Coronavirus (COVID-19) Review: data and analysis, March to October 2020

Office for National Statistics

Helen Fox and Ellys Monahan

COVID19Analysis@ons.gov.uk

Contents

Overview

Overview

This review provides an overview of the coronavirus (COVID-19) pandemic and how our data and analysis has been able to provide insight and understanding of the impacts of the pandemic on health, society and the economy. By bringing all the information together in one place, we provide a narrative of how society and the economy has been impacted and responded so far for the period March to October 2020.

We have published a wide variety of data and analysis across various themes and topics over the last seven months in response to the pandemic on our dedicated COVID-19 web page. We have introduced new surveys, developed new insight, used new data sources and published new cross-cutting analysis in our response to demands for high quality, trustworthy and up-to-date statistics throughout the pandemic, while maintaining and developing existing statistics to assess the impact of the coronavirus pandemic. We have recently published our analytical work plans for the autumn for how we will continue to monitor the impact and provide further insight into the coronavirus pandemic.

This pack brings together information on the pandemic by theme. Each theme section provides an overall narrative on the subject matter based on what we have published so far and provides links to more detailed data and analysis along with the relevant contact points.

Levels of infection and preventative measures

This section includes analysis on the number of new infections, prevalence rates and preventative measures taken by society to reduce the transmission of the virus

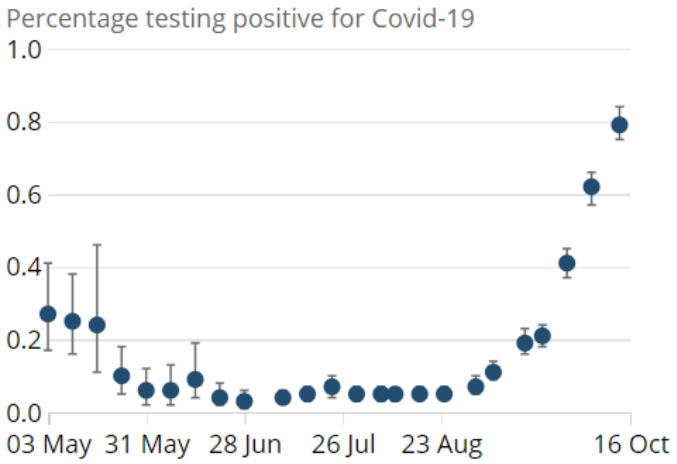
Positivity rates have rapidly increased in recent weeks

- In August there was some evidence of a small increase in the percentage of people testing positive for COVID-19 in July, following a low point in June. However, the estimates show that the number on infections has increased rapidly in September.
- The latest estimates from this survey show that the number of infections has continued to increase in recent weeks.
- In the most recent week (10 to 16 October 2020):
    - An estimated 433,300 people (95% credible interval: 407,500 to 459,300) within the community population in England had the coronavirus (COVID-19) during the most recent week; equating to around 1 in 130 people (95% credible interval: 1 in 130 to 1 in 120).

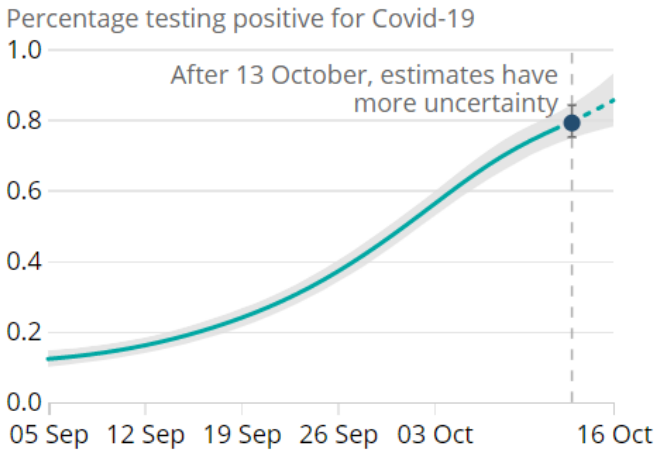
“Positivity rate” means the number and percentage of people who have COVID-19 at a point in time. This positivity rate is not the same as prevalence – to measure prevalence, we would need to know the true sensitivity and specificity of our nose and throat swab test.

Estimated percentage of the population in England testing positive for the coronavirus (COVID-19) on nose and throat swabs based on modelled estimates from 5 September 2020

Official reported estimates of the rate of COVID-19 infections in the community in England.



Modelled estimates are used to calculate the official reported estimate. The model smooths the series to understand the trend and is revised each week to incorporate new test results.



Source: Coronavirus (COVID-19) Infection Survey: UK, 23 October 2020

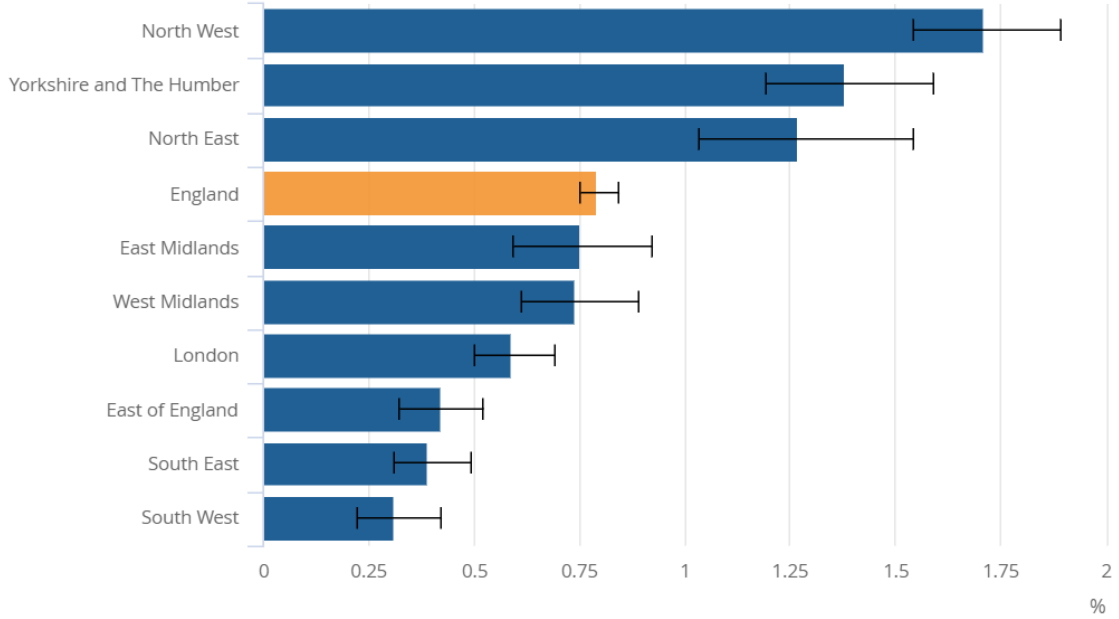
Lead analysts: Sarah Walker and Ruth Studley

There is clear evidence of variation in COVID-19 infection rates across the regions of England

Regional estimates

- During the most recent week of the study (10 to 16 October 2020), there is clear evidence of variation in COVID-19 infection rates across the regions of England, with the highest rates continuing to be seen in the North West, and Yorkshire and The Humber and the North East.
- North East, North West, and Yorkshire and The Humber have all seen steep increases in recent weeks.
- There has been growth in positivity in most regions of England over the last two weeks with the exception of the South West.

Estimated percentage of the population testing positive for the coronavirus (COVID-19) on nose and throat swabs across regions, England, 13 October 2020 (reference point of the most recent week from modelling)



Source: Coronavirus (COVID-19) Infection Survey: UK, 23 October 2020

Lead analysts: Sarah Walker and Ruth Studley

There has been a marked increase in the incidence rate over the last six weeks

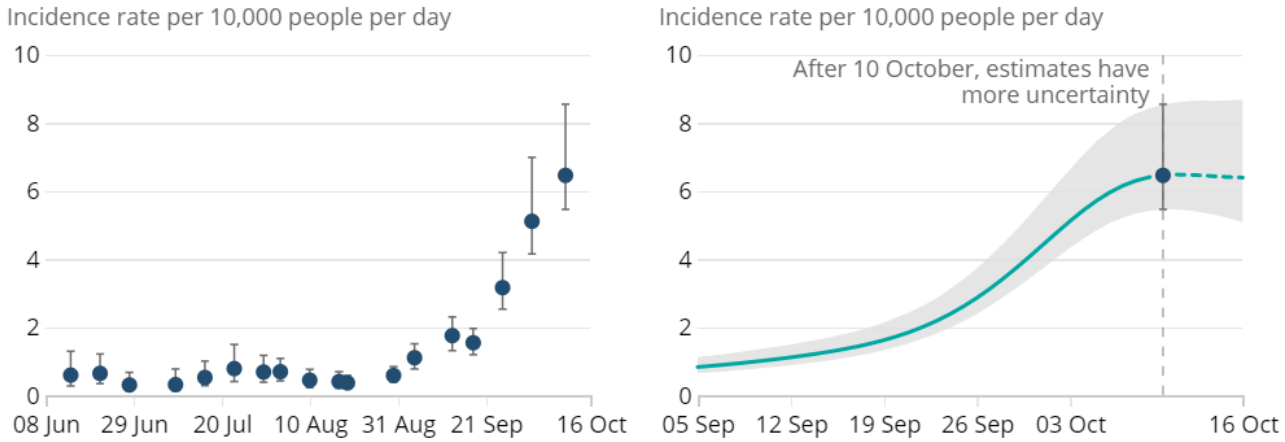
- The incidence rate for England has continued to increase in recent weeks.
- It is estimated that during the most recent week of the study (10 to 16 October 2020), there were 6.46 new coronavirus (COVID-19) infections per 10,000 people per day (95% credible interval: 5.46 to 8.55).
- This equates to 35,200 new infections per day (95% credible interval: 29,800 to 46,600).

Incidence is the rate of occurrence of new cases of the disease over a given period of time. Incidence refers to the number of individuals who have a positive test in the study divided by time from joining the study to their last test. Individuals who are positive when they join the study are not included in this calculation.

Estimated numbers of new infections with the coronavirus (COVID-19), England, with modelled estimates from 5 September 2020

Official reported estimates of the rate of new COVID-19 infections in the community in England.

Modelled estimates are used to calculate the official reported estimate. The model smooths the series to understand the trend and is revised each week to incorporate new test results.



Source: Coronavirus (COVID-19) Infection Survey: UK, 23 October 2020

Lead analysts: Sarah Walker and Ruth Studley

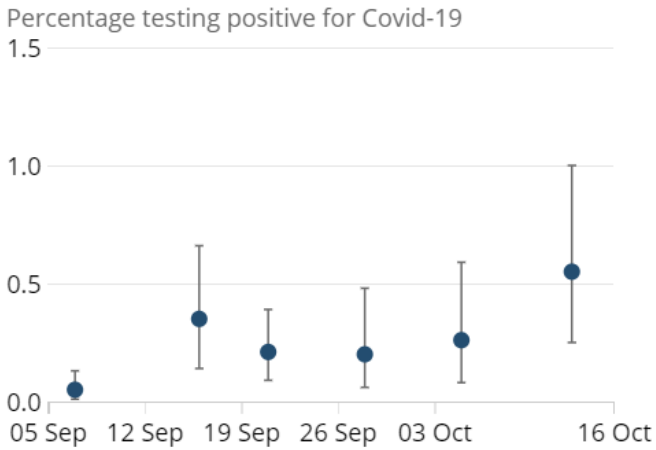
The number of COVID-19 cases in Wales has increased in recent weeks

- Because of the relatively small number of tests and a low number of positives in our sample, credible intervals are wide and therefore results should be interpreted with caution.
- During the most recent week of the study (10 to 16 October 2020), we estimate that 16,700 people in Wales had the coronavirus (COVID-19) (95% credible interval: 7,600 to 30,400).
- This equates to 0.55% (95% credible interval: 0.25% to 1.00%) of the population in Wales or around 1 in 180 people (95% credible interval: 1 in 400 to 1 in 100).

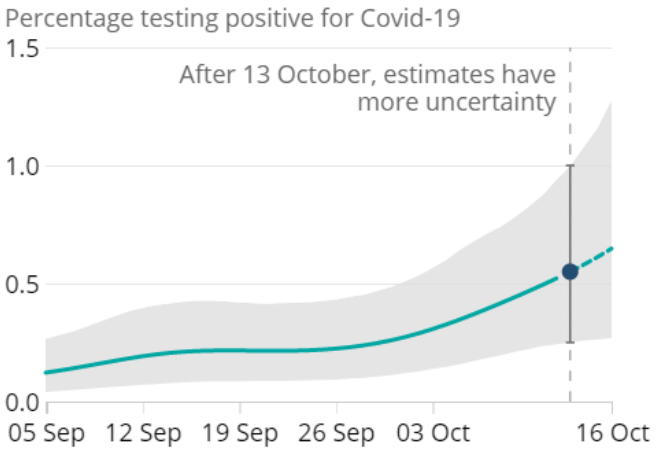
- In Wales, the modelled estimates for the latest six-week period are based on 13,270 swab tests collected over this period. During these weeks, there were a total of 43 positive swabs taken from 33 people from 25 households.

Estimated percentage of the population in Wales testing positive for the coronavirus (COVID-19) on nose and throat swabs since 05 September 2020

Official reported estimates of the rate of COVID-19 infections in the community in Wales.



Modelled estimates are used to calculate the official reported estimate. The model smooths the series to understand the trend and is revised each week to incorporate new test results.



Source: Coronavirus (COVID-19) Infection Survey: UK, 23 October 2020

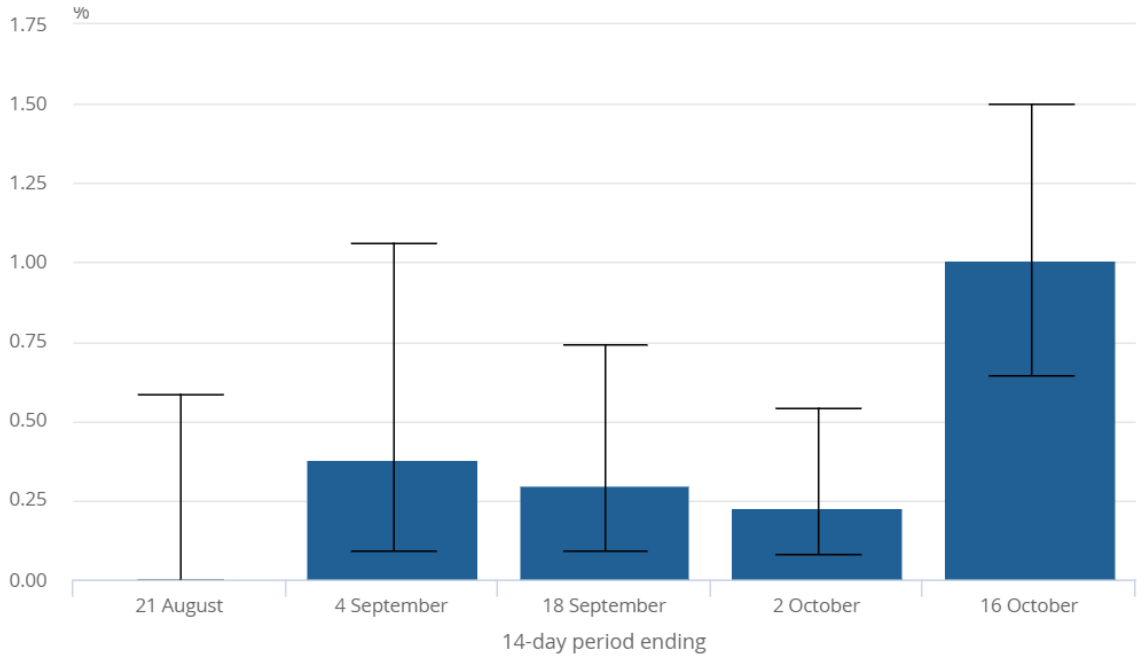
Lead analysts: Sarah Walker and Ruth Studley

The rate of infection in Northern Ireland is increasing, however it is too early to say that this constitutes a trend

- Because of the relatively small number of tests and positive swab results within our sample, confidence intervals are wide and therefore results should be interpreted with caution.
- During the most recent two weeks of the study (3 to 16 October 2020), we estimate that 1.01 % of people in Northern Ireland had the coronavirus (COVID-19) (95% confidence interval: 0.64% to 1.50%).
- This equates to 1 in 100 people (95% confidence interval: 1 in 160 to 1 in 70).

- In Northern Ireland, the weighted estimates for the latest two-week period are based on swab test results from 2,932 participants collected over this period. During these weeks, there were 28 people from 24 households who tested positive.

Estimated percentage of the population in Northern Ireland testing positive for the coronavirus (COVID-19) by non-overlapping 14-day periods between 6 August and 16 October 2020



Source: Coronavirus (COVID-19) Infection Survey: UK, 23 October 2020

Lead analysts: Sarah Walker and Ruth Studley

It is too early to comment on a trend on the proportion of the population testing positive for COVID-19 in Scotland

- For the first time, we are able to include an estimate of the number of people testing positive for the coronavirus (COVID-19) in Scotland.
- During the most recent two weeks of the study (3 to 16 October 2020), we estimate that 0.57% of people in Scotland had the COVID-19 (95% confidence interval: 0.35% to 0.88%).
- This equates to 1 in 180 people (95% confidence interval: 1 in 290 to 1 in 110).

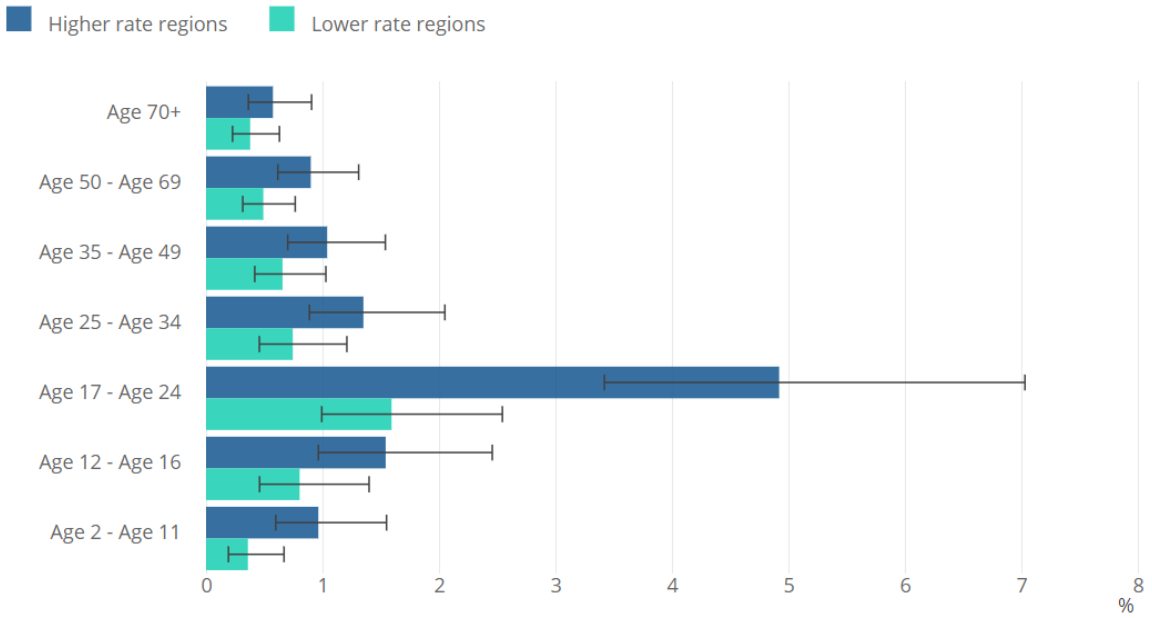
- In Scotland, the weighted estimates for the latest two-week period are based on swab test results from 4,639 participants collected over this period. During these weeks, there were 24 people from 20 households who tested positive.

