

Aberdeen City Council – Socio Economic Rescue Plan

Data Pack
June 2020



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Macro effects



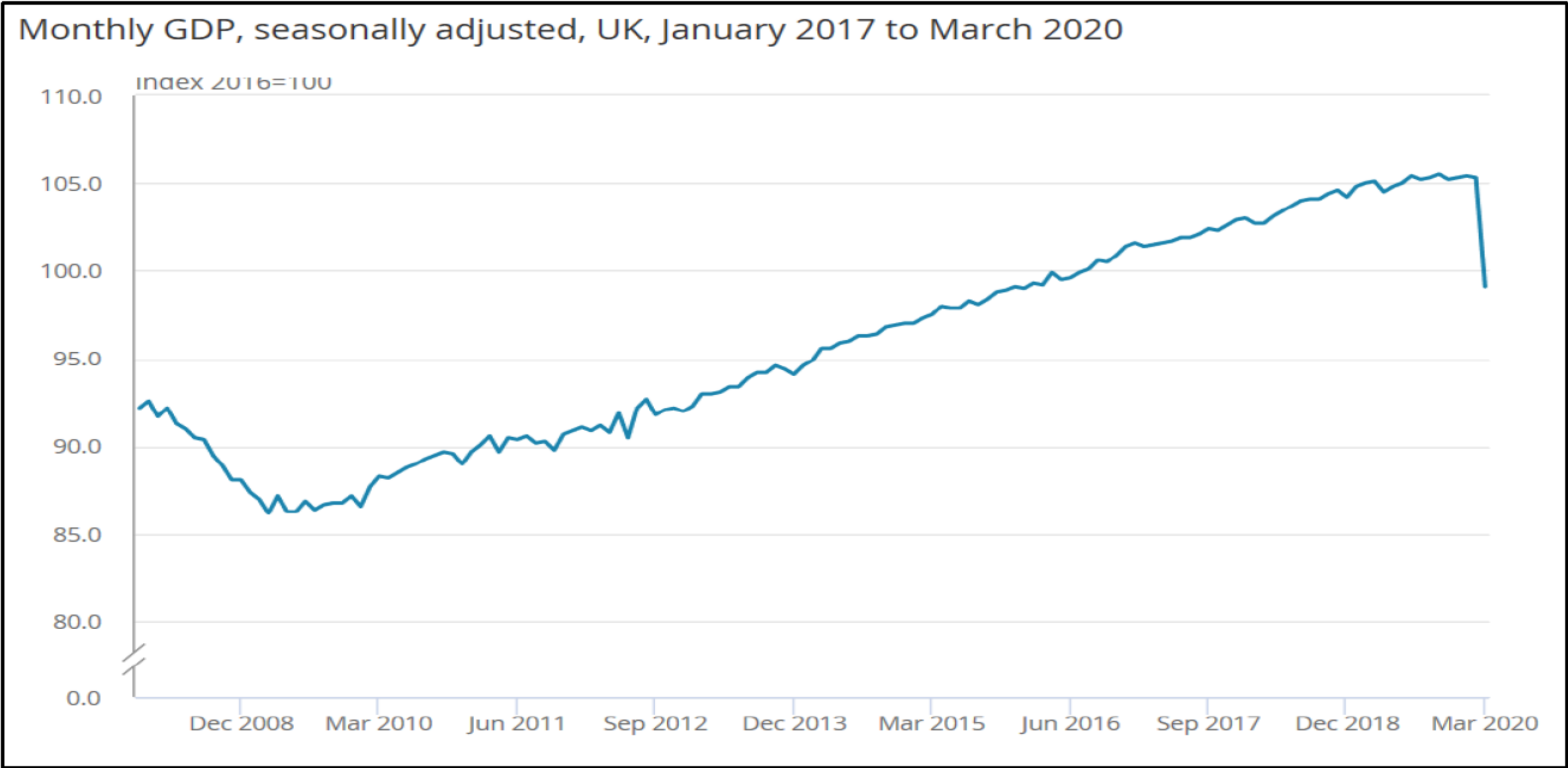
GDP Forecasts

Forecaster	Detail
Bank of England	UK GDP down 14% in 2020
Scottish Government	Scottish GDP down 12% in 2020, Scottish GDP down 33% in Q2 2020
OBR	UK GDP down 13% in 2020, UK GDP down 35% in Q2 2020
Fraser of Allander	Scottish GDP down 20-25% in Q2 2020
EY	UK GDP down 6.8% in 2020
KPMG	UK GDP down 8.2% in 2020

Scottish GDP to contract by around a quarter to a third in Q2 2020 and by 7%-14% in 2020.

Bank of England's forecasts activity picks up late 2020 and into 2021 after social distancing measures are relaxed, although it does not reach its pre-Covid level until late 2021. Scottish Government forecasts that pre-Covid output levels may not be reached until early 2023.

GDP Actual Data



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GDP Actual Data January to March 2020

The latest ONS GDP data for the first quarter of 2020 (Jan to March) as well as the monthly GDP data for February to March provides the first direct indication of how COVID-19 has affected the UK economy. Key findings are:

- Over the first quarter (Jan-March) UK GDP declined by 2%, the biggest quarterly drop in activity since Q4 2008.
- Overall GDP fell by 5.8% in the month of March, the largest fall since monthly records began in 1997, reflecting record widespread falls in services, production and construction output.
- Service sector output fell by 6.2% in March, the largest monthly fall since records began in January 1997. All but one (public administration) service subsectors experienced a decline, with Accommodation and Food Services experiencing the largest fall in output (-31%).
- Production sector (manufacturing and energy) output declined 4.2% in March 2020. Manufacturing sector output (which makes up 75% of production) was down -4.6%. Construction sector output fell by 5.9% in March.



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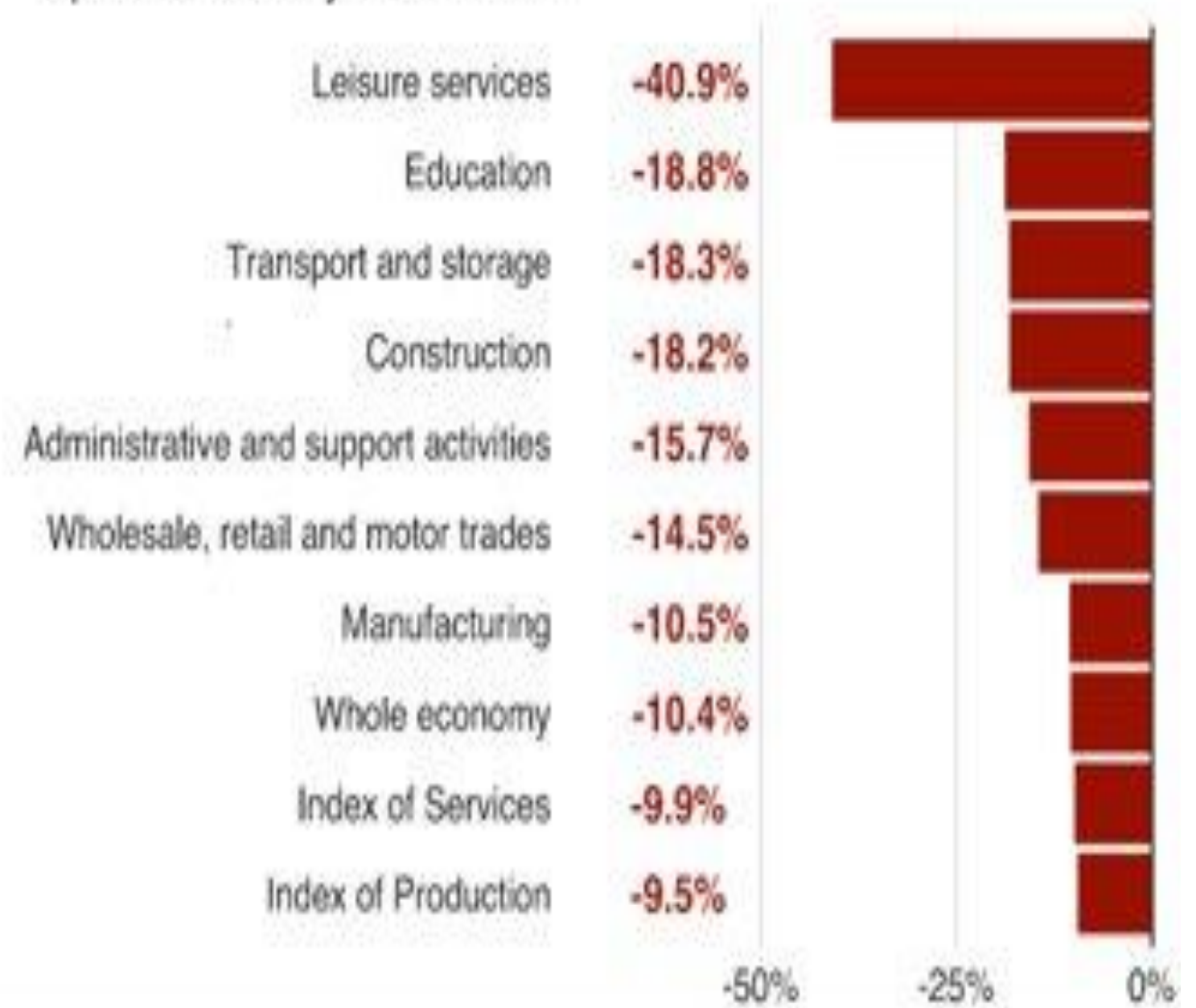
GDP Actual Data April 2020

Monthly GDP data for March to April shows how COVID-19 has affected the UK economy. Key findings are:

- The fall in GDP in April 2020 is the biggest shock to the economy since records began. UK GDP output fell by 20.4% in April 2020. By way of comparison, during the 2008-2009 recession the UK economy fell by no more than 1% in a single month.
- Sectors most likely to be impacted are shown below and include leisure, education, transport, etc. These sectors are mostly affected by social distancing, but others such as administration have a high proportion of women with dependent children.

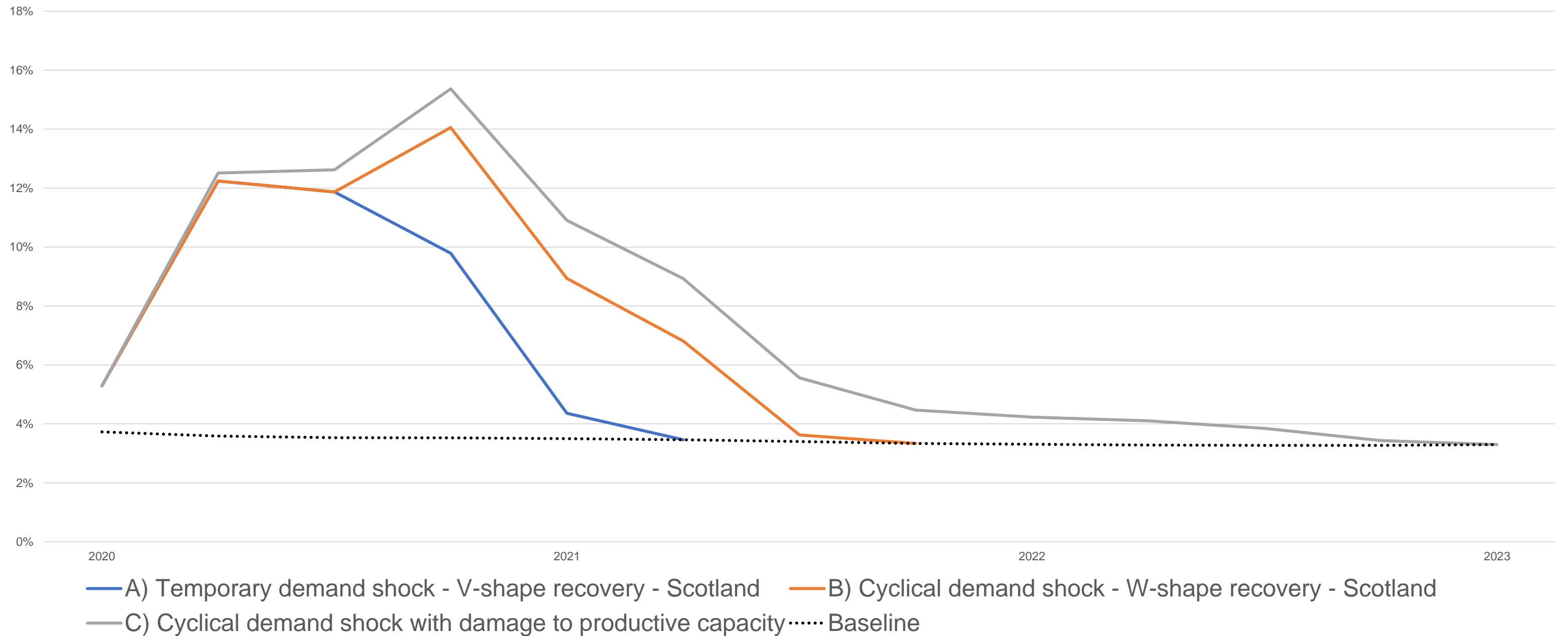
Widespread contractions across the economy

Top 10 sectors by contraction



Labour Market Forecasts

Profile of the Scottish Unemployment Rate under the Illustrative Scenarios



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Labour Market Forecasts

Scottish Government modelled 3 scenarios to give illustration of impacts and recovery:

- A temporary V shaped shock – with unemployment rising to around 12% and falling back to normal levels by around Q2 of 2021
- A W shaped recovery – with unemployment rising to around 14% and recovering by around Q4 2021
- Longer-term damage with scarring effects (an L shaped recovery), with unemployment rising to around 15% before slowly recovering

The degree of uncertainty is large – we don't know if the medium term impact will take years for the labour market to return to pre-pandemic levels like after the financial crisis, or if it might bounce back much quicker.



