

West of England Economic Briefing on Covid-19 Business Impacts

6 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

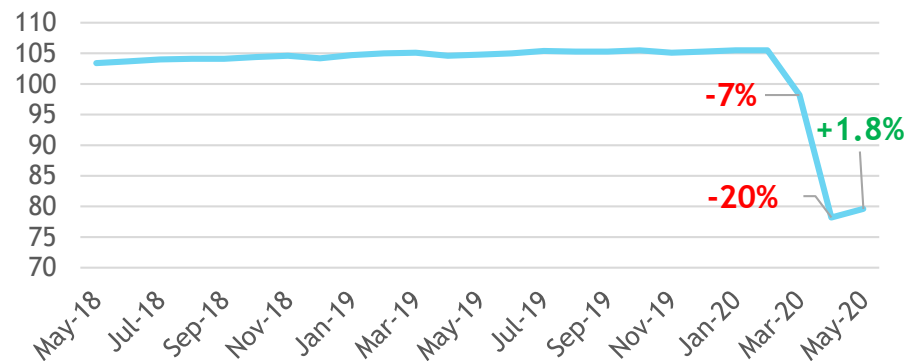
Updates this week

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: As of 30 July, 194 businesses based in the West of England have appointed liquidators since March, including 39 in July. This appears stable and is a similar amount to this time last year. • Labour Market: There were 8,146 jobs advertised in the West of England in June 2020, down 10% from June 2020, and 36% lower than July 2019. After the sharp decrease in April, vacancies now appear stable, albeit lower than pre-pandemic levels. • Mobility: Footfall remains below pre-pandemic levels but has risen significantly in workplaces and is gradually rising in retail outlets. Public transport patronage is increasingly, more so in North Somerset and South Gloucestershire than in Bath and North East Somerset, and Bristol. • Local authorities in the region are distributing grants to support businesses. As of 26 July, 16,486 grants have been distributed, amounting to £206.3 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. 	18-19
C	<ul style="list-style-type: none"> • Allocations under the Getting Building Fund have been announced, including £13.7m for the West of England • Within the £2bn Green Homes Grant, £500 million will be administered by local authorities through the GHG Local Authority Delivery Scheme • The Government’s “Eat Out to Help Out” scheme launched at the start of the month and will run until the end of August. • £800k of funding was announced to be allocated under the Local Digital Fund to local authorities. • £20m of funding was pledged by the Government to help SMEs. 	20
D	<ul style="list-style-type: none"> • Face coverings became mandatory in shops and supermarkets from 24 July, with further indoor settings to be included from 8 August. • Certain venues (such as casinos, indoor theatres) were postponed in opening for at least another two weeks from their original date of 1 August. • Local restrictions were placed on parts of the North of England in an attempt to control the spread of the virus in the region. 	21

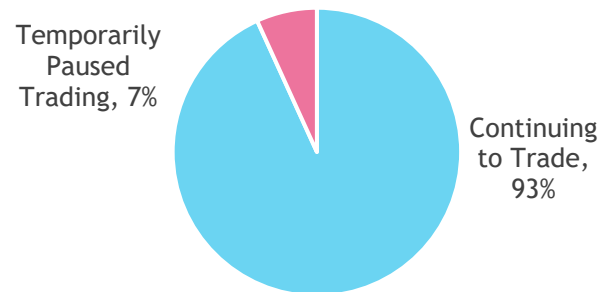
Business impacts are significant: GDP has fallen dramatically, and many businesses are closed and facing financial pressures

UK GDP returned to growth in May 2020 but remains a quarter smaller than in February



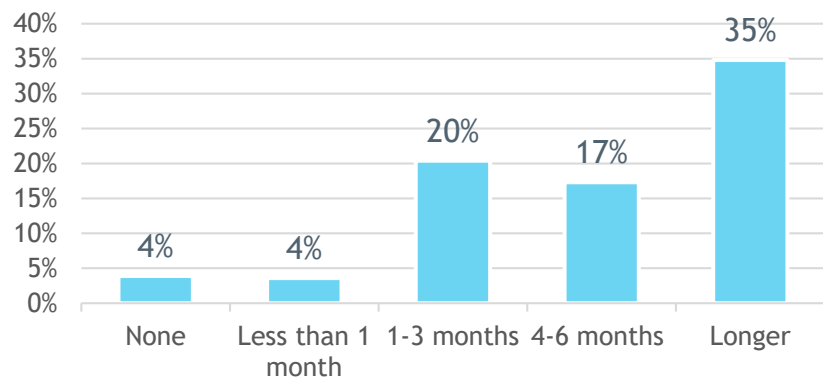
Source: [ONS GDP estimates, May 2020](#)

7% of UK businesses have temporarily paused trading



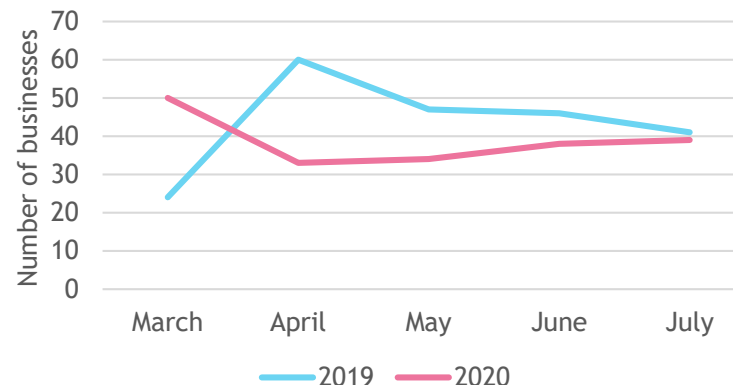
Source: [ONS Business Impact Survey](#), 29 June-12 July 2020

