



Impacts of Covid-19

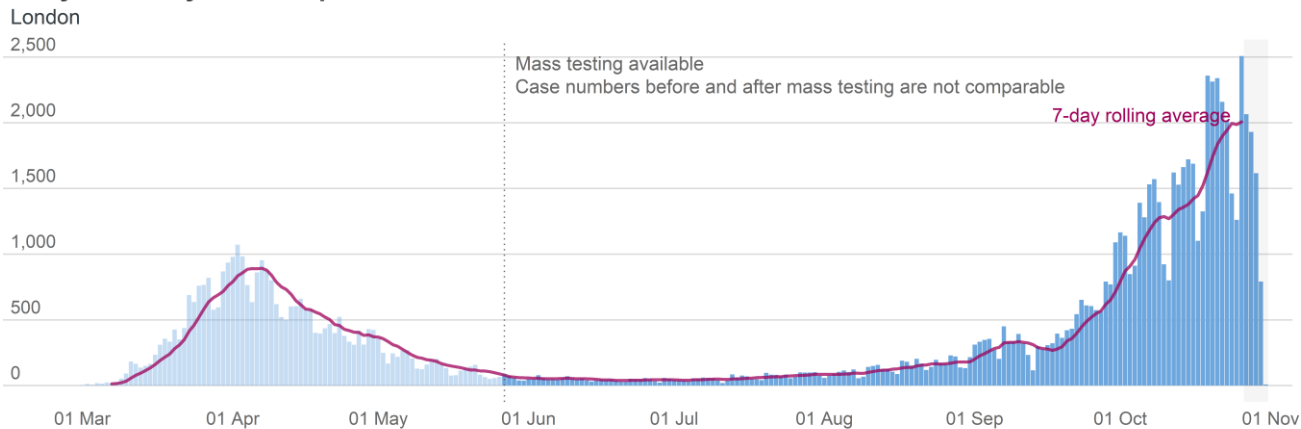
Briefing for London Recovery Board

10 November 2020

Weekly cases are increasing, with new cases concentrated among those of higher education age

- London has 10,000 cases per week compared with 300 cases per week at the end of June
- Cases are rising in all age groups, with the largest increase among student-age population since start of academic year

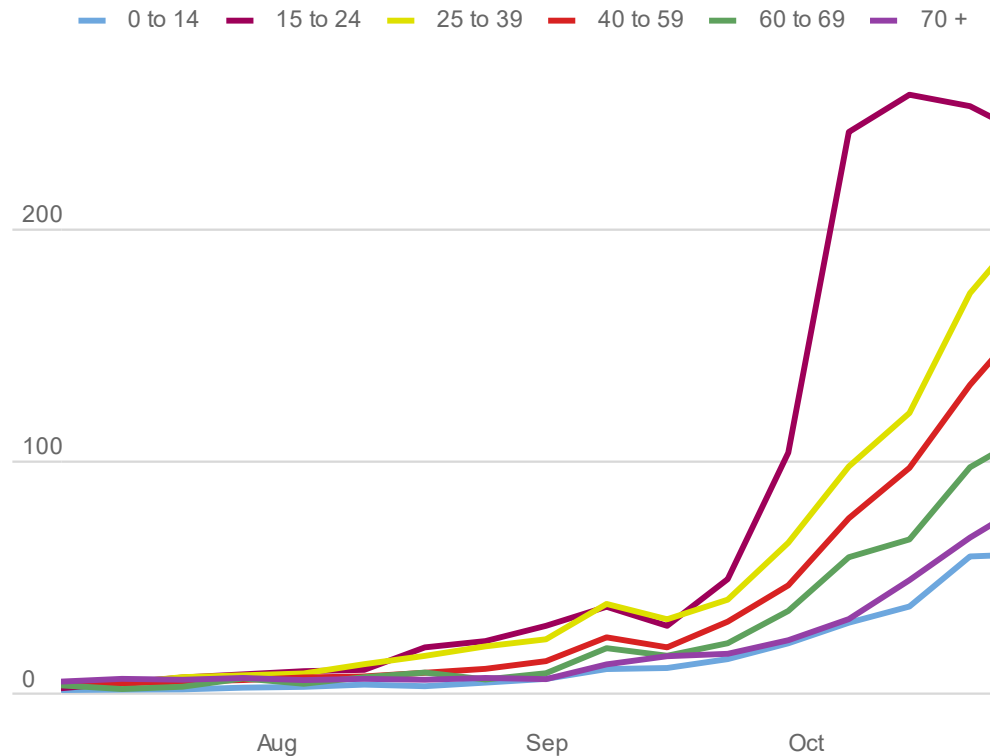
Daily Cases by date of specimen



Source: PHE COVID-19 Dashboard
Note: Recent data (shaded region) is likely to be revised upwards
Graphic by GLA City Intelligence

Weekly case rates by age

Rates per 100,000 resident population in London

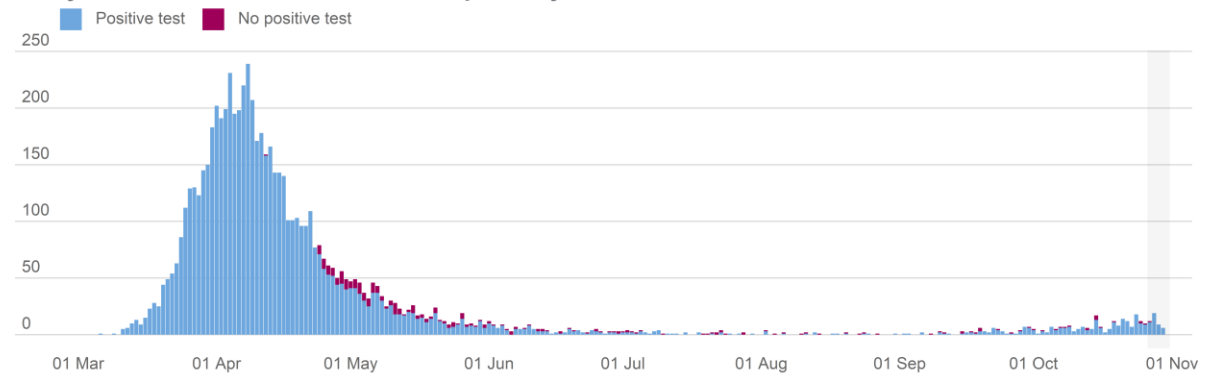


The numbers of patients being treated in hospital for COVID-19, and COVID-19-related deaths are increasing

- On 31 October, there were 857 Covid-19 patients in hospital, compared with 641 on 24 October
- On 31 October, there were 131 patients in mechanical ventilation beds, compared with 97 on 24 October
- Weekly deaths now around **40**
 - down from peak of over **2,000** a week in April
 - up from less than **5** a week in August
- Total cumulative Covid-19 deaths in London – **8,750***
- By location:
 - Hospital - **6,449**
 - Care homes – **1,410**
 - Home – **693**
 - Other – **198**

*Deaths occurring up to 16 October Source: ONS weekly deaths

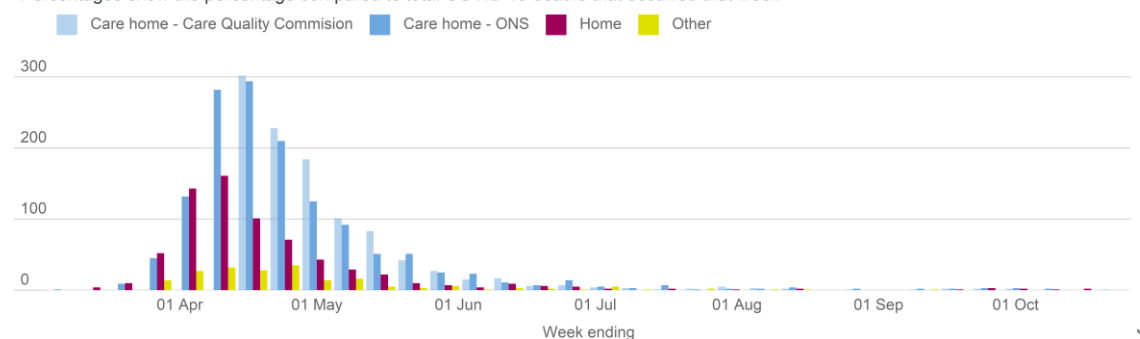
Daily COVID-19 deaths in London hospitals by date of occurrence



