Executive summary - Aggregated impacts

Health	● Prevalence had levelled off since early June, but has begun to rise slightly in recent weeks. There are differences across regions. ● Recent increases in cases identified also suggest that prevalence may be slightly increasing. ● Non-Covid-19 healthcare activity is increasing but remains below normal levels.
Economic	● The economy grew by 1.8% between April and May, but remains ~25% smaller than its Feb 2020 level. ● Flash estimates suggest employment continued to fall, though at a slower rate as many workers remain furloughed. ● Card spending has continued increasing and consumer confidence remains stable. Business confidence, though still near record lows, is increasing.
Regional	● North and Central England have the highest incidence rates of Covid-19. ● Daily new cases have fallen in Leicester since the local lockdown was imposed. However local interventions are now being imposed in areas including Oldham, Blackburn with Darwen and Luton.
Social and wellbeing	● Socialising levels have increased, with 25% of adults reporting socialising as a reason to leave their their home. ● Wellbeing levels remain stable, with little change to the public mood since easements. ● Domestic abuse reporting levels remain elevated and are much higher than pre Covid-19 levels.
Distributional	● Covid-19 death rates remain disproportionately high for BAME groups, especially for Black Caribbean and Indian groups. ● School attendance varies according to affluence, with the most deprived areas reporting significantly lower attendance rates. ● Adults of the lowest socioeconomic backgrounds are less likely to be able to do all or nearly all of their jobs from home, compared with adults of the highest socioeconomic backgrounds.

Executive summary - NPI Impacts

Isolation	• Mobility is increasing suggesting increased confidence in leaving the home. • Compliance with isolation remains low at just 19%. • 66% of contacts identified on test and trace were told to self-isolate.	Gatherings	• Overall levels of socialising are increasing. • 71% of adults met up with other people to socialise this week, up from 67% last week. • Concurrently, loneliness is showing signs of a slight decrease. However 1 in 5 adults still report often or always feeling lonely.
Shielding	• There was a significant decrease in clinically extremely vulnerable people reporting completely following shielding guidance. • However, most clinically extremely vulnerable people are still at least mostly following the guidance. • Self-reported well-being and and mental health are unchanged.	Retail	• Retail sales increased since the reopening of non-essential retail on 15 June. • However, mobility is still significantly lower than this time last year. • Only 3% of wholesale/retail trade is temporarily closed.
Stay At Home/Stay Alert	• Time spent outside residential area is back to normal. • Commuting trips have levelled off at 35-40% of pre-Covid levels. In store card spending has increased to -6%, compared to -16% at the end of June. • Around 29% of adults consistently report feeling unsafe outside their home due to the outbreak.	Bars & Restaurants	• During the w/c 20 July, the daily average number of seated diners was 37% less than the same day a year ago, up from 99% less in the week before restaurants reopened. • A quarter of sites are not expected to open until Sept/Oct. • In-store spending on restaurants and fast food has increased, though remains 29.7% lower than the same week in 2019.
Access to Public Services	• Access to public services is increasing following easing • Use of primary care, A&E and mental health services is increasing, but still below normal levels • Furlough and working from home are keeping public transport use well below normal levels	Leisure & Sport	• Card spending in entertainment has increased in the last month with more firms intending to start trading in the next two weeks. • Levels of physical exercise previously remained unchanged on the month (mid-June to mid-July). • However, snapshot data of gym usage following the reopening of gyms in England on 25th July suggests usage at approximately half the level of the same period last year.
Education & Childcare	• Attendance in education settings increased from 1.1% on 29 May to 15.9% on 16 July • 8% of parents suggested homeschooling was negatively affecting their wellbeing • 70-85% of all responding primary, first and middle schools were open for Reception, Year 1 or Year 6 pupils	Accommodation	• After large falls in economic activity, firms in the sector are starting to reopen and restart trading. 54% were open or opening on 4th July. • Moreover, hotel bookings are starting to recover, albeit gradually. • However, consumers remain cautious about making plans in the near term, with over a fifth not planning on booking a hotel until April 2021 or later.

AGGREGATED IMPACTS AND DEEP DIVES

CONTENTS

1) **OVERALL IMPACTS**

- Health
- Regional (inc. Leicester zoom in)
- Economic
- Societal
- Distributional

1) **EXPLORATION OF SPECIFIC NPIs**

- Economic support schemes
- Home Working
- Face Coverings

KEY NOTES ON DATA

Geography
Data on health, economic and social impacts differ by geographic scope (as a result of data availability), and should be interpreted accordingly.