Evidence suggests 17 to 24 year olds have highest percentage of positive COVID -19 tests

Age

- 17- to 24-year-olds have higher positivity rates in both the higher and lower rate regions, however the difference is much greater in the higher rate regions.
- Higher rate regions include the North West, Yorkshire and The Humber and the North East.
- The reference region for the higher rate regions is Yorkshire and The Humber.
- Lower rate regions include the West Midlands, East Midlands, London, South West, East of England and the South East.
- The reference region for the lower rate regions is the East Midlands.

Estimated percentage testing positive for the coronavirus (COVID-19) on nose and throat swabs, daily, by age and region, between 25 September and 08 October 2020, England



Source: [COVID-19 Infection Survey: characteristics of people testing positive for COVID-19 in England, October 2020]

Lead analysts: [Sarah Walker] and [Ruth Studley]

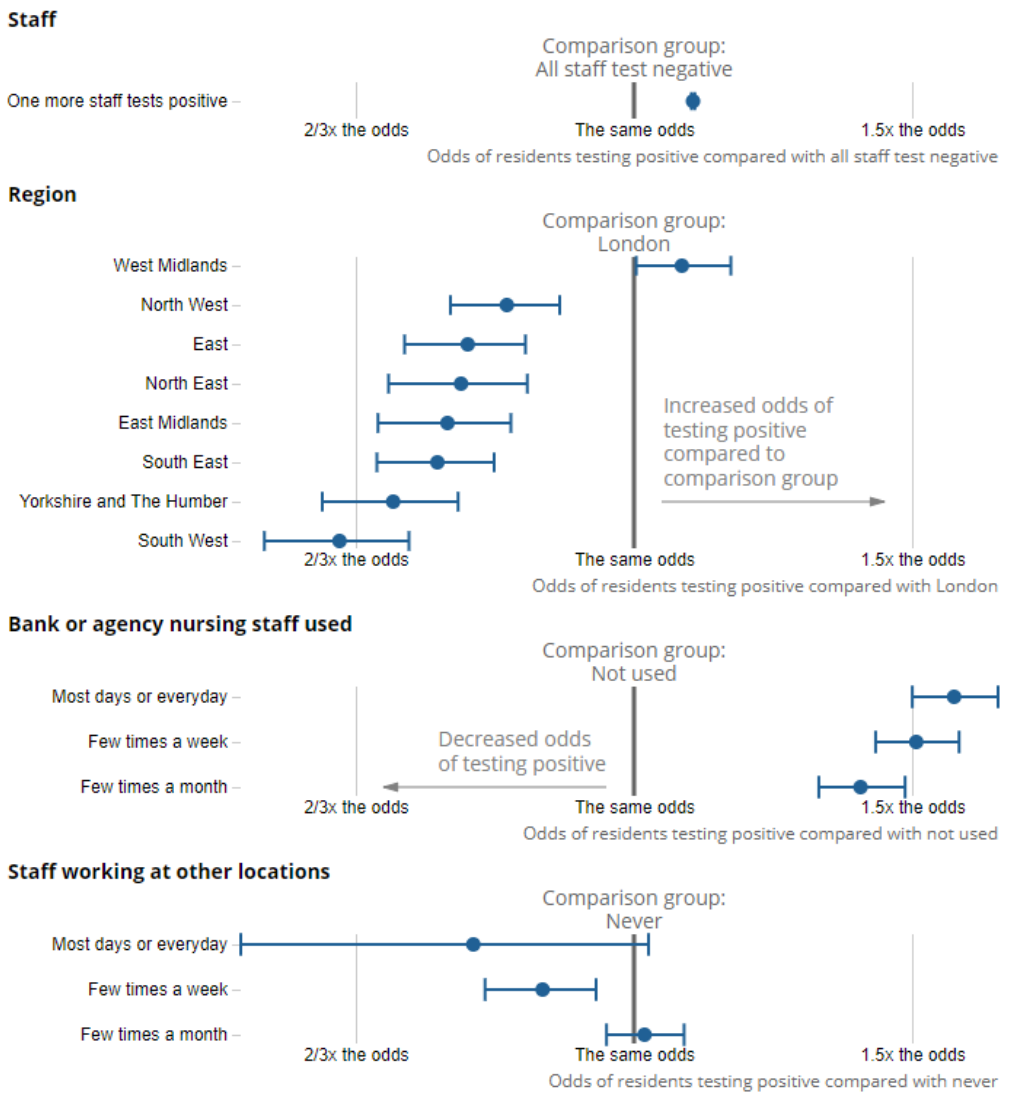
During some point up until 20 June 2020, over half of care homes in England caring for dementia patients and older people had at least one case of COVID-19 among their staff and residents

- Between 26 May and 20 June 2020, an estimated 56% of 9,081 care homes in England providing dementia care or care of the elderly (part of the Vivaldi project) reported at least one confirmed case of COVID-19 among staff or residents.
- Across the care homes that reported at least one confirmed case of COVID-19, an estimated 20% of residents and 7% of staff tested positive for COVID-19, as reported by care home managers, since the start of the pandemic.
- Findings include some common factors in care homes with higher levels of infection among residents, such as:
  - prevalence of infection in staff
  - more frequent use of bank or agency nurses or carers
  - regional differences (such as in London and the West Midlands)

During some point up until 20 June 2020, over half of care homes in England, caring for dementia patients and older people, had at least one case of COVID-19 among their staff and residents

- There is some evidence that in care homes where staff receive sick pay, there are lower levels of infection in residents compared with those where staff do not receive it
- Findings include some common factors in care home with higher levels of infection among staff, such as:
  - prevalence of infection in residents
  - more frequent use of bank or agency nurses or carers
  - care homes employing staff who work across multiple sites

Odds of COVID-19 infection in care home residents by staff infection, region, use of bank or agency nursing staff, and staff working at other locations



Source: Impact of coronavirus in care homes in England (Vivaldi): 26 May to 19 June 2020

Lead analysts: Laura Shallcross and Becky Tinsley

Levels of self-isolation and staying at home dropped as lockdown restrictions eased, but wearing of face coverings rose as they became mandatory in more situations and countries

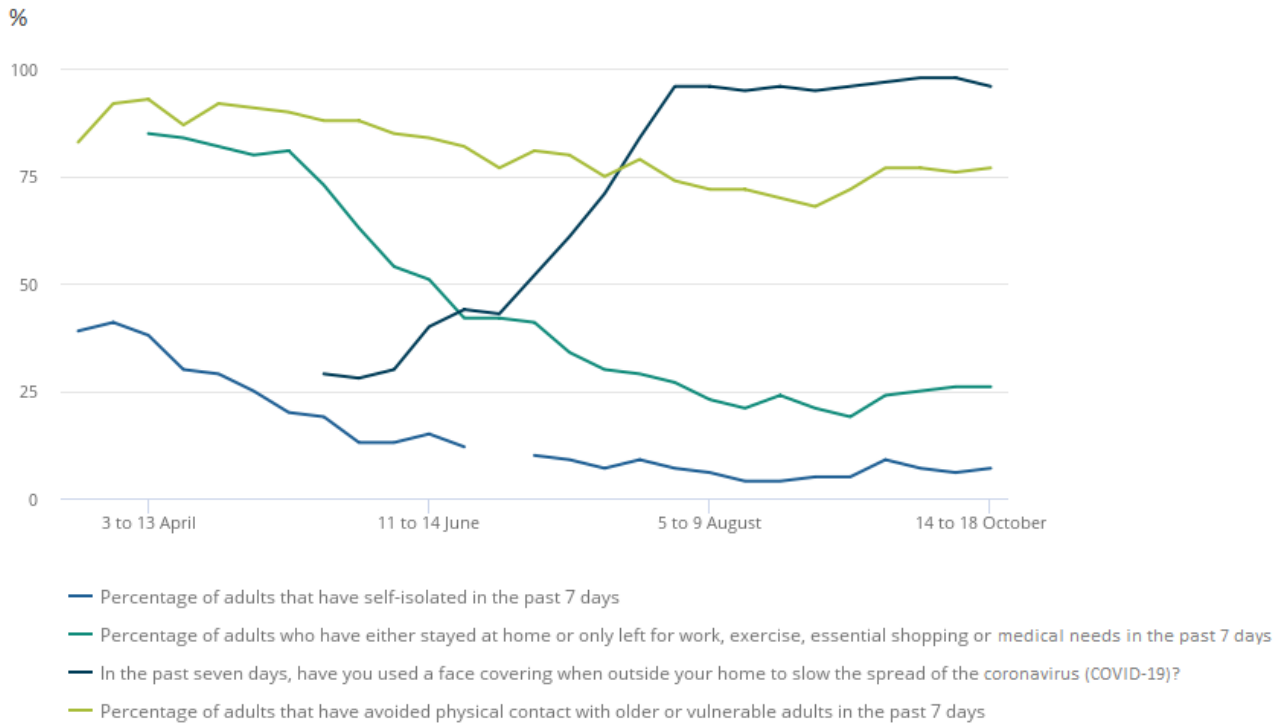
- On average, for the six weeks between 3 April and 17 May 2020, 82% of adults only left their home for essential work, shopping for basic necessities, exercise and medical need each week; this proportion decreased throughout the summer and has been less than 25% since early August.
- For the first three weeks of lockdown (from 23 March 2020), 40% of adults said they were self-isolating, and this was on a downward trend until the end of August 2020 (4%); throughout September, the percentage isolating started slowly increasing again, with 9% of adults saying they had self isolated in the last seven days at the end of September.
- Consistently high levels of adults said they were avoiding physical contact with other people when outside their home – over 90% until the end of May 2020; there has been a slight decrease through July and August 2020, but levels went up again at the end of September with over 85% of people avoiding contact with others.

Self-protection: handwashing and face coverings

- Between 14 and 18 October, around 9 in 10 (91%) adults who left their home said they always or often washed their hands with soap and water straight away after returning home from a public place; this is a lower proportion than on 31 May (94%), when lockdown measures started to ease.
- At the beginning of lockdown, over the period 27 March to 6 April, 100% of adults said that they had washed their hands with soap and water to avoid infection.
- As lockdown restrictions started to ease and more people left their home, there was been a steady rise in the number of adults wearing face coverings; at the end of May, before they were mandatory, 29% of adults who had left their home said they had worn a face covering to prevent the spread of the coronavirus (COVID-19), but this has risen to over 95% through August and September after they became compulsory on public transport across Great Britain and in shops and other enclosed spaces in England and Scotland.

More people left their home as lockdown restrictions eased and wearing of face coverings rose as they became mandatory

Trends in preventative measures, Great Britain, March to October 2020



Source: Opinions and Lifestyle Survey, ONS

Lead analyst: Andrea Lacey

Approximately 2.2 million clinically extremely vulnerable people were advised to shield from COVID-19 at home from the end of March 2020, and around 60% of those people followed shielding advice completely

- Between mid-May and mid-July 2020 the percentage of CEV people reporting that they completely followed the guidance varied but remained around 60% as the guidance was gradually eased.
- There was a trend of CEV people increasingly completely following shielding guidance by increasing age group; the older the age group, the higher the percentage of people completely following guidance.
- An estimated 328,000 CEV people (15%) lived in a household with children aged under 16 years; 3% (68,000 CEV people) reported that living in this type of household has had an impact on their ability to shield.

Indicators of clinically extremely vulnerable people following shielding advice

England, 14 May to 16 July 2020

	14 to 19 May	28 May to 3 June	9 to 18 June	24 to 30 June	9 to 16 July
Percentage that report completely following shielding advice	63	62	63	58	60
Percentage that report either not leaving the house at all or leaving the house only for exercise	65	67	64	60	48
Percentage receiving no visitors, except for support with personal care	86	87	83	77	65

Source: Coronavirus and shielding of clinically extremely vulnerable people in England: 9 July to 16 July 2020

Lead analyst: Tim Gibbs

Deaths

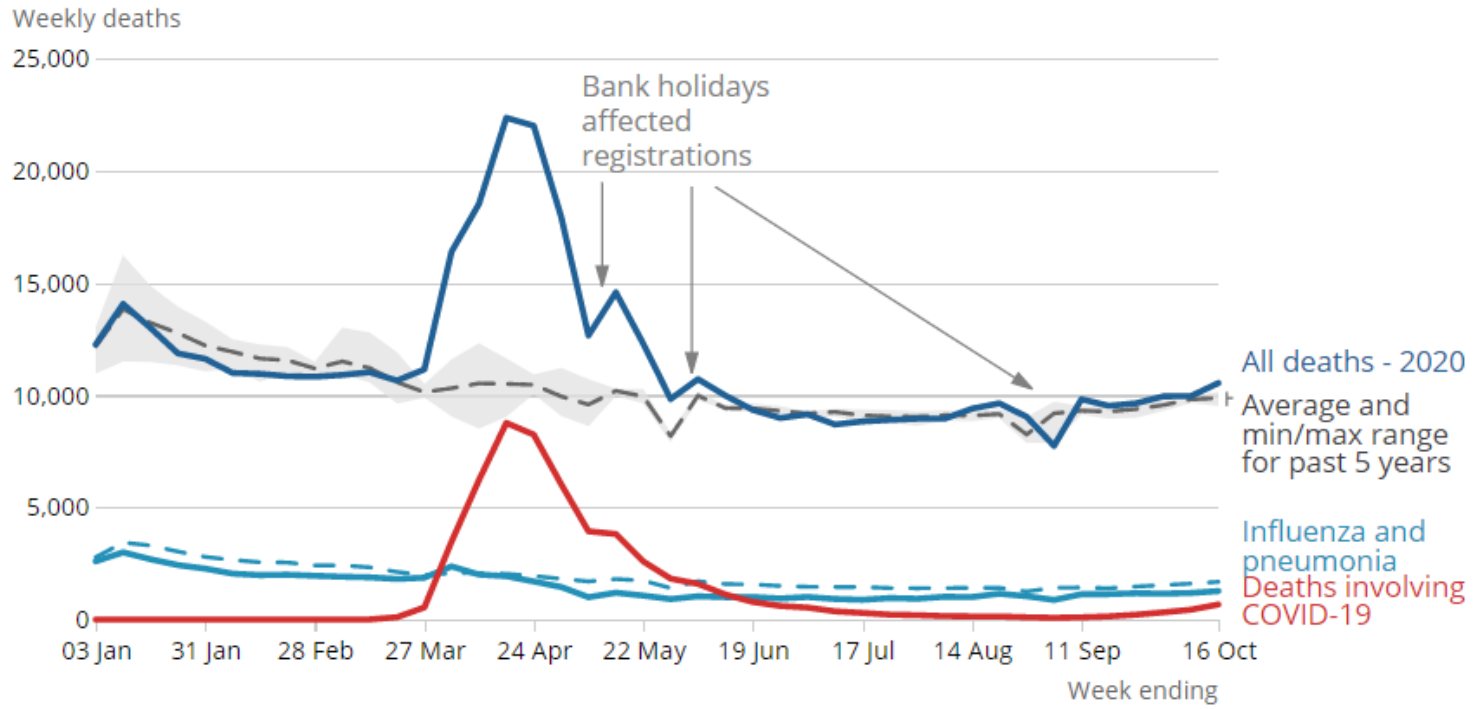
This section includes analysis on the number and rate of death related to COVID-19 as well as how different populations of our society have been affected

The number of deaths registered in England and Wales this year up to 16 October 2020 was 484,206; 55,092 more than the five-year average

- From the start of the year to week ending 20 March 2020, 138,916 deaths were registered, which was 4,822 fewer than the five-year average for these weeks; this was likely because of the mild winter and low flu circulation.
- However, between Weeks 13 and 42 of 2020, 345,320 deaths were registered, which was 55,092 more than the five-year average.
- COVID-19 has had a large impact on the number of deaths registered over the last few months and is the main reason for deaths increasing above what is expected (the five-year average).
- The disease has had a larger impact on those most vulnerable and those at older ages; some of these deaths would have likely occurred over the duration of the year but have occurred earlier because of COVID-19; this could contribute to a period of deaths below the five-year average.
- Looking at the year-to-date, the number of deaths for England was 454,396 and in Wales was 29,112, which is 52,421 (13.3%) and 2,215 (8.2%) more than the five-year average, respectively.

The number of weekly deaths from all causes was above the five-year average throughout April and May 2020

Number of deaths registered by week, England and Wales, 28 December 2019 to 16 October 2020



Source: Deaths registered weekly in England and Wales, provisional

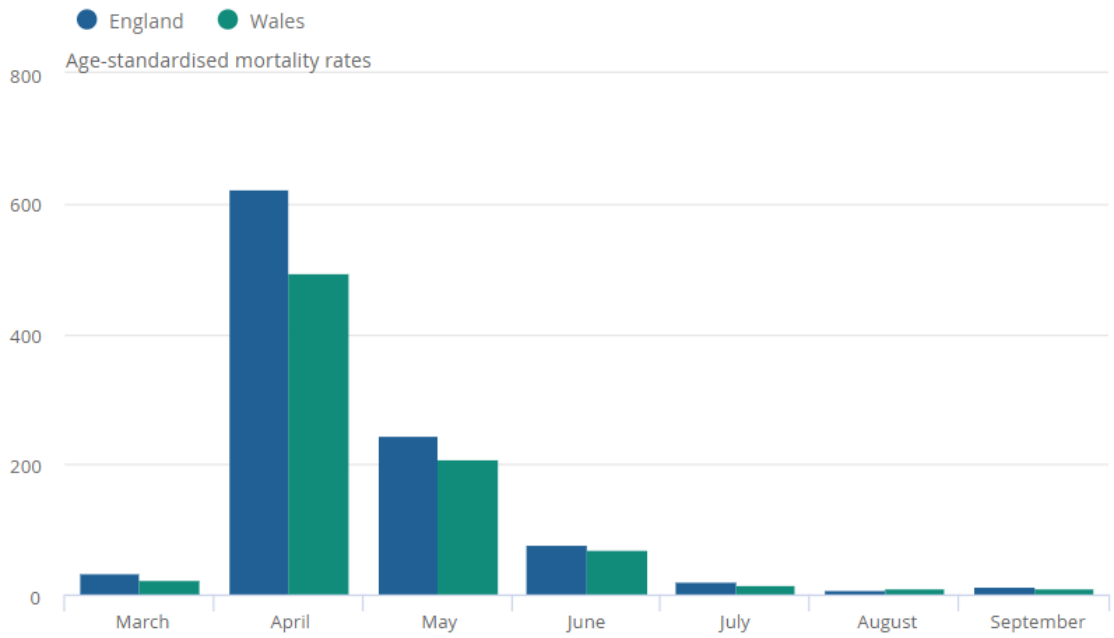
Lead analysts: Sarah Caul and Danielle Cornish

Of the deaths registered by 16 October 2020, 54,325 mentioned COVID-19 on the death certificate, 11.2% of all deaths in England and Wales

- In England, 51,553 deaths registered by 16 October 2020 mentioned COVID-19, 11.3% of all deaths.
- In Wales, 9.5% of all deaths registered so far in 2020 involved COVID-19 (2,697 deaths).
- The age-standardised mortality rate for deaths due to COVID-19 peaked at 623.2 deaths per 100,000 persons in England and 495.1 in Wales in April 2020.
- COVID-19 was the leading cause of death in England and Wales in both April and May 2020. For example in April, the number of deaths due to COVID-19 was more than double the number of deaths due to Dementia and Alzheimer's disease (the next most common cause of death) in England.
- In September 2020, the age-standardised mortality rate of deaths due to COVID-19 was 12.6 per 100,000 persons in England and 10.8 in Wales.
- In September 2020, COVID-19 was the 19th most common cause of death in England and the 24th most common cause of death in Wales.