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



Source: [ONS Business Impact Survey](#), 29 June-12 July 2020

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



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

As of 2 August:

16,468 grants, totalling £206.3 million distributed by West of England local authorities (as of 26 July)

£34.3 billion lent across the UK in Bounce-Back loans

£13.1 bn lent to UK SMEs in Business Interruption Loans

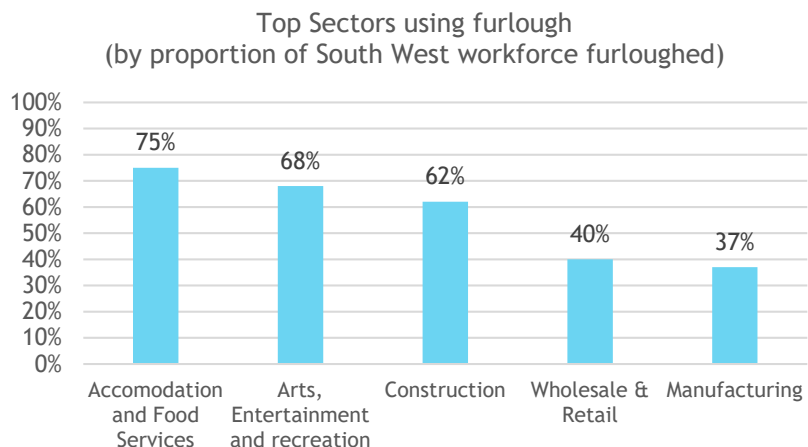
9.6 million UK workers furloughed by 1.2 million employers - costing £33.8 bn

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

Source: [HMRC Coronavirus Support Statistics](#)

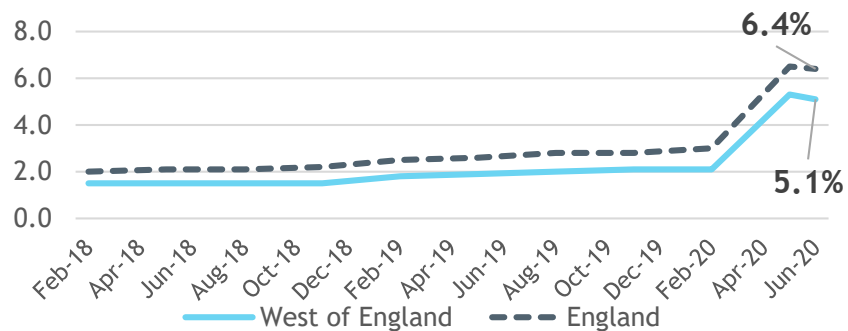
The labour market is severely affected: 29% of the region's workforce are furloughed; unemployment benefit claims have risen; and vacancies fell sharply

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



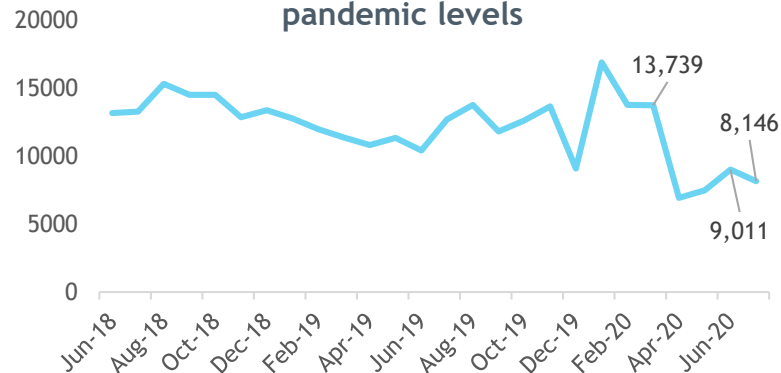
Source: [Nomis Labour Market Profile](#)

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:

43% of people said their well-being was being affected by the pandemic - through stress, anxiety, boredom and loneliness

23% of people report their household finances were affected in July

27% of people say they feel unsafe outside of their homes due to COVID-19

34% of people would feel comfortable eating at a restaurant indoors; 13% visiting an indoor swimming pool; and 12% visiting an indoor gym