Expected Impact on Sectors

- SG analysis was carried out to identify the sectors in Scotland's labour market which are at highest risk.
- **Accommodation & food services, Education and Arts, entertainment & recreation** most affected by Social Distancing Guidance and given automatic **RED** RAG rating.
- **Manufacturing** also at **RED** risk through high COVID-19 absence rates & existing labour supply shortages.
- **Public Admin & Defence** at **RED** risk through high proportion of women with dependent children.
- **Administrative & support services, Health & social work and Other Services** at **RED** risk through high proportion of women with dependent children but also existing labour supply shortages.

Sector	International Supply	International Demand	Domestic Demand	Labour Market Disruption
Agriculture, forestry and fishing	y	a	y	y
Mining and Quarrying Industries	y	a	a	y
Manufacturing	r	r	a	r
Electricity & Gas Supply	y	y	y	a
Water Supply & Waste Management	y	y	y	y
Construction	y	y	r	r
Retail & wholesale	y	y	r	r
Transport & Storage	y	y	a	a
Accommodation & food services	y	a	r	r
Information & Communication	a	y	y	y
Financial & Insurance Activities	y	y	y	a
Real Estate Activities	y	y	y	a
Professional, Scientific & Technical Services	y	a	y	a
Administrative & Support Services	y	y	a	r
Public Administration and Defence	a	y	y	r
Education	y	a	y	r
Health and Social Work	a	y	y	r
Arts, entertainment and recreation	y	y	r	r
Other Services	y	y	a	r

For Labour Market Disruption, RAG ratings were determined by a) COVID-19 absence rates, b) Existing labour supply shortages c) Women with dependent children (due to school closures) and d) Sectors affected by Social Distancing guidance



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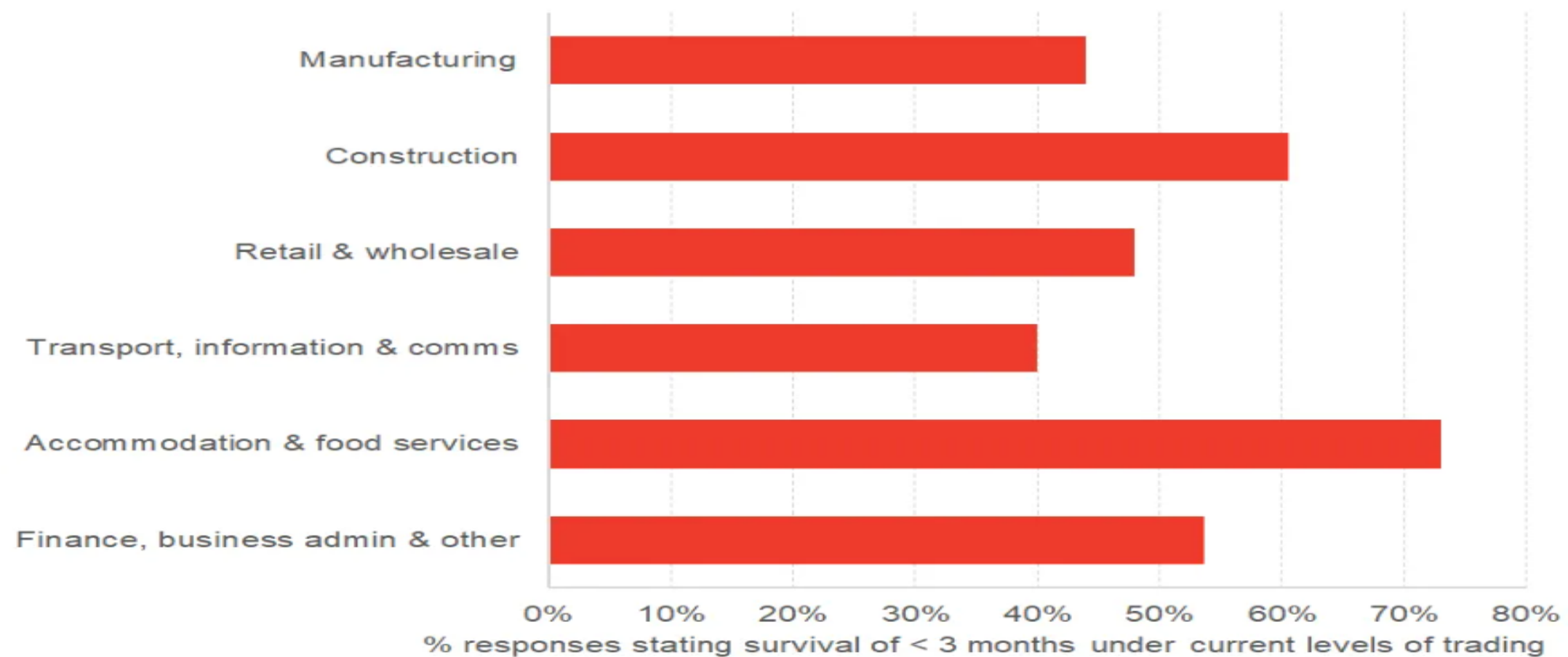
Business



Access to Business Finance

Fraser of Allander Scottish Business Monitor Survey asked how long businesses in Scotland could survive under current levels of trading. Of those who knew, 54% said 'less than three months' while a further 32% said they could survive for 'four to six months'. This result are driven by small businesses. Accommodation and food services and construction firms in Scotland are particularly cash strapped.

Chart: Percentage of responding businesses stating their business can survive less than three months under current levels of trading, by sector

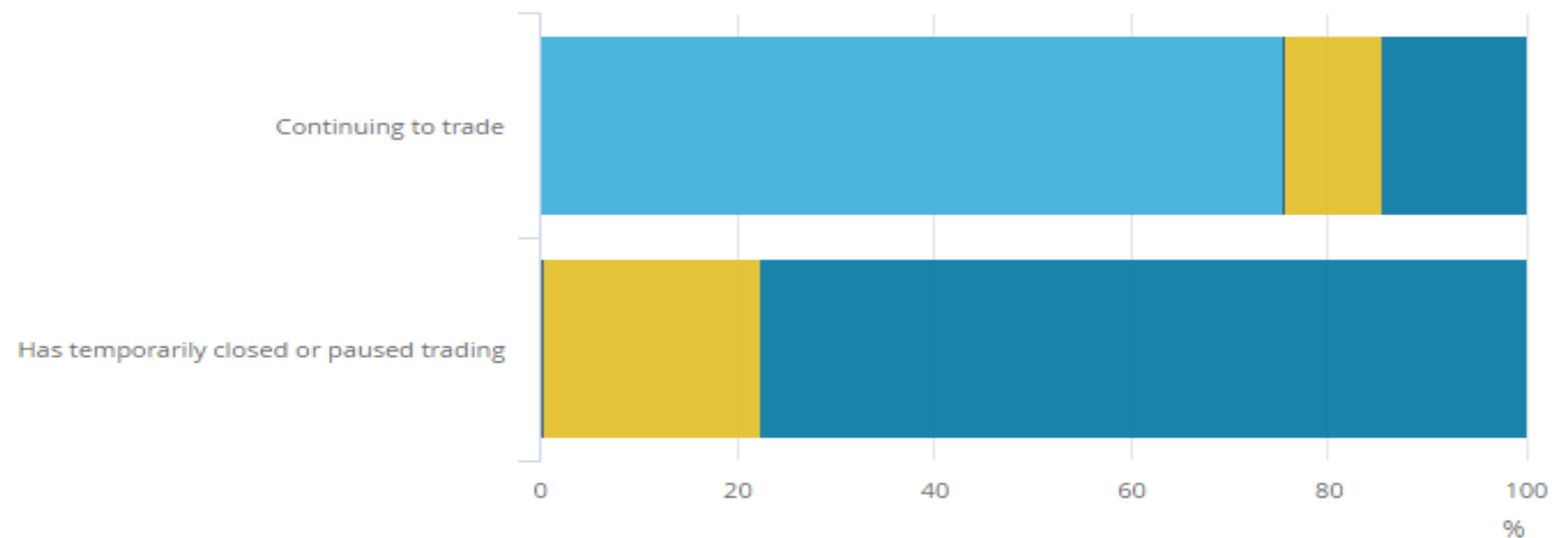


Furlough UK

Latest ONS data for the UK suggests 14% of the workforce in businesses that continued trading and 78% in businesses that had temporarily closed had been furloughed.

Proportion of the workforce by working arrangements, for responding businesses that were still trading or had temporarily paused trading, UK, 23 March 2020 to 5 April 2020

- Put on furlough leave
- Other and off sick or in self-isolation due to coronavirus (COVID-19) with statutory or company pay
- Made redundant
- Working as normal



Furlough UK & Aberdeen

Approximately 9.1 million jobs have been furloughed in the United Kingdom as part of the government's job retention scheme. There have been 27,700 furloughed employees in Aberdeen and 29,700 in Aberdeenshire, around a quarter of those in employment.

Particular high furloughed sectors include accommodation and food services, hospitality, manufacturing and retail. Over 90% of employees of accommodation and food companies that have paused trading have been furloughed (84% of employees of all companies). Of businesses continuing to trade, 19% of the workforce had been furloughed in the period 6 April to 19 April 2020.



COVID-19 Business Support Grants

As at 16th June, Aberdeen City Council had released a total of 2,062 Small Business and Retail, Hospitality & Leisure, (Phases 1 and 2) and Newly Self-Employed Hardship grant payments, to a value of £23.8m , from the Business Support funding streams announced by the Scottish Government, to eligible businesses in the City.

Grant Stream	No of Grants Awarded	Value (£)
Small Business/RH&L	1,900	£23,468,750
Newly Self-Employed Hardship	162	£324,000
Total	2,062	£23,792,750

Almost a third of grants are to accommodation and food services, with more than a fifth to the arts and entertainment sector and around a sixth of payments released are to the retail sector.



Business Start-ups in Aberdeen

Small Business Start-ups	April 2020	Monthly comparison	Yearly comparison	YTD comparison
Aberdeen City	36	-58.1%	-69.0%	-34.3%
Scotland	674	-63.9%	-72.5%	-30.8%

Legal Status Start-ups	April 2020	Monthly comparison	Yearly comparison	YTD comparison
Limited Companies	26	-57.4%	-69.4%	-37.6%
Sole Traders	7	-63.2%	-66.7%	-28.8%
Other For Profit Start-ups		0.0%	0.0%	-66.7%
Commercial Enterprises	33	-58.8%	-68.9%	-36.4%
Not For Profit	3	-50.0%	-70.0%	-12.8%
Total	36	-58.1%	-69.0%	-34.3%

Top 3 Industries	April 2020	Monthly comparison	Yearly comparison	YTD comparison
Real estate, professional services & support activities	11	-64.5%	-78.8%	-43.1%
Wholesale & retail trade	7	-30.0%	-22.2%	-40.4%
Recreational, personal & community service	6	-45.5%	-60.0%	19.5%

Business Start-ups in Aberdeen

34.3% fewer businesses start-ups in Aberdeen City during the first four months of this year compared with the corresponding period of last year

This growth rate ranks Aberdeen City at 22 out of the 32 Scottish districts.

The make up of start-ups is Limited Companies 72.2%, Sole Traders 19.4%, Other For Profit Start-ups (mainly Partnerships) 0.0% and Not For Profit 8.3%.

The top 3 industries account for 66.7% of the starts.