Mortality rates due to COVID-19 increased for the first time since April 2020

Age-standardised mortality rates for deaths due to COVID-19, England and Wales, deaths registered in March to September 2020



Source: Monthly Mortality Analysis, England and Wales: September 2020

Lead Analyst: Sarah Caul

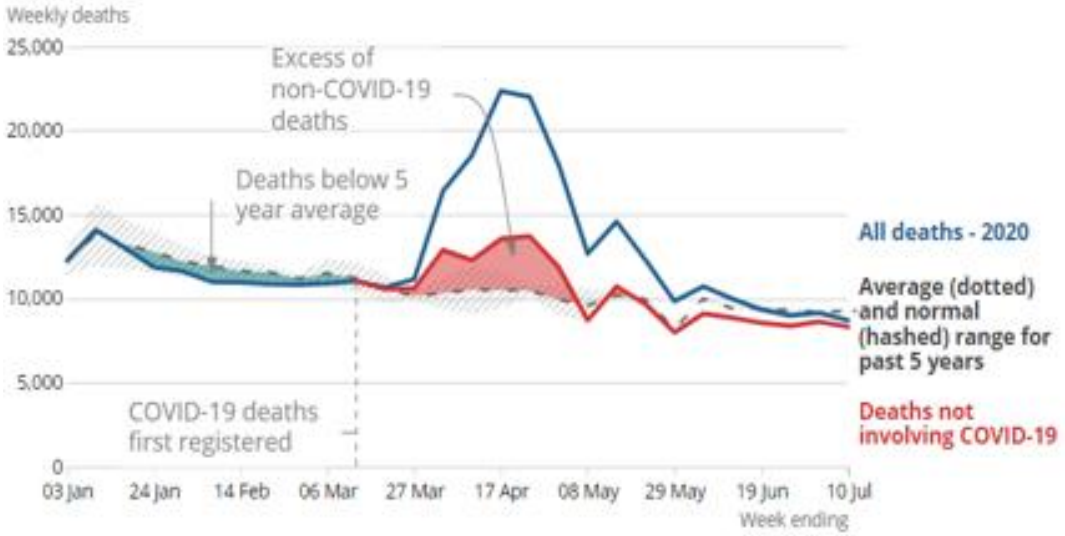
Non-COVID-19 excess deaths peaked during COVID-19 deaths' peak in April 2020, and have since returned to below average levels; but the composition of such deaths remains different

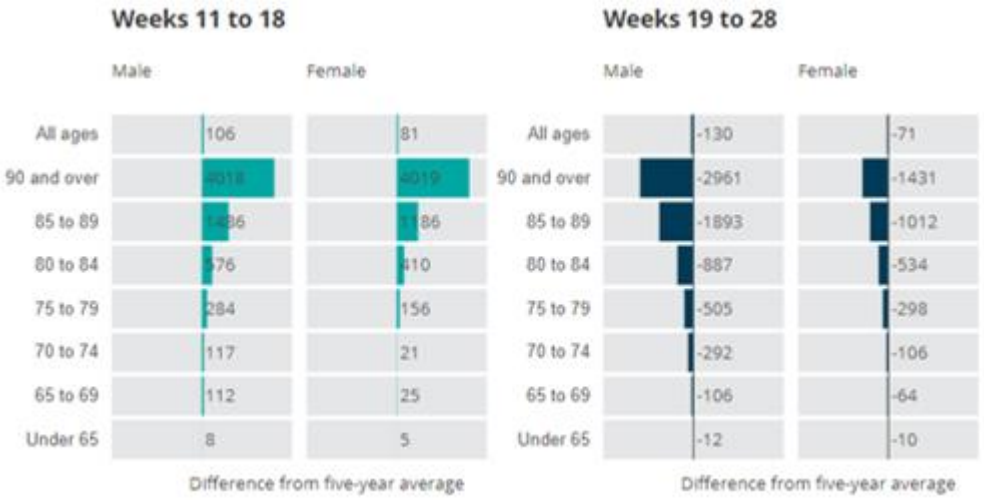
- Between week ending 13 March 2020 (the first week with a death due to COVID-19 registered) and week ending 1 May), non-COVID-19 deaths exceeded the five-year average for the period by 15.3%.
- From then until week ending 10 July 2020, non-COVID-19 deaths have returned to a level comparable with January and February 2020: 6.0% below the five-year average.
- As with COVID-19 deaths, non-COVID-19 deaths remain above five-year average levels for deaths in private homes; non-COVID-19 deaths in hospitals have been below average levels throughout 2020; deaths in care homes not involving COVID-19 increased during the first spike of COVID-19 deaths, then reduced to below average levels since.
- The age groups for which most non-COVID-19 deaths were registered are older age groups, particularly those aged 80 years and over. From weeks ending 2 May to 10 July 2020, the same groups that experienced the greatest increases in mortality in March to May have experienced the greatest reduction in mortality compared with five-year average levels.

Non-COVID-19 excess deaths peaked during COVID-19 deaths' peak in April 2020, and have since returned to below average levels in recent weeks; but the composition of such deaths remains different

- Causes of death such as dementia and Alzheimer's disease, and "symptoms, signs and ill-defined conditions" (usually an indicator of senility) increased for non-COVID-19 deaths when COVID-19 deaths peaked earlier in 2020; while most leading causes of deaths have returned to levels comparable with the start of the year, causes such as diabetes and heart conditions continue to be recorded on death registrations above average levels.
- Deaths in care homes, for older adults, and for some causes of death, which increased to well above average levels earlier in the year, all reduced to below five-year average levels in May to early July 2020. This may suggest deaths were brought forward by only a short amount of time.

Non-COVID-19 excess deaths peaked during COVID-19 deaths' peak in April 2020, and have since returned to below average levels in recent weeks; but the composition of such deaths remains different





Source: Analysis of death registrations not involving coronavirus (COVID-19), England and Wales

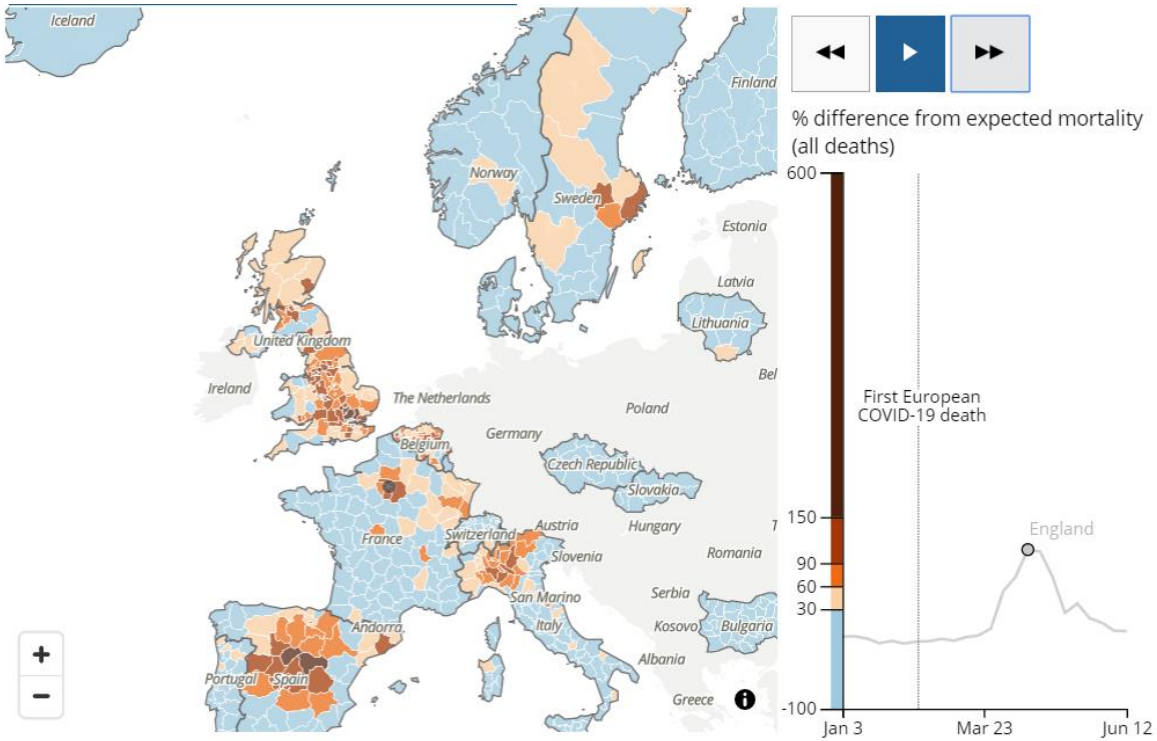
Lead analysts: Greg Ceely

England had the longest continuous period of excess mortality of any European country compared, resulting in England having the highest levels of excess mortality in Europe for the period as a whole

- Because of the pandemic, the first half of 2020 saw extraordinary increases in mortality rates across countries in Western Europe above the 2015 to 2019 average.
- The highest peak excess mortality at national level was in Spain, with some local areas in Northern Italy and Central Spain having excess mortality levels as high as 847.7% of the average.
- Of the four nations of the UK, England had the highest peak excess mortality (107.6% in week ending 17 April 2020).
- While none of the four UK nations had a peak mortality level as high as Spain or the worst-hit local areas of Spain and Italy, excess mortality was geographically widespread throughout the UK during the pandemic, whereas it was more geographically localised in most countries of Western Europe.
- Combined with the relatively slow downward “tail” of the pandemic in the UK, this meant that by the end of May 2020, England had seen the highest overall relative excess mortality out of all the European countries compared.

Peaks of excess mortality were geographically localised in the countries of Western Europe

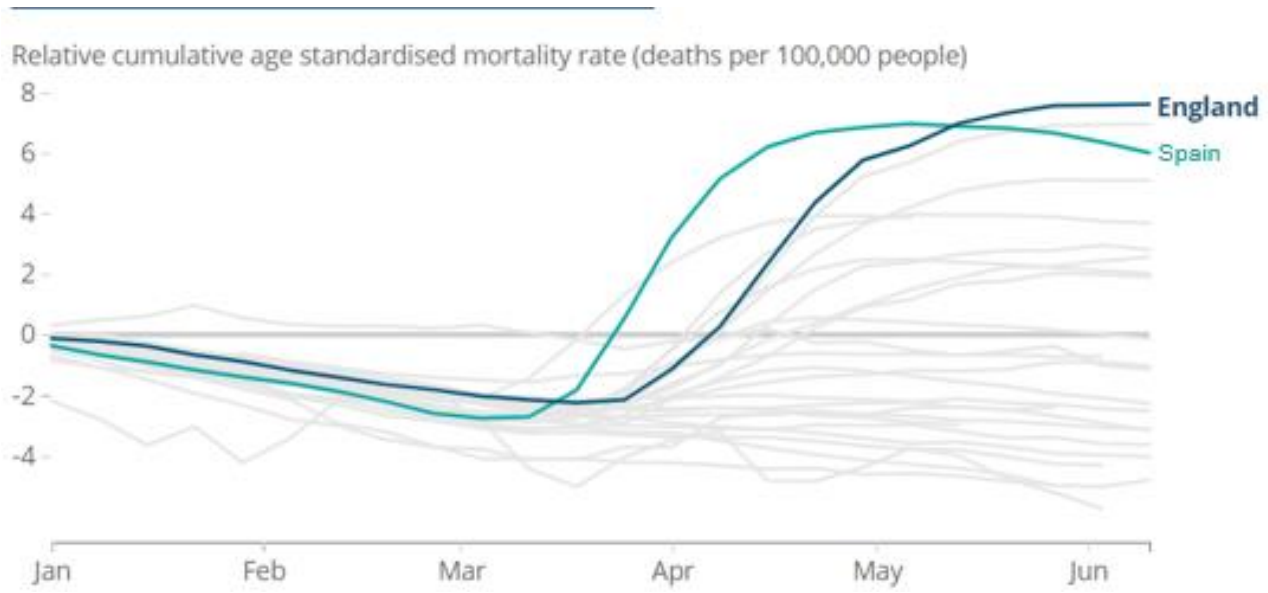
Map showing relative age-standardised mortality rates by week and NUTS3 region of Europe



Source: [Comparisons of all-cause mortality between European countries and regions: January to June 2020]

By week ending 29 May 2020, England had the highest relative cumulative age-standardised mortality rate in Europe

Relative cumulative age-standardised mortality rates for selected European countries



Source: Comparisons of all-cause mortality between European countries and regions: January to June 2020

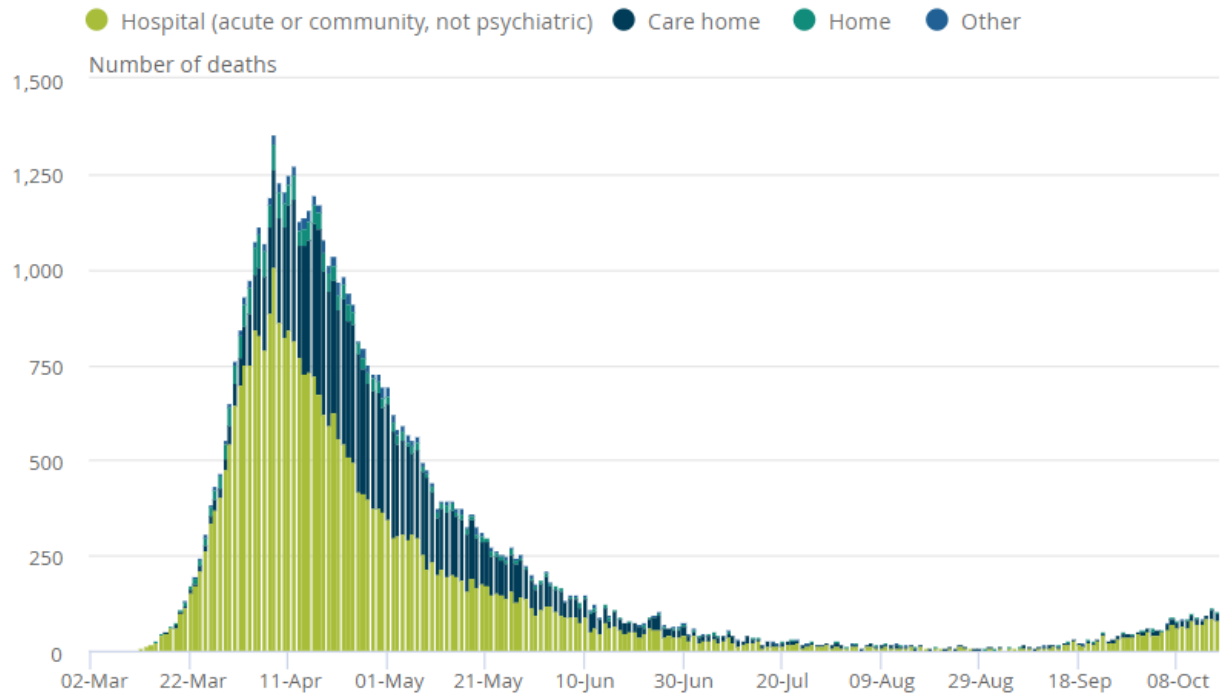
Lead analysts: Annie Campbell and Edward Morgan

Most deaths involving COVID-19 in England and Wales have been in hospitals and care homes, but overall deaths in private homes remain higher than expected based on the five-year average

- Of all deaths involving COVID-19 registered up to Week 42 (week ending 16 October 2020) in England and Wales, 63.9% occurred in hospital (34,709 deaths).
- The remainder mainly occurred in: care homes (29.1%; 15,819 deaths), private homes (4.8%; 2,594 deaths) and hospices (1.4%; 767 deaths).
- The number of excess deaths (above the five-year average) peaked in April 2020 across all settings.
- Excess deaths in hospitals and care homes have since declined, and have been around or below the five-year average since June 2020, but, excess deaths in private homes have remained above the five-year average; in the most recent week of data (Week 42), the number of deaths in private homes was 776 deaths higher than the five-year average.
- Looking in more detail at deaths in private homes in the most recent week of data, males accounted for 364 excess deaths, compared to 412 for females. While those aged 70 years and over accounted for the majority of the excess (662 deaths in people aged 70 years and over, compared with 114 in people aged under 70 years).

More than 75% of all deaths involving COVID-19 occurred in hospitals

Number of deaths involving COVID-19 by place of occurrence, England and Wales, occurring up to 16 October 2020 and registered up to 24 October 2020

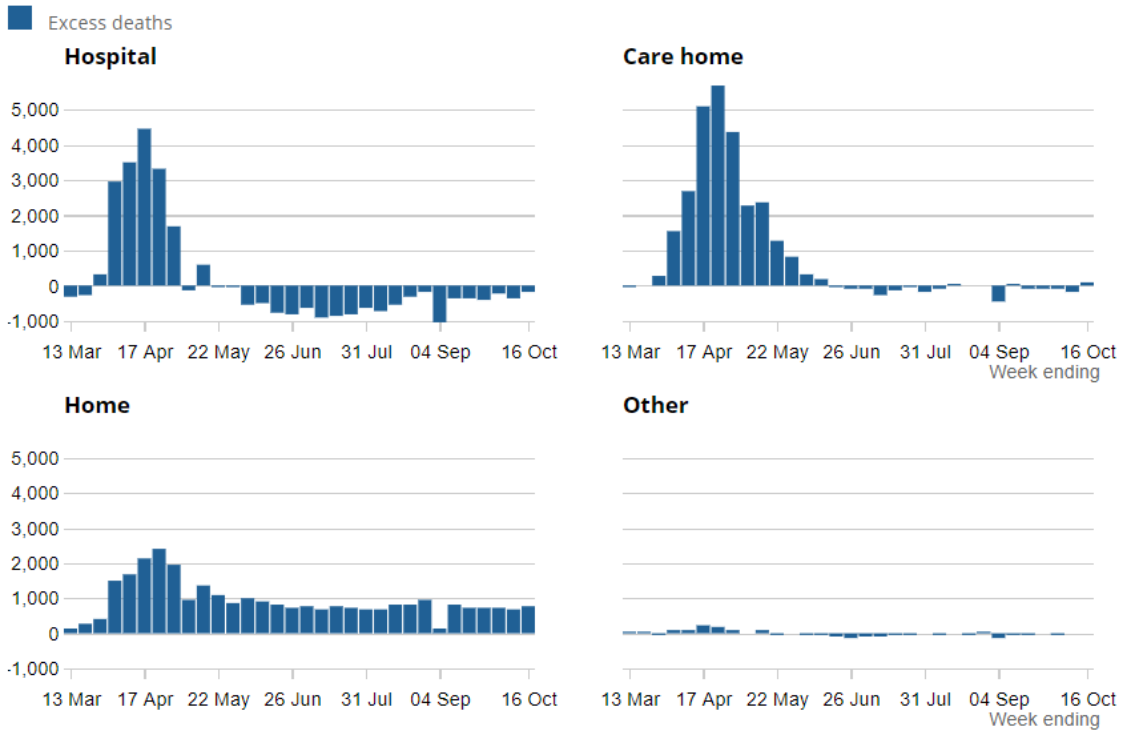


Source: Deaths registered weekly in England and Wales, provisional

Lead analysts: Sarah Caul and Danielle Cornish

Deaths in private homes remain above the five-year average

Number of excess deaths by place of occurrence, England and Wales, registered between 7 March 2020 and 16 October 2020