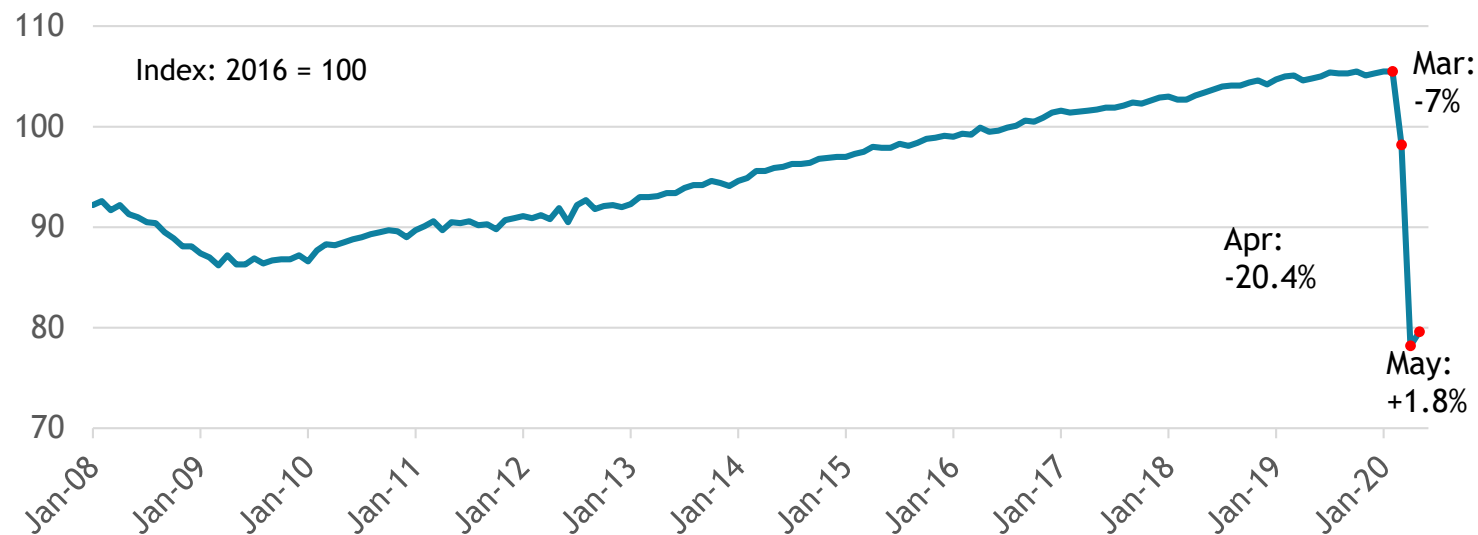
Source: [ONS Opinions and Lifestyle Survey \(22-26 July\)](#) 5

A. Overview: The economic impacts are significant, with a quarter of economic output lost since February

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

- **UK GDP fell by 19% in the three months to May 2020 (ONS)**, as government restrictions on movement dramatically reduced economic activity. The services sector fell by 18.9%, production by 15.5% and construction by 29.8%.
- **However, the first small step of recovery began in May, as monthly GDP grew by 1.8% after a 20% fall in April.**
- The ONS said “Manufacturing and house building showed signs of recovery as some businesses saw staff return to work... In the important services sector, we saw some pickup in retail, which saw record online sales.”

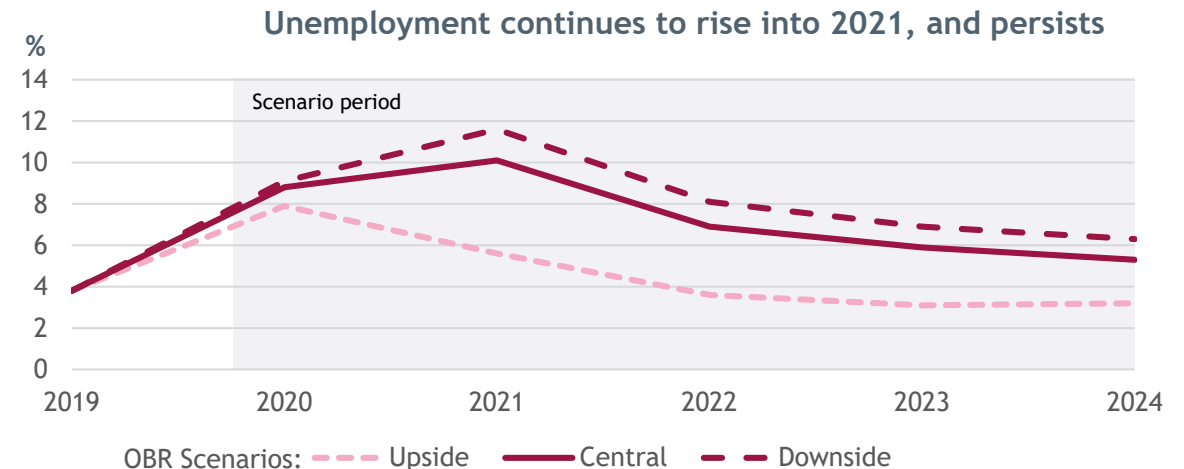
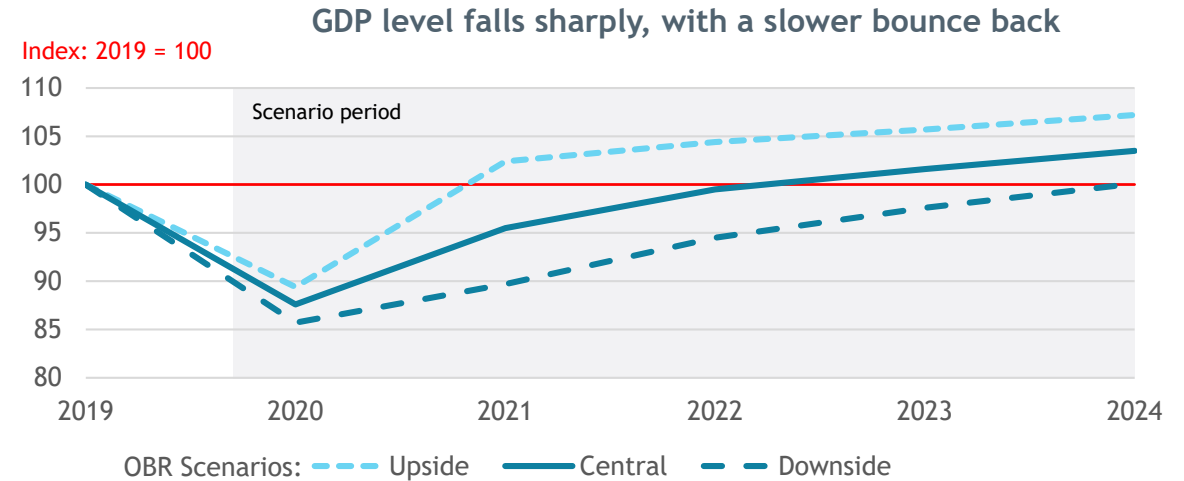
UK monthly GDP returned to growth in May but remains a quarter smaller than in February:



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 7% of businesses closed nationally compared to 24% when lockdown restrictions were first imposed in late March.