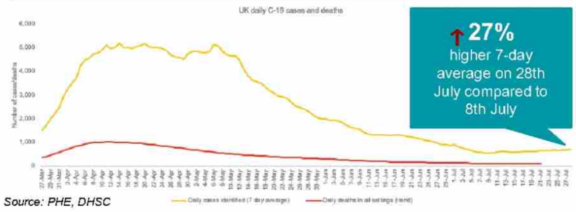
Counterfactual data and baselines
Comparator/baseline data has been provided in the analysis based on the most relevant time point for the data in question. This will differ across data points; i.e some data will be compared to March 2020 (when NPIs were first introduced), whilst others will compare to the same point in the previous year.

Assessment of Outcomes/Impacts
Any conclusions on the outcomes and impacts of NPIs in this pack should be interpreted with attention to the difficulty of attributing sole impacts to a specific NPI/set of NPIs. It is more likely that the combination of NPIs in conjunction with each other have led to the patterns observed in this pack. However, the Theory of Change approach does seek to identify the outcomes that are most relevant to specific NPIs.

Health impacts of lockdown and easements

Prevalence initially decreased but there is evidence to suggest it has risen slightly in recent weeks. The small increase in daily new cases should be kept under observation.

Daily deaths are down nationally but cases are increasing slightly[1]



Source: PHE, DHSC

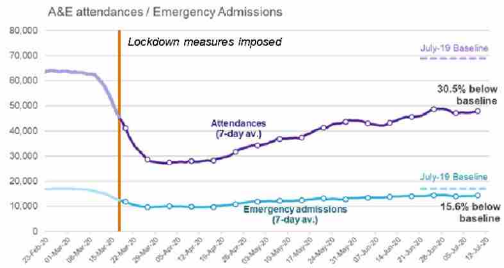
0.07%* of population estimated to have had Covid-19 in England between 20 and 26 July. Positivity has decreased from April** but has risen in recent weeks.[2] **There remains regional variation:** While most regions have had level rates in recent weeks, London has consistently been above the average for England.

0.8-0.9*** Latest R range for the UK (0.8-1.0 for England).[3]

Total deaths registered w/e 17th July ↓ 3% on the 5 year average. This is the 5th consecutive week of deaths below the average and is likely a result of Covid-19 causing deaths to occur earlier in the year.[4]

** 95% credible interval: 0.04% to 0.10%. ** ONS infection survey pilot started 26 April. ***Estimates for the R number are lagged and are hence unlikely to cover full impacts of 4 July easements. Early*

Non-Covid-19 healthcare activity remains below normal levels



Source: NHS E&I, England only

Non-Covid-19 activity is gradually increasing towards baseline, however compared to the same period last year (pre-Covid-19):

Emergency admissions still ↓16%[5]

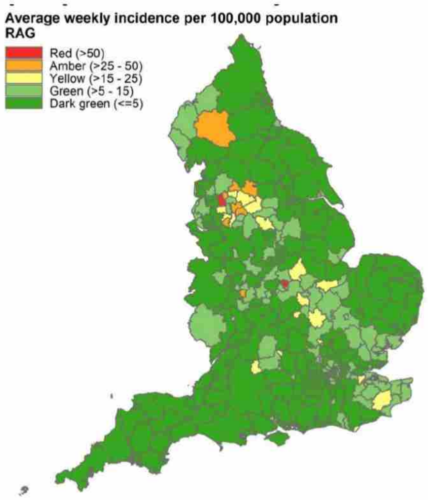
A&E attendances still ↓31%[6]

Urgent cancer referrals still ↓27% (compared to Feb/March 2020)[7]

Non-emergency admissions still ↓ 45% (compared to March 2020)[8]

Regional differences in health impacts

Incidence rates of Covid-19 cases remain highest in the North and Central regions of England



Source: JBC/ PHE

List of upper tier Local Authorities with highest incidence rates between 17-23 July[9]

	Weekly incidence rate per 100,000 people	
Local Authority	**10-16 July**	**17-23 July**
Blackburn with Darwen	81.2	75.9
Leicester	91.5	64.2
Bradford	40	46
Rochdale	41.8	41.4
Oldham*	11.9	40.3
Trafford	8.5	30.5
Sandwell	17.4	27.8
Kirklees	28.7	24.2
Calderdale	24.8	23.3
Luton	38.3	19.1
England	**7.1**	**7.4**