Source: Deaths registered weekly in England and Wales, provisional

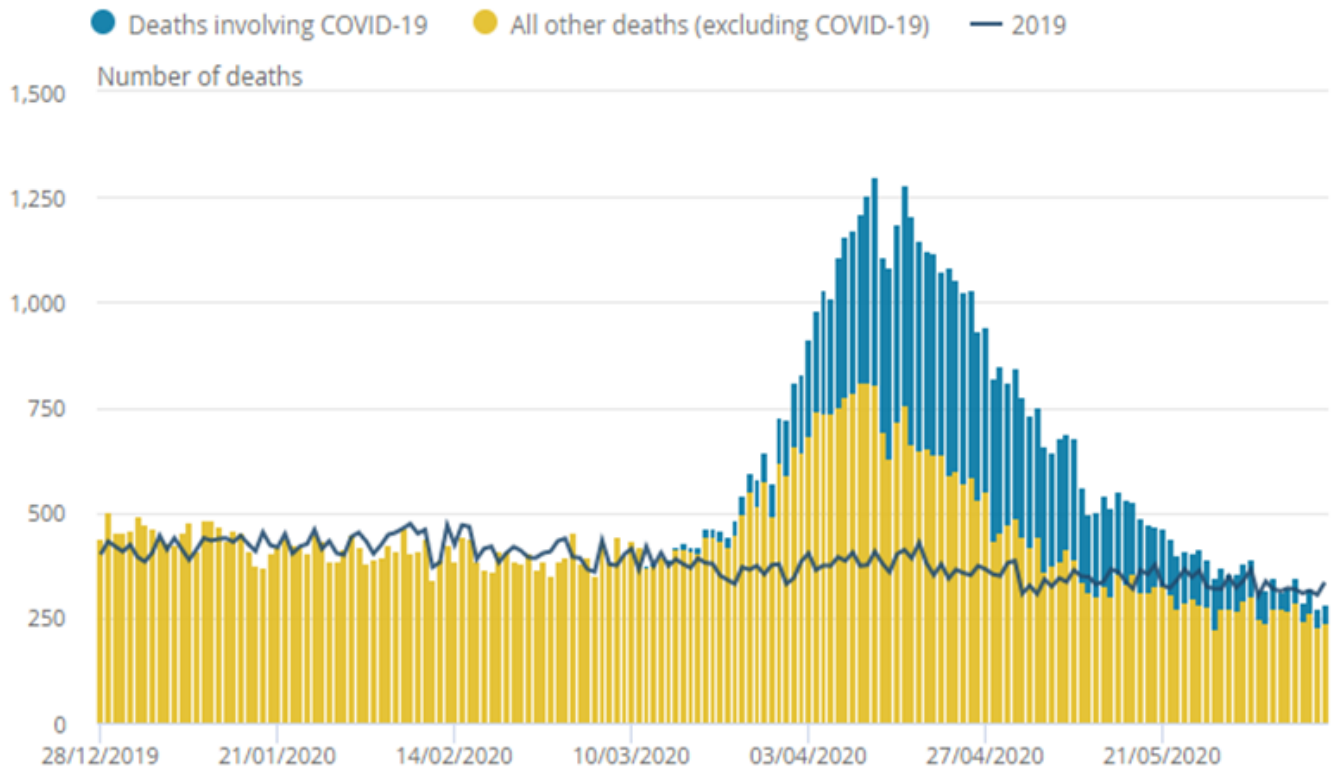
Lead analysts: Sarah Caul and Danielle Cornish

Deaths among care home residents peaked in mid- April; between 2 March and 12 June 2020 (registered up to 20 June 2020), there were 19,394 deaths involving COVID-19, which was 29.3% of all deaths of care home residents.

- During the coronavirus (COVID-19) pandemic, there was an increase in the number of deaths of care home residents above the numbers we saw in 2019.
- Looking at place of death; of deaths involving COVID-19 among care home residents, 74.9% (14,519 deaths) occurred within a care home and 24.8% (4,810 deaths) occurred within a hospital.
- From 2 March 2020, of all deaths in hospital involving COVID-19, 15.5% could be accounted for by care home residents.
- COVID-19 was the leading cause of death in male care home residents, accounting for 33.5% of all deaths, and the second leading cause of death in female care home residents, after Dementia and Alzheimer's disease, accounting for 26.6% of all deaths.
- Dementia and Alzheimer's disease was the most common main pre-existing condition and was involved in 49.5% of all deaths of care home residents involving COVID-19.

The number of deaths among care home residents peaked in mid-April 2020

Number of deaths of care home residents from 28 December 2019 to 12 June 2020, registered up to 20 June 2020, England and Wales



Source: Deaths involving COVID-19 in the care sector, England and Wales: deaths occurring up to 12 June 2020 and registered up to 20 June 2020 (provisional)

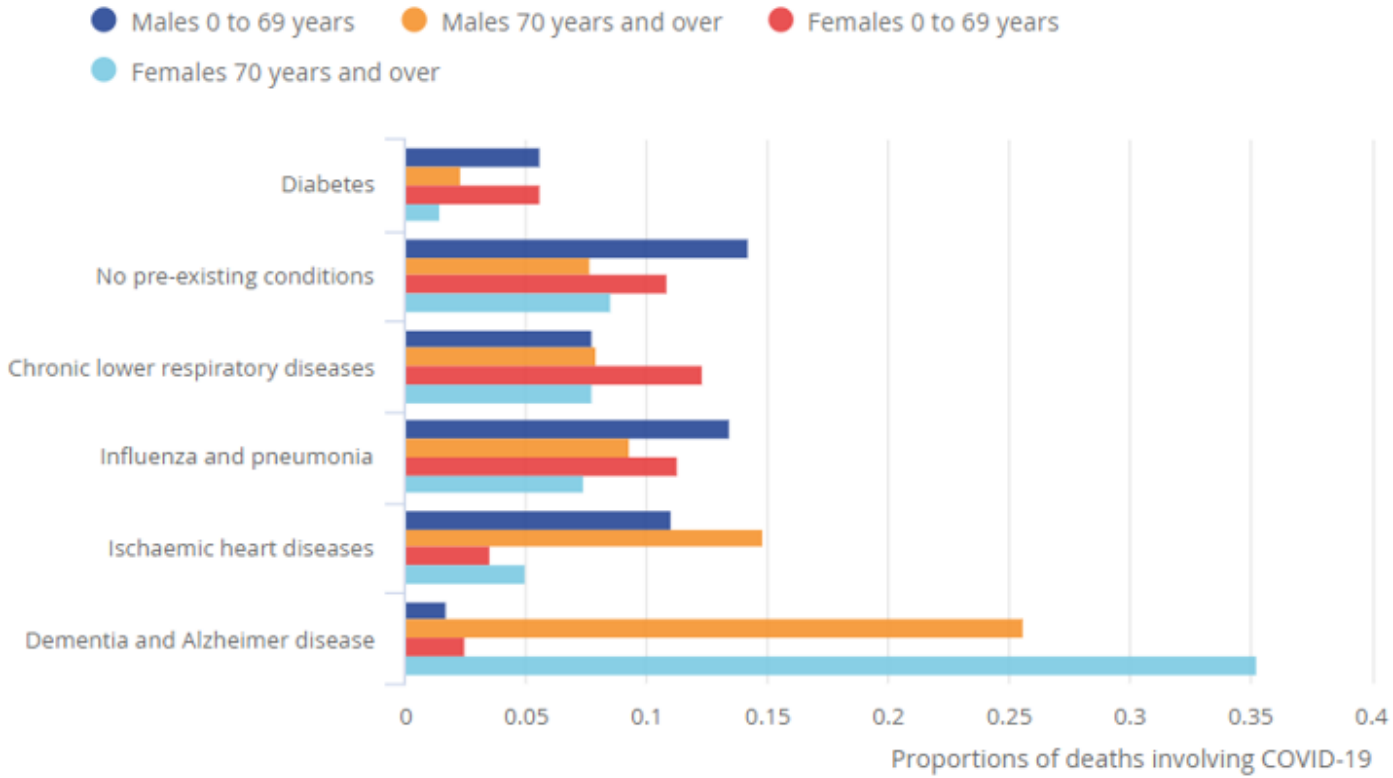
Lead analyst: Sophie John

9 out of 10 deaths involving COVID-19 in March to June 2020 involved at least one pre-existing condition; Dementia and Alzheimer’s disease was the most common main pre-existing condition, followed by ischaemic heart diseases

- Of the deaths involving COVID-19 that occurred in England and Wales in March to June 2020, there was at least one pre-existing condition in 91.1% of cases, while 8.9% had no pre-existing conditions.
- Focussing on the main pre-existing condition (the conditions that is most likely to be the underlying cause of death for a person of that age and sex had they not died from COVID-19), Dementia and Alzheimer’s disease was the most common main pre-existing condition; 25.6% of all deaths involving COVID-19 had Dementia and Alzheimer's disease as a main pre-existing condition.
- Ischaemic heart diseases were the second most common main pre-existing condition, involved in 9.9% of all deaths involving COVID-19.
- The most common main pre-existing conditions differed by age group; for people younger than 70 years, "No pre-existing conditions" ranks much higher than in those aged 70 years and over, where conditions such as Dementia and Alzheimer’s disease are much more prominent.

Dementia and Alzheimer's disease was the most common main pre-existing health condition in deaths involving COVID-19 between March and June 2020

Proportion of deaths involving COVID-19 by main pre-existing condition, sex and age, England and Wales, occurring in March to June 2020



Source: Deaths involving COVID-19, England and Wales: deaths occurring in June 2020

Lead analysts: Annie Campbell and Sarah Caul

There were 3.4 times as many deaths due to COVID-19 compared with deaths due to influenza and pneumonia between January and August 2020 in England and Wales

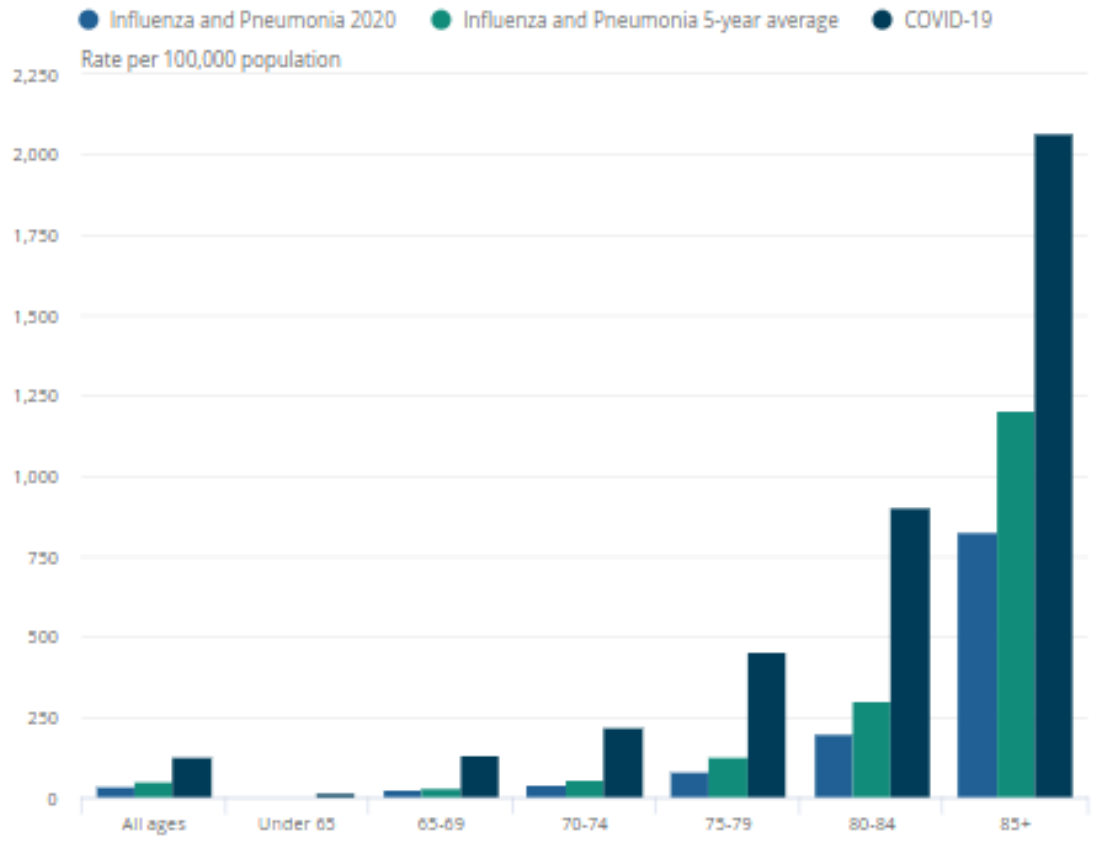
- Of all death occurrences between January and August 2020, there were 48,168 deaths due to COVID-19, compared with 13,619 deaths due to pneumonia and 394 deaths due to influenza.
- Influenza and pneumonia was mentioned on more death certificates than COVID-19, however, COVID-19 was the underlying cause of death in over three times as many deaths between January and August 2020.
- The highest number of deaths due to influenza and pneumonia occurred in January 2020, however, influenza and pneumonia deaths were below the five-year average (2015 to 2019) in every month between January and August 2020.
- Deaths due to COVID-19 were higher than deaths due to influenza and pneumonia between March and June 2020.

COVID-19 mortality rates were statistically significantly higher than mortality rates for influenza and pneumonia

- Age-standardised and age-specific mortality rates for deaths due to COVID-19 were statistically significantly higher than mortality rates due to influenza and pneumonia when compared with the five-year average and 2020 rates.
- The proportion of deaths occurring in care homes due to COVID-19 was almost double the proportion of deaths due to influenza and pneumonia (30.0% and 15.2% respectively).
- In comparison with the deaths due to influenza and pneumonia occurring in the year to 31 August 2020, COVID-19 has been higher than every year monthly data are available (1959 to 2020).

COVID-19 mortality rates were higher than influenza and pneumonia rates for 2020 and the five-year average for all age groups in England

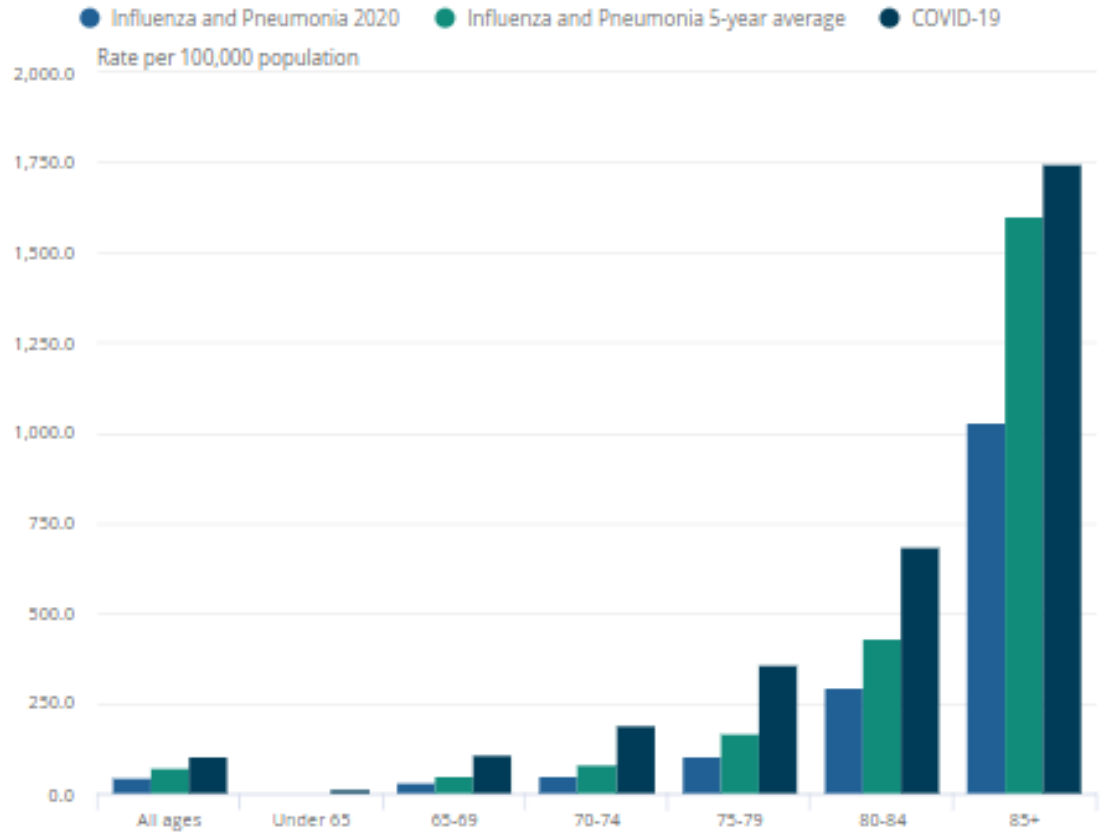
Age-standardised mortality rates for deaths due to influenza and pneumonia, and COVID-19, England, occurring between 1 January and 31 August 2020 and registered by 5 September 2020



Source: Deaths due to coronavirus (COVID-19) compared with deaths from influenza and pneumonia, England and Wales, deaths occurring between 1 January and 31 August 2020

Those aged 85 and over had statistically significantly higher rates than all other age groups for deaths due to influenza, pneumonia and COVID-19 in Wales

Age-standardised mortality rates for deaths due to influenza and pneumonia and COVID-19, Wales, occurring between 1 January and 31 August 2020, registered by 5 September 2020



Source: Deaths due to coronavirus (COVID-19) compared with deaths from influenza and pneumonia, England and Wales, deaths occurring between 1 January and 31 August 2020

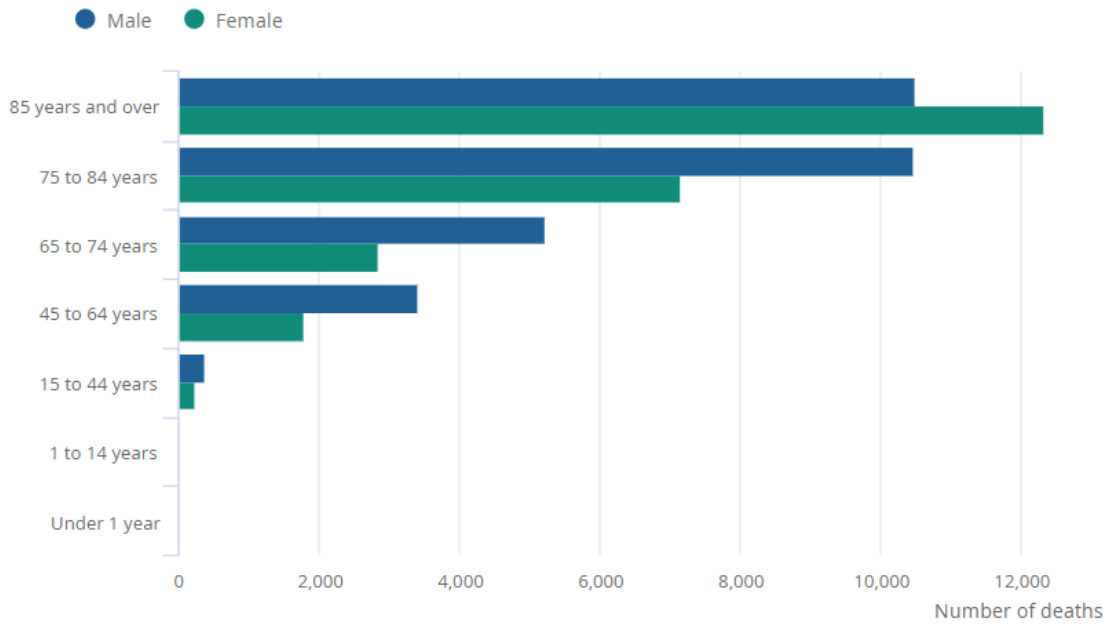
Lead analyst: Rachel Rushton

So far in 2020, males had a higher mortality rate due to COVID-19 than females, and the mortality rate increased with age in both sexes

- Looking at the year-to date (up to 16 October 2020), for all age groups except 85 years and over, there have been more deaths involving COVID-19 in males than in females; so far in 2020, 55.2% of all deaths involving COVID-19 were in males.
- There were more deaths in females in the age group of aged 85 years and over (12,330) than males (10,505), possibly because of the over-85-years female population being larger than the over-85-years male population in England and Wales.
- Age-standardised mortality rates (ASMRs) are a better measure of mortality than the number of deaths, as they account for the population size and age structure; using ASMRs, males had a significantly higher rate of death due to COVID-19 than females between March and June 2020.
- The ASMR for deaths due to COVID-19 for males in England was 781.9 deaths per 100,000 males, compared with 439.0 deaths per 100,000 females in April 2020; in Wales, the rate was 630.6 deaths per 100,000 males compared with 363.2 deaths per 100,000 females.
- Looking at the age-specific mortality rates due to COVID-19, the mortality rate increased consistently with age in both sexes, with those aged 90 years and over having the highest rate of death.