Restarting the Economy

The Glasgow Chamber of Commerce survey in April of over 200 Glasgow businesses on the impact of COVID-19 reported that:

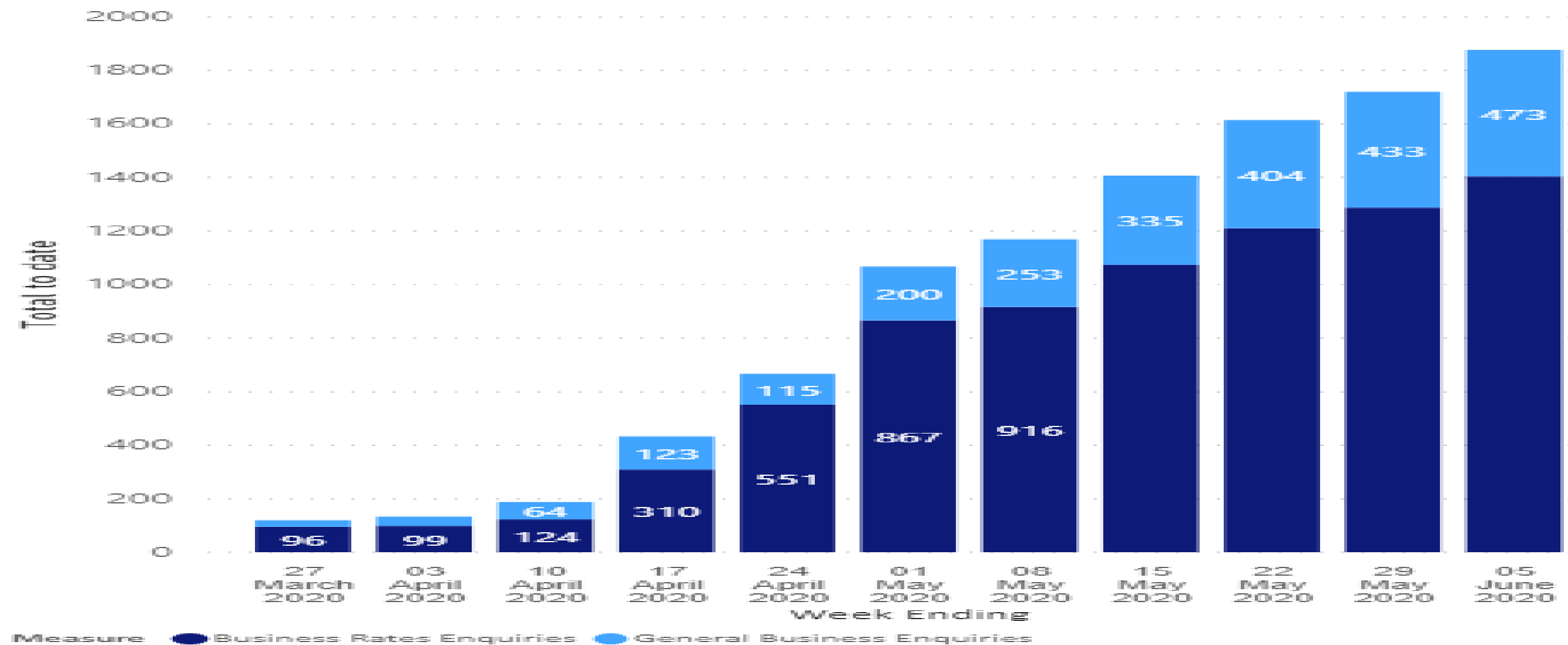
- Almost half of companies are not confident that they could return to work under current social distancing rules.
- 21% said they could not operate under the rule that says people must stay two metres apart (social distancing), with 24% saying they didn't know if they could due to staff having to work closely together or trading space being too tight.
- Further government guidance is needed on how companies can operate under social distancing.
- Longer-term support is needed including a tapering of the Job Retention Scheme to avoid redundancies. 57% of respondents asked for the retention of the scheme, while 63% of companies were using it.



ACC: Business Response Hub Enquiries

Overall Business Enquiries addressed by the Council's Business Response Hub have increased tenfold since the crisis began with around 75% of these about business rates. As at 5th June, there had been a total of 1,876 enquires received (1,403 relating to business rates and 473 general business queries)

General Business and Business Rates Enquiries (Allocate...



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People



Unemployment Forecasts in Aberdeen

Proofed Unemployment Calculation; Jan 2019-Dec 2019			
	Aberdeen City	Aberdeenshire	Aberdeen City & Shire
Economically Active Aged 16 Plus	132,400	142,200	274,600
Unemployment aged 16 plus	4,200	3,800	8,000
Unemployment Rate	3.2%	2.7%	2.9%
5 % Unemployment Range	6,620	7,110	13,730
10% Unemployment Range	13,240	14,220	27,460
15% Unemployment Range	19,860	21,330	41,190

Over 30,000 jobs are estimated to be at risk in Aberdeen. Unemployment is likely to rise considerably beyond 10% this year.

Oil and Gas UK estimate **30,000 jobs in the sector in the UK** could be lost as a result of the coronavirus pandemic and the low oil price with around a third of these in the North East.

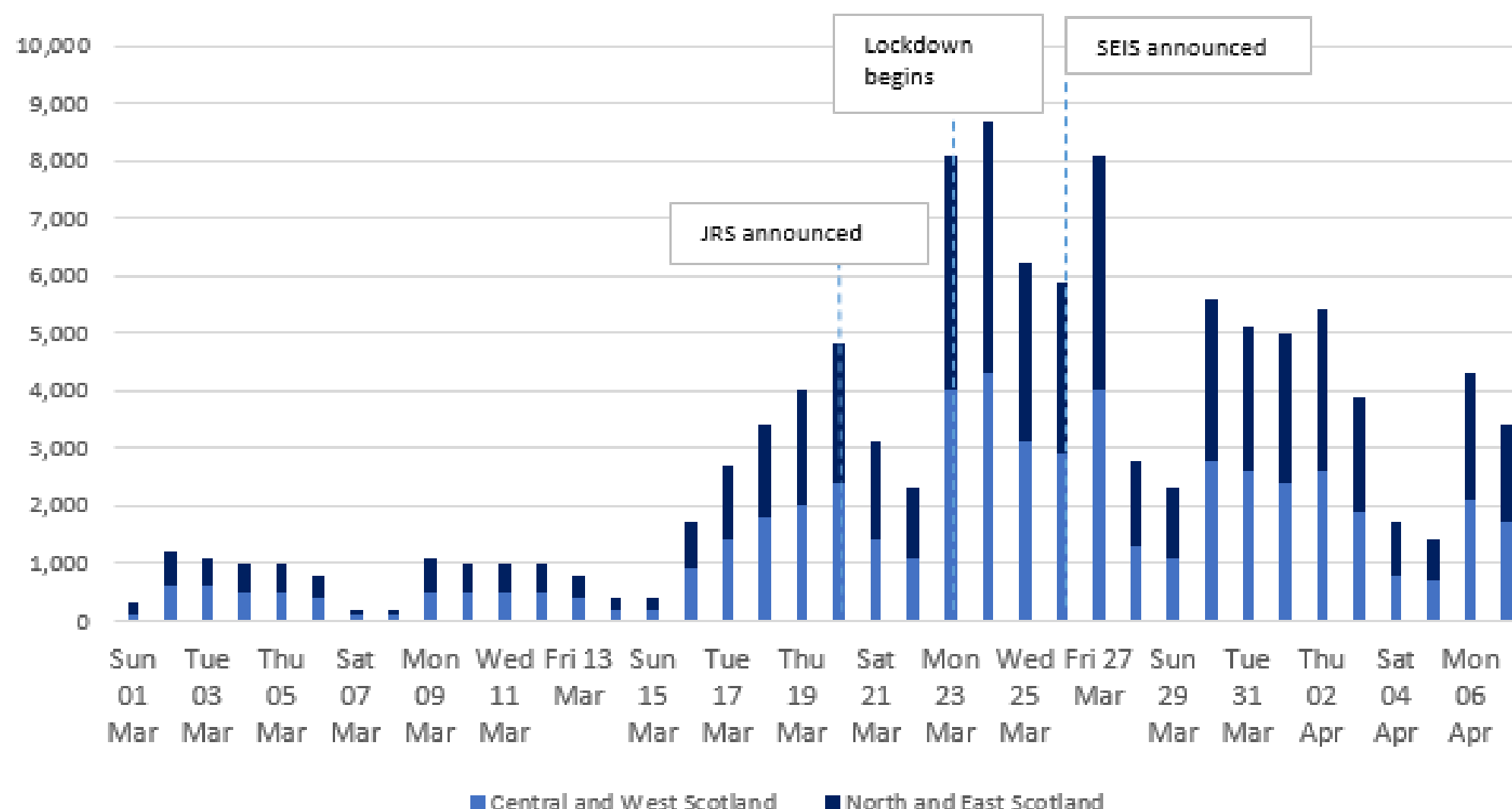


Sharp Rise in Universal Credit Claims in Scotland

The impact of COVID social distancing measures had an immediate impact on the labour market.

- From 1st March new UC claimants in Scotland rose from a daily average pre-crisis of 800 to a peak of 8,700 on 24th March. Totalling almost 100,000 over the period 16th March to 7th April.

UC Total Contracts, Scotland



Source: DWP, Apr 2020

Source: ONS, BICS
Survey Results, April 2020



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Universal Credit in Aberdeen & Scotland

People on Universal Credit (In employment and not in employment) Aberdeen City & Scotland, 2020

	Aberdeen City	Scotland
March 2020	7,966	264,117
April 2020	11,815	373,526
May 2020	14,516	440,229
Percentage Increase (March-May)	82.2%	66.7%



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Expected Impacts on Groups of People

Younger people – employees aged under 25 more likely to work in a sector that is now shut down. More likely to be financially vulnerable prior to COVID-19.

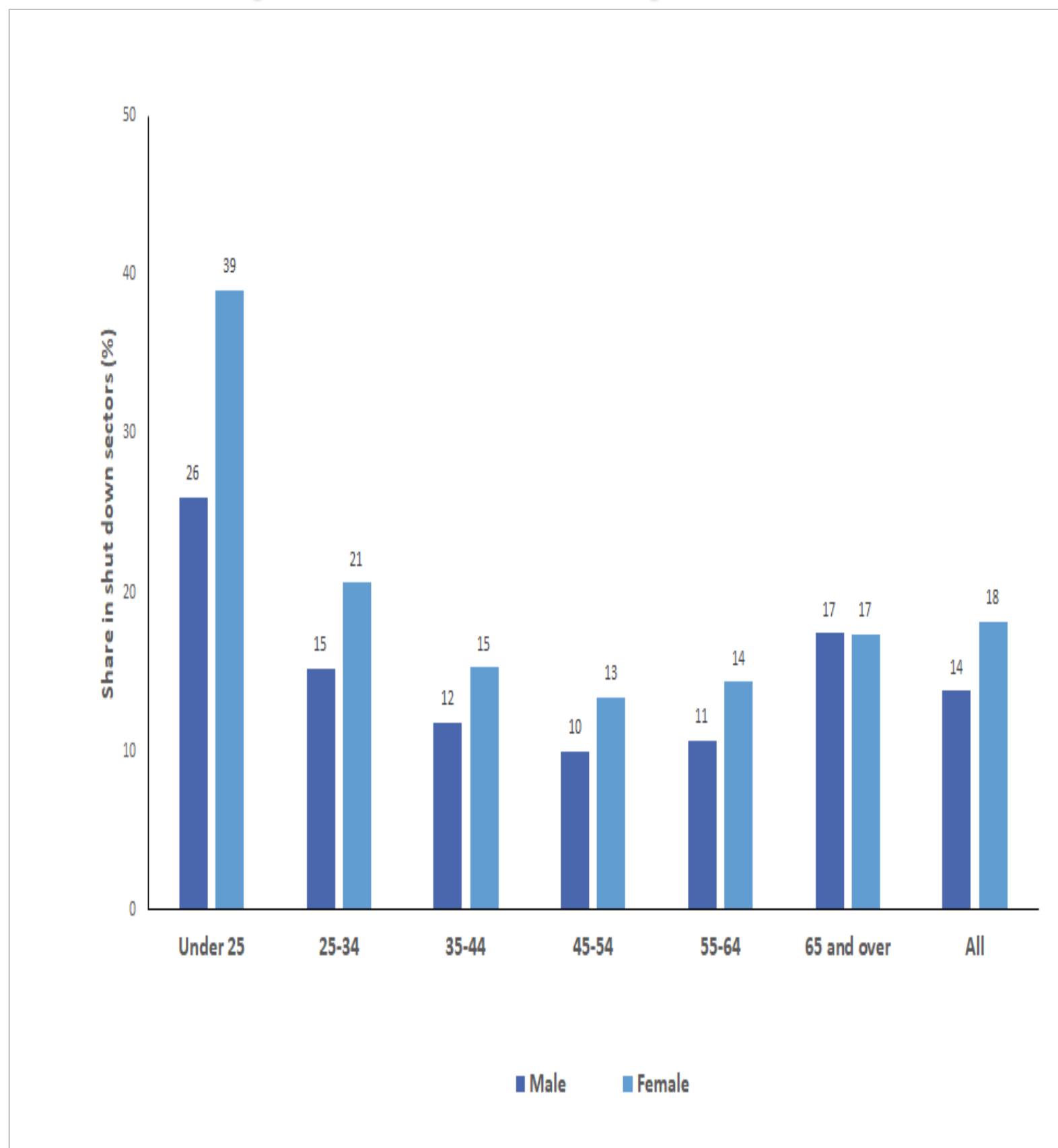
Women – more likely to have caring responsibilities which may make it hard to maintain or take on employment. More likely to work in shut-down sectors such as retail, accommodation and food services. Earn less on average than men so a reduction in income may be particularly harmful.