Source: NHS England COVID-19 Daily Deaths
Cases with no positive test are only published from 25 April
Note: Recent data (shaded region) is likely to be revised upwards
Graphic by GLA City Intelligence

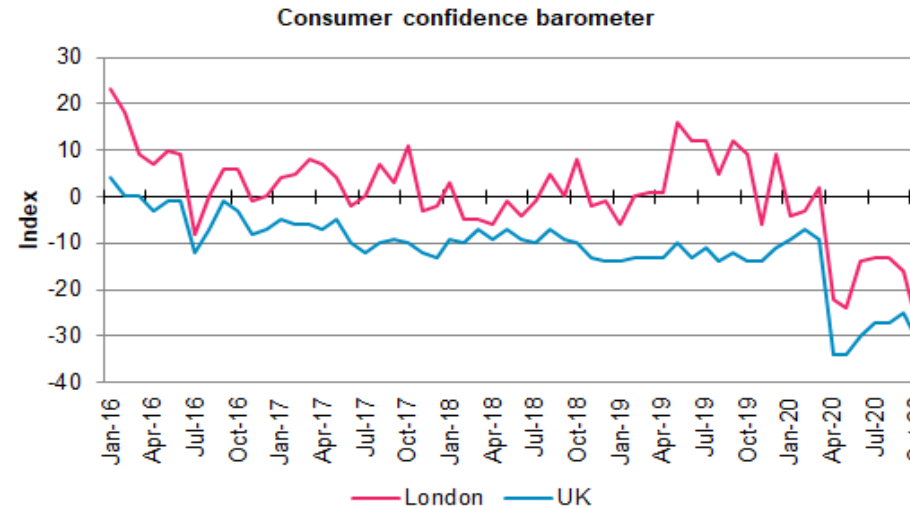
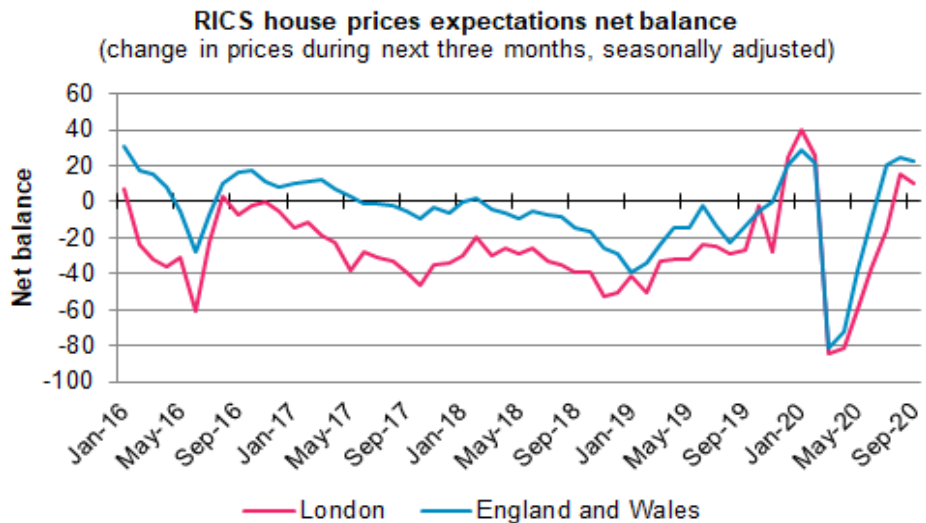
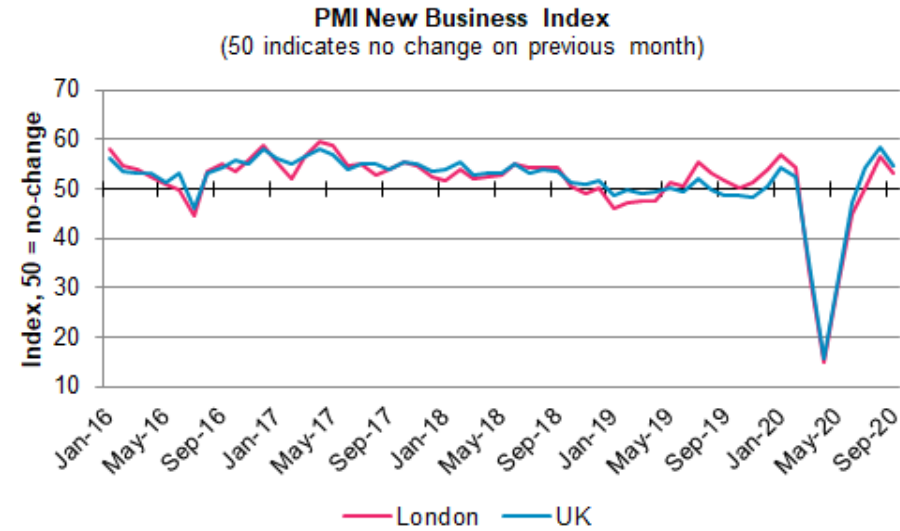
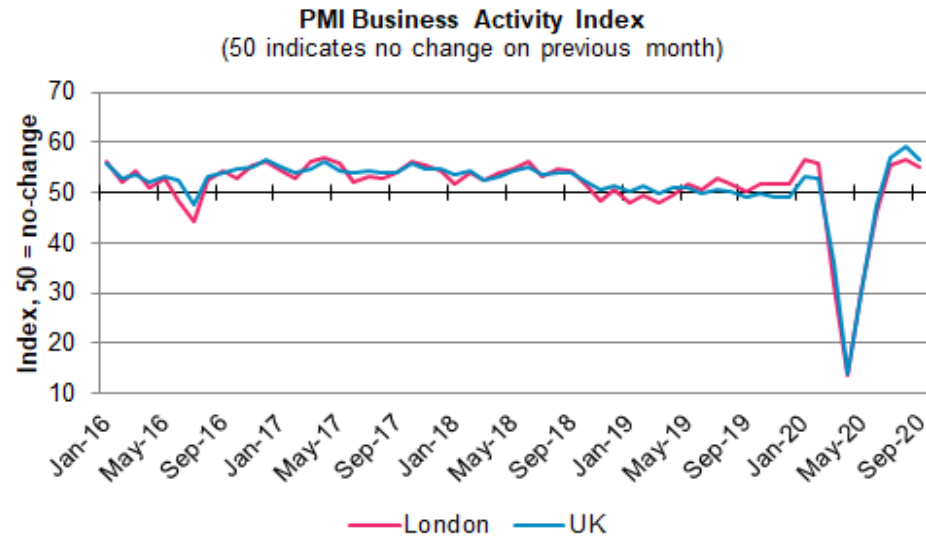
COVID 19 Deaths outside of hospital

London
Percentages show the percentage compared to total COVID 19 deaths that occurred that week