Trading Status:

- The latest [ONS Business Impact Survey](#) (data from 29 June to 12 July) reports that **7% of businesses across the UK were temporarily closed or had paused trading in the period 29 June to 12 July, compared to 11% in the period 15 June to 28 June.** The sectors reporting the largest percentages of closures were arts, entertainment and recreation; and accommodation and food, reporting 44% and 21% respectively.
 - **6% of businesses have started trading within the last two weeks, after having a pause in trading.** This was most common in accommodation and food services, where 33% of respondents from that sector reported reopening within the last two weeks.
 - **5% of businesses 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.

Financial performance:

- Of businesses continuing to trade between 29 June to 12 July, **57% reported their turnover had decreased outside of normal range in this period;** 26% said financial performance had not been affected; and 11% reported an increase in turnover.
 - Sectors appearing to be worst hit are arts, entertainment and recreation (72% of businesses report decreased turnover); accommodation and food services (84%); and education (70%).
 - The main sectors reporting increased turnover were wholesale and retail (22% of businesses); and admin and support services (14%).

Business Resilience and Confidence:

- All businesses were asked about their cash reserves. **4% reported their cash reserves will last less than 1 month;** 20% 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 30 July, 25 businesses based in the West of England have appointed administrators since 16 March¹. 33 businesses appointed administrators in the same time period last year.

Liquidations

- As of 30 July, 194 businesses based in the West of England have appointed liquidators since 16 March¹, including 39 in July. 218 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	Mar - Jul 20	Mar-Jul 2019
Bath and North East Somerset	1	0	0	0	3	4	1
Bristol City	3	3	3	5	4	18	26
North Somerset	0	0	0	1	2	3	3
South Gloucestershire	0	0	0	0	0	0	3
West of England Total	4	3	3	6	9	25	33

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

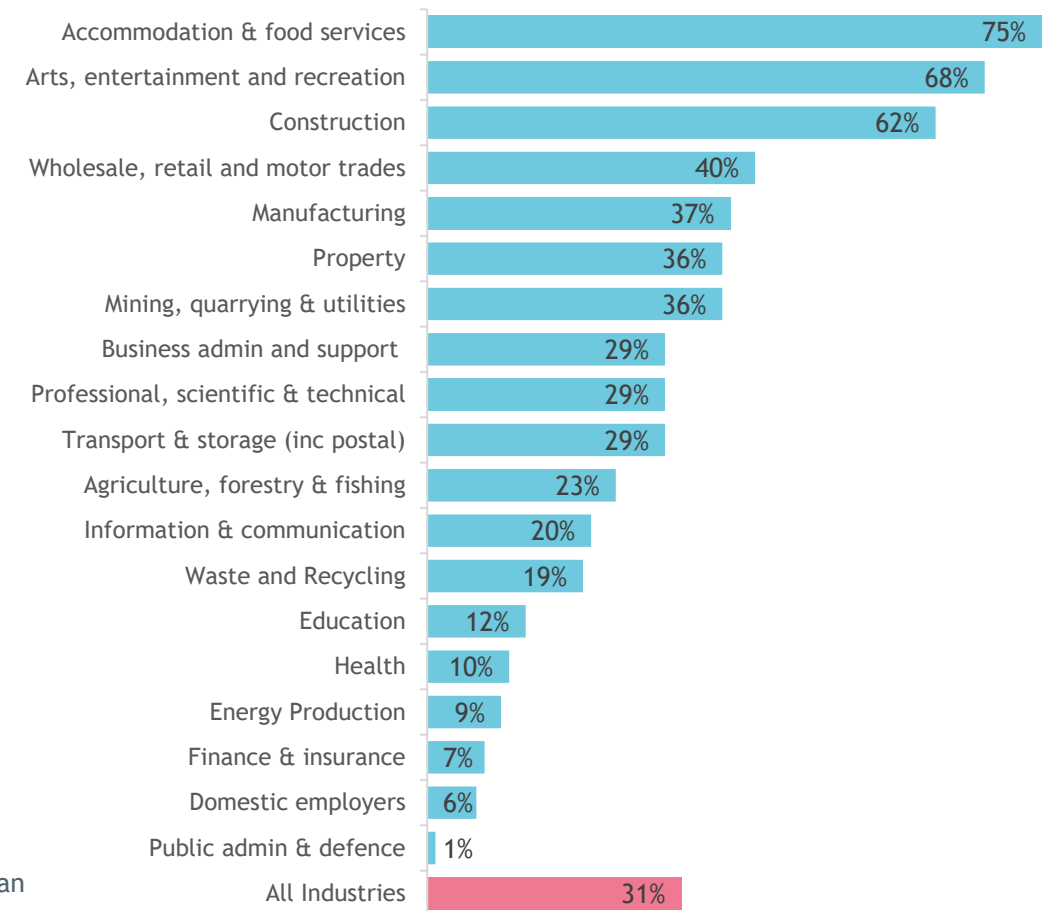
Unitary Authority	Mar 20	Apr 20	May 20	Jun 20	Jul 20	Mar - Jul 20	Mar-Jul 2019
Bath and North East Somerset	9	4	6	6	5	30	38
Bristol City	25	17	19	20	27	108	128
North Somerset	9	7	6	6	5	33	32
South Gloucestershire	7	5	3	6	2	23	20
West of England Total	50	33	34	38	39	194	218