The number of deaths involving COVID-19 was highest in males across the majority of age groups

Number of deaths involving COVID-19 by sex and age group, England and Wales, registered between 28 December 2019 and 16 October 2020



Source: Deaths registered weekly in England and Wales, provisional; Deaths involving COVID-19, England and Wales

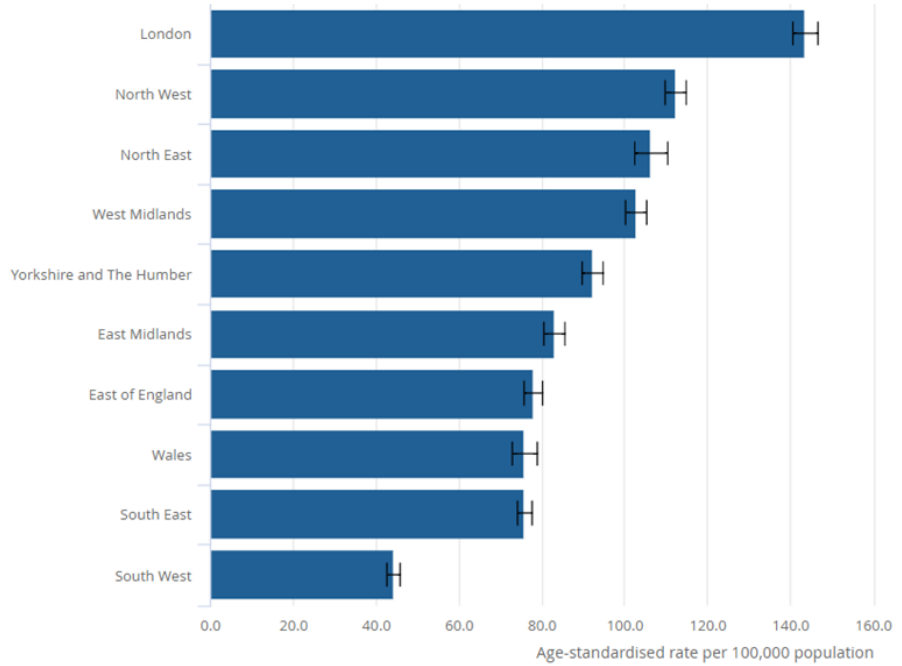
Lead analysts: Sarah Caul and Danielle Cornish

London had the highest age-standardised mortality rate for deaths involving COVID-19 in March to July 2020 while the lowest rates were found in sparse, rural settings across England and Wales

- Between March and July 2020, London had the highest ASMRs with 143.4 deaths involving COVID-19 per 100,000 people; this was significantly higher than any other region in England. Between April and July 2020, London's COVID-19 mortality rate dropped the most between, with a 98.7% decrease.
- Of the 10 local authorities with the highest ASMRs for deaths involving COVID-19 over this period, nine were London boroughs; Brent had the highest overall ASMRs with 218.3 deaths per 100,000 people, followed by Newham (203.4) and Hackney (186.6).
- The most deprived areas in Wales had ASMRs for deaths involving COVID-19 of 121.4 deaths per 100,000, nearly twice as high as in the least deprived areas (66.5 deaths per 100,000 people).
- The highest COVID-19 ASMRs were in urban major conurbations, with 132.8 deaths per 100,000 people; this was statistically significantly higher than all other rural-urban categories in England and Wales; the lowest rates were all found in sparse settings; rural hamlets and isolated dwellings in a sparse setting had the lowest ASMR of 24.4 deaths per 100,000 people.

London had the highest COVID-19 mortality rate between March and July 2020

Age-standardised mortality rates for deaths involving the coronavirus (COVID-19), per 100,000 population, English regions and Wales, deaths occurring between 1 March and 31 July 2020



Source: Deaths involving COVID-19 by local area and socioeconomic deprivation: deaths occurring between 1 March and 31 July 2020

Lead analysts: Sarah Caul and Danielle Cornish

People of Black and South Asian ethnic background have increased risk of death involving COVID-19 compared with those of White ethnic background

Deaths involving COVID-19 by ethnic group in England and Wales for period 2 March to 28 August 2020

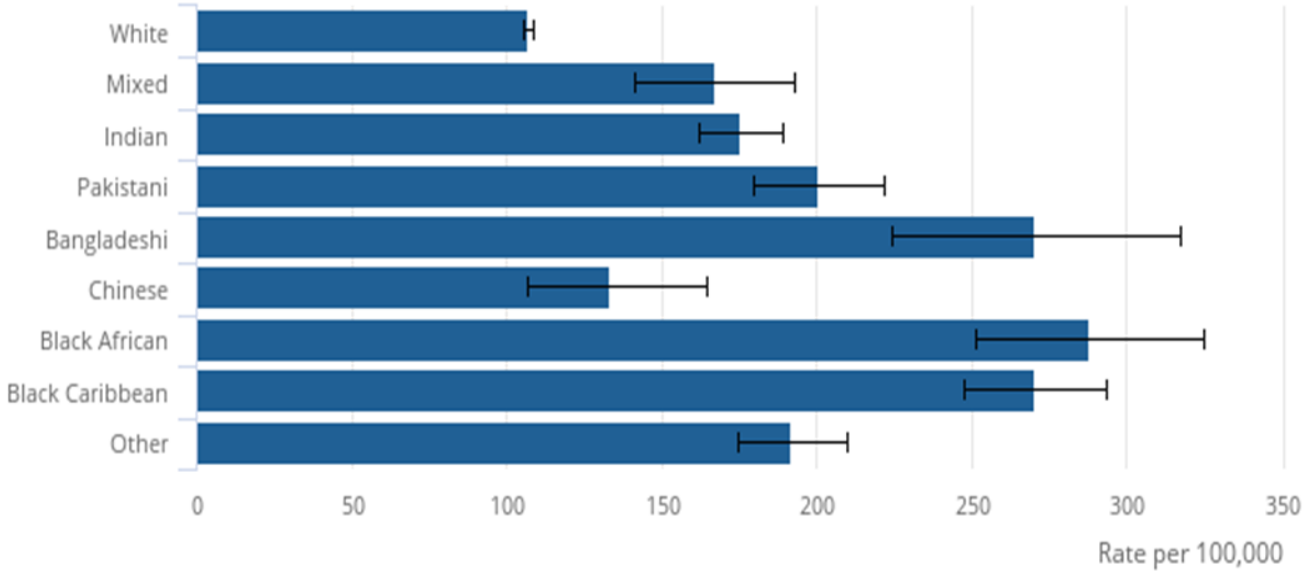
- Males and females of Black and South Asian ethnic background were shown to have increased risks of death involving COVID-19 compared with those of White ethnic background.
- Males of Black African ethnic background had the highest rate of death involving COVID-19, 2.7 times higher than males of White ethnic background.
- Females of Black Caribbean ethnic background had the highest rate of death involving COVID-19, 2.0 times higher than females of White ethnic background.
- All ethnic minority groups other than Chinese had a higher rate than the White ethnic population for both males and females.

When adjusting for age, rates of death involving COVID-19 remain greater for most ethnic minority groups, most notably for people of Black African, Black Caribbean, Bangladeshi and Pakistani ethnic background

- For residents in private households in England, based on a statistical model adjusting for age, the rate of death among Black African males was 3.8 times higher than those of White background, while for Black African females the rate was 2.9 times higher.
- Taking account of geography, socio-economic characteristics and health measures, including pre-existing conditions, males of Black African background retained a 2.5 times higher rate than those of White background, while for females a 2.1 times greater risk remained.
- For males, all ethnic minority groups other than Chinese retained a raised rate of COVID-19 mortality following adjustments; for females, all other than Bangladeshi, Chinese and Mixed ethnic groups retained a raised rate of COVID-19 mortality.
- In the care home population, males of Asian ethnic background and females of Black and Asian ethnic backgrounds also had a raised rate of death involving COVID-19 compared with people of White ethnic background after taking account of geography and health measures.

Males of Black African ethnic background had the highest rate of death involving COVID-19, more than 2.7 times higher than males of White ethnic background

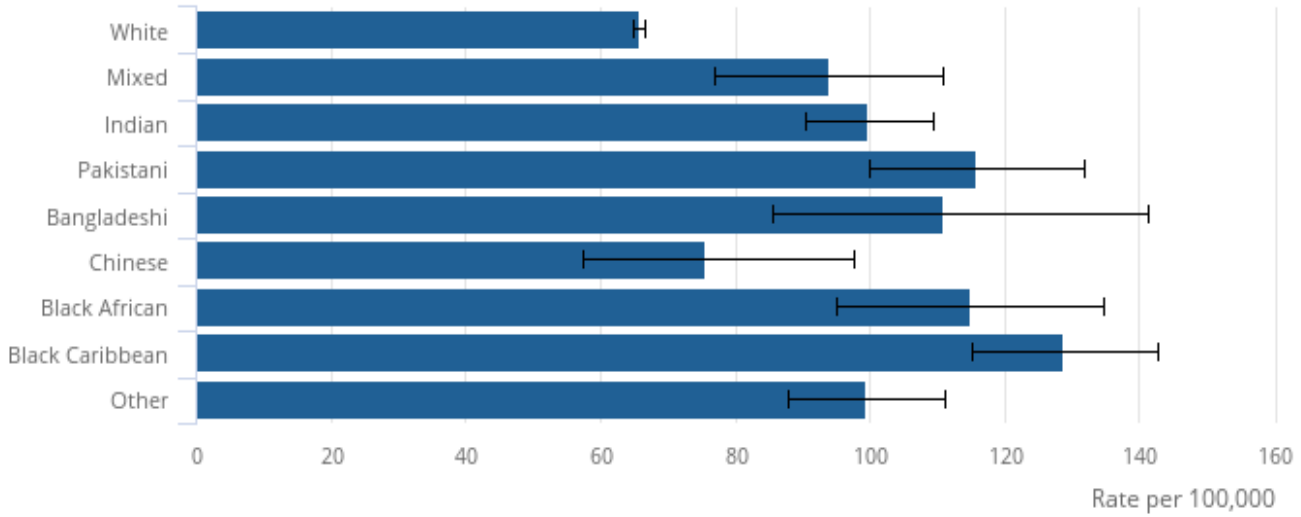
Age-standardised rates of death involving the coronavirus (COVID-19) among males aged 9 years and over by ethnic group, England and Wales, deaths occurring between 2 March and 28 July 2020 and registered by 24 August 2020



Source: Updating ethnic contrasts in deaths involving the coronavirus (COVID-19), England and Wales: deaths occurring 2 March to 28 July 2020

Females of Black Caribbean ethnic background had the highest rate of death involving COVID-19, 2 times higher than females of White ethnic background

Age-standardised rates of death involving the coronavirus (COVID-19) among females aged 9 years and over by ethnic group, England and Wales, deaths occurring between 2 March and 28 July 2020 and registered by 24 August 2020



Source: Updating ethnic contrasts in deaths involving the coronavirus (COVID-19), England and Wales: deaths occurring 2 March to 28 July 2020

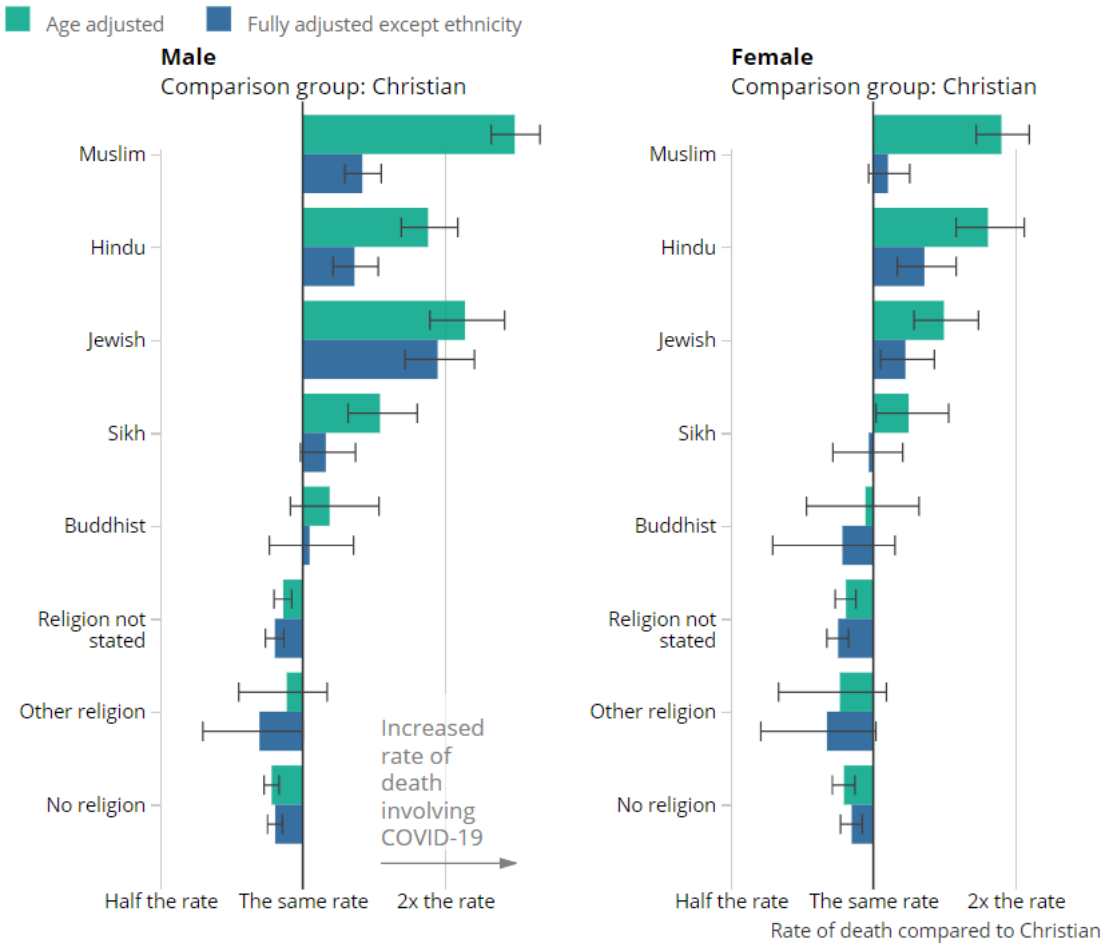
Lead Analysts: Chris White and Daniel Ayoubkhani

The risk of death involving COVID-19 varies across religious groups, with those identifying as Muslims, Jewish, Hindu and Sikh showing a higher rate of death than other groups

- Those of Hindu, Jewish, Muslim and Sikh affiliation had the highest rates of death involving COVID-19 while those of “No Religion” had the lowest.
- Only males and females of Jewish affiliation retained an increased risk of death after adjusting for ethnic background and a medley of socio-demographic characteristics.

How the risk of death involving COVID-19 varies by religious group for males and females

Hazard ratios of death involving COVID-19 by religious group and sex, England and Wales, 2 March to 15 May 2020



Source: Coronavirus related deaths by religious group, England and Wales: 2 March to 15 May 2020

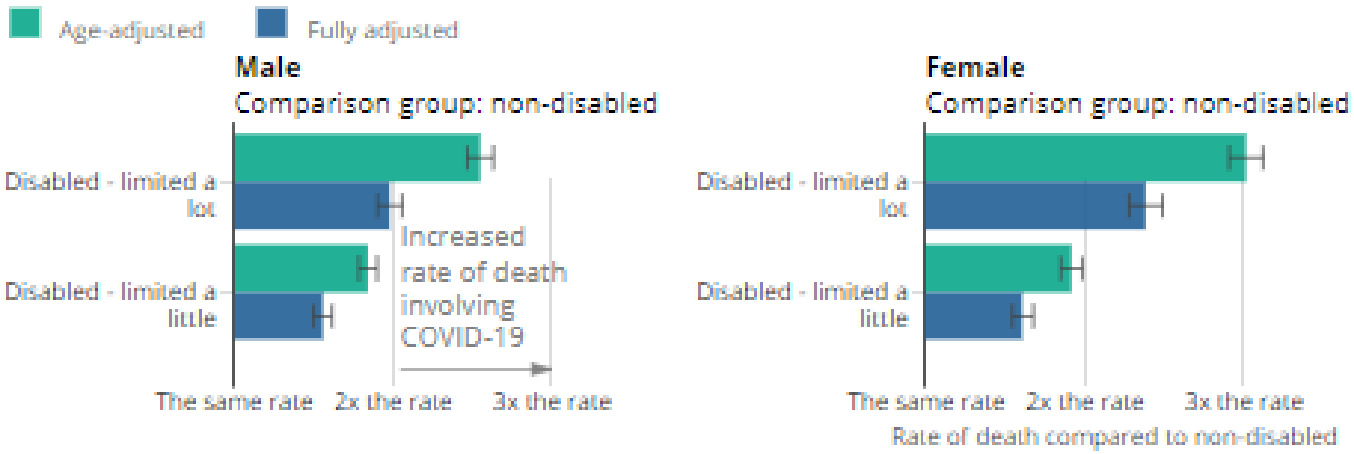
Lead analyst: Charlotte Gaughan

Risk of death involving COVID-19 varies by disability status in England and Wales

- Between 2 March and 14 July 2020, disabled people made up almost 60% of all deaths involving COVID-19; disabled people made up around 16% of the study population followed from the 2011 Census.
- Disability is more common in older populations; age-standardised mortality rates (ASMRs) allow populations with different age structures to be compared more fairly; males aged 65 years and over who were disabled and limited a lot had the highest age-standardised COVID-19 mortality rate at 860.8 per 100,000.
- Females aged 9 to 64 years who were disabled and limited a lot who had a rate of death involving COVID-19 10.8 times greater than non-disabled females and 6.5 times greater for males.
- Relative gaps in ASMRs were smaller in the 65 years and over age group; males aged 65 years and over, who were disabled and limited a lot, were 2.4 times more likely and females were 3.1 times more likely to die than their counterparts who were non-disabled.
- Males and females disabled and limited a lot in daily activities had a 2.0 and 2.4-times higher rate of death respectively than those non-disabled after adjusting for socio-demographic characteristics.