Low earners – less likely to be able to work from home and a large % work in the hardest hit sectors. Reductions in pay are likely to put significant pressure on finances.

Lone parents – More likely to be financially vulnerable prior to COVID-19. More exposed to reductions in earnings/job losses than those with partners and less likely to have someone to share childcare with and may be unable to work as a result.

Minority ethnic people – disproportionately impacted in previous recessions, and this may be repeated, especially given a higher % of the visible minority ethnic population work in the hospitality industry.

Disabled people – known to earn less on average than non-disabled people so a reduction in income may be particularly harmful. Slightly more likely than non-disabled people to work in areas experiencing damaging impacts from restrictions.



Source: Annual Population Survey, Jan-Dec 2019, ONS.
Notes: Employees only, excludes workers in full-time education

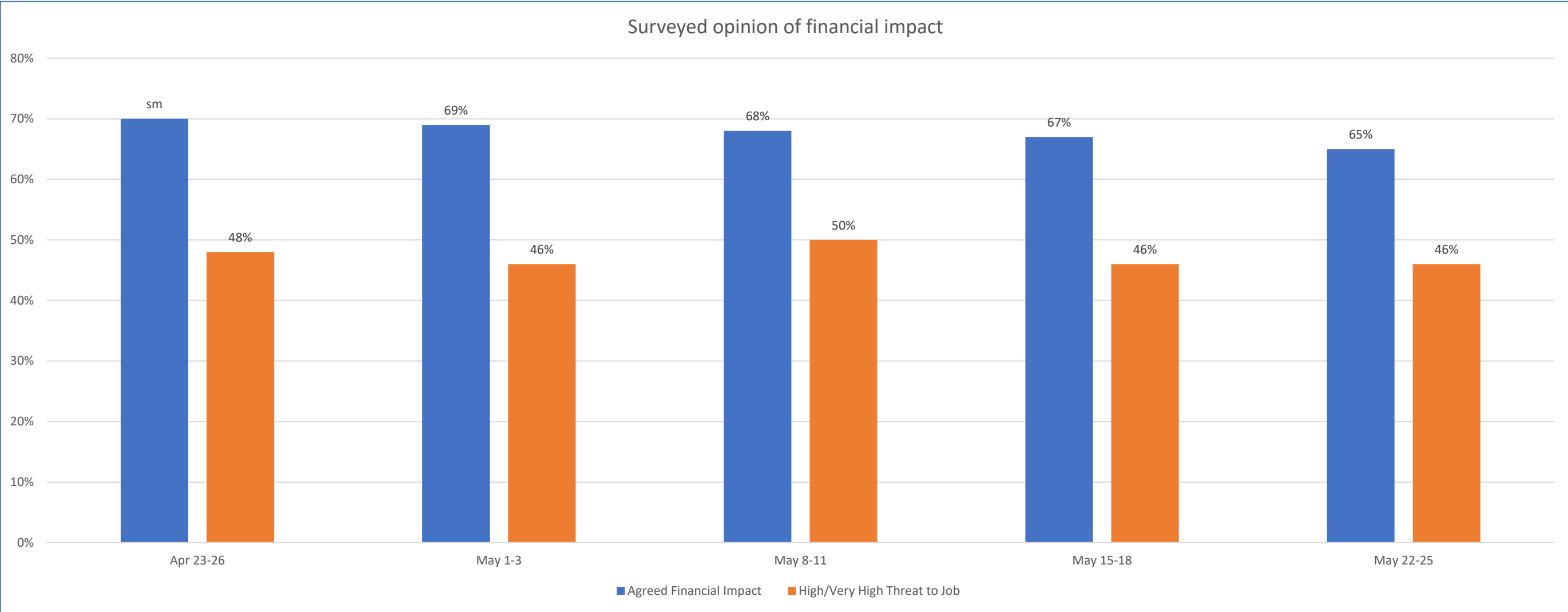


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Public Attitudes to Coronavirus- Economic Impacts

The Scottish Government, on the 12th June, as a follow-up to previously released information, published a detailed report outlining the outcomes from recent surveying of public attitudes on the impacts of Coronavirus, The following table outlines surveyed opinion in Scotland during May in respect of perceptions around financial and employment impacts from Coronavirus. This captures the % of respondents who agreed that coronavirus involved personal financial consequence and expressed an opinion that their job or business was either at Risk or very High Risk. From the same report, 24% of respondents were very/extremely concerned that they would be able to pay their bills, 22% were similarly concerned about their continued employment, and 25% were concerned that they would be able to provide for their household.

Source: <https://www.gov.scot/publications/public-attitudes-coronavirus-summary/pages/5/>



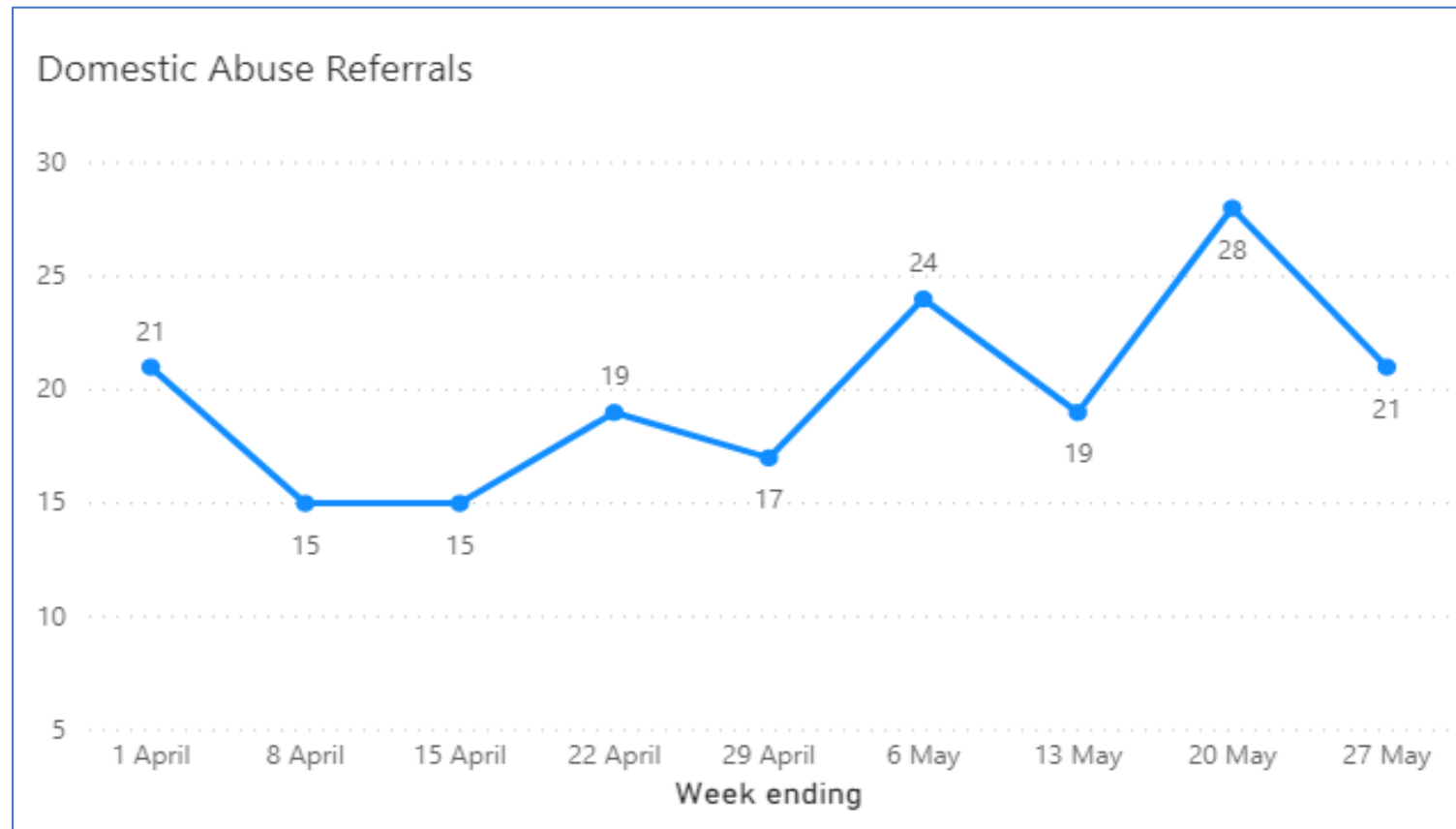
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City Response Data Overview

- The table opposite captures a data overview of critical People indicators during the Response Phase.
- These data form the basis of national submissions provided by Aberdeen City Council on a weekly basis against the People theme and, at additionally detailed levels, inform decision making at senior levels on the current and future levels of intervention that are needed to protect citizens during current and future phases of the crisis.
- Where appropriate, and informative to the recommendations of this Report, expanded data-sets are captured in the slides below in both this section and the Place category
- The data reflected in this table are those relating to the week ending 5th June 2020

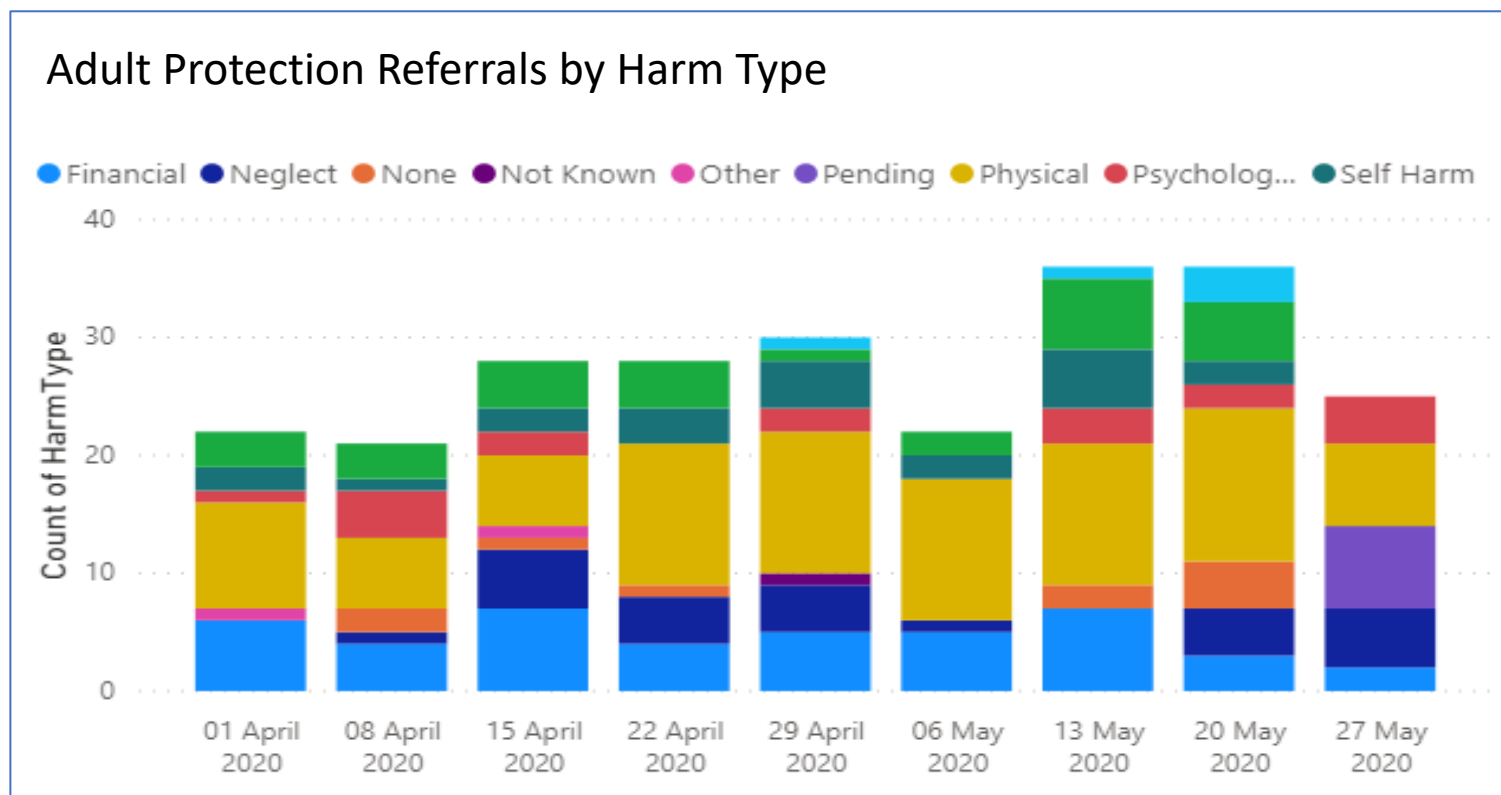
Number of individuals on shielding list in contact with LA	5305
Number of individuals assessed to be in need of food delivery but not pharmacy	9
Number of individuals assessed to be in need of pharmacy delivery but not food	38
Number of individuals assessed to be in need of both food and pharmacy delivery	0
Number of individuals who received other services	29
Number of individuals calling helpline in LA area	7068
How many children (including unborn babies) were added to the child protection register in the last week?	0
How many children with child protection plans were seen face to face by a professional (education/health/social work) in the last two weeks?	103
Number of teaching staff physically working in schools/hubs or LA ELC settings today	55
Number who physically attended today (excluding those that only attended for a free school meal)	200
Number of children and young people for whom vouchers, direct payments or home deliveries have been provided for	4337
Number of Homeless applications received in the month	129
All categories delayed discharges	24
Number of Adult at Risk / Adult Protection Referrals over the last week	28
Number of Adult Concerns (from Police Scotland) over the last week	63
Number of adults [at risk of harm] that were subject to an adult support and protection investigation started in the last week	4

Vulnerable Adults



The number of new referrals of Domestic Abuse Team shows an overall upward trend.