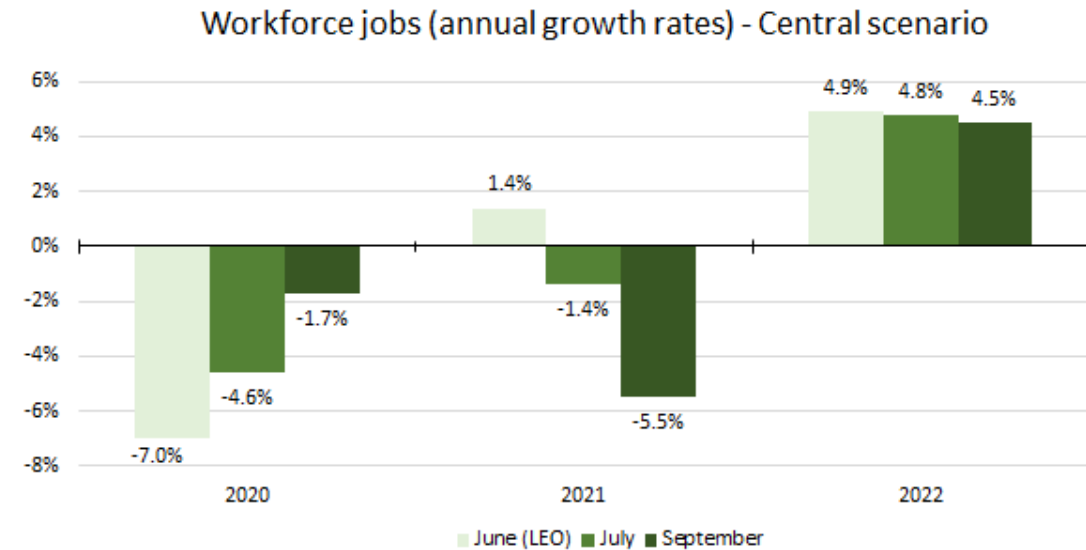
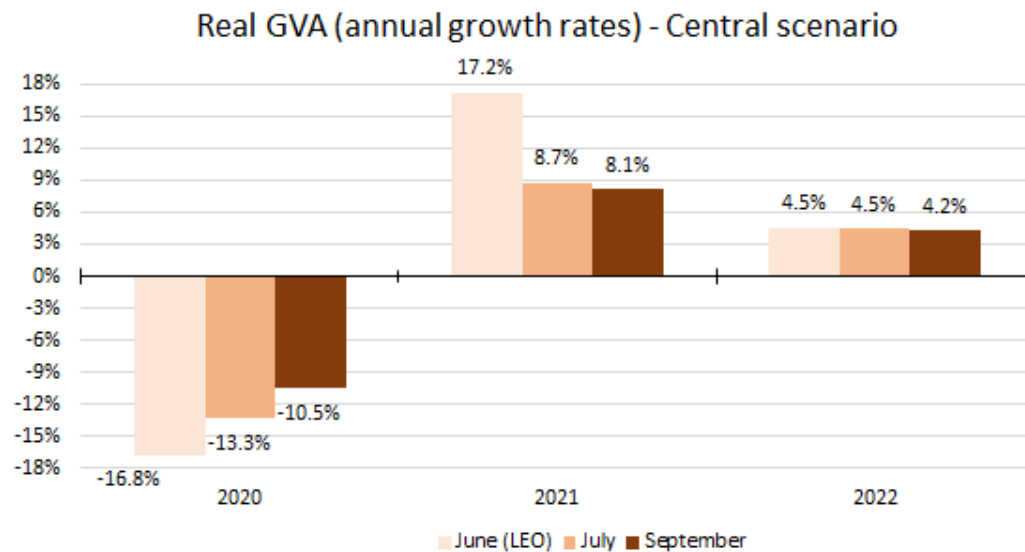


Source: ONS weekly deaths by Local Authority and Care Home deaths reported to the CQC
Graphic by GLA City Intelligence

Many macro-economic indicators recovered to pre-crisis levels in July and August but may have turned since September. London consumer confidence remains at its lowest level in eight years since April



September's macro-economic projections for London indicated a less deep but longer recession. But the next projections in December will be revised downwards



Source: GLA Economics estimates

- The most affected sectors have been 'Accommodation & Food Service' activities (annual real GVA growth rate down 30% in the year to September 2020, and 'Arts, Entertainment and Recreation' (down 25%)

Property portal listings show an active housing market with a 3% increase in sale prices, but a 7% fall in private rents in Inner London

Private rents

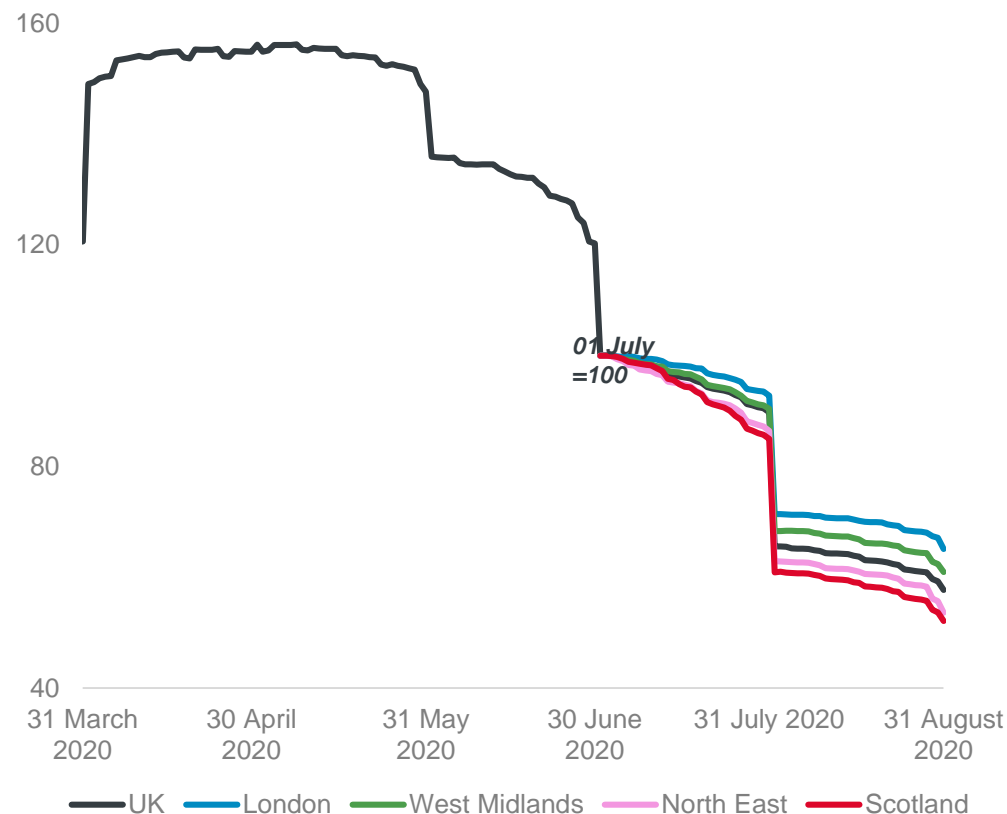
- Rightmove report that average asking rents in London were down 3% in Q3 2020 compared to a year ago, compared to a national increase of 2.4%.
- But the London average masks a sharp divergence between Inner London, where rents were down 6.8%, and Outer London where they were up 0.8%.

House prices

- Rightmove also report that average asking prices in London were up 2.6% in October 2020, but this was the lowest increase of any region and at the national level prices were up 5.5%.
- The sales market remains very active, as illustrated by the average time taken to secure a buyer falling to 48 days, the lowest since mid-2016.
- The end of the Stamp Duty holiday in March and the impact of job losses are likely to bear down on prices in 2021.

Furlough numbers were falling prior to the new lockdown, but more gradually so in London than elsewhere

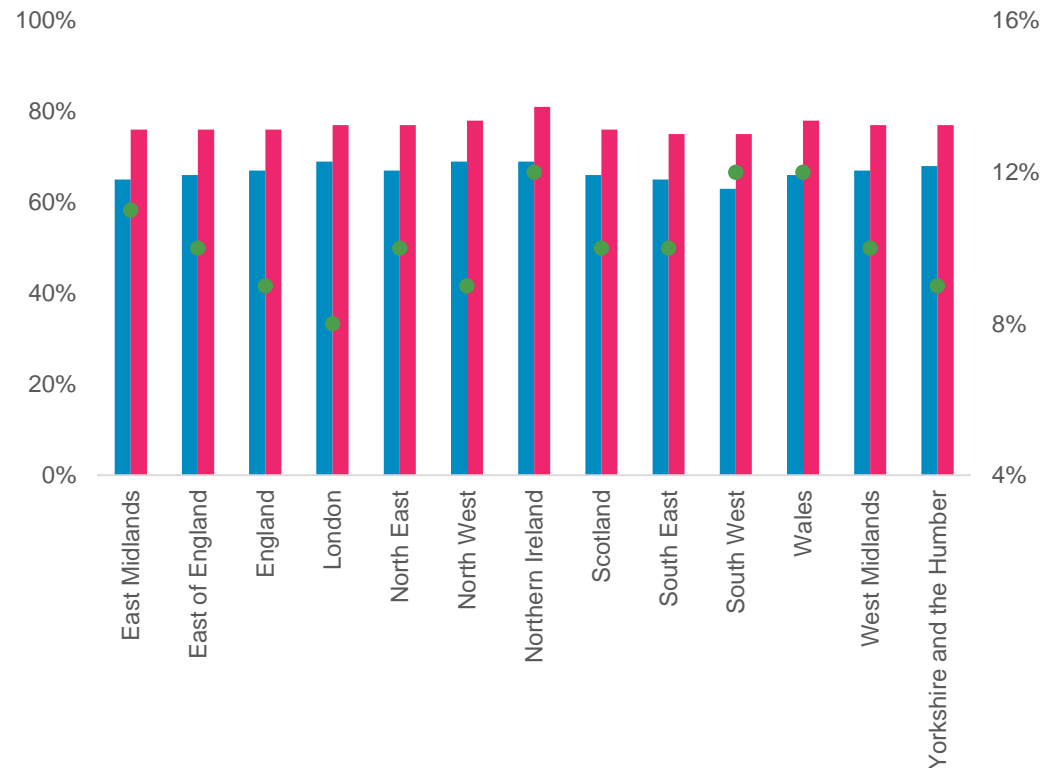
UK employments furloughed on CJRs (index 1 July = 100)