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

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

- As of 2 August 2020, 9.6 million people in the UK have been furloughed, by 1.2 million employers, with claims amounting to £33.8 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)

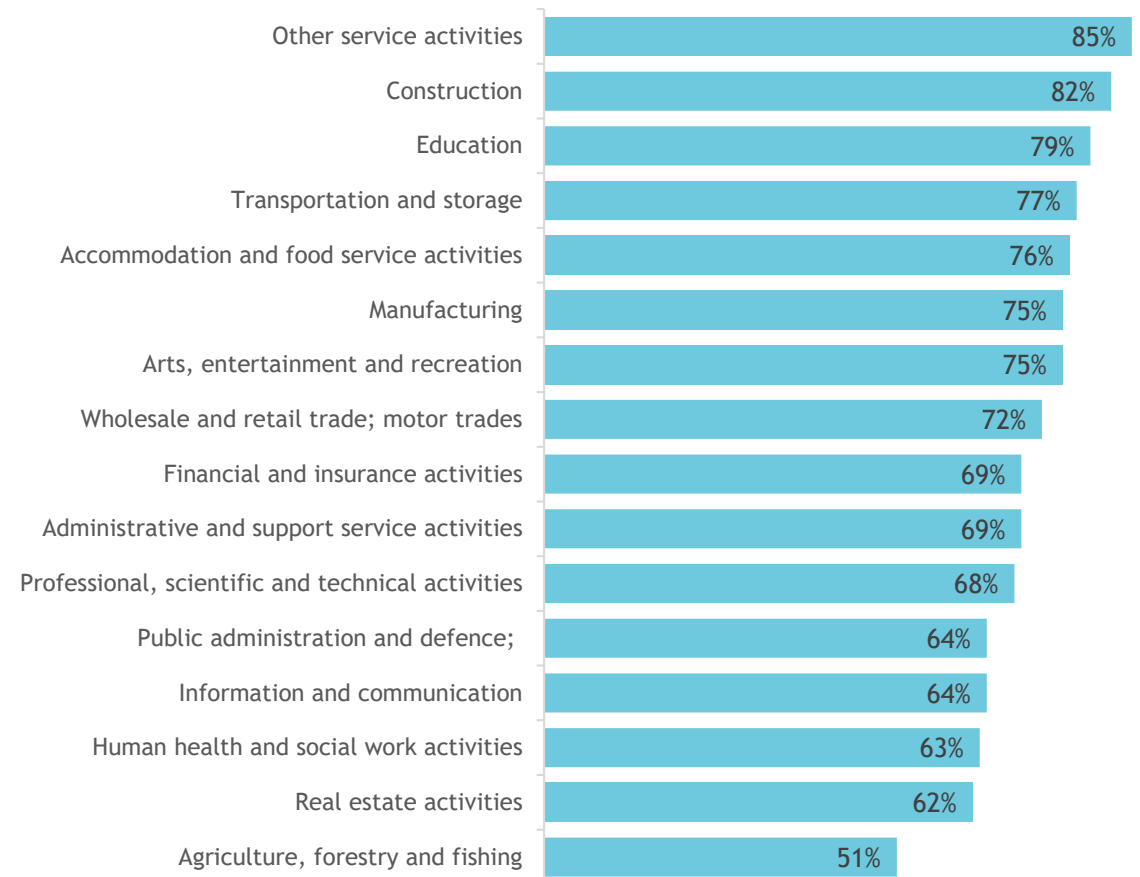


NB: Percentages are calculated based on number of employments eligible for furlough, which may be slightly less than the total workforce, due to a small number of people not eligible for furlough (e.g. new starters)