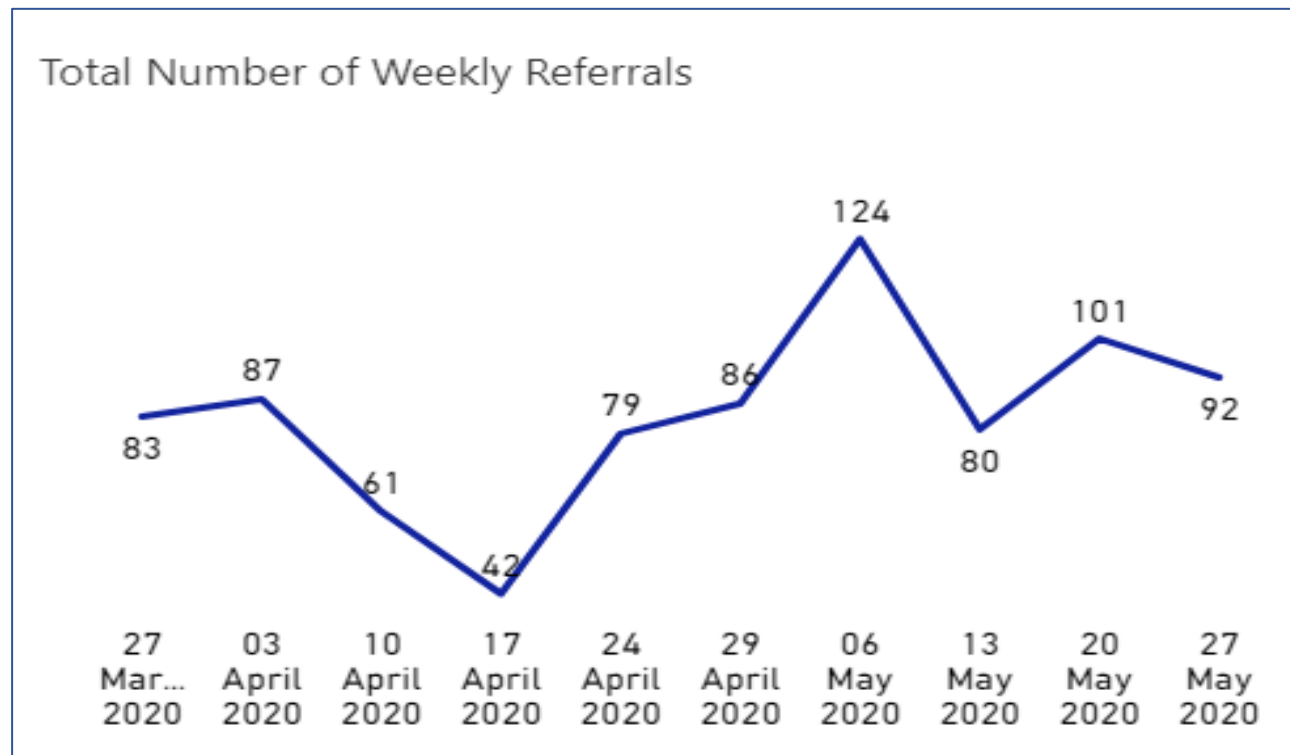
There is an increase in contacts and an increase in women previously known to the service seeking advice and support. Themes over the period include deteriorating mental health; pressure of home schooling and isolation; issues around child contact; men pushing limits; not adhering to lockdown conditions when they have access to their children; not adhering to child contact agreements; not having a third party to provide pick up and drop off of children.



Adult Protection referrals show a slight decrease in referrals for this time period (average per week down by 1.1 on last year).

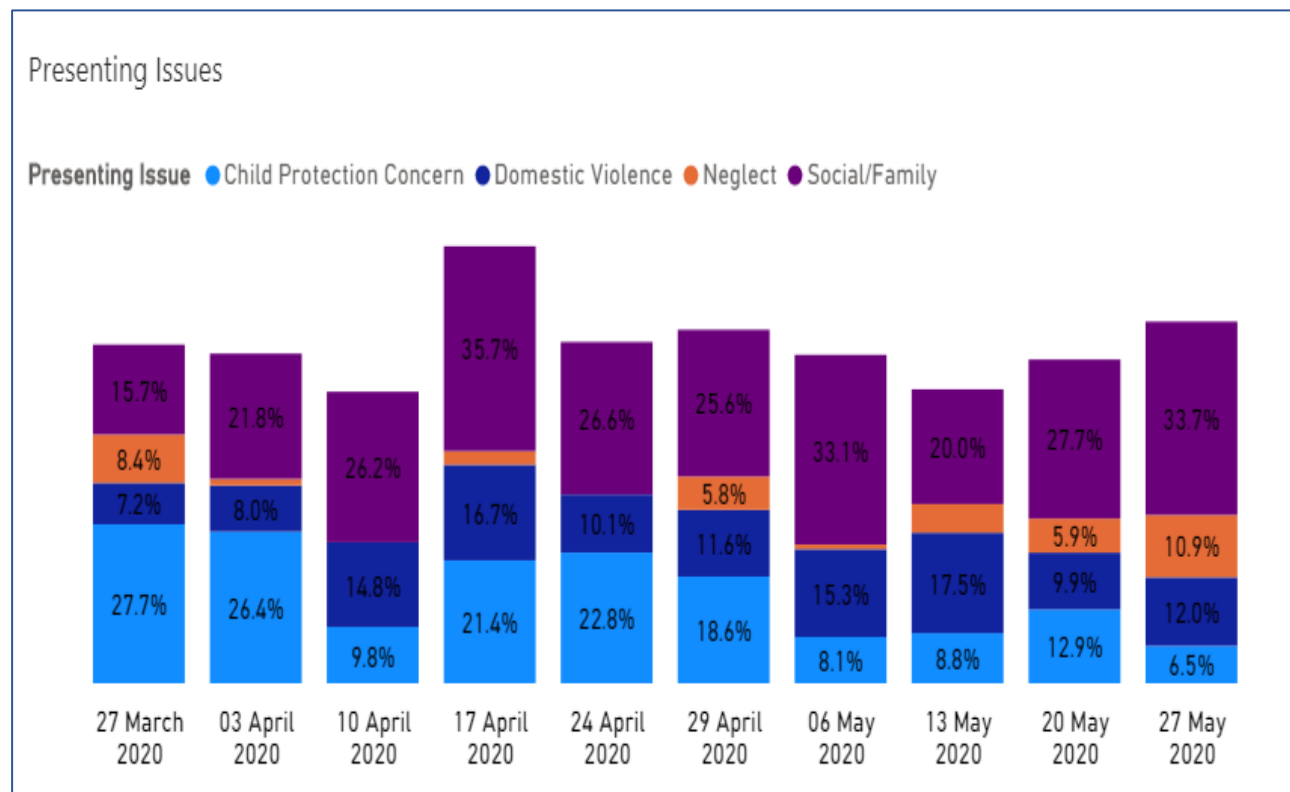
The largest harm types for referrals is “Physical” accounting for 36% of all referrals, a decrease of 4% on the same time period last year, and “Financial” at 17%, an increase of 4% on the same time period last year.

Vulnerable Children



Data gathered for COVID-19 reporting illustrates an increase in relation to Social and Family issues, Domestic Violence, but a reduction in referrals relating to Neglect.

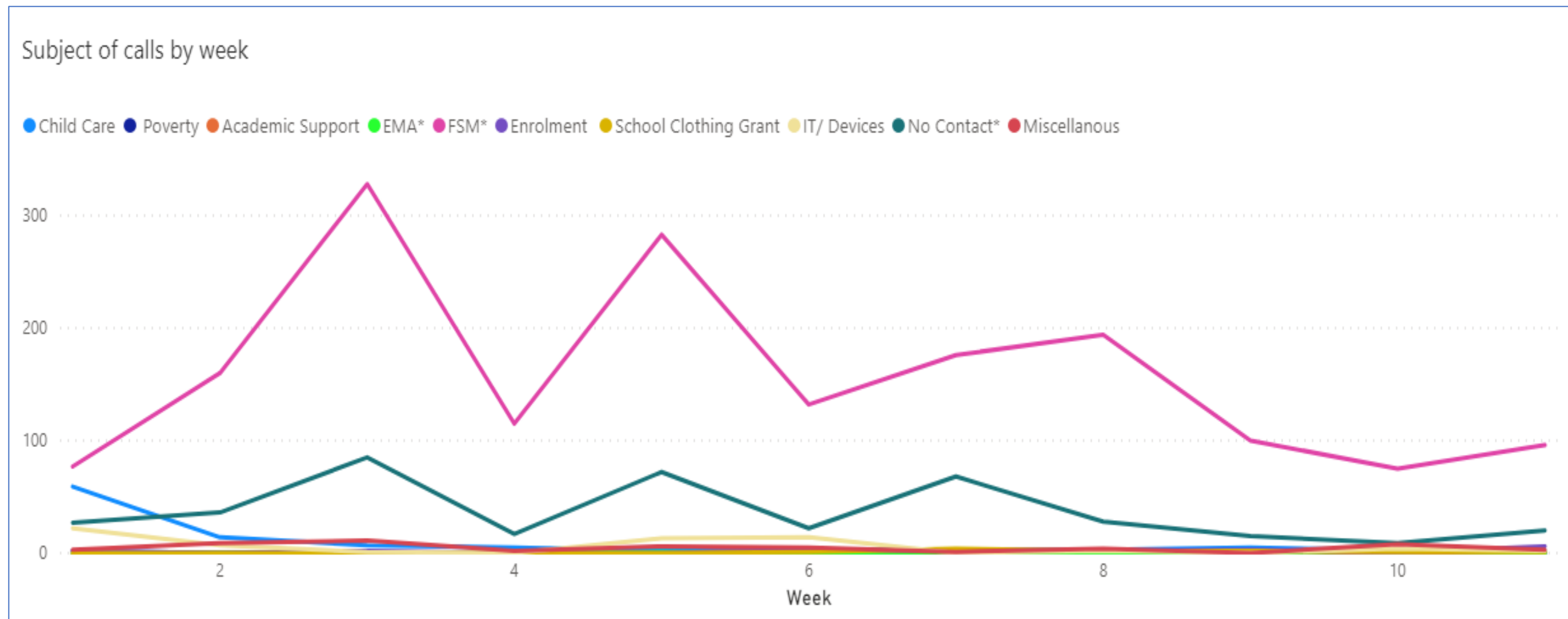
The most common presenting issues are Social and Family Issues (27%), Domestic Violence (23%) and Child Protection Concern (16%)



Presenting Issue	27 March 2020	03 April 2020	10 April 2020	17 April 2020	24 April 2020	29 April 2020	06 May 2020	13 May 2020	20 May 2020	27 May 2020
Advice Assistance						1	0	0	0	0
Alcohol Misuse (Child)	0	1	0	0	0	0	0	0	0	0
Alcohol Misuse (Parent)	1	4	2	3	3	7	3	0	1	3
Assessment Request for Service	0	2	3	1	3	2	6	1	3	1
Child placing self at risk					1	1	0	0	0	0
Child Protection Concern	23	23	6	9	18	16	10	7	13	6
Child Reported Missing	3	1	0	0	0	0	0	0	0	3
Child Sexual Exploitation	0	7	0	0	0	0	1	0	0	1
Civil Matters	7	2	5	0	2	4	5	7	13	5
Domestic Violence	6	7	9	7	8	10	19	14	10	11
Emotional Abuse	2	0	1	1	3	0	0	1	0	4
Financial Difficulties NRPf	3	2	1	0	0	3	5	0	0	2
Learning/Physical Disabilities (Child)	1	1	0	0	2	0	0	0	3	2
Mental Health (Child)	1	0	1	0	1	2	2	1	1	0
Mental Health (Parent)	6	8	5	1	4	5	11	15	8	5
Missing Person Alert	0	0	0	4	0	0	0	0	0	0
Neglect	7	1	0	1	0	5	1	4	6	10
Non School Attendance						2	2	0	1	0
Offending (Child)	4	3	3	0	1	1	3	0	1	0
Physical Abuse	2	1	5	0	3	3	5	6	7	6
Reporter - Care & Protection					1	0	0	0	0	0
Sexual Abuse	3	4	0	0	2	2	1	3	2	0
Social/Family	13	19	16	15	21	22	41	16	28	31
Substance Misuse (Child)	0	0	1	0	0	0	0	2	3	0
Substance Misuse (Parent)	1	1	3	0	5	1	6	3	1	1
Violence (Neighbourhood)							3	0	0	1
Total	83	87	61	42	79	86	124	80	101	92