- All regions were seeing **fewer people on furlough** at the end of August compared to a month earlier – for the UK as a whole there were 3.27 million as at 31 August (11% take-up), down from a peak of 8.86 million in May.
- The number on furlough in London has fallen by less as a share of its population than any other region since 1 July, reaching 557,000 at 31 August (13% take-up).
- Within this total, the share of London’s partially furloughed grew 7pp from 31st July to 25% at 31 August. In the rest of the UK it rose 10pp to 33%, widening the gap against London.

...with the self-employed more likely to stay on support

Take up rates **Grant 1** and **Grant 2** by region and **respective change (RHS, pp)**



Self-employment income support scheme (SEISS) take-up rates were down for all regions between Grant 1 (until end July) and 2 (August till end October).

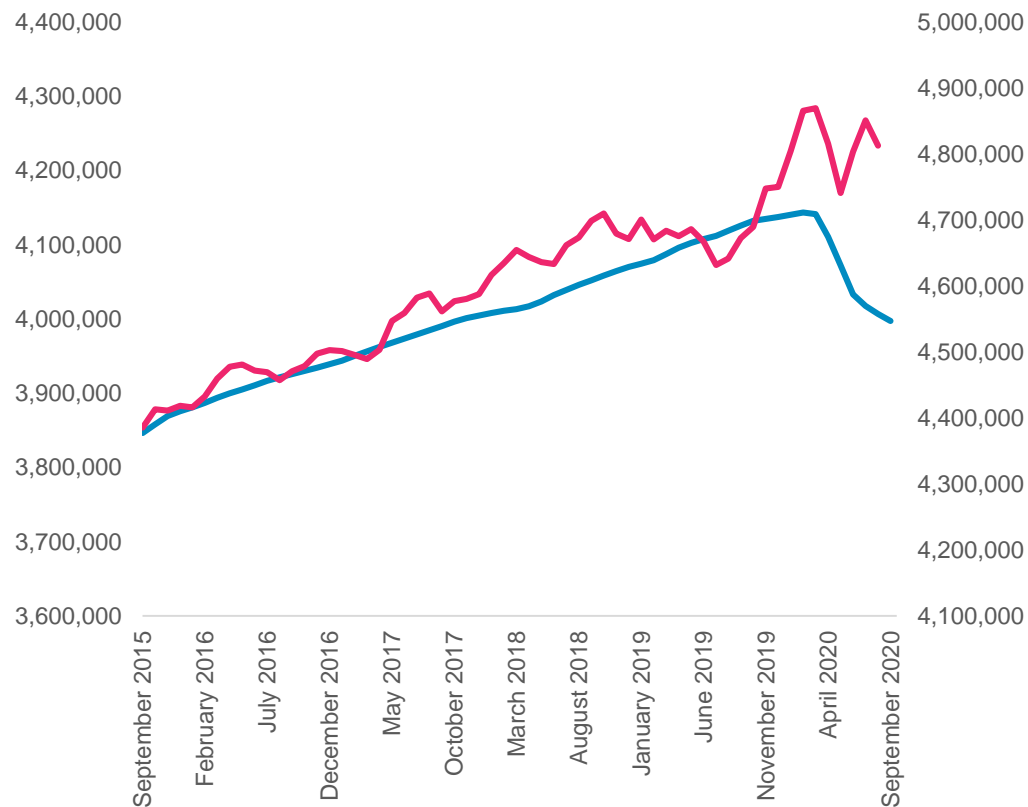
Looking at data covering claims to 30 September:

- London had a 447,000 claims for Grant 2, 51,000 lower than Grant 1 but the lowest reduction in take up rate (8pp) in the UK.
- The overall number of UK claims fell by 342,000 to 2.26 million between Grant 1 and Grant 2 (10pp reduction in take-up rate)
- London now had the highest take up rate for Grant 2 as of 30 September

Source: HMRC CJRS Statistics

While headline employment numbers to September point to a degree of resilience, there are doubts about the actual strength of London's employment

LFS employment (16+, RHS) and payroll employees (3 month moving average)



Source: HMRC PAYE data and ONS Labour Force Survey

Employment (Labour Force Survey data)

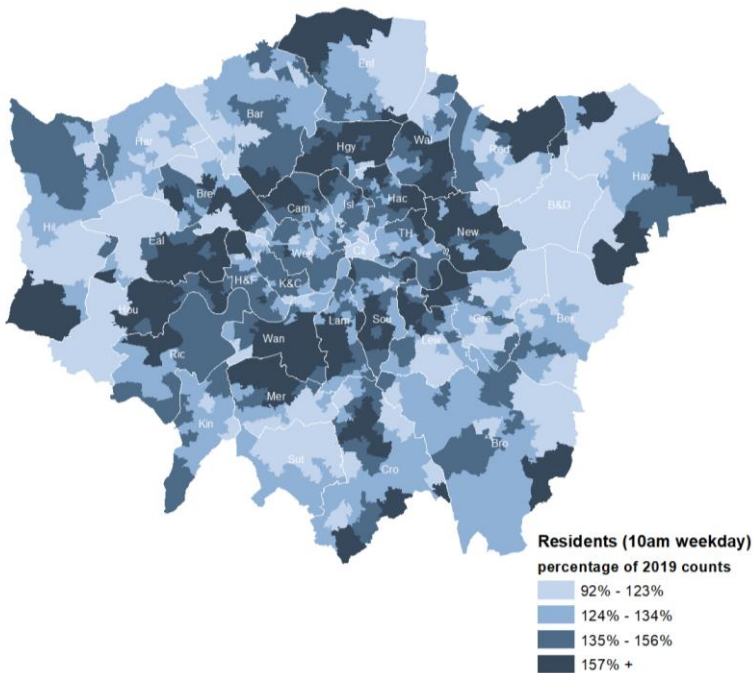
- London's 16-64 employment rate was 76.1%, up 0.7pp on the quarter and 1.9pp on the year
- In August it was 0.7pp lower than during the three months to February placing it among regions with the smallest falls.