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

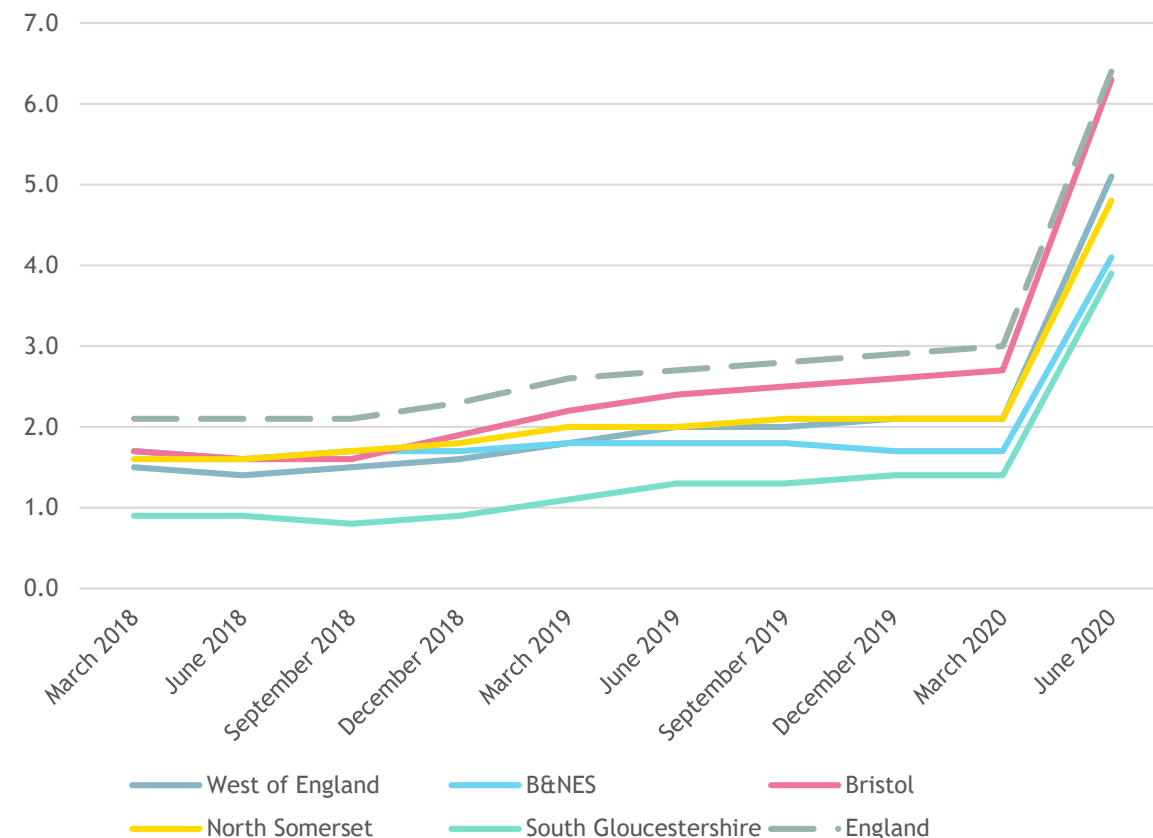
- Table 3 shows the number of people claiming out of work benefits. Around 5% of the region's workforce claimed out of work benefits in June 2020, similar to the data for May 2020, but greater than the 2% reported in March 2020, before the effects of the pandemic were clear.

Table 3: Claimant Count

	May 2020		June 2020	
	Number	% workforce	Number	% workforce
Bath and North East Somerset	5,260	4.2	5,035	4.1
Bristol City	20,285	6.4	19,950	6.3
North Somerset	6,240	5	5,970	4.8
South Gloucestershire	7,260	4.1	6,870	3.9
West of England Total	39,045	5.3	37,825	5.1

- The [UK unemployment rate](#) for March to May was estimated at 3.9%, 0.1 percentage points higher than a year earlier but unchanged from the previous quarter. For March to May an estimated 1.35 million people in the UK were unemployed - 55,000 more than a year earlier.
- The number of people claiming unemployment benefits in June in the UK was 2.6 million. This represents a monthly decrease of 1.1% from May 2020 but an increase of 112%, or 1.4 million, since March 2020.

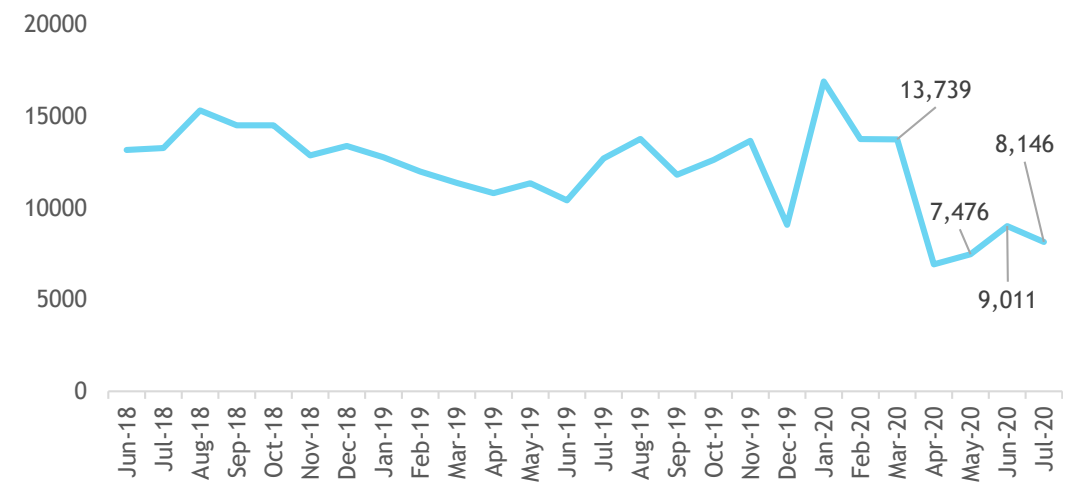
Percentage of Working Age Residents Claiming Unemployment Related Benefits



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 2020. 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 (see charts for Bristol - trends in other West of England LAs are similar).
- As lockdown restrictions ease, workplace activity has risen as many businesses have reopened, but some industries remain closed or working remotely.
- Retail and leisure facilities have been hit hard but there is evidence of a rise in activity following the reopening of non-essential retail from 15 June and some leisure from 4 July. All of the Big Four grocers have reported [a slowdown in sales](#) as the lockdown eases, and shoppers return to their pre-lockdown habits.
- The Centre for Cities has launched a [High Street Recovery Tracker](#) which measures how quickly cities are returning to their usual levels of activity. For the period 6-13 July 2020, average footfall in Bristol city centre was around 45% of the pre-lockdown baseline. The chart below shows an index of city centre activity in the last few months.