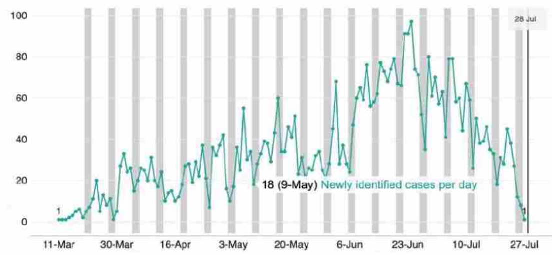
*Oldham were not listed as an area for intervention at the GOLD meeting on 23/07, but new measures have been brought in to contain the virus

JBC Areas of intervention   JBC Areas of concern

Leicester zoom in

Since the local lockdown was imposed new daily cases in Leicester have fallen from the peak of 97, reducing pressure on hospital services

Number of new Covid-19 cases identified in Leicester per day, 11 Mar - 27 Jul[10]



Source: PHE, DHSC

9.7% Share of beds occupied by Covid-19 patients in university hospitals of Leicester NHS trust on 26 July (vs 28.1% on 28 June and 4.7% and in all NHS England hospitals).[11]

0.17 Hospital admissions per 100,000 people in Leicester on 26 July were for Covid-19 (vs 0.95 on 23 June and 0.10 in all NHS England hospitals).[12]

3% Percentage of staff absences in acute hospitals in Leicester related to Covid-19 on 26 July (vs 6% on 22 June and 2.6% in all NHS England hospitals).[13]

The JBC have found that asymptomatic cases and clusters in residential properties remain a concern, while there are still barriers to social distancing in local communities

From the beginning of June there was a clear spike infections in the Asian / British Asian community.

In the fortnight up to 22/07, there was a clear decline in cases in the Asian community.

Asymptomatic cases have been around 30 per day, meaning that recent cases have often been asymptomatic.

There have been 108 clusters in residential properties - the majority of these in terraced housing.

Further engagement with local communities has found:

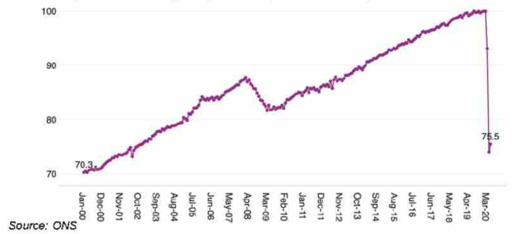
1. There are concerns about the costs of facemasks - the city council are hoping to work with local textile factories produce enough masks to distribute to each household.
2. It's important to use the right influencers to affect local behaviour, and how to feedback to the community via these influencers.
3. There is complexity of managing social distancing in crowded households. Attitudinal aspects and impacts of religious behaviour have also been highlighted.[14]

Economic impacts of lockdown and easements

The economy grew by 1.8% between April and May, but remains ~25% smaller than in February 2020. Employment continues to fall, but at a slowing rate.

The fall in GDP due to the pandemic reversed nearly 18 years of economic growth, affecting public debt and employment

GDP level, Jan 00 to May 20 (indexed, 100 = Feb 20)



Source: ONS

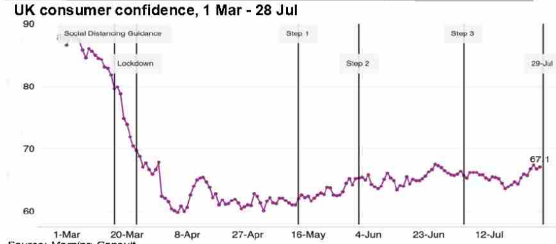
99.6% ↑ the ratio of UK public sector net debt to GDP in 2020, an 18.9pp increase relative to June 2019.[15]

649k ↓ fewer people were in paid employment in June relative to March. The number of people in paid employment fell by around 74k between May and June.[16]

11% ↓ decrease in average daily household Universal Credit declarations, June 10-23rd vs. July 10-23rd, from 10,066 to 8,978 average daily claims.[17]

Consumer confidence is significantly below pre-pandemic levels. While business activity is increasing, some firms remain closed