How the risk of death involving COVID-19 varies by disability status for males and females

Hazard ratios of death involving COVID-19 by disability status and sex, England and Wales, 2 March to 14 July 2020



Source: Coronavirus (COVID-19) related deaths by disability status, England and Wales: 2 March to 14 July 2020

Lead Analyst: Daniel Ayoubkhani

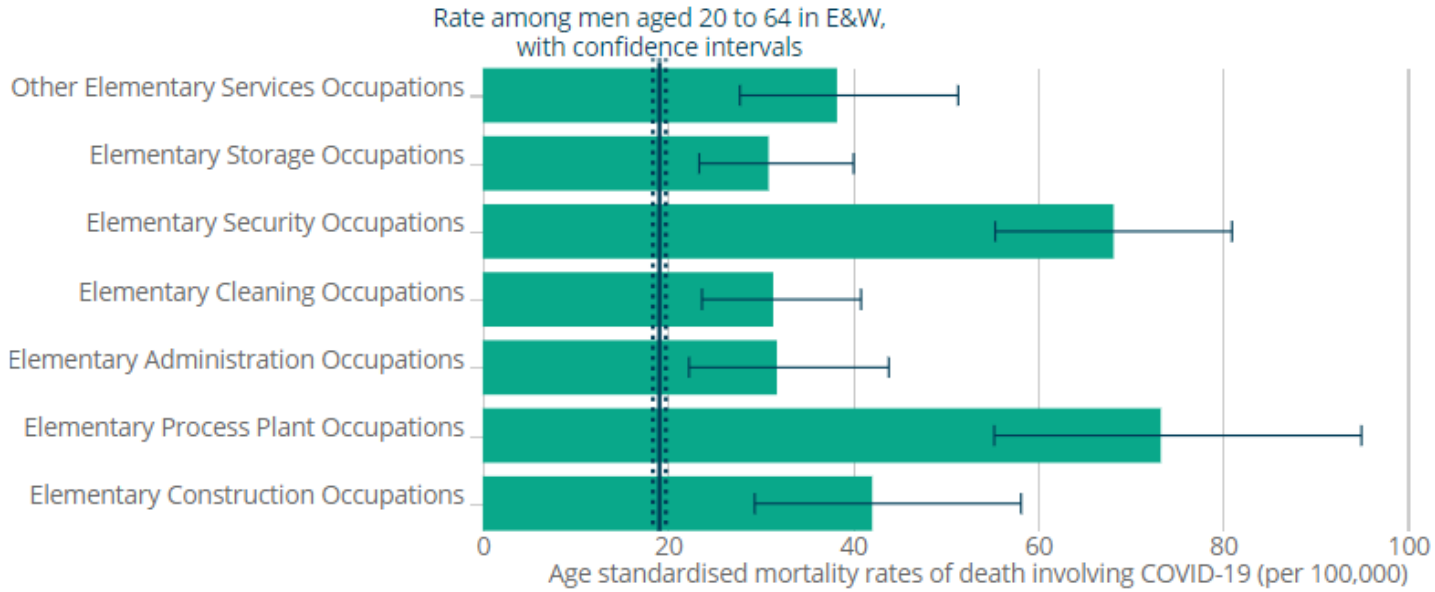
Occupations involving close and frequent interaction with others generally had the highest rates of death involving the COVID-19 among those of working age in England and Wales

For deaths registered between 9 March and 25 May 2020:

- Among men, elementary workers had the highest rate of death involving COVID-19, double the rate seen among men of the same age in the general population; this group includes jobs such as factory workers, security guards, construction workers, and cleaners.
- Men working in a range of other occupations with either direct or indirect contact with others had elevated rates, including bus drivers and taxi drivers, chefs, and sales and retail assistants.
- Women and men working in health and social care occupations, those on the frontline of the pandemic, also had elevated rates when compared with those of the same age and sex in the population.
- Social care occupations had the highest rates in the health and social care sector, explained by the number of registered deaths among men and women working as care workers and home carers.
- Of the individual health care occupations, elevated rates were only found among men and women working as nurses.

Among men, those working in elementary occupations had the highest rate of death involving COVID-19

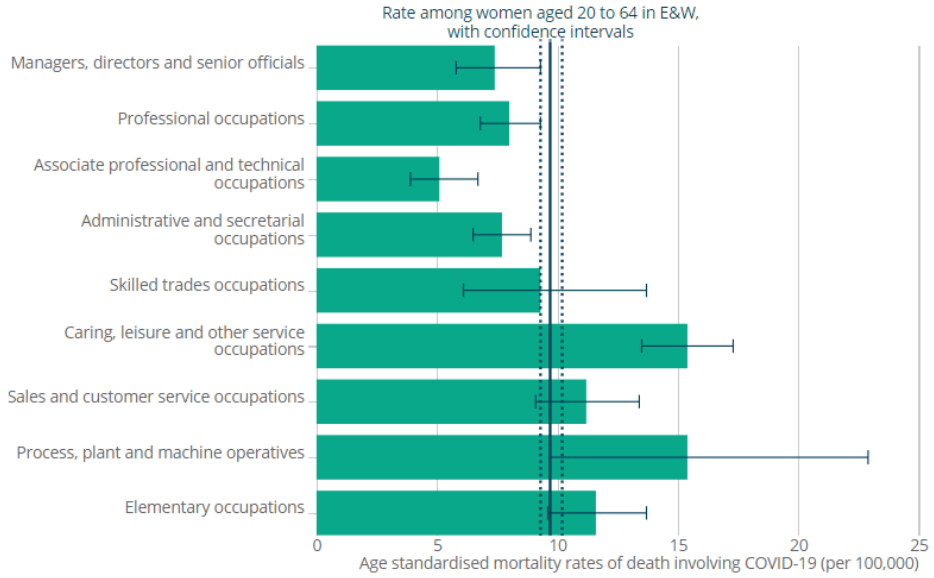
Age-standardised mortality rates of death involving the coronavirus (COVID-19) in England and Wales, deaths registered between 9 March and 25 May 2020



Source: Coronavirus (COVID-19) related deaths by occupation, England and Wales: deaths registered between 9 March and 25 May 2020

Women in caring, leisure, and other service occupations had the highest rate, explained by deaths among care workers and home carers

Age-standardised mortality rates of death involving the coronavirus (COVID-19) in England and Wales, women, deaths registered between 9 March and 25 May 2020



Source: Coronavirus (COVID-19) related deaths by occupation, England and Wales: deaths registered between 9 March and 25 May 2020

Lead analyst: Ben Windsor-Shellard

Rates of death involving COVID-19 by occupation were statistically significantly lower during lockdown than before lockdown

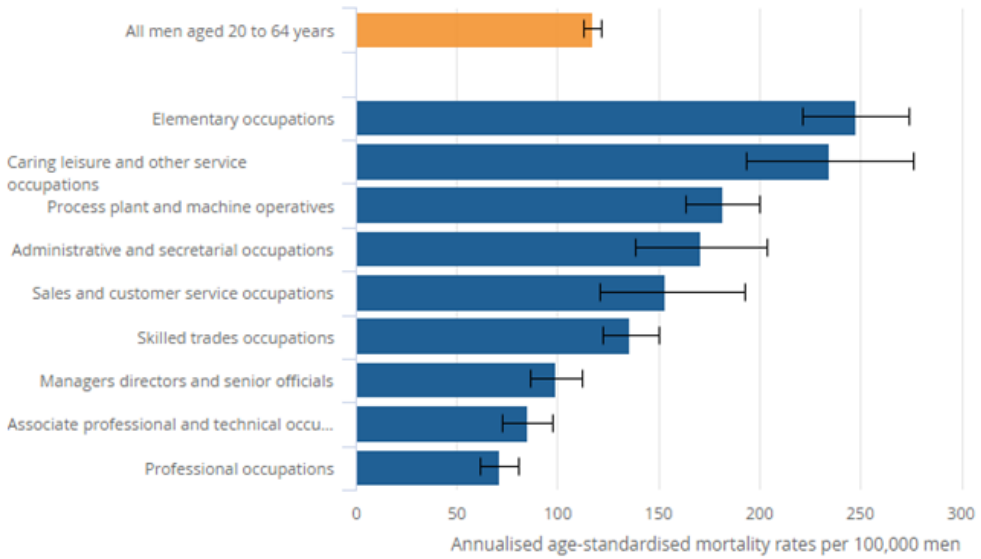
- Between 9 March and 30 June 2020, prior to the widespread easing of lockdown restrictions, 5,330 deaths involving COVID-19 in the working age population (those aged 20 to 64 years) of England and Wales were registered.
- 72.0% of the total number (3,839 deaths) were likely to be the result of an infection acquired before lockdown.
- For both sexes, age-standardised rates of death involving COVID-19 by occupation were statistically significantly lower during lockdown than before lockdown.

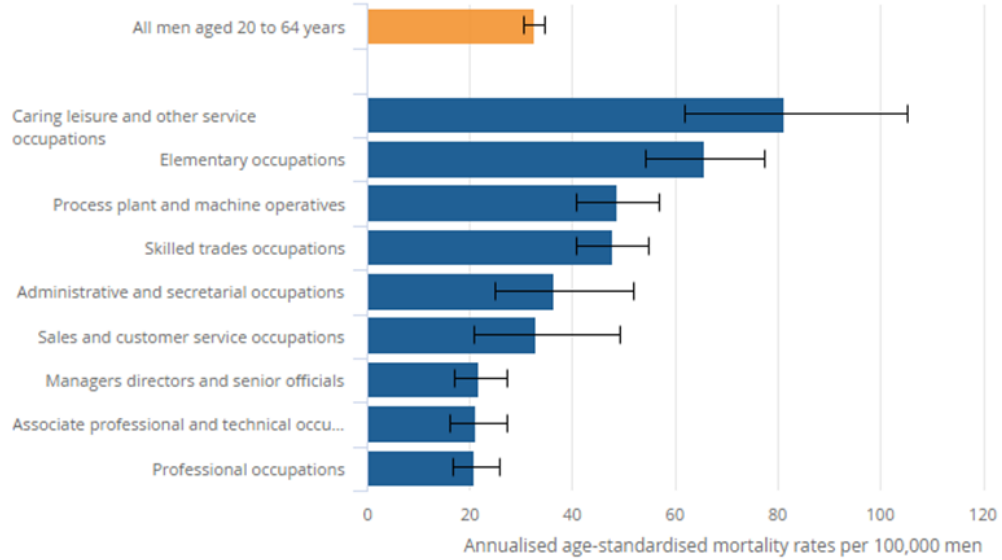
Some occupations continued to have high rates of COVID-19 mortality during lockdown

- Across the entire time period, some groups of occupations continued to have high rates of death involving COVID-19, when compared with rates among those of the same age and sex in the population.
- Among men, four of the nine major occupation groups (elementary; caring, leisure and personal services; process, plant and machine operatives; and skilled trades) had statistically significantly higher rates of death involving COVID-19 both before and during lockdown, when compared with rates among those of same age and sex in the population.
- Among health and social care professionals, rates of death involving COVID-19 in men were around three times higher when the virus was more likely acquired before lockdown than during lockdown; in women, rates were around two times higher.
- Reasons for these findings are complex, but factors like the level of exposure to others before and during lockdown, the ability to work from home, whether an occupation was furloughed, and where someone lives could all be playing a role.

For all groups of occupations, mortality rates among men were statistically significantly lower during lockdown, similar findings are true for women

Annualised age standardised rates of death involving COVID-19, deaths registered in England and Wales between 9 March 2020 and 30 June 2020 and occurred on or before 25 April 2020 (left) and on or after 26 April 2020 (right)





Coronavirus (COVID-19) related deaths by occupation, before and during lockdown, England and Wales: deaths registered between 9 March and 30 June 2020

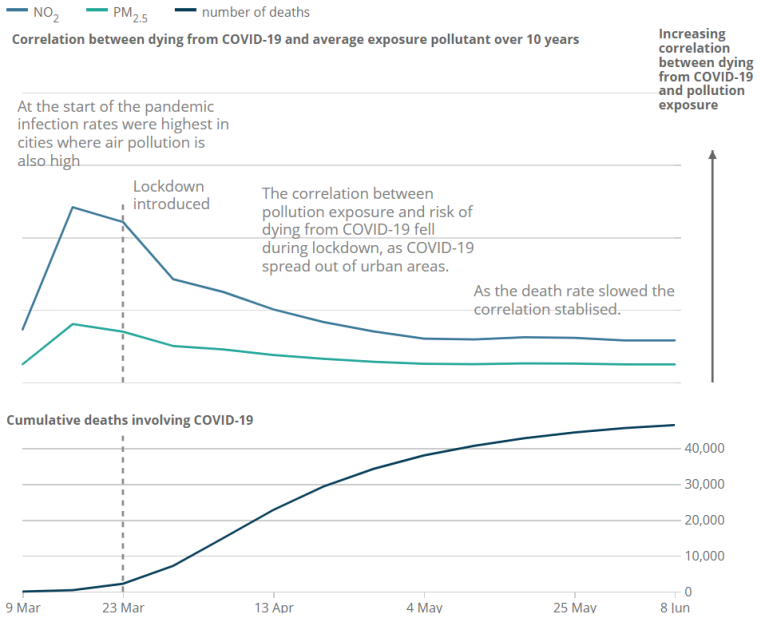
Lead analyst: Ben Windsor-Shellard and Asim Butt

The effects of long-term exposure to air pollution as a factor that increases COVID-19 mortality appear smaller than those reported in previous studies

- Some studies have suggested that long-term exposure to air pollution before the pandemic is associated with severe symptoms from COVID-19 and a greater risk of death.
- Our analysis shows that deaths involving COVID-19 were more common in highly polluted areas, particularly early in the pandemic.
- However, the correlation between pollution and mortality fell as deaths rose and lockdown was introduced, before levelling off in early May.
- Early COVID-19 deaths and exposure to dirty air was partly down to the outbreak in London (where pollution levels are generally higher than the rest of the country); up to the week when lockdown began (week ending 27 March 2020), 45% of COVID-19 deaths in England had occurred in the capital; by the week ending 12 June 2020 (cut-off date for this analysis), this had fallen to 18%.
- As the virus spread across the country and deaths became more evenly distributed, the correlation between air pollution exposure and COVID-19 mortality decreased.

Polluted areas initially had higher rates of COVID-19 deaths, but this trend decreased as the death toll rose

Correlation between COVID-19 deaths in England and 10-year exposure to nitrogen dioxide (NO_2) and fine particulate matter ($PM_{2.5}$)



Source: Does exposure to air pollution increase the risk of dying from the coronavirus (COVID-19)?; Coronavirus (COVID-19) related mortality rates and the effects of air pollution in England

Lead analyst: Adam Dutton

Air pollution exposure could be a contributing factor if it causes COVID-19 deaths, with the BAME population more likely than those of White ethnicity to live in inner city areas

- Ethnicity is strongly correlated with pollution exposure, with ethnic minorities more likely to live in polluted areas; however, when controlling for ethnicity in our model, air pollution exposure has no statistically significant impact on COVID-19 deaths.
- Air pollution is just one of many factors that could be driving disproportionate outcomes for minority ethnic groups; the increased risk of dying from COVID-19 (found when ethnicity is not controlled for) is likely to be an overestimate of the true effect.
- Our previous analysis on COVID-19 death rates among people of Black, Asian and Minority Ethnicity (BAME) are higher.
- Air pollution may or may not be one of the drivers of COVID-19-related higher mortality amongst ethnic minorities; however, the many risk factors correlated with dense populations could not be fully disentangled at this level of granularity and without a strong control for infection rate.

Natural environment

This section includes analysis on access to green spaces during the pandemic and how this varied for certain populations in our society.

One in eight British households had no access to a garden during the COVID-19 lockdown

Private gardens

- In England, Black people are nearly four times as likely as White people to have no access to outdoor space at home, whether it be a private or shared garden, a patio or a balcony (37% compared with 10%).
- Even when comparing people of similar age, social grade and living situation, those of Black ethnicity are 2.4 times less likely than those of White ethnicity to have a private garden (further analysis).
- People in semi-skilled and unskilled manual occupations, casual workers, and those who are unemployed are almost three times as likely as those in managerial, administrative or professional occupations to be without a garden (20% compared with 7%).
- Older people – those at greater risk of severe illness from COVID-19 and advised to stay at home as much as possible – are among those most likely to have access to a garden.

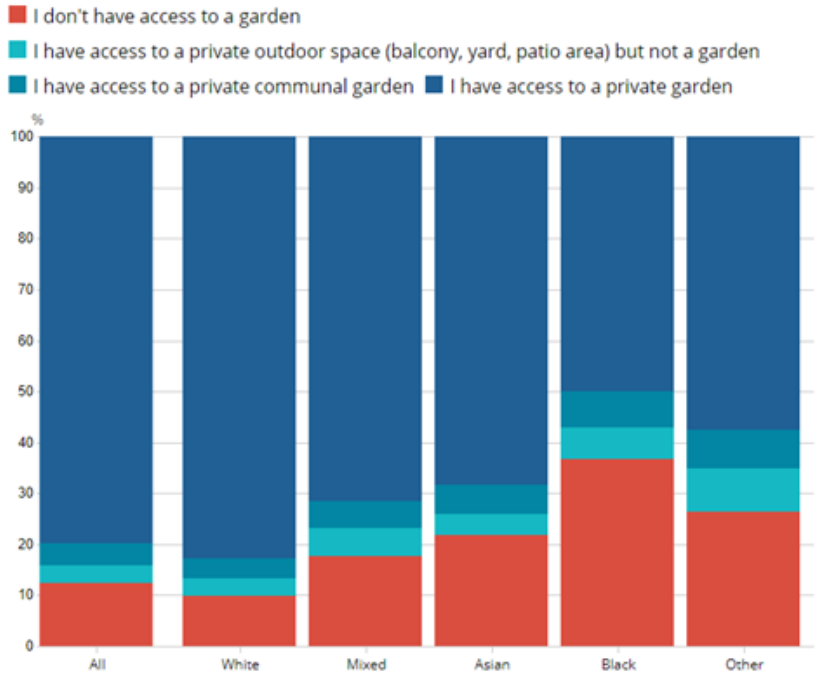
More than a quarter of people in Great Britain live within a five-minute walk of a public park

Parks

- People living in areas least likely to have a private garden are most likely to live close to a public park.
- Using Ordnance Survey (OS) data, we estimate that more than a quarter of people (28%) in Great Britain live within a five-minute walk of a public park (based on an approximate crow flies distance metric), while 72% live less than 15 minutes away.
- London has the highest percentage of its population living within five minutes of a public park (44%).
- The average park in Great Britain serves just under 2,000 people, although some parks in densely populated areas cater for many more; around 46,000 people have Clapham Common as their nearest park, more than 20 times the average.

People from minority ethnic group are less likely to have access to a private garden

Percentage of people with access to a private garden, by ethnic group, England, 2014 to 2019



Source: One in eight British households has no garden

Lead analyst: Adam Dutton

Impact on mental health

This section includes analysis on how our society's mental health has been affected, particularly well-being, loneliness, depression and anxiety

Levels of anxiety declined after the start of lockdown; this stabilised in June and July and may have begun to increase again since late September

- Levels of happiness and anxiety, which tend to reflect more immediate or acute feelings, saw the greatest change as lockdown was introduced compared to pre-pandemic levels (February 2020).
- These measures stabilised in June and July 2020, returning closer to pre-lockdown levels (February 2020). as restrictions started to ease across the UK. More recently, through September and October 2020, levels of anxiety have started to increase and levels of happiness started to decrease again, as more of Great Britain faces more restrictions through local lockdowns, firebreaks, and COVID-19 alert levels.
- The other two measures of life satisfaction or feeling things you do in life are worthwhile, which tend to reflect a longer term view on life, have stayed closer to pre-lockdown levels (February 2020), however the measure of life satisfaction has started to decrease through October and September 2020, reaching its lowest level between 14 and 18 October 2020.