Visits and length of stay at retail and leisure facilities and workplaces remain low but are rising gradually; charts below for Bristol (in line with other regional UAs)
 Source: [Google Community Mobility Reports](#), 31 July

Retail and recreation

-42% compared to baseline



Workplaces

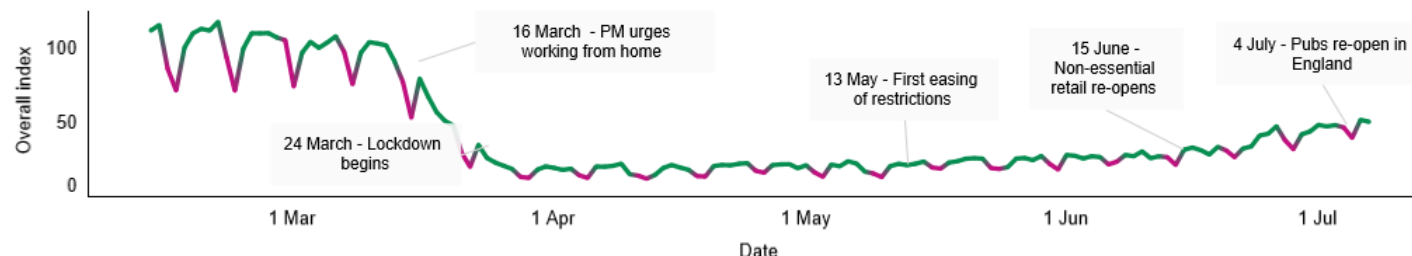
-57% compared to baseline



Bristol

Overall recovery index

This index looks at everyone who was in the city centre at any time of the day, compared to a pre-lockdown baseline of 100.



● Weekend ● Weekday

Overall index: 45

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

Bath and North East Somerset

-44% compared to baseline



Bristol

-55% compared to baseline



North Somerset

-24% compared to baseline



South Gloucestershire

-40% compared to baseline



- Public transport usage initially declined sharply but is gradually rising. Patronage in North Somerset is noticeably closer to the pre-lockdown baseline than elsewhere.
- 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 26 July, 16,468 grants have been distributed, amounting to £206.3 million in the West of England. Local authorities estimate that 17,557 businesses in the region are eligible for these grants.

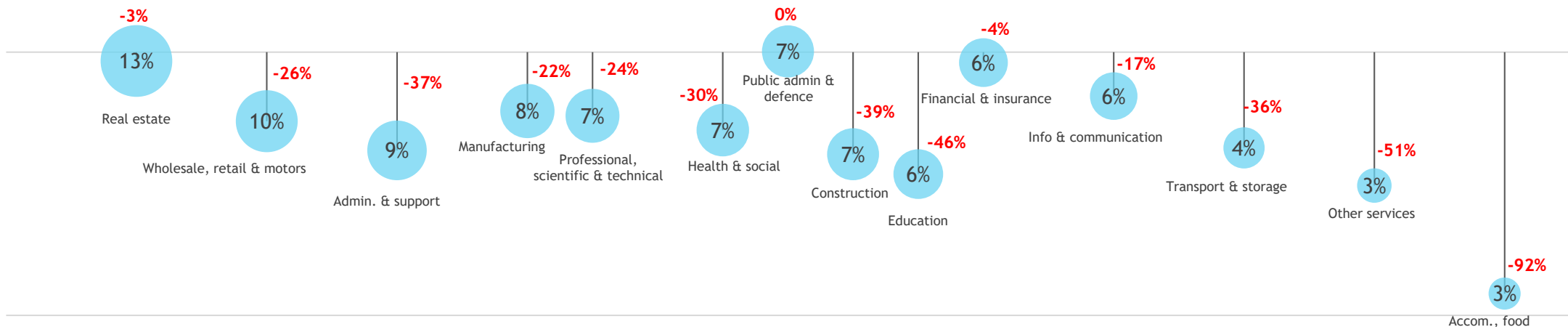
- As of 2 August: nationally £34.3bn has been lent in Bounce Back loans of up to £50,000 each; £13.1bn to SMEs under the Coronavirus Business Interruption Loan Scheme; and £3.3bn in loans to larger companies.
- As of 19 July, nationally 2.7 million people have claimed Self-Employment Income Support, with claims amounting to £7.8 billion; and as of 2 August, 9.6 million people have been furloughed by 1.2 million employers, at a cost of £33.8 billion.
- The ONS Business Impact Survey found that **nationally, 22% of businesses have applied for a Government backed loan or finance agreement; and 20% applied for a Government grant.**
 - Sectors most commonly applying for loans are accommodation & food services (38% of businesses); construction (30%); and admin and support services (28%)
 - Sectors most commonly applying for grants are accommodation & food services (38%); arts and entertainment (31%); and retail (30%)

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.