Employee estimates using experimental HMRC PAYE data

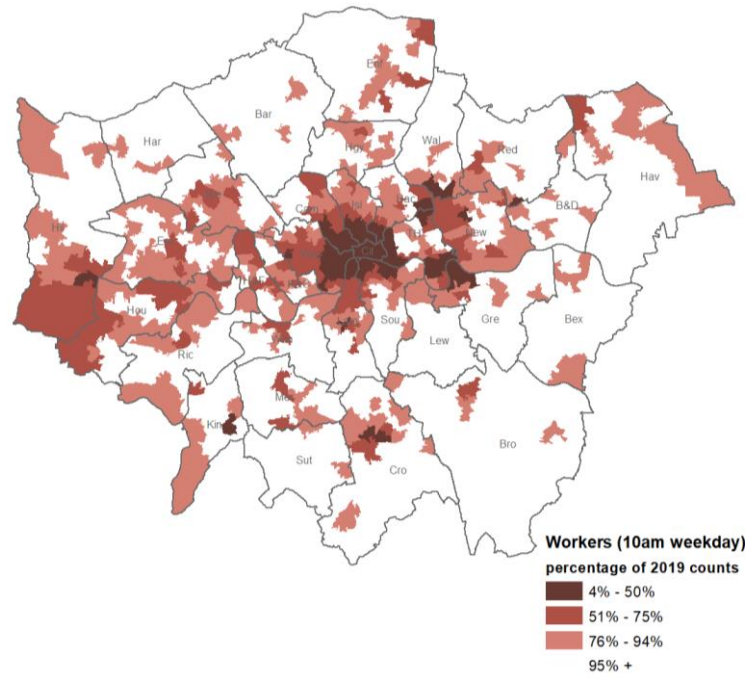
- The seasonally adjusted number of payroll employees in London fell sharply in the April month and has fallen steadily since. The number of employees in September was 3.7% lower than in February.
- London's falls since February and against September last year were nearly 1pp larger than in any other region.

Areas where residents are more likely to be spending the day at home than previously show a ring in Zones 2 & 3

Ring of home workers in Zones 2 & 3



Corresponding drop in workers in key office districts



Most Night Time Economy Town centres (yellow points) are significantly quieter on Saturday nights



The number of Londoners claiming Universal Credit has risen steadily since May



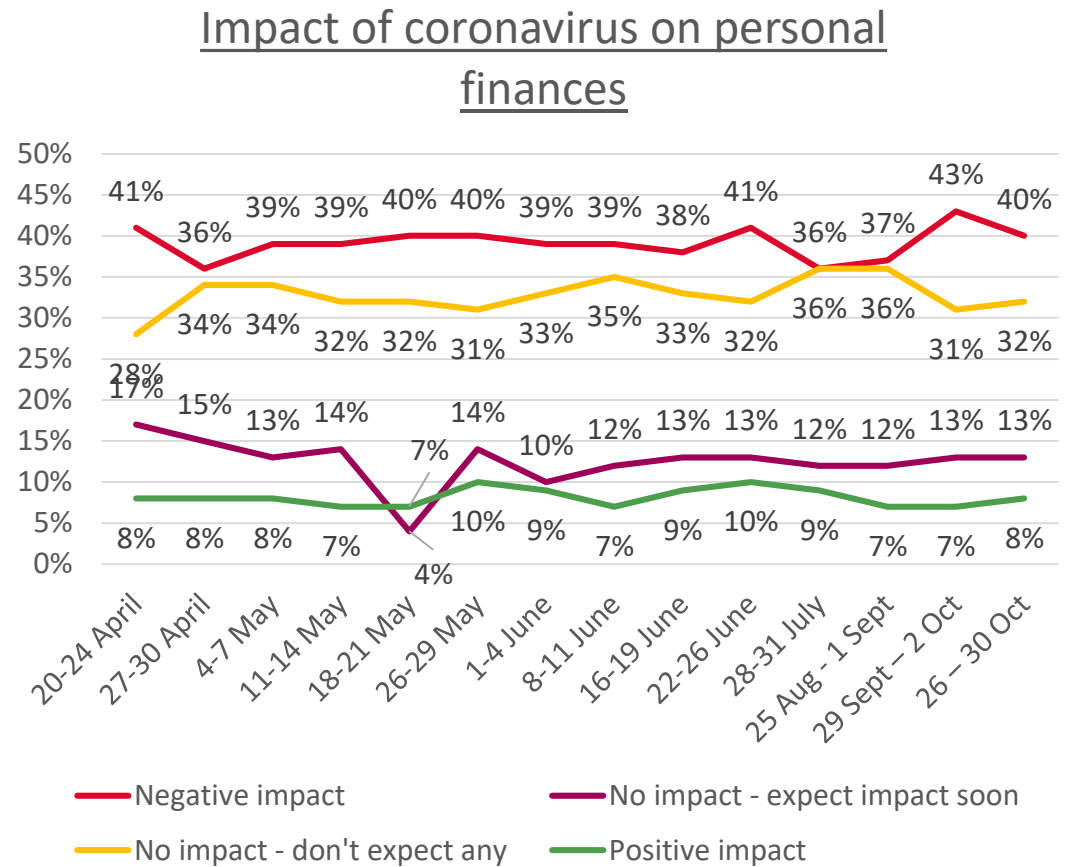
- **930,000 Londoners were claiming Universal Credit in September 2020, an increase of nearly 500,000 since March.**
- The numbers of claimants from every age group under 60 have doubled since March, but increased even more among men aged 20-34, tripling among men aged 25-29.
- The increase in Universal Credit is greater in London than in other parts of Britain. The only other regions where the numbers of claimants have more than doubled are in neighbouring South East and East of England.

Source: DWP

Notes: August figures have now been revised and September figures are provisional.

Forty per cent of Londoners say that Covid-19 has had a negative impact on their personal finances, and 16% are struggling to cope

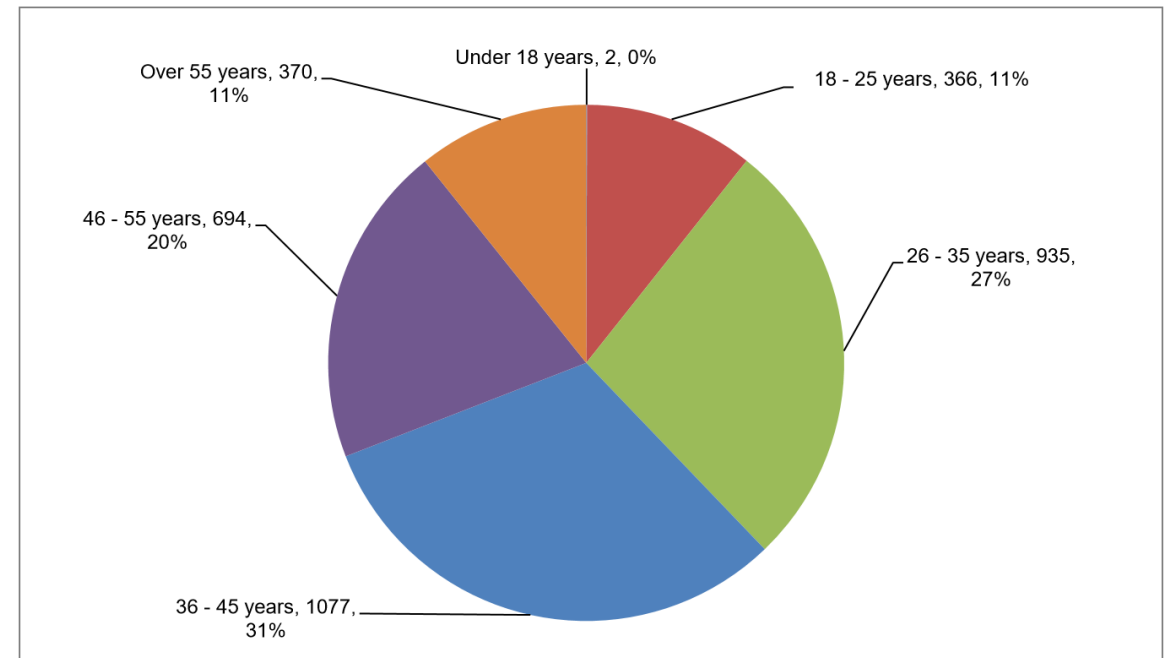
- Forty per cent have seen a negative impact on their personal finances
- This comprises of 24% who have had a negative impact and are coping, 11% who are struggling to make ends meet, and 5% who are going without basic needs and/or relying on debt



Between July and September the number of people sleeping rough in London was 8% lower than the same period in 2019

- Between July and September outreach teams recorded 1,901 people sleeping rough in London for the first time, 8% lower than the same period in 2019.
- A total of 3,444 people were seen sleeping rough in this period, including intermittent rough sleepers and those deemed to be living on the streets, down 14% from 2019.
- 336 people seen between July and September were deemed to be living on the streets, down 23% from 2019.
- But while overall trends are positive, the number of young people seen sleeping rough has increased sharply from last year.