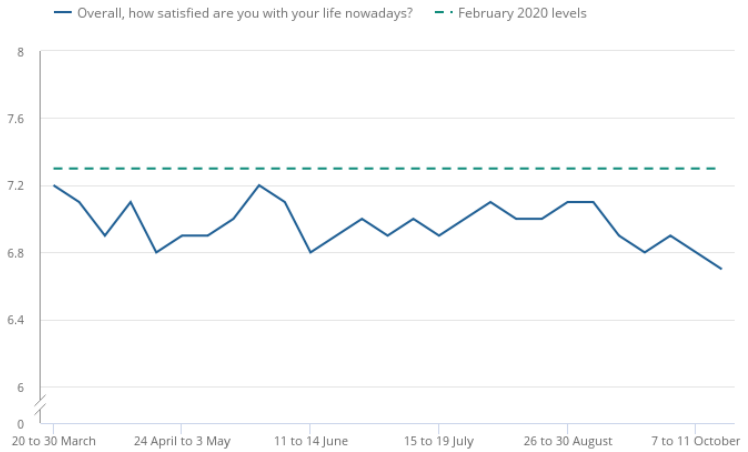
Mean scores for personal well-being ratings

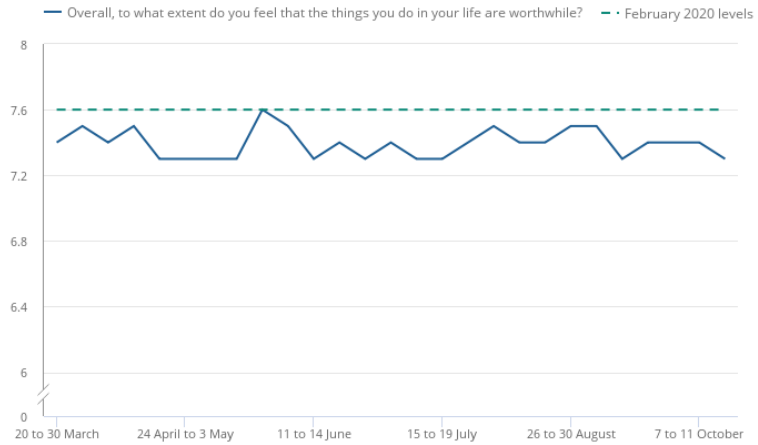
Great Britain, February[1] to October 2020

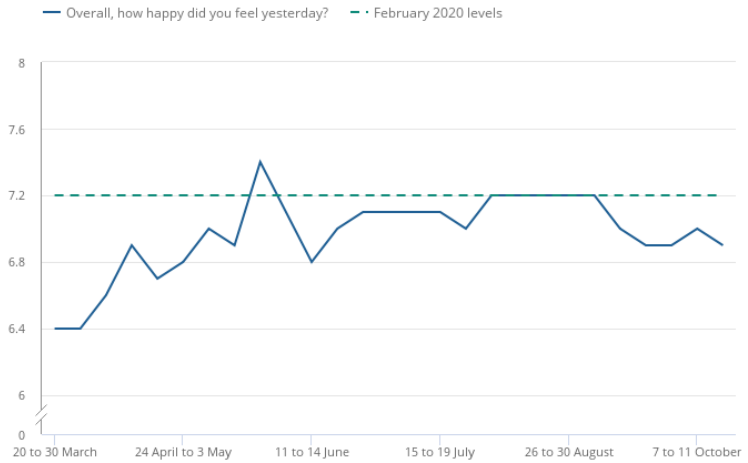
[1]Well-being levels are presented for February 2020 as a dashed line providing a reference point to pre-COVID-19 levels. These data are from the monthly Opinions and Lifestyle Survey (OPN), which differs in sampling and methodological approaches used in the weekly OPN, which was introduced from 20 March 2020.

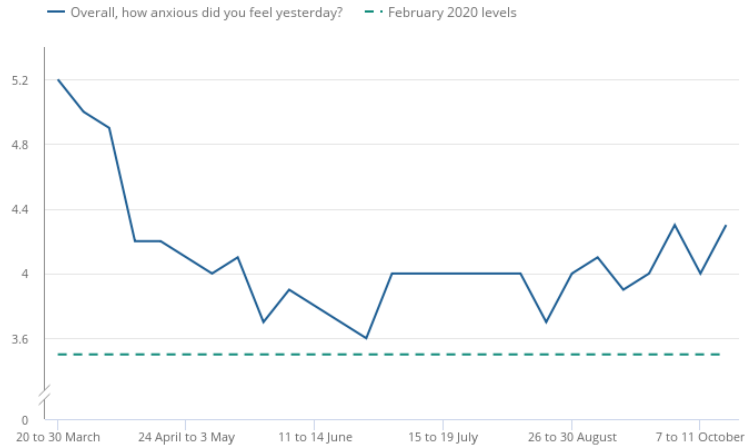
Questions: “Overall, how satisfied are you with your life nowadays?”; “Overall, to what extent do you feel that the things you do in your life are worthwhile?”; “Overall, how happy did you feel yesterday?”; and “Overall, how anxious did you feel yesterday?”.

Each of these questions is answered on a scale of 0 to 10, where 0 is “not at all” and 10 is “completely”.









Source: Opinions and Lifestyle Survey, ONS

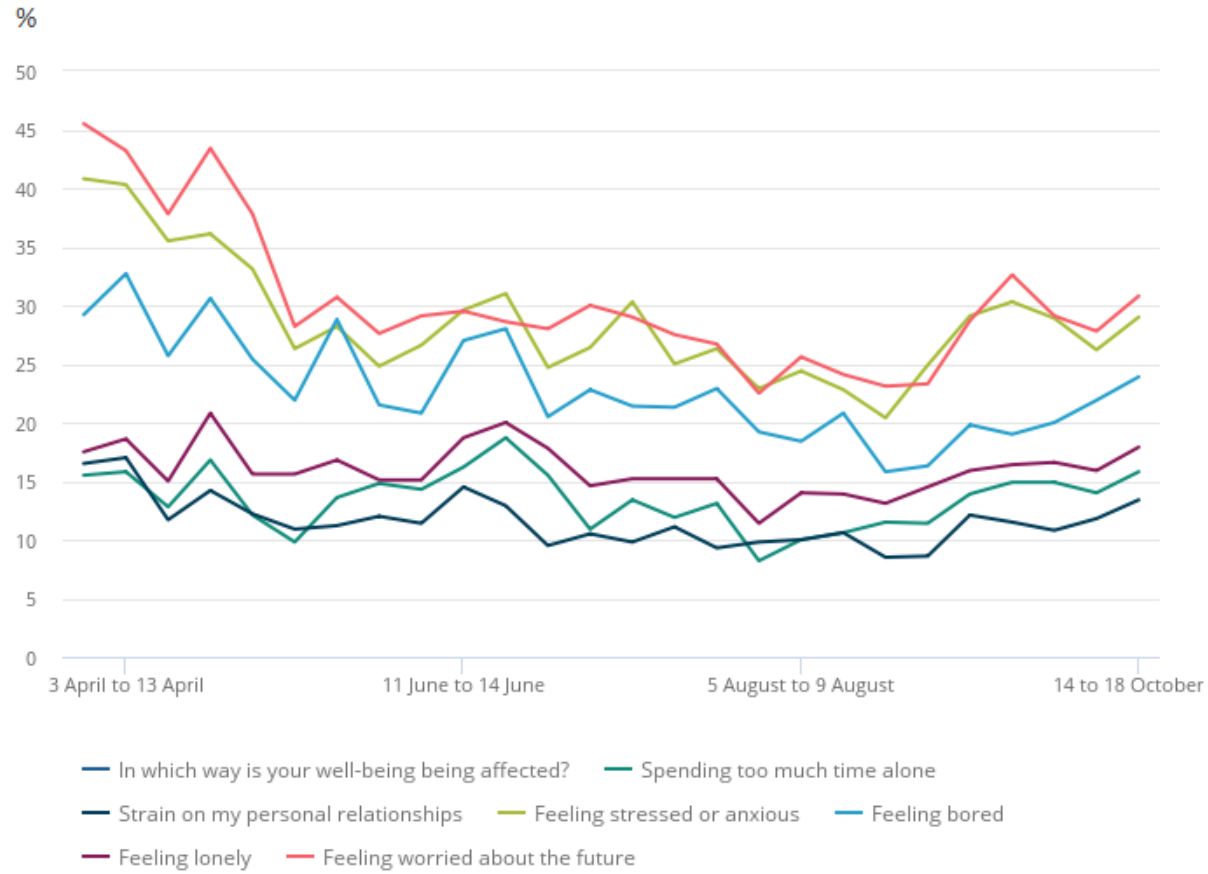
Lead analyst: Andrea Lacey

In April, half of adults said their well-being was affected by the pandemic

- By mid-April, many had been confined to their homes, except for essential shopping and exercise, for several weeks. Around 45% of adults said they were worried about the future, and this remained the factor that most people said was impacting their well-being; other common reasons were boredom, feeling stressed or anxious, or feeling lonely.
- However, throughout April, more than three-quarters of adults said that staying in touch with family and friends remotely helped them to cope. While many struggled, some people saw improvements to their well-being: **“My well-being is very positive as I have exercised more and am now much fitter.”**
- Others reported an increased sense of community spirit, with 80% of adults saying they thought people were doing more to help others since the outbreak. This helped some with feeling less isolated: “**The village has organised volunteers who will help if needed.”**
- As the pandemic progressed, loneliness peaked in mid-June, with a fifth of adults saying they felt lonely between 18 and 21 June 2020.
- For others, the problem was spending too much time with others in their household; by June, the proportion of adults reporting a strain on their personal relationships was at its highest at 15%: **“I have absolutely no me time and it feels like wall to wall family time.”**

Main reasons for well-being being affected by the coronavirus (COVID-19) pandemic

Great Britain, March to October 2020



Source: Opinions and Lifestyle Survey, ONS

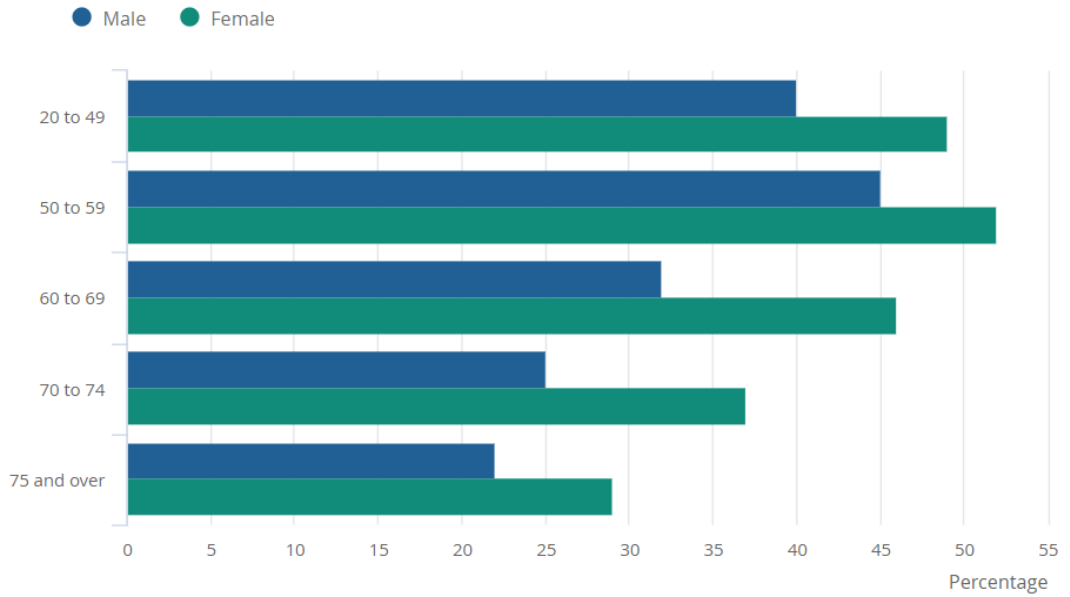
Lead analyst: Andrea Lacey

Of those that were shielding, the majority of clinically extremely vulnerable (CEV) people stated their mental health had not been affected and around a third reported it had got worse since being advised to shield

- An estimated 785,000 (35%) of clinically extremely vulnerable (CEV) people reported a worsening in their mental health or well-being since receiving shielding guidance.
- CEV females were more likely to report a worsening in their mental health or well-being than CEV males, regardless of age.
- Guidance for shielding changed on 6 July 2020 to include forming a support bubble; between 9 and 16 July 2020, of the CEV people who received at least one visitor who was not providing care, 36% only had visitors from within their support bubble.
- In mid-July, 6% of CEV people who normally worked were planning not to return to work in the next four months.

Clinically extremely vulnerable females were more likely to report a worsening in their mental health, regardless of age, than clinically extremely vulnerable males

Percentage of clinically extremely vulnerable people who reported a worsening in their mental health, by gender and age group, England, 9 to 18 June 2020



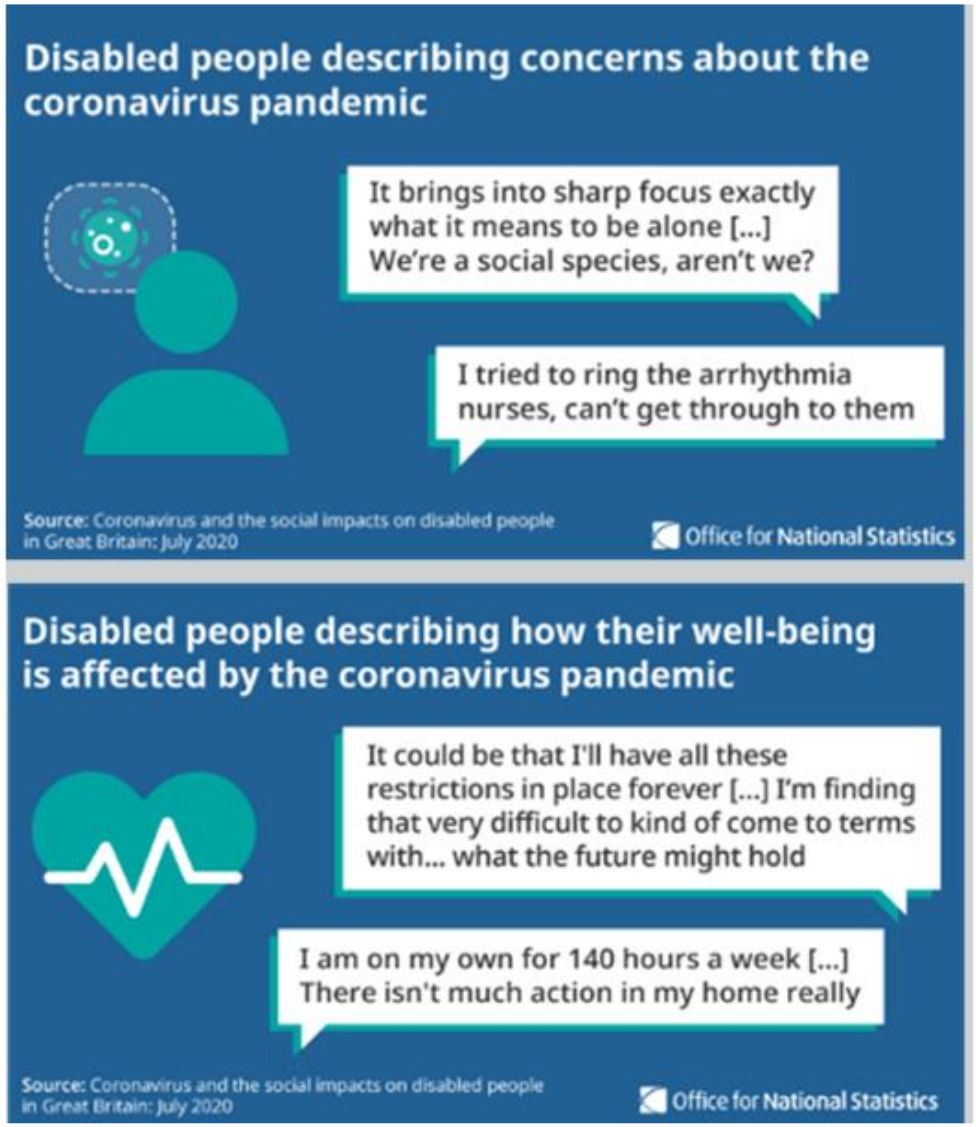
Source: Coronavirus and shielding of clinically extremely vulnerable people in England: 9 June to 18 June 2020

Lead analyst: Tim Gibbs

Disabled people were concerned about the impacts of COVID-19 on their well-being

- In July 2020, as lockdown restrictions began to ease, around three-quarters of disabled people (75%) reported they were “very worried” or “somewhat worried” about the effect that COVID-19 was having on their life (66% for non-disabled people).
- A quarter of disabled people were most concerned about the impact of the coronavirus pandemic on their well-being (24%); next most frequently, 13% of disabled people reported being most concerned about access to health care and treatment (13% and 3% for non-disabled people).
- Disabled people continued to experience poorer well-being ratings than before the pandemic started; in July, 45% of disabled people reported high anxiety, compared with 29% of non-disabled people.

Disabled people were concerned about the impacts of COVID-19 on their well-being in July 2020



Source: Coronavirus and the social impacts on disabled people in Great Britain: July 2020

Lead analysts: David Ainslie and Josephine Foubert

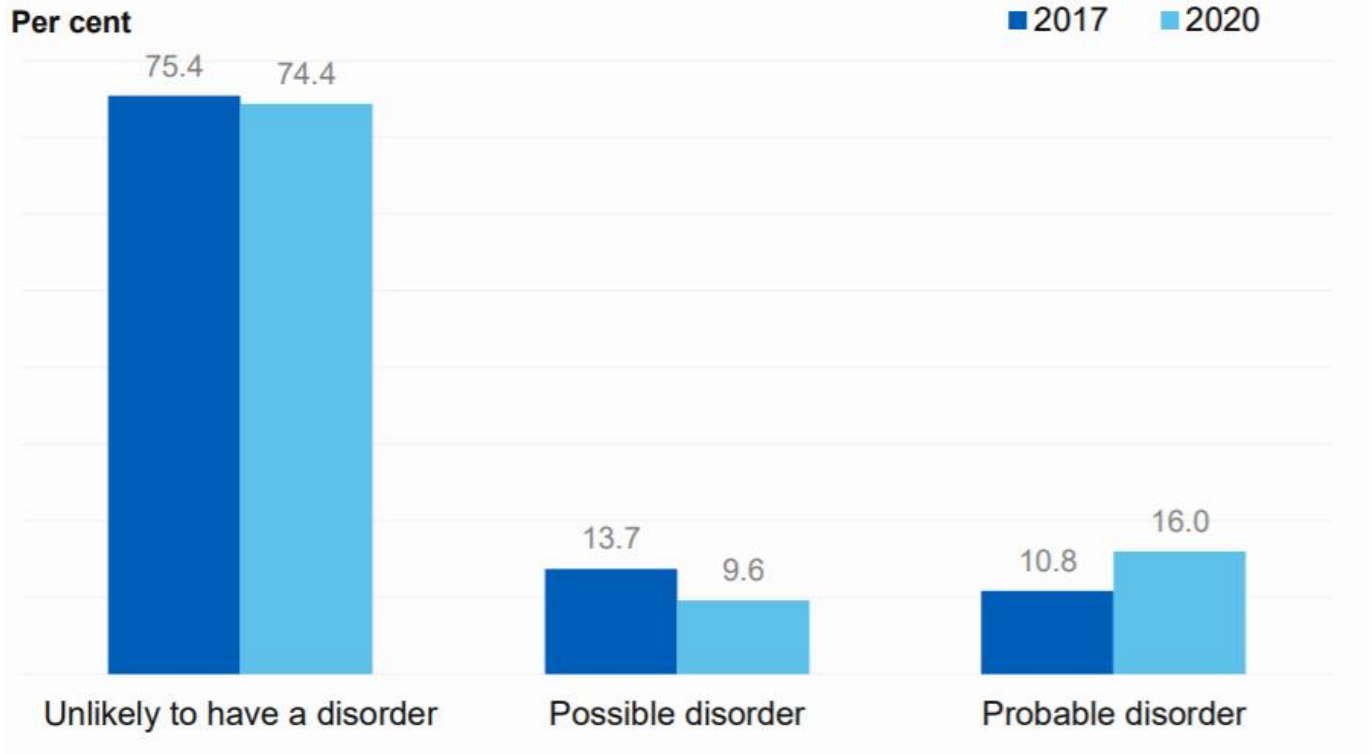
The proportion of children experiencing a probable mental disorder has increased over the past three years, from one in nine in 2017 to one in six in July this year.