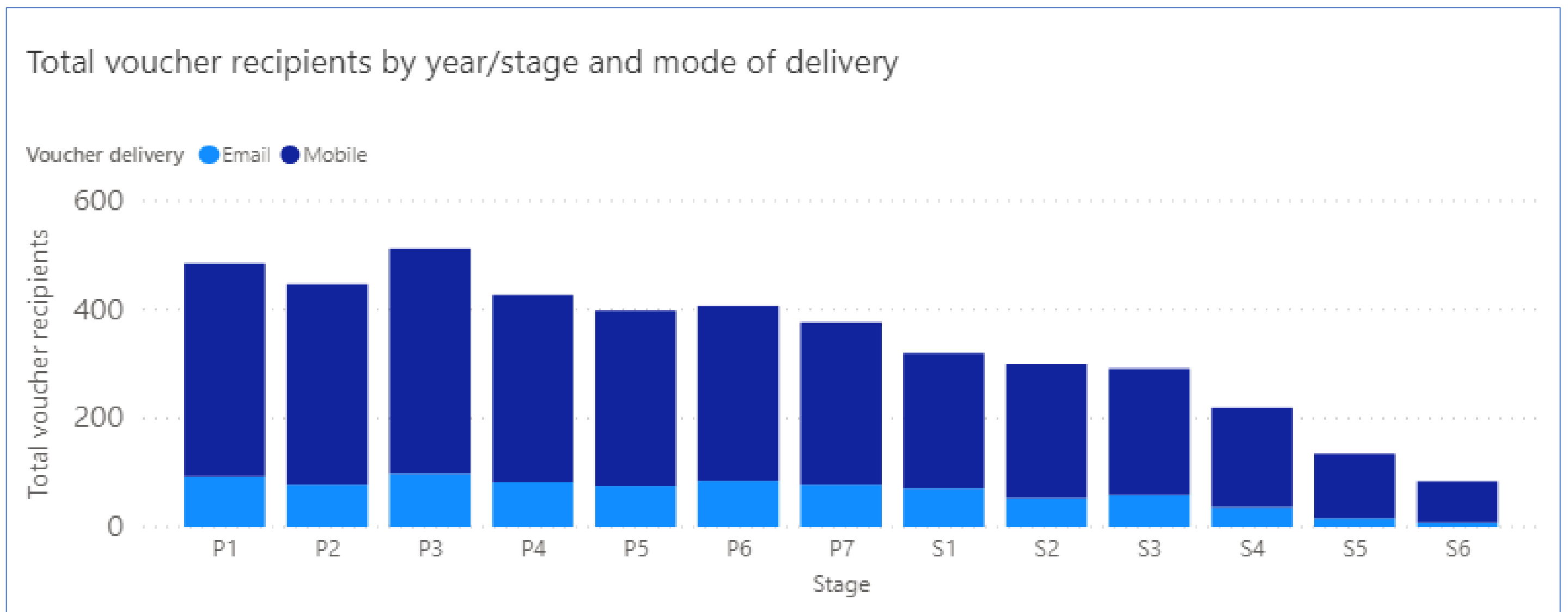
ACC: Virtual School Helpline

As at Week 11 (w/c 1st June), there had been a total of 2,455 calls directly to the Virtual School Helpline, the overwhelming majority of which related to Free School Meals entitlement (71%) Enquiries against this theme have been consistently the most common query in each of the past 11 weeks, with Childcare queries also being prevalent (at a lower level) in the early part of the lockdown.



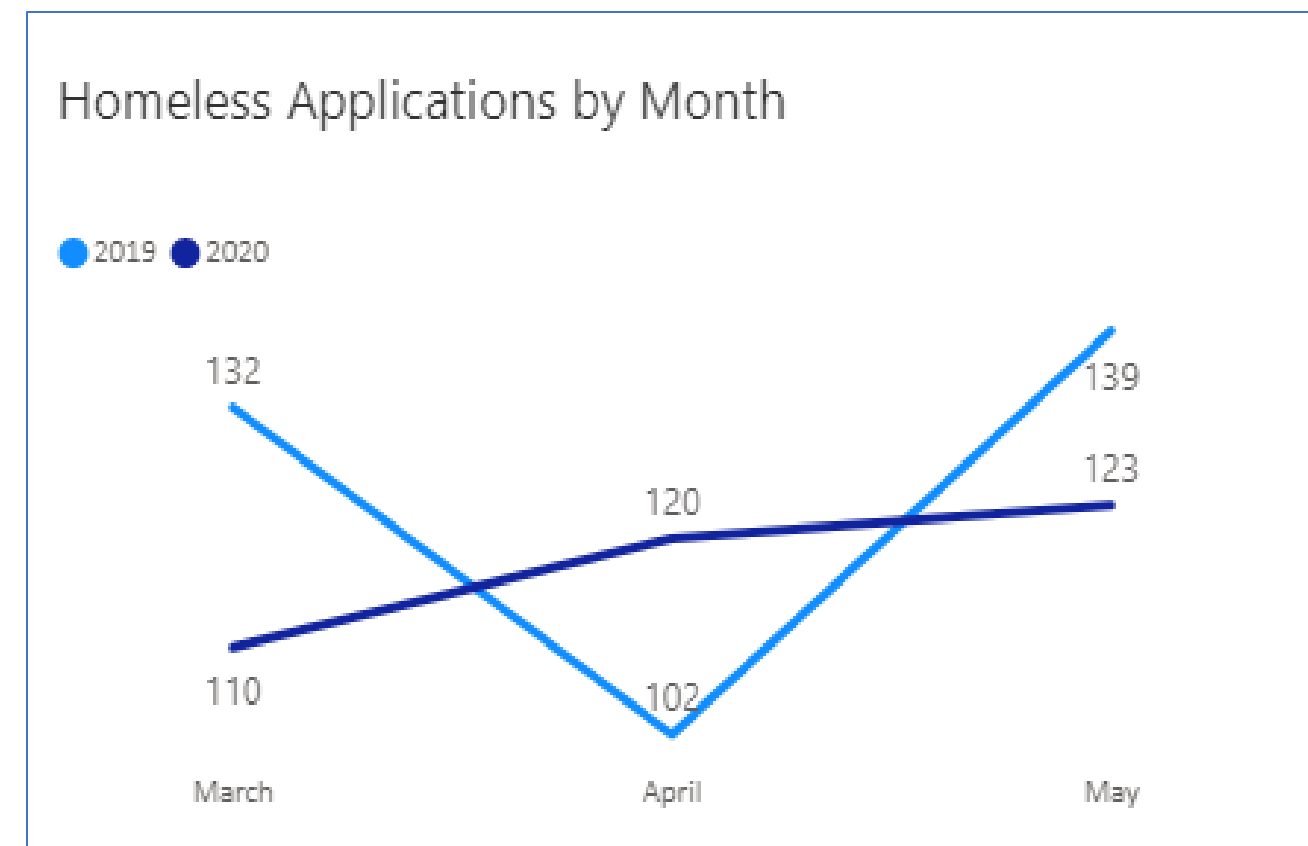
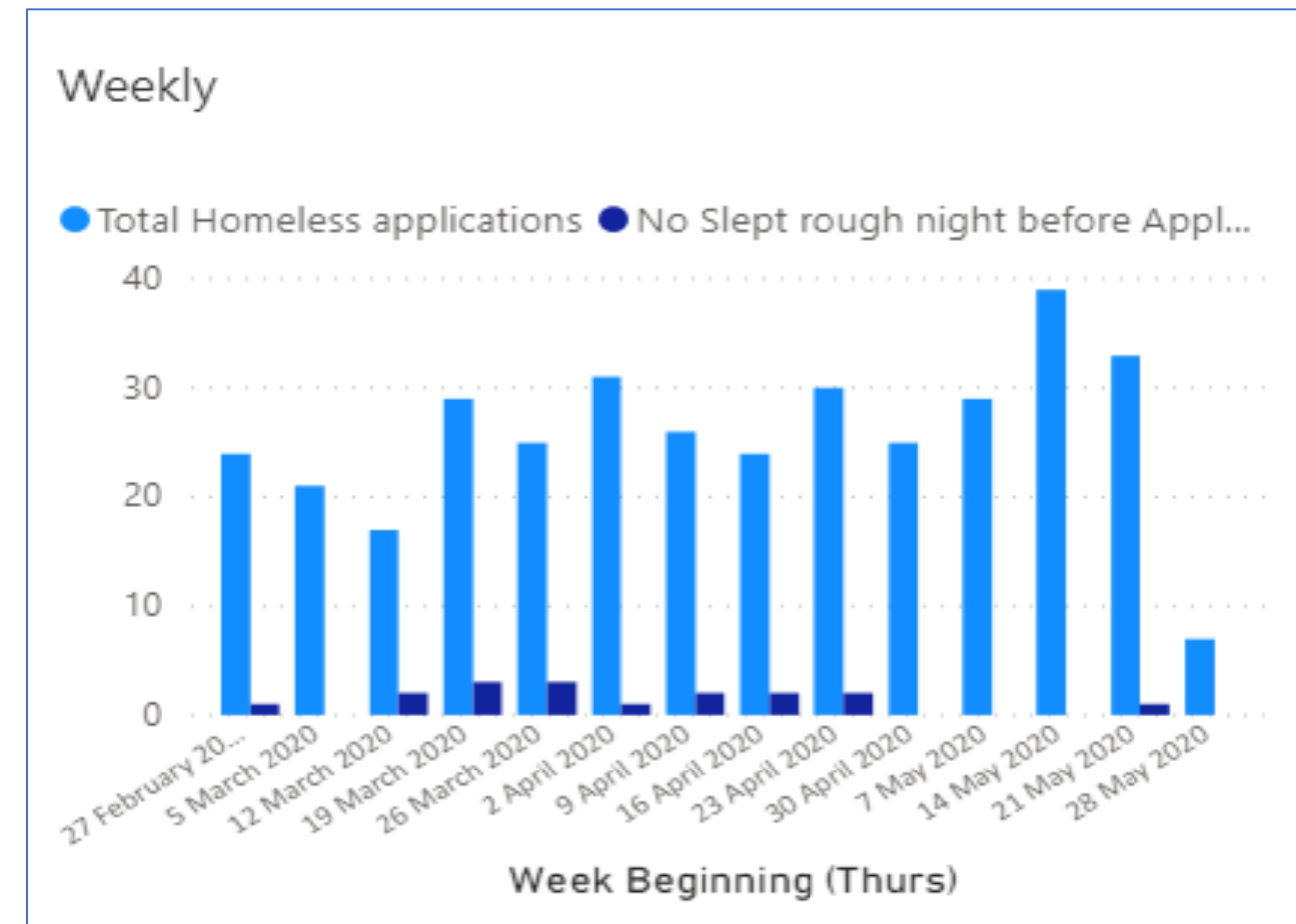
Free School Meals Support

As at week 11 (w/c 1st June) there have been 4,355 completed applications against Free School Entitlement vouchers and a total of 4,356 voucher recipients to date.