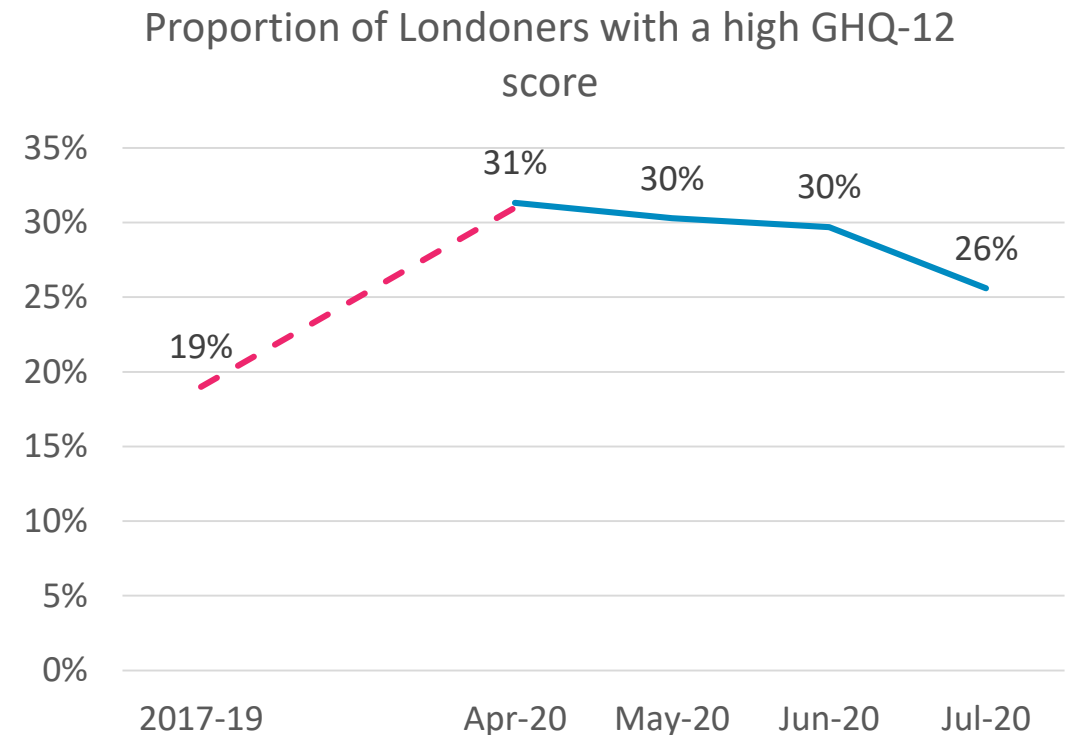
Age of people seen rough sleeping by outreach services.



Base: 3444

The proportion of Londoners who have poorer mental health continues to be higher during Covid-19, and is likely to increase again during the current lockdown

- In July 2020, around a quarter (26 per cent) of Londoners aged 16+ reported characteristics of poor mental health, which has decreased slightly from 31 per cent in April. The pre-pandemic estimate from this survey in 2017-19 was 19 per cent, so the prevalence has increased.
- Younger Londoners displayed a more marked decrease in features of poorer mental health between June and July: 30 per cent of Londoners aged 16-29 in July 2020 reported characteristics of poor mental health, compared with 40 per cent in June.
- Female Londoners continue to be more likely than male Londoners to show a GHQ-12 score of 4 or more in July 2020 (29 per cent of females, 22 per cent of males).
- Fewer Londoners living with a partner had aspects of poor mental health in July 2020 (20 per cent compared with 31 per cent not living with a partner).
- The General Health Questionnaire (GHQ-12) helps to identify minor psychiatric disorders in the general population. Higher scores are indicative of poorer mental health.

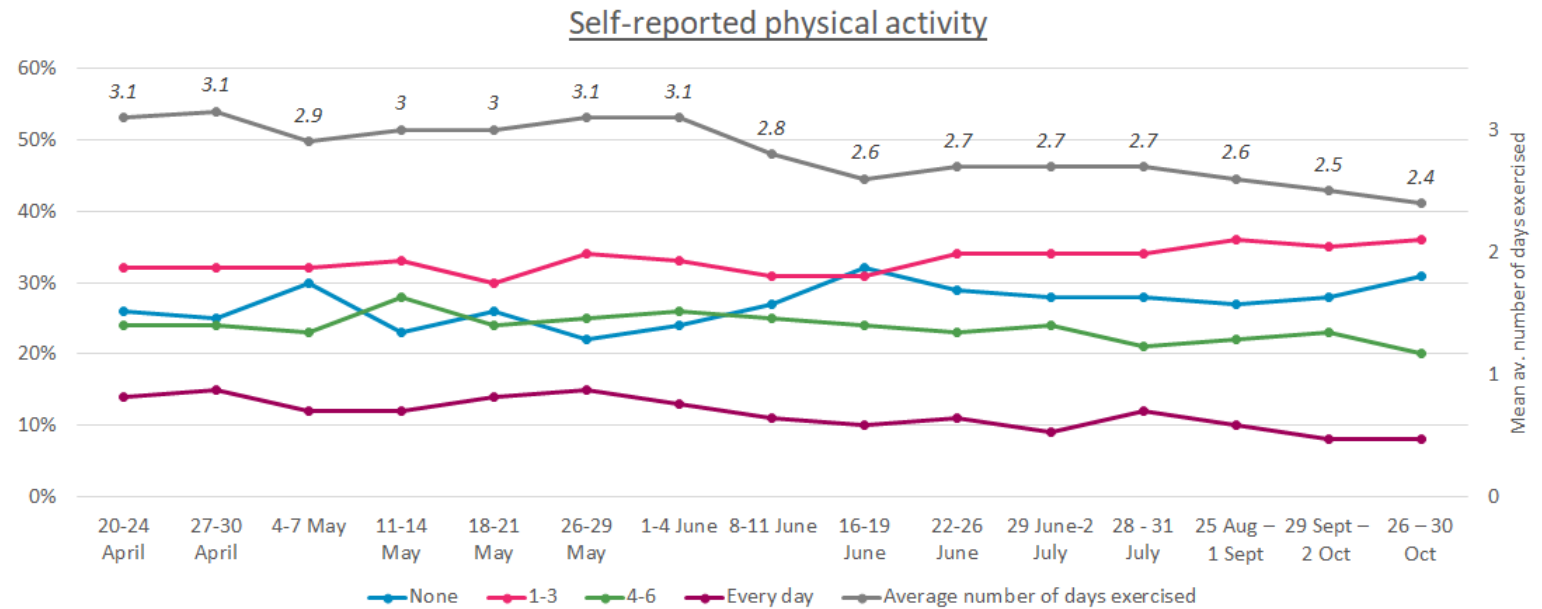


Base: Londoners aged 16+ 2017-19: 4,123; April-20: 1,617; May-20: 1,419; June-20: 1,295; July-20: 1,297

Source: University of Essex, Institute for Social and Economic Research. (2020). Understanding Society: COVID-19 Study, 2020.