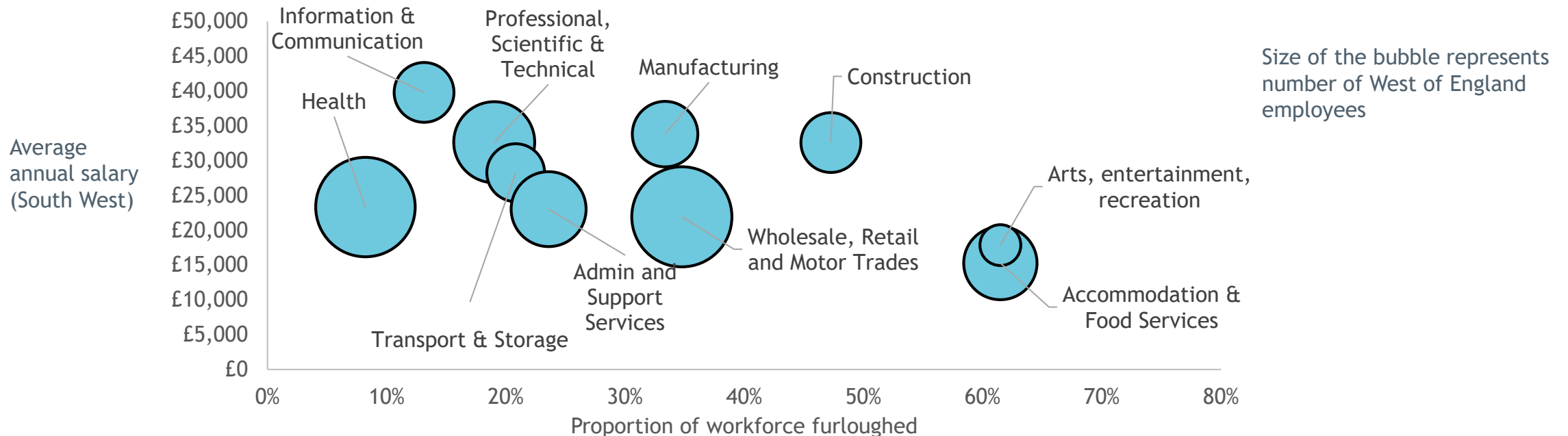
Size of bubble represents % of regional GVA in 2018 and red figure is national change in activity from February to May 2020
NB Figures do not sum to 100% due to the exclusion of agriculture, mining, utilities and waste



- 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.



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





- The government has announced the allocation of £900m of funding under the Getting Building Fund to invest in "shovel-ready" housing and infrastructure projects. WECA and the Local Enterprise Partnership has secured £13.7 million of funding under the scheme, which will fund Town Centre improvements, new homes and office space, road and cycling improvements and a new railway station. More than 265 businesses will benefit from the projects, with 2,403 jobs created or safeguarded, plus another 153 during construction.
- Within the £2 billion funding for the new Green Homes Grant, £500 million will be administered by local authorities through the Green Home Grant Local Authority Delivery Scheme, with authorities able to bid for funding to support low-income households in their area.
- The "Eat Out To Help Out" scheme launched on 3 August. The scheme enables restaurants to offer a 50% discount on food or non-alcoholic drinks to eat or drink in (up to a maximum of £10 discount per diner) all day every Monday, Tuesday and Wednesday from 3 to 31 August 2020. There is no limit to the number of times customers can use the offer during the period of the scheme, but customers cannot get a discount for someone who is not eating or drinking. Alcohol and service charges are excluded from the offer.
- The government has pledged £20 million of new funding to help SMEs recover from the effects of the coronavirus pandemic. SMES can apply for grants of between £1,000 - £5,000 to help them access new technology and other equipment as well as professional, legal, financial or other advice to help them get back on track.
- The Government has announced, through the new 'Community Match Challenge', it will boost the fundraising efforts of funders and philanthropists by doubling the money going to selected coronavirus charity campaigns in England. Up to £85 million of funding will go to charities through matched funding from 18 July to 31 August
- The government has announced the allocation of £800,000 of funding under the Local Digital Fund to local authorities for innovative digital projects to solve common problems facing councils as they respond to the coronavirus pandemic. South Gloucestershire Council and the Royal Borough of Kingston upon Thames will jointly receive £80,000 to build on increased online access to public meetings which has been improved quickly due to social distancing measures stopping people attending in person. This will also cover citizens' assemblies and statutory consultations.

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"> On 31 July, it was announced that Casinos, Bowling Alleys and Skating Rinks, due to open 1 August, will remain closed until at least 15 August, due to an increase in coronavirus infection rates Restrictions will also remain on the highest risk close contact services, such as treatments on the face including eyebrow threading or make-up application 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"> On 31 July, it was announced indoor theatre performances, due to be permitted on 1 August, will remain postponed until at least 15 August, due to an increase in coronavirus infection rates From 8 August, the list of premises where facemasks are mandatory will be extended to include cinemas, theatres, concert halls, museums, galleries, aquariums, indoor zoos or visitor farms, or other indoor tourist, heritage or cultural sites Conferences and Business Events will be able to take place from 1 October
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.
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. On 25 July and 30 respectively, travellers from Spain and Luxembourg will now need to self-isolate for 14 days upon their arrival to the UK. As of 28 July 2020, passengers arriving from Estonia, Latvia, Slovakia, Slovenia and St Vincent and the Grenadines will not need to self-isolate upon arrival to the UK.
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 25 July, Luton and Blackburn with Darwen entered into lockdown. Indoor gyms, pools, and other sport and exercise facilities remained closed in these areas. Lockdown measures will be reviewed on 8 August On 28 July, Oldham entered into a two-week lockdown. Residents are not able to have indoors social visits and have to maintain 2m distancing outside. Care home residents and those who are shielding were advised to remain indoors. Lockdown measures were imposed in the North of England on 31 July, limiting the number of households who were able to mix in indoor and outdoor settings

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