Homelessness

- There were 360 Homeless Applications received during this period of which 308 households were offered and accepted accommodation, 75 households were offered accommodation and declined with 4 not being in a position where a suitable offer was available
- The most common cause of Homelessness over this period was where residents are asked to leave the household (33.2%) with Disputes within the Household (non-violent) the second most common at 16.5% of all applications
- 36 applications were received from residents who cited Dispute within the Household where violence was noted and a slightly smaller number (31) recorded Discharge from an institutional setting (Hospital/Prison/Care) in the application as the reason for homelessness.
- The Homeless services continue to see strong demand for all provision, including the Out-of-Hours service, with an upwards trend in the latter part of the monitoring period. The number of applicants who slept rough the previous night has been minimal and in May has rarely been cited which reflects the level of support provided by the Council against this theme.
- Data from 27th February to 28th May 2020

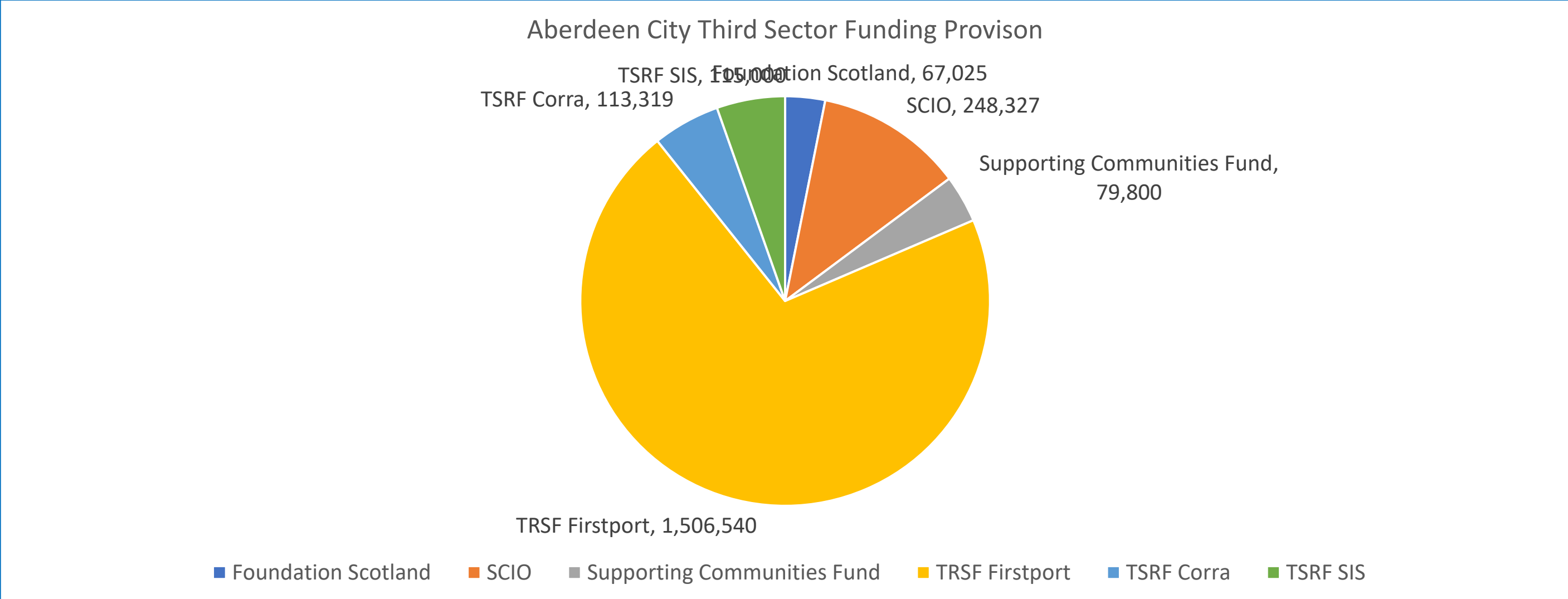


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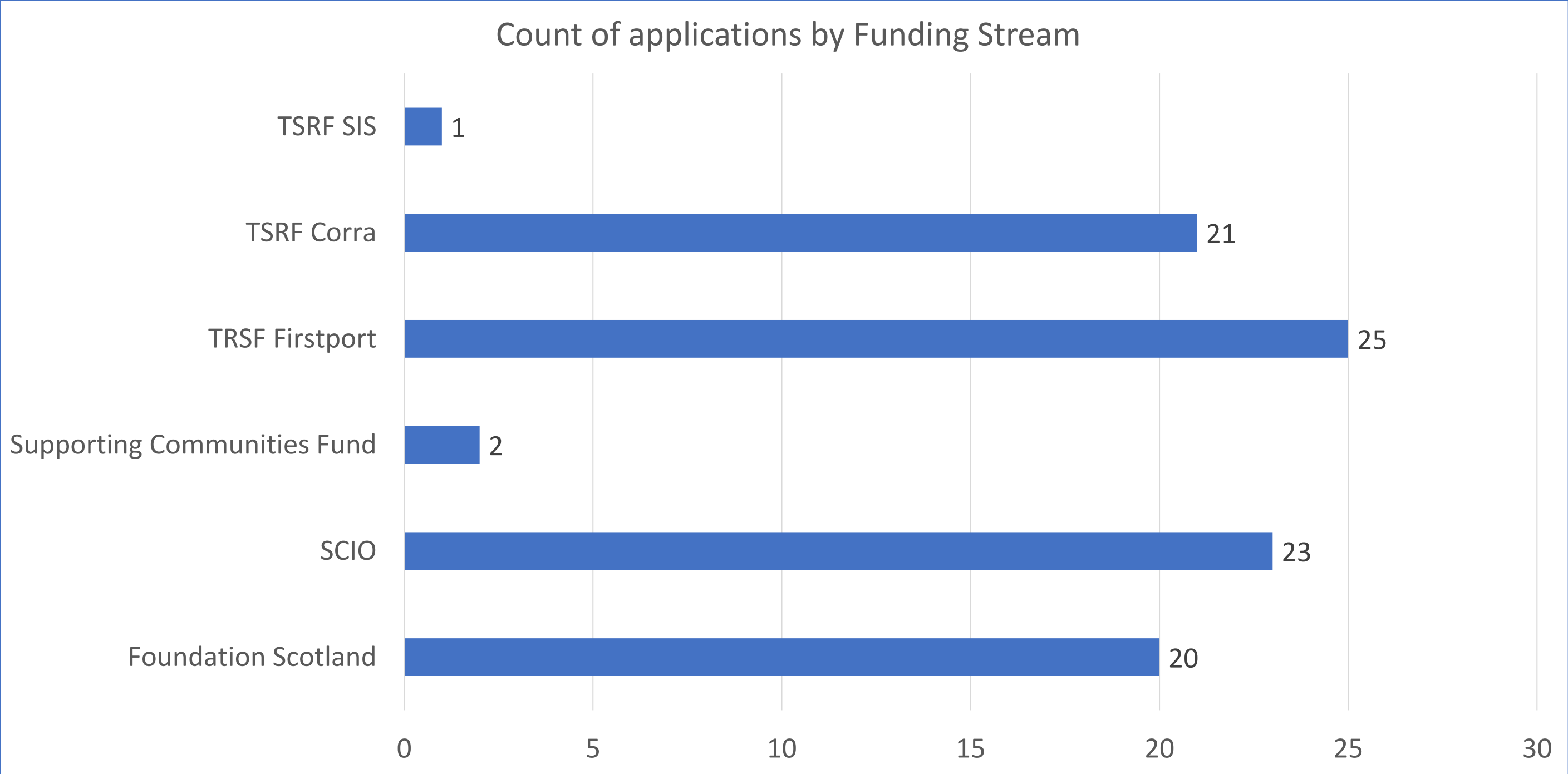
Supporting Communities

At the beginning of June 2020, a total of £2.13m had been disbursed from the four main grant streams supporting Third Sector organisations within the City from the funding provided through the emergency coronavirus support announced by the Scottish Government in March.

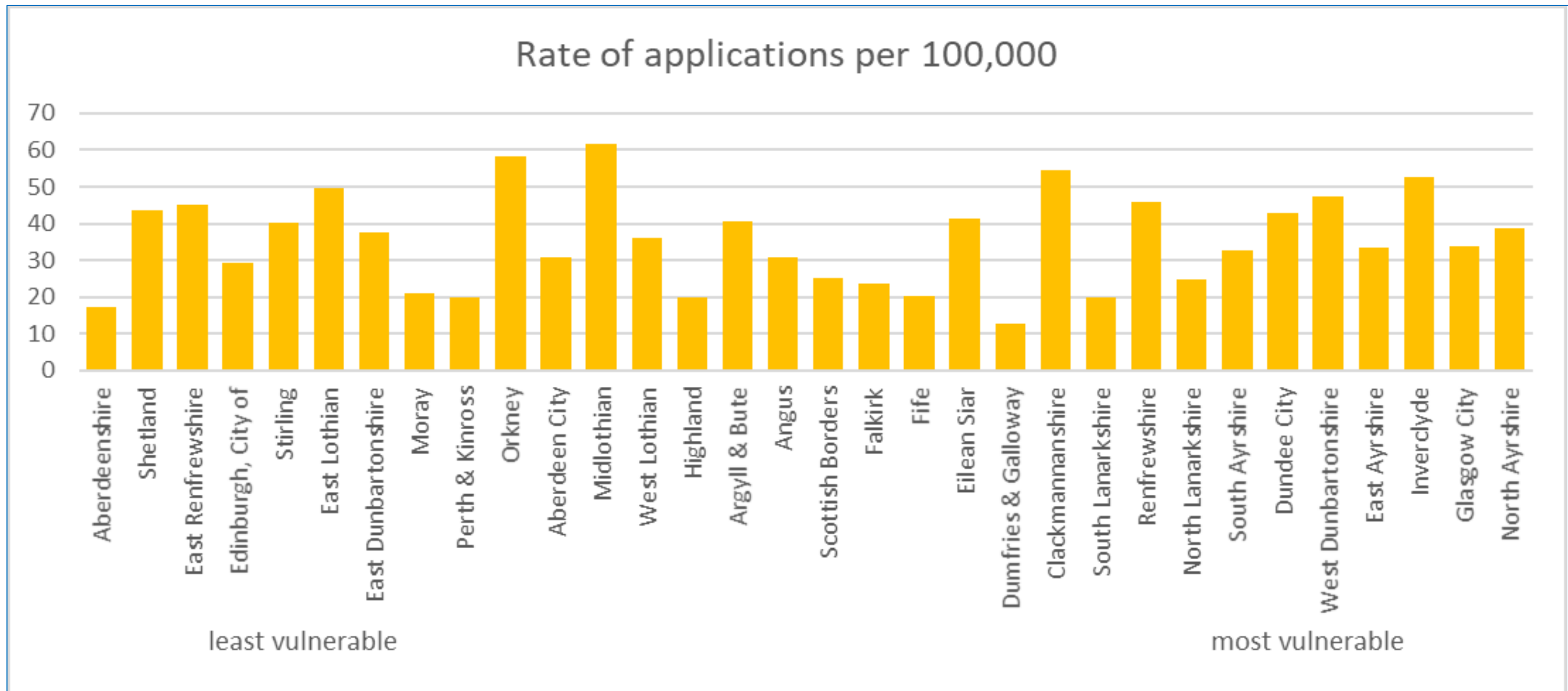
Awards have been made to a total of 92 local organisations who made applications to these funds covering a variety of aspects of support, including assistance for those with disabilities, mental health interventions, community-based information, signposting and financial advice.



Supporting Communities



Wellbeing Fund



The £50 million national Wellbeing Fund is providing immediate support to third sector organisations providing crucial services to vulnerable people impacted by coronavirus measures. 70 applications were received from organisations based within the City (although these may also be supporting shared-authority actions) to a value of £1.159m against Phase 1

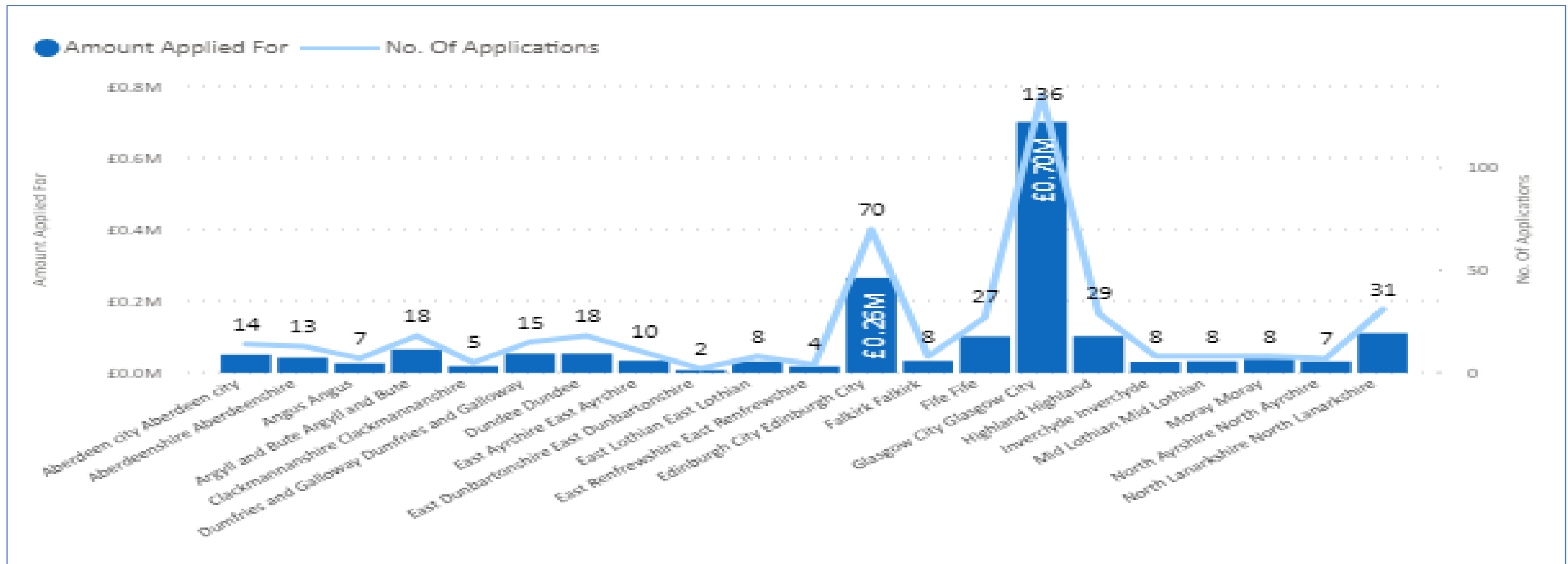


Response, Recovery and Resilience Fund

The Response and Resilience Fund, administered by the Scottish Council of Voluntary Organisations, which focuses on supporting organisations working to mitigate the emotional, physical and practical impacts for clients of an extended lockdown and move to effective delivery of continuous service through implementation of remote practice.