The average number of days a week that people are exercising continues to decrease since the original lockdown was eased, and numbers doing no exercise have increased slightly

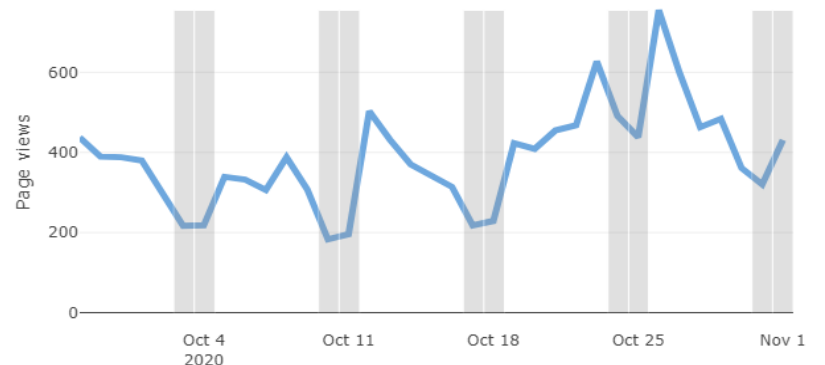
- Londoners are exercising an average of 2.4 days a week compared with 3.1 days in April 2020
- 64% of Londoners have exercised at least once in the last week October – down 2 percentage points on the previous month
- Londoners from lower social grades more likely to say they haven't done any exercise in the last week, at 37% vs 26%
- There is little difference by ethnicity, but women and the oldest Londoners are least likely to be exercising weekly



London's civil society organisations are experiencing pressures over the last week meeting demand related to poverty, health, access to food and victim support

- The top 3 issues where beneficiaries are seeking support from civil society organisations are mental health (38%), loss of employment (34%), and financial insecurity (32%)
- Over the last two months 7% of responding organisation were unable to meet demand for any of their services, and 57% were able to meet demand for some of their services but not others.
- Twenty three per cent of organisations experienced a deterioration in their financial position over the last two months
- Source: GLA Community Response Survey
- Page view data from Citizens Advice shows high demand for information on using a foodbank during the half-term school break
- Food insecurity is likely to increase more widely during lockdown, though with reduced impact on children when they are in school

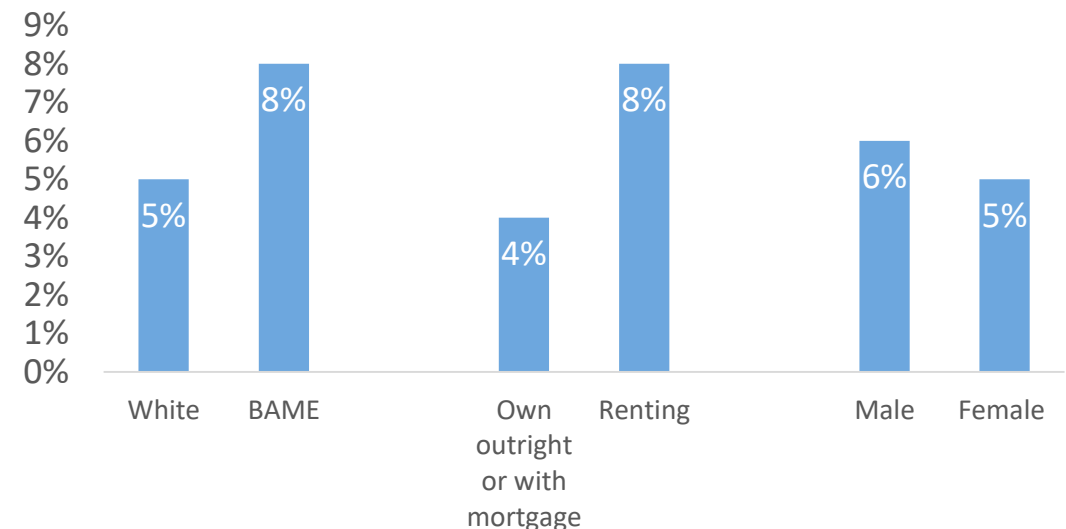
Citizens Advice page views: using a foodbank



Six per cent of Londoners have volunteered since March 2020 to support the coronavirus response, and BAME Londoners are more likely to have volunteered for this than White Londoners

- In July 2020, 6 per cent of Londoners aged 16+ reported that they had, since March 2020, given unpaid help or worked as a volunteer for any type of local, national or international organisation or charity specifically to support the response to coronavirus.
- BAME Londoners were more likely to have volunteered for this reason (8 per cent) compared with White Londoners (5 per cent).
- Twelve per cent had given unpaid help or worked as a volunteer for any local, national or international charity
- Conversely, White Londoners were more likely to have volunteered for any reason compared with Black Londoners (13 per cent and 10 per cent respectively).

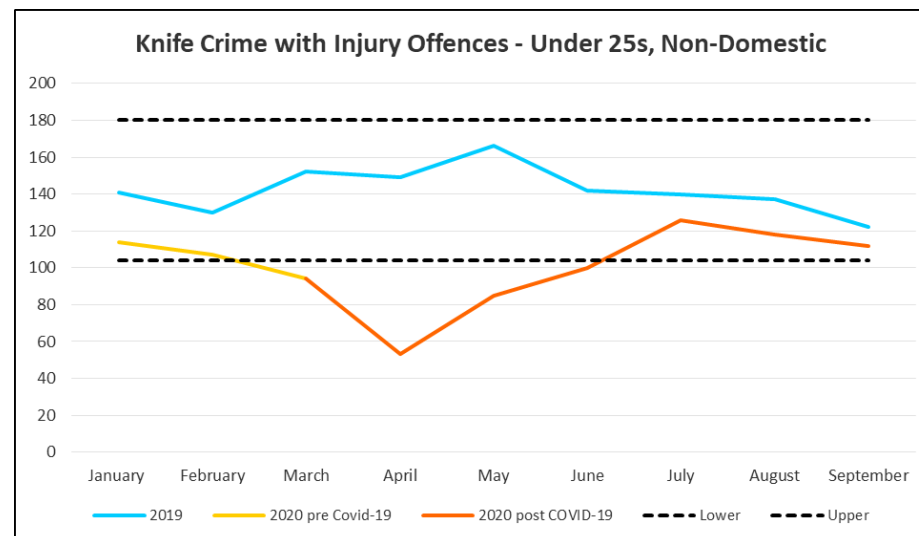
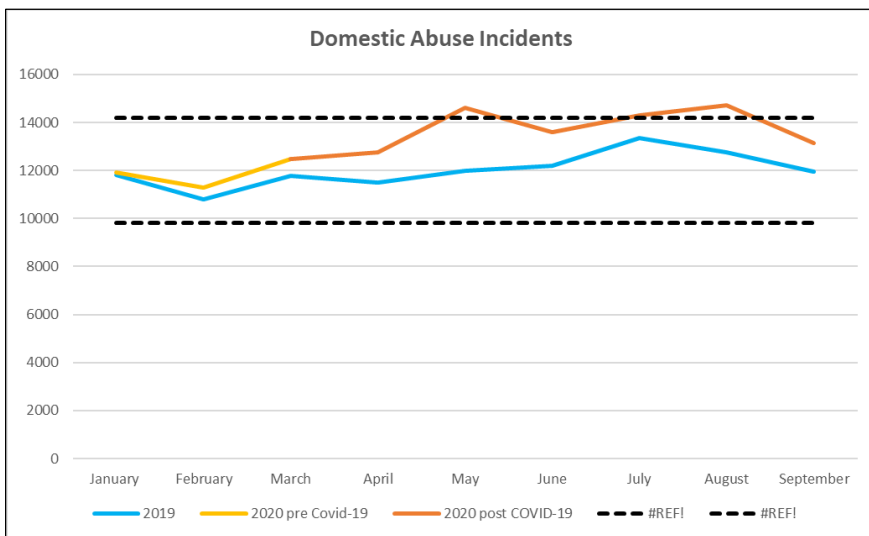
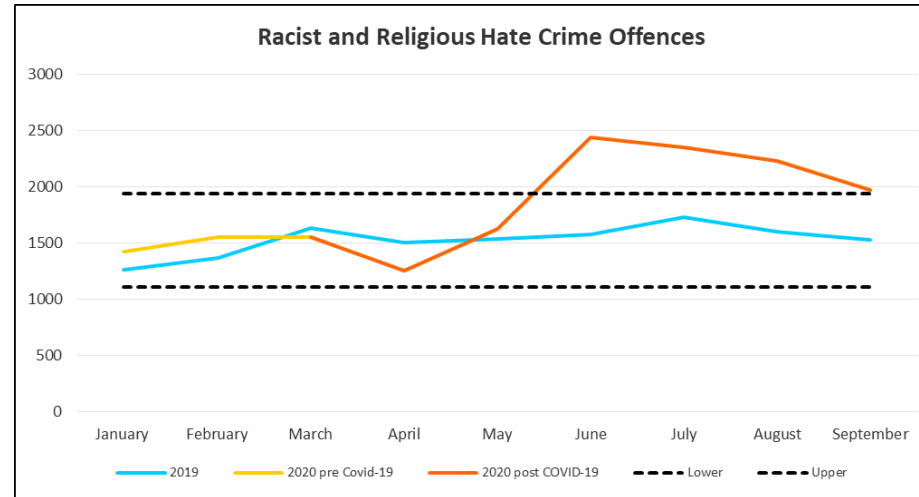
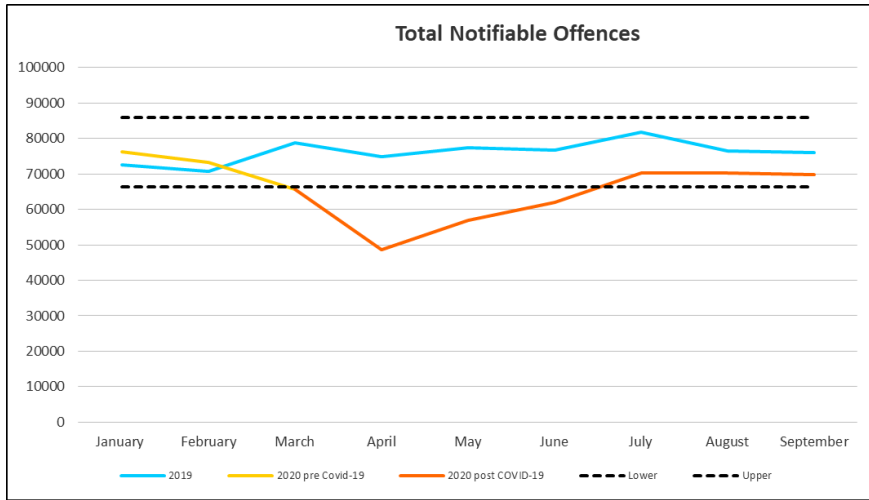
Proportion of adults who volunteered in the last 4 months to support the coronavirus response