UK consumer confidence, 1 Mar - 28 Jul



Source: Morning Consult

9.3% ↑ the increase in in-store and online spending during w/e 19 July relative to the same week in 2019. In the w/e 14 June it was only 1% higher YoY (before non-essential retail reopened).[18]

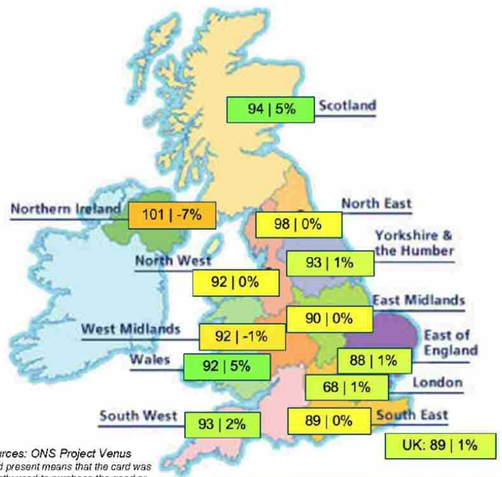
57.1 ↑ the level of the composite PMI in July - an increase from 47.7 the previous month. Both manufacturing and service PMIs also showed business activity as increasing.[19]

6.9% ↓ of business survey respondents reported that they were closed temporarily between 13-22 July. This compares to 10.6% between 15-28 June.[20a] Overall business confidence rose eight percentage points to -22% in July, the highest since March.[20b]

Regional differences in economic / societal impacts

Businesses and consumer spending have been lowest in London, while school attendance has also been lower compared to other UK regions

UK regional spending, card-present, value, week ending 19 July



Sources: ONS Project Venus
Card present means that the card was directly used to purchase the good or service, i.e. there was a contactless or pin confirmed transaction.

latest index (2019=100) | week-on-previous-wek growth

Similar proportions of workers were furloughed in each region, while business reopenings have been lowest in London and the East Midlands

29-32% the share of workers who have been furloughed across UK regions. On June 30 the UK average was 31%.[21]

43% the share of hospitality, leisure and retail businesses that reopened in the East Midlands - the lowest in the country. 44% had reopened in London, compared to the UK average of 52%.[22]

A smaller share of schools have reopened in London, while attendance has also been lower than other UK regions

9-16% the share of pupils DfE analysis suggests attended school on 16/7 in London - one of the lowest attendance rates in any region. Attendance is assumed to be highest in the South West, where 14-21% attended school.[23]

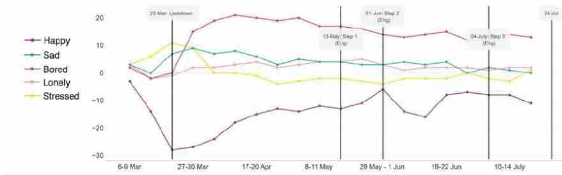
53% the share of early years settings DfE analysis suggests were open on 16/7 in London - the lowest share in any region. 72% were open in the North East - the highest of any UK region.[23]

Overall Impacts: Societal

Wellbeing levels remain fairly stable since June and July easements, with a moderate increase in the number of people socialising.

Recent easements appear not to have affected, including financial stress, with levels remaining consistent

Public mood tracker, % point difference in adults reporting each feeling compared to this time last year, latest data point 17-20 July[24]



YouGov via DDT Dashboard

42% Of people reporting their wellbeing has been affected. Of these, top reasons included feeling worried about the future (67%), feeling stressed or anxious (61%) and feeling bored (52%).[25]

20% Of people reporting their household finances being affected; of these 67% report reduced income.[20] While stress due to Covid-19 has halved, financial insecurity is a consistent stress.[26]

Slightly more people have been socialising since the easements

25%↑ Of adults leaving their home reported meeting up with people in a public place; up from 14% on 28-31 May. Similar trend for those meeting up in a private place.[27]

Despite easing of measures, other impacts continue to affect members of society

Crime has remained consistent with higher domestic abuse cases.

66%↑ Rise in calls to domestic abuse helplines, compared to pre-lockdown. After an initial spike, calls remain steady but elevated.[28]

As restrictions ease, it is anticipated most crime will return to pre Covid-19 trends, but there is no specific evidence on this to date.

Housing remains an issue for wellbeing and working from home.

42% Of respondents interviewed suggested a lack of suitable work surfaces made working from home challenging.[29]