As at 11th May, 14 applications from a variety of volunteer and voluntary support organisations had been received through the Phase 1 stream and a disbursed amount of £50,365 awarded, representing 2% of the total amount disbursed. A further 6 grants, to a value of £16,660 had been awarded in Phase 2 (as at 2nd June 2020).

The Fund is presently paused temporarily to accommodate planning for the Recovery phase and will re-open for applications in July. <https://wwwFOUNDATIONSscotland.org.uk/coronavirus-appeal/whats-been-funded/>



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Place



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Place Impacts

Over 3,000 job loss notifications have been posted from PACE since the crisis began, several times higher than any other local authority.

City centre footfall has fallen seven-fold from over 70,000 a day to around 10,000 a day.

City centre office vacancy and rental data remain stable at around 13% and \$18 per square foot but we expect this to worsen once the lockdown is lifted.

The number of people using public transport in Britain's cities could be up to a third lower than normal after the end of the coronavirus lockdown.



Place Impacts: Mobility

Google mobility data below shows a huge fall in mobility in all areas of Aberdeen apart from residential areas and parks.

Aberdeen City

Retail and recreation

-74% compared to baseline



Supermarket and pharmacy

-25% compared to baseline



Parks

+15% compared to baseline



Public transport

-65% compared to baseline



Workplaces

-36% compared to baseline



Residential*

+14% compared to baseline



Place Impacts: Air Quality

Global to local environments have overall been subject to significant and wide-ranging beneficial impacts resulting from coronavirus lockdowns. This is a result of massive global and local changes in societal / individual activities and behaviours, e.g. reduction in motorised traffic. Environmental benefits are broadly proven to translate into human health & wellbeing benefits.

There have been huge improvements in air quality across Aberdeen.

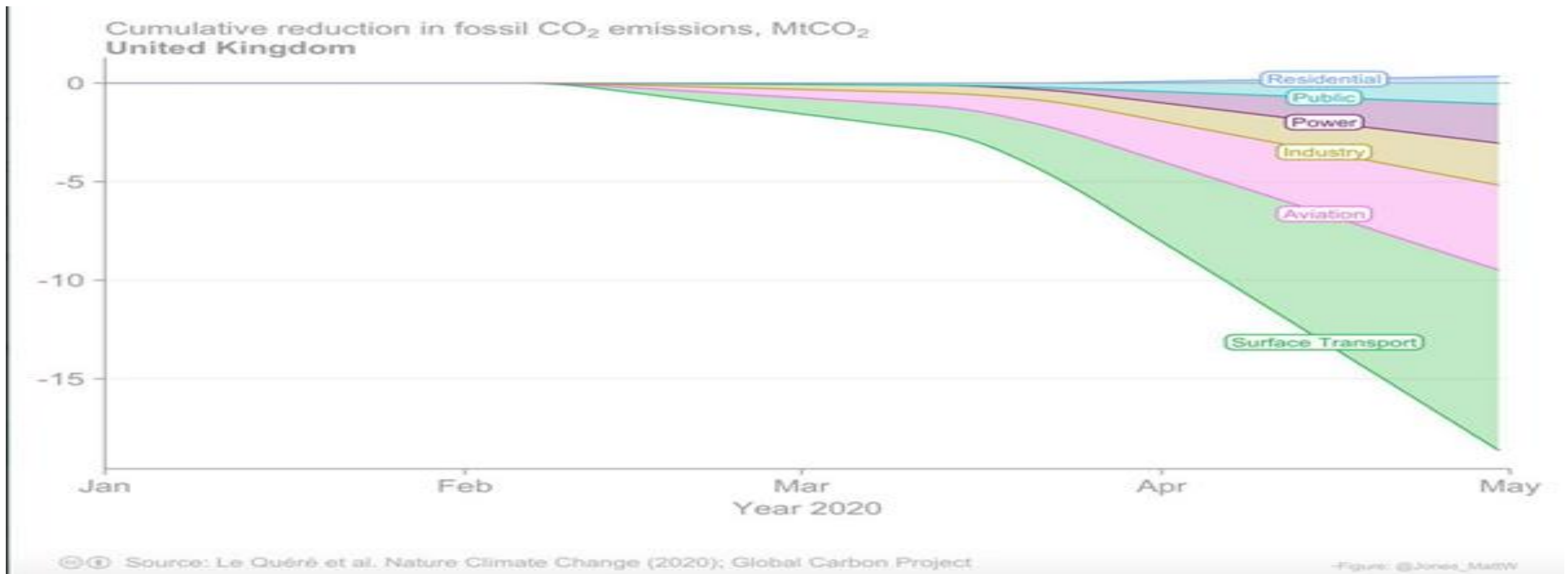
Mean Nitrogen Dioxide concentrations (NO₂ ug/m³): 1 Apr-31 May 2019 & 2020

01 April - 31 May	Anderson Drive	Errol Place	King Street	Market Street	Union Street	Wellington Road
2019	16.3	12.9	16.3	41.1	36.7	44.4
2020	8.6	8.3	10.6	17.2	18.1	18.1
Decrease	47%	36%	35%	58%	51%	59%



Place Impacts: Greenhouse Gases

Under lockdown, UK greenhouse gas emissions have seen their lowest level in nearly a century, dropping by around a third nationally. The large part of this decrease is due to massive reductions in surface and air transport. This decrease is against a backdrop of a 17% decrease globally. Emissions will begin to rise as lockdown eases and behaviours change.



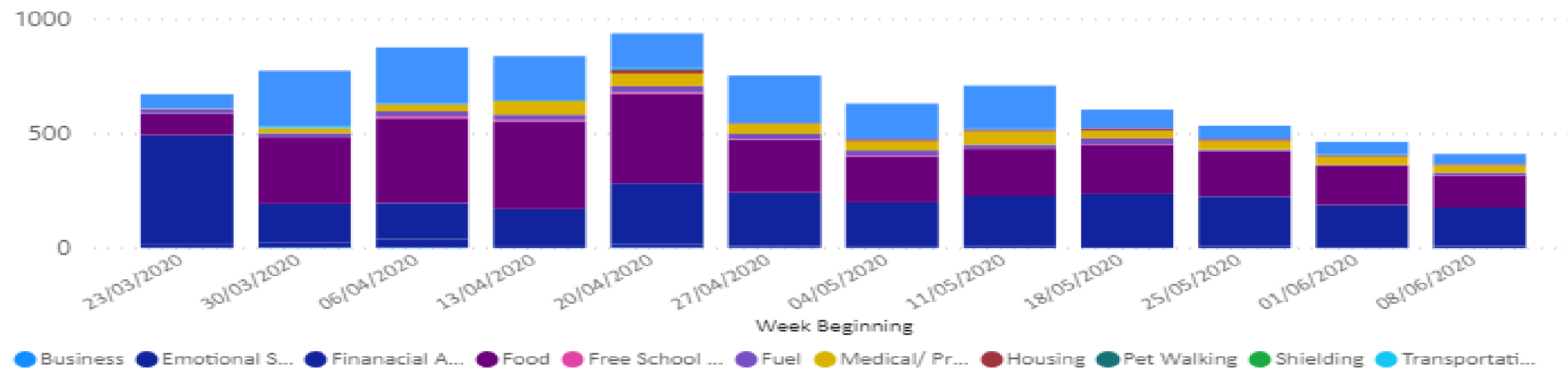
ACC: Crisis Line Contacts

Crisis Line Contacts: As at 8th June, there had been 18,270 Crisis Line contacts responded to and 11,260 requests for assistance received, of which calls about Food, Financial Assistance and Shielding were the most common enquiries.

In the category covering Food Need, a significant proportion (2,335) had an urgent need and 2,162 of these (83%) noted that they had no funds available.

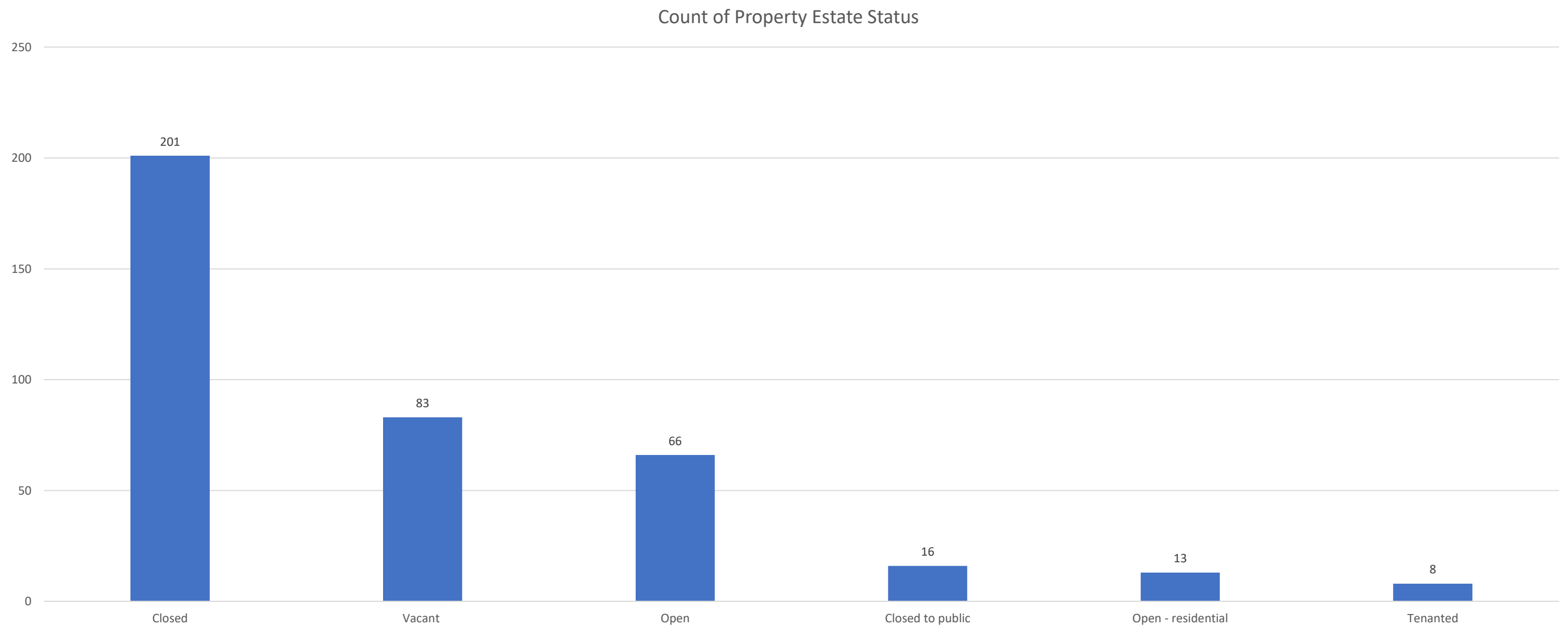
Crisis Grants: As at 5th June 2020, there had been 5,033 Crisis Grant applications received (an average of 85 per day) with peak demand during early to mid-April, and funding to the value of £223,958 has been released to date.

Requests for Assistance by Category (Weekly)



ACC: Asset Management

The most recent data records that of 387 properties on the Asset Estate. 201 Council owned premises were closed due to current COVID-19 provisions, with a further 16 closed to the public, including event venues, libraries, community centres, workshops, depots and all ALEO sites.



ACC: Social Tenancies

At the end of May, the total number of tenancies that had contacted Aberdeen City Council to notify the Housing service of an inability to meet rental costs as a result of the impact of COVID-19, was 301.*

Area data, as at 12th June, including the arrears position of those 295* tenancies which, through self-notification, were in the cohort of those continuing to experience difficulty in meeting rental payments is outlined below.

*These figures should not be taken to represent the number of tenancies in the City experiencing essential financial tenancy pressures as a result of COVID-19, including meeting rental and other costs.

	Area Team Central	Area Team North	Area Team South	<u>Citywide Total</u>
Number of tenancies notifying impact	164	79	52	295
Number in Arrears:	155	75	50	280
% in Arrears:	92.3%	94.9%	92.6%	93.0%
Total Arrears Balance:	£142,210	£85,092	£40,590	£267,892
Average Debt:	£917	£1,135	£812	£957



ACC: Volunteering

As at 1st June, 1,725 people have contacted the Council to volunteer during the current circumstances, covering a range of 'duties' that provide support. The nature of support offered is highlighted below and the response team are presently matching these with the needs of those residents who have contacted the Council or been signposted to the response provision through other channels.