Since March 2020, children and young people have experienced major changes in their lives. NHS Digital, in collaboration with the ONS, the National Centre for Social Research, the University of Cambridge and the University of Exeter took a look at the mental health of children and young people in England in July 2020 and how this has changed since 2017.

- In 2020, one in six (16.0%) children aged 5 to 16 years were identified as having a probable mental disorder, increasing from one in nine (10.8%) in 2017; the increase was evident in both boys and girls.
- The likelihood of a probable mental disorder increased with age with a noticeable difference in gender for the older age group (17 to 22 years); 27.2% of young women and 13.3% of young men were identified as having a probable mental disorder in 2020.
- Children and young people with a probable mental disorder were more likely to say that lockdown had made their life worse (54.1% of 11- to 16-year-olds and 59.0% of 17- to 22-year-olds) than those unlikely to have a mental disorder (39.2% and 37.3% respectively).

Percentage of children with an unlikely, possible and probable mental disorder, 2017 and 2020

Base: 5- to 16-year-olds in England



Source: NHS Digital, The Mental Health of Children and Young People in England, 2020

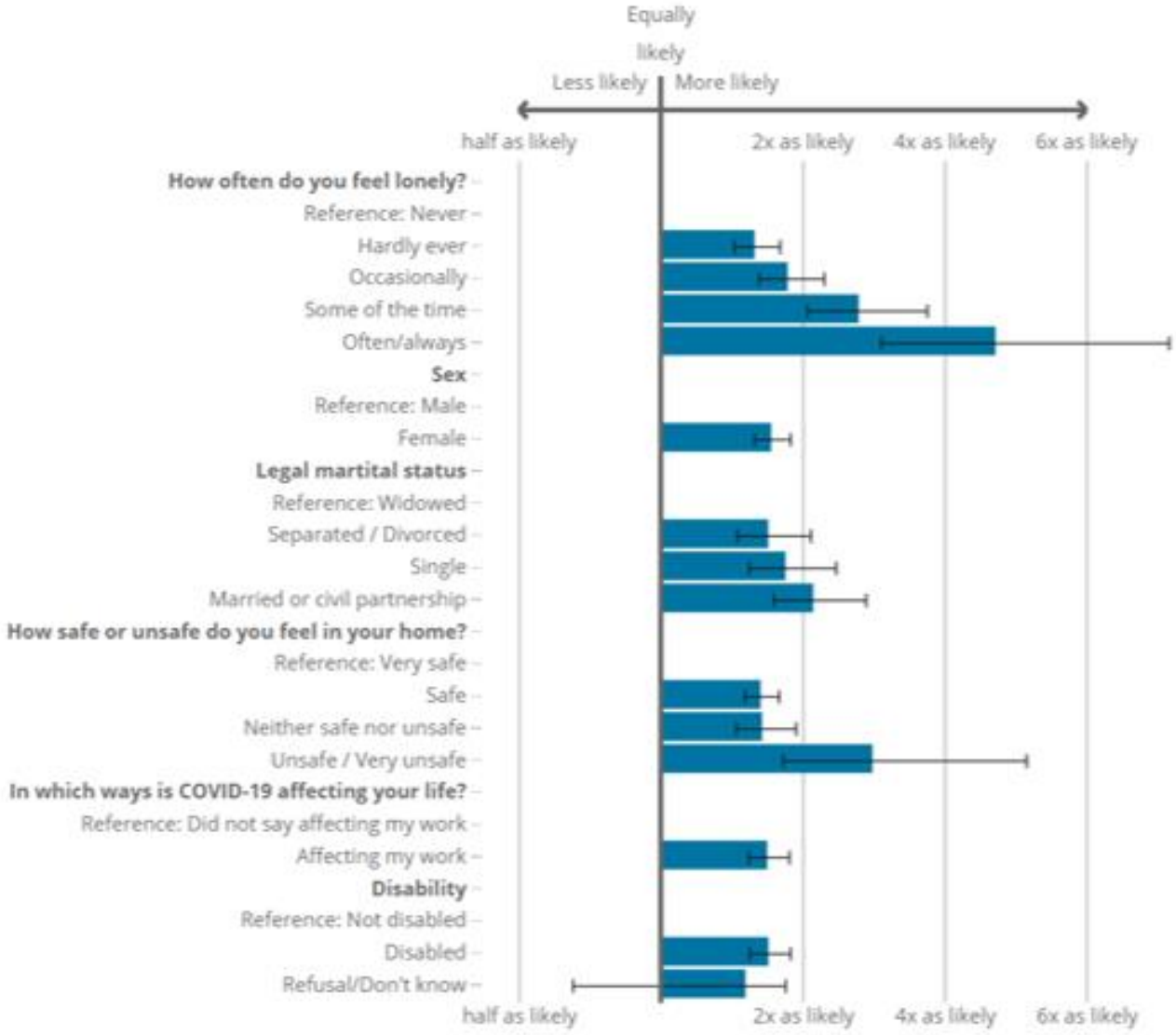
Lead analysts: Tim Vizard, Jodie Davis, Tracy Williams and Charlotte Leach

The factors most strongly associated with high anxiety during lockdown included loneliness, marital status, sex, disability, whether someone feels safe at home or not, and work being affected by the pandemic

- Feeling lonely was the factor most strongly associated with reporting high anxiety – people who “often or always” felt lonely were almost five times more likely to report high anxiety than those who “never” felt lonely.
- The percentage who reported high levels of anxiety significantly increased for people who are married or in a civil partnership during lockdown to 39%, up from 19% in the last quarter of 2019; prior to the pandemic, the percentage reporting high anxiety was lowest for people who are married or in a civil partnership compared with all other marital status groups.
- Those who are married or in a civil partnership are more likely to be balancing homeschooling alongside other commitments, with one in four people homeschooling during the pandemic, compared with approximately 1 in 10 people who are single, separated or divorced.
- Those aged 75 years and over were almost twice as likely as those aged 16 to 24 years to report high anxiety during lockdown; analysis of data prior to lockdown suggests anxiety tended to be lowest among those aged from their mid to late 60s, remaining relatively stable in later years.

Odds ratios of factors affecting high anxiety

Great Britain, 3 April to 10 May 2020



Source: Coronavirus and anxiety, Great Britain: 3 April 2020 to 10 May 2020

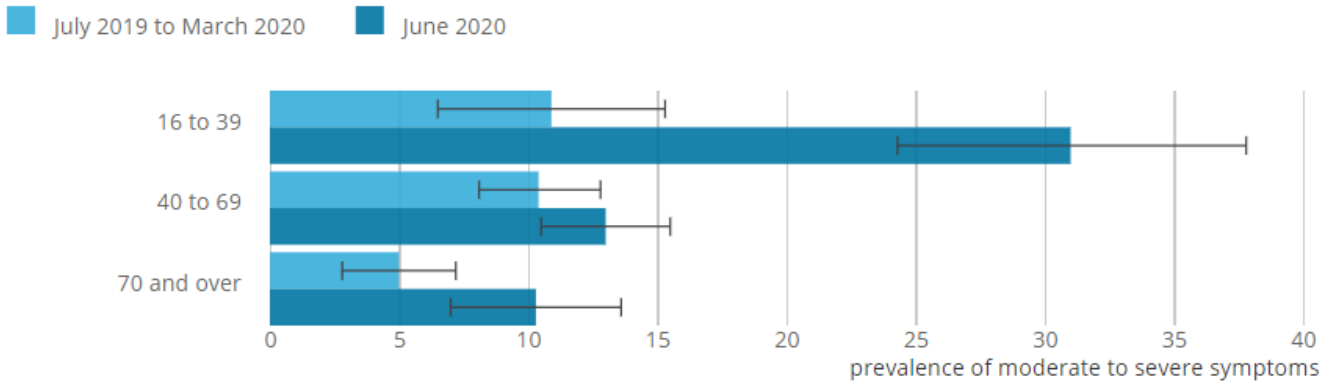
Lead analyst: Lucy Tinkler

Almost one in five adults were likely to be experiencing some form of depression during the pandemic; almost double the proportion before the pandemic

- Depression is among the most common types of mental disorders experienced by adults in Great Britain; it can affect people in different ways and can cause a wide variety of symptoms. Ranging from lasting feelings of unhappiness and hopelessness to losing interest in the things they used to enjoy and feeling very tearful.
- Almost one in five adults (19.2%) were likely to be experiencing some form of depression during the pandemic in June 2020; this had almost doubled from around 1 in 10 adults (9.7%) before the pandemic (July 2019 to March 2020).
- One in eight adults (12.9%) developed moderate to severe depressive symptoms during the pandemic, while a further 6.2% of the population continued to experience this level of depressive symptoms; around 3.5% of these saw an improvement over this period.
- Adults who were aged 16 to 39 years old, female, unable to afford an unexpected expense, or disabled were the most likely to experience some form of depression during the pandemic.

Younger adults were more likely than other adults to have some form of depression in June 2020

Great Britain, July 2019 to June 2020



Source: Coronavirus and depression in adults, Great Britain: June 2020

Lead analysts: Tim Vizard, Jodie Davis, Emmie White and Bella Beynon

When assessing loneliness during the pandemic to date (20 March to 18 October 2020), there had been no significant change in the proportion of adults aged 16 years and over reporting chronic loneliness

The coronavirus pandemic has had the potential to greatly impact people's well-being, including reported loneliness. This has been especially true during lockdown, as people's relationships and daily norms were directly impacted.

We looked at two measures of loneliness during the coronavirus pandemic. These were:

- "Chronic loneliness" – this measures the percentage of those who feel lonely "often or always" and;
- "Lockdown loneliness" – this measures the percentage of those who said their well-being had been affected through having felt lonely in the last seven days; this question was only asked to respondents who had already reported that their well-being had been affected in the past seven days and that they were "very" or "somewhat worried" about the effect of the coronavirus on their life.

Since we began collecting data on loneliness during the pandemic, there has been no week-on-week increase in those reporting "often or always" lonely in the Great British population. However, in the week 14 to 18 October we may have signs that those reporting "often or always" lonely is beginning to increase, although it is too soon to say whether this is the start of a trend.

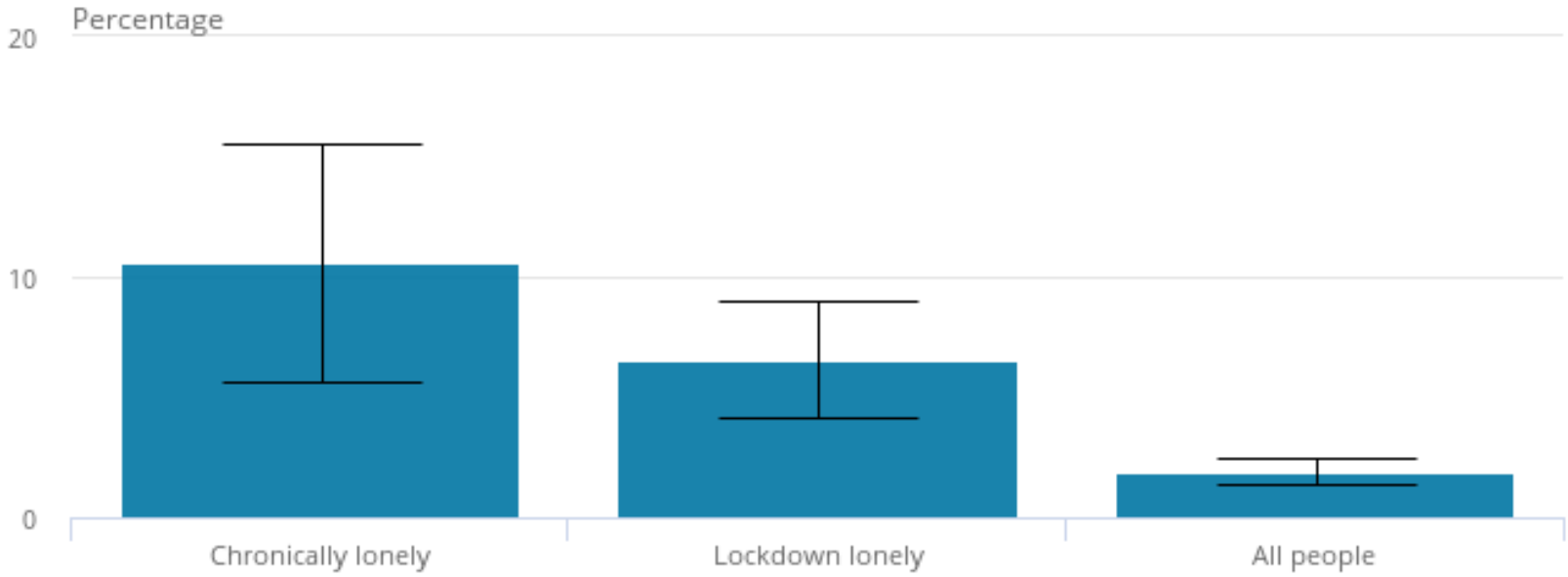
5.0% of people in Great Britain (2.6 million adults) reported that they felt lonely “often” or “always” between 3 April and 3 May 2020, about the same proportion as pre-lockdown

During the lockdown, between 3 April to 3 May 2020, we looked at the characteristics of those reporting “lockdown” and “chronic” loneliness and inequalities emerged. We found:

- 5.0% of people in Great Britain (2.6 million adults) reported “chronic loneliness”, about the same proportion as pre-lockdown.
- 30.9% (7.4 million adults) reported their well-being had been affected by “lockdown loneliness”.
- working-age adults living alone were more likely to report both “chronic” and “lockdown” loneliness than the average adult; this was also the case for those in “bad” or “very bad” health, in rented accommodation, or who were either single, divorced, separated, or a former or separated civil partner.
- those “chronically lonely” were no more likely than the Great Britain average to use a particular activity to help them cope, but they were less likely to use spending time with other household members, keeping up with family and friends, cooking, exercising, gardening and working.

Both the chronically lonely and the lockdown lonely groups are more likely to be struggling to find things that help them cope with lockdown

Percentage of adults saying that they are struggling to find things that help while staying at home, Great Britain, 3 April to 3 May 2020



Source: Coronavirus and loneliness, Great Britain: 3 April to 3 May 2020

Lead analysts: Eleanor Rees and Rebecca Large

Household and community impact

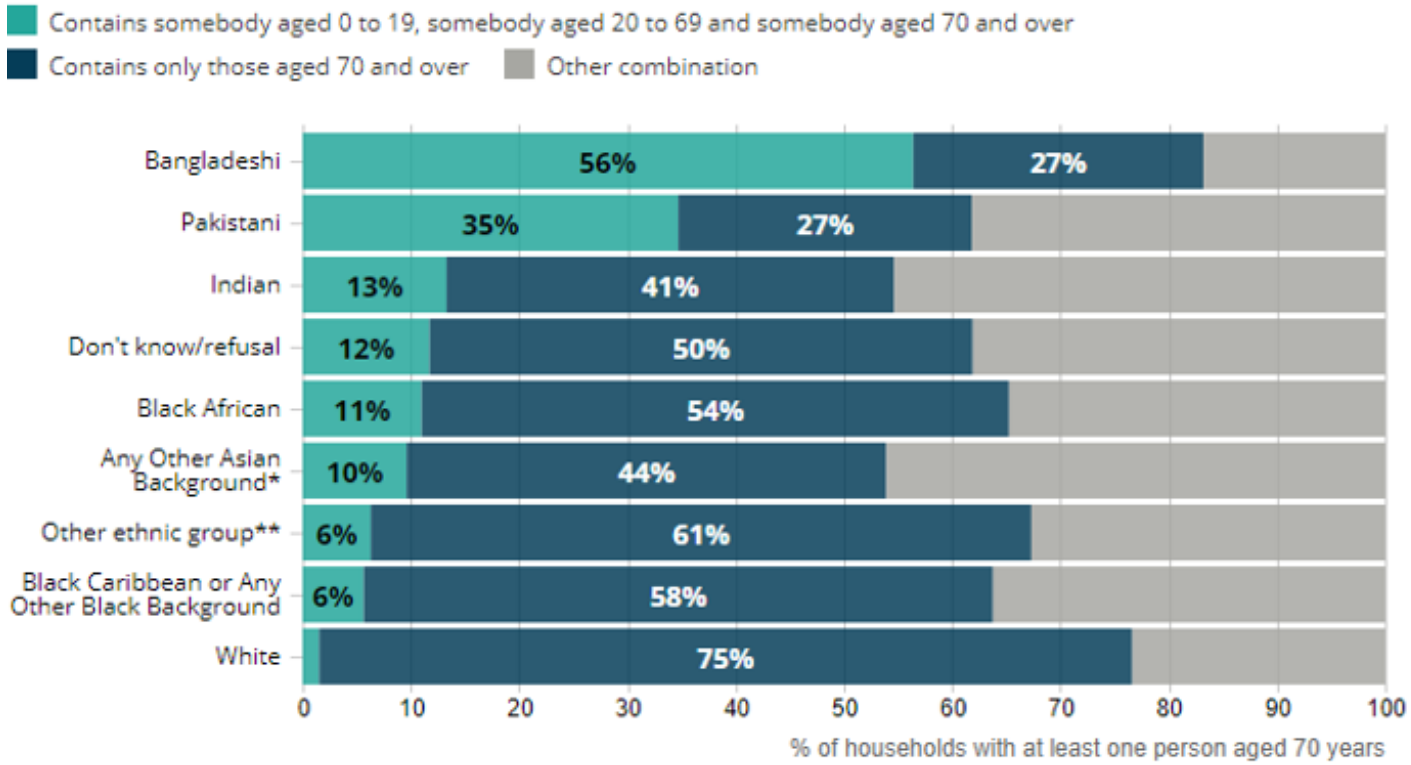
This section includes analysis on how different households have been affected by the pandemic and how communities have responded

Older people living in multigenerational households may be more exposed to COVID-19

- People aged 70 years or over from certain ethnic groups are more likely to live with those from a range of ages.
- Households containing someone aged 70 years or over are most likely to contain a mix of ages living together if that person's ethnicity is Bangladeshi (56%) or Pakistani (35%)
- Older people who live with more than one generation of people may be more exposed to COVID-19.
- Over 80% of deaths registered up to 25 September 2020 that mention COVID-19 on the death certificate in England and Wales relate to someone aged 70 years or over.

Households containing someone aged 70 years or over are more likely to contain a mix of ages living together if that person's ethnicity is Bangladeshi or Pakistani

Proportion of households with at least one person aged 70 years or over by ethnic group of that person, by mix of ages in the household, UK, 2018



Source: ONS Coronavirus (COVID-19) roundup: Mutigenerational households