Base: July-20 White: 734; BAME: 550; Own outright or with mortgage: 934; Renting: 376; Male: 542; Female: 772

Source: University of Essex, Institute for Social and Economic Research. (2020). Understanding Society: COVID-19 Study, 2020.

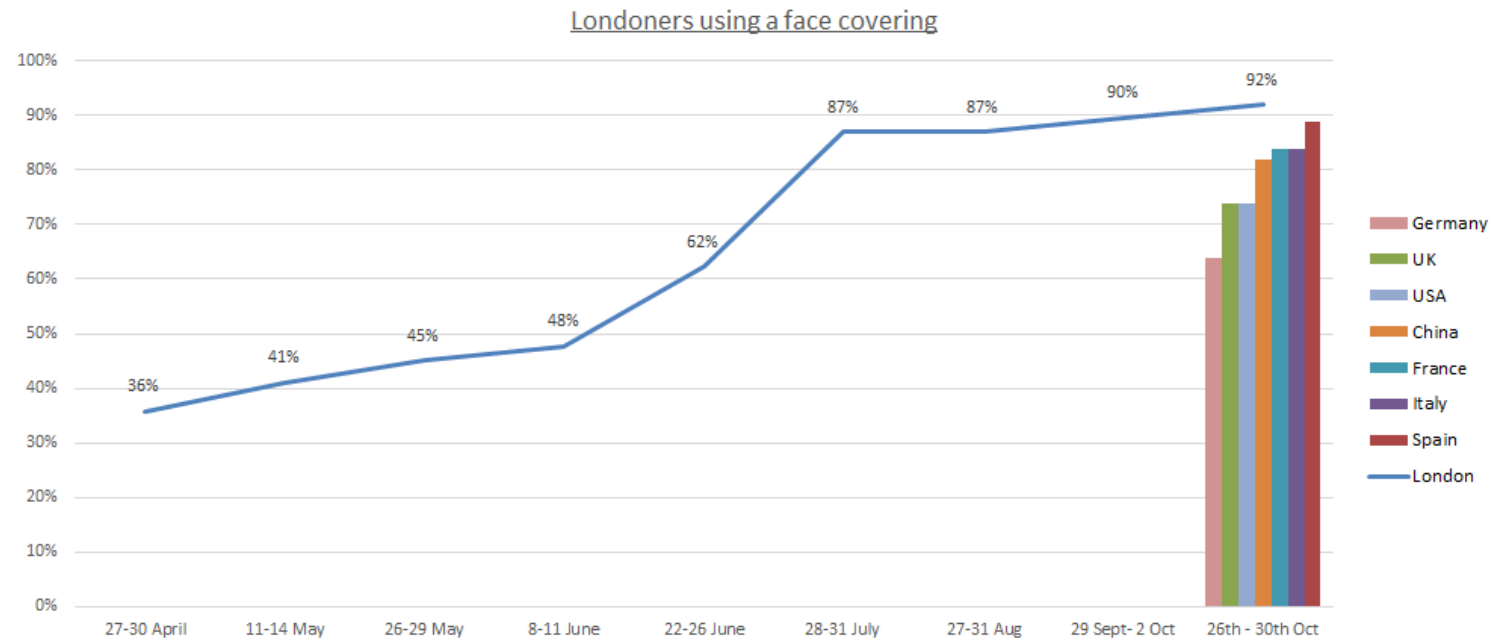
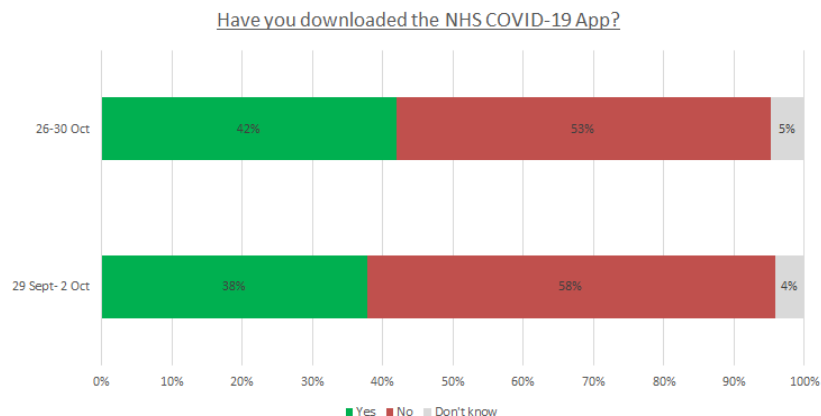
Total crime rates, domestic abuse incidents and knife crime with injury for young people, are all similar to 2019. Racist & religious hate crime has fallen but is still higher than in 2019



Source: MOPAC from MPS Crime and Hate Crime or Special Crime dashboards

Ninety two per cent of Londoners are using a face covering; 42% have downloaded the NHS Covid app; and 64% know how to get a Covid-19 test

- 92% of Londoners are using a face covering when out and about – similar to the last 4 months and higher than the rest of the UK and other countries
- 42% of Londoners have now downloaded the NHS Covid app and 64% are confident in knowing how to get a test



Source: GLA/GovGov surveys, multiple dates for London results. [YouGov International COVID-19 tracker](#) for international results. Note question wording slightly different, results show % who say they are wearing a face mask when in public places

The GLA's 'Rapid Evidence Review' into the disproportionate impacts of Covid-19 provided immediate recommendations for consideration, going into a second lockdown

- The report highlighted serious inequalities in how different groups felt the impact of the policies that the government put in place i.e. the first lockdown period:
 - Gender inequality – increased childcare responsibilities for women, increased risk of domestic violence and abuse
 - Women, LGBTQ+, ethnic minority and disabled Londoners said that their mental health had been negatively impacted by the coronavirus lockdown
 - Access to private outdoor spaces – all ethnic minority groups are less likely than the White group to have access to outdoor space at home
 - Lockdown and social isolation measures significantly disrupted opportunities to access and provide social support, and to organise around community and religious identities
- Includes 35 recommendations focused on preventing or mitigating these inequalities, including
 - Provide opportunities to access green space and to exercise for those with no or limited access to outside spaces during periods of lockdown
 - Ensure that access to relevant information is fully accessible – using sign language, large print, translations into other languages, and graphic and audio modes of delivery, etc
- ['Rapid Evidence Review - Inequalities in relation to COVID-19 and their effects on London'](#) published on 1 October 2020. Led by the University of Manchester, with support from The Ubele Initiative and the University of Sussex