.
- The National Academy for Social Prescribing (NASP) has been awarded £5 million of funding to deliver social prescribing projects to help people to stay connected and maintain their health and wellbeing following the COVID-19 pandemic.. NASP will provide grants under the **Social Prescribing Scheme** to support local community partnerships deliver social prescribing initiatives aimed to help tackle loneliness, improve wellbeing and assist recovery from COVID-19
- The deadline for England's dairy farmers to apply for funding under the **Dairy Response Fund** has been extended to 11 September. Farmers are able to access up to £10,000 each to help them overcome the impact of the coronavirus outbreak.

D. The Government is continuing with its lockdown exit strategy

On Sunday 10th May, the Prime Minister announced the Government’s official lockdown exit strategy in a command paper [Our Plan To Rebuild: The UK Government’s COVID-19 recovery strategy](#) and set out the staggered relaxation of lockdown measures over three stages. As of Saturday 4 July, England has entered Stage 3 of the lockdown, meaning the majority of businesses and institutions will be open to the public, provided they are able to comply with “COVID-secure” guidelines. Below is information about sectors still in lockdown, and any updates from the government

Sector	Businesses Affected	Updates from Government
Retail & Hospitality	<p>The following retail operations reopened on 13 July:</p> <ul style="list-style-type: none"> Beauty Parlours Nail salons <ul style="list-style-type: none"> Face coverings became mandatory in shops on 24 July 	<ul style="list-style-type: none"> From Saturday 15 August, Casinos, Bowling Alleys and Skating Rinks were permitted to open. Restrictions also lifted on close contact services, such as treatments on the face including eyebrow threading or make-up application, allowing these services to operate from 15 August. From 8 August, the list of premises where facemasks are mandatory will be extended to include professional & financial services, barbers & nail salons, indoor entertainment venues (e.g. arcades), bingo halls, places of worship, public libraries, community centres, veterinary services, auction houses and storage & distribution facilities
Culture & Tourism	<ul style="list-style-type: none"> Theatres and Music Venues may open, but are not allowed live performers on stage From 11 July, performing arts were allowed to take place outside, provided the audience was arranged in a socially-distanced manner Conference Centres are only open to people who already work there Youth Hostels remain closed 	<ul style="list-style-type: none"> From 15 August indoor theatre, music and performance venues were allowed to reopen with socially distanced audiences. Pilots will take place at conference venues ahead of the expected resumption of business event from 1 October at the earliest.
Sport & Leisure	<ul style="list-style-type: none"> On 3 July, it was confirmed that recreational cricket games will be permitted from 11 July Outdoor swimming baths opened to the public on 11 July Indoor gyms and swimming baths re-opened on 25 July 	<ul style="list-style-type: none"> Sporting events will allow fans to return from 1 October with social distancing in place, if it is safe to do so. The piloting of a small number of sporting events to test the safe return of spectators will resume, commencing with the final of the World Snooker Championship at Sheffield’s Crucible Theatre.
Transport	<ul style="list-style-type: none"> Face coverings are compulsory on all public transport settings Government still advise against all “non-essential travel” 	<ul style="list-style-type: none"> The government continues to update its “Air Bridges” guidance to reflect international infection rates. As of 6 August, Andorra, Belgium and The Bahamas are to be removed from travel corridors list. People arriving in England from Andorra, Belgium and The Bahamas from 4am Saturday 8 August 2020 will need to self-isolate for 2 weeks as the countries are removed from the travel exemptions list. As of 15th August the 14 day isolation requirement will also apply to those entering the UK from France, The Netherlands, Monaco, Malta and Aruba.
Second Wave & Local Lockdowns	<ul style="list-style-type: none"> The government has advised that the relaxing of lockdown has always been “led by the science”, and that lockdown measures could be tightened, as well as relaxed, depending on infection rates Local Councils in England have been granted additional powers to close non-essential retail stores during a local lockdown On 2 July, it was announced that WECA’s constituent Unitary Authorities had published their own Local Lockdown Management Plans 	<ul style="list-style-type: none"> On 17 July, lockdown restrictions were eased in Leicester, which had entered local lockdown on 28 June. On 14 August, it was announced that lockdown measures in parts of the North West, West Yorkshire, East Lancashire and Leicester are set to continue for a further two weeks. Residents are still not permitted to mix with households outside of their support bubble. Planned easements on the reopening of indoor entertainment venues will not take place in Bradford and Blackburn with Darwen. Shielding will also continue for individuals in Blackburn with Darwen, and Leicester City. Nail bars, beauty salons, tanning booths and salons, spas and beauty salons, massage parlours, tattoo parlours, body and skin piercing services, and outdoor pools in Leicester can lawfully reopen from 19 August. However, current rules for gatherings in private homes and gardens will remain in place

Contact us

-  westofengland-ca.gov.uk
-  Strategy@WestOfEngland-CA.gov.uk
-  [WestofEnglandCA](https://twitter.com/WestofEnglandCA)
-  [West-of-England-Combined-Authority](https://www.linkedin.com/company/West-of-England-Combined-Authority)

For further information on support available to businesses, visit the West of England Growth Hub: wearegrowth.co.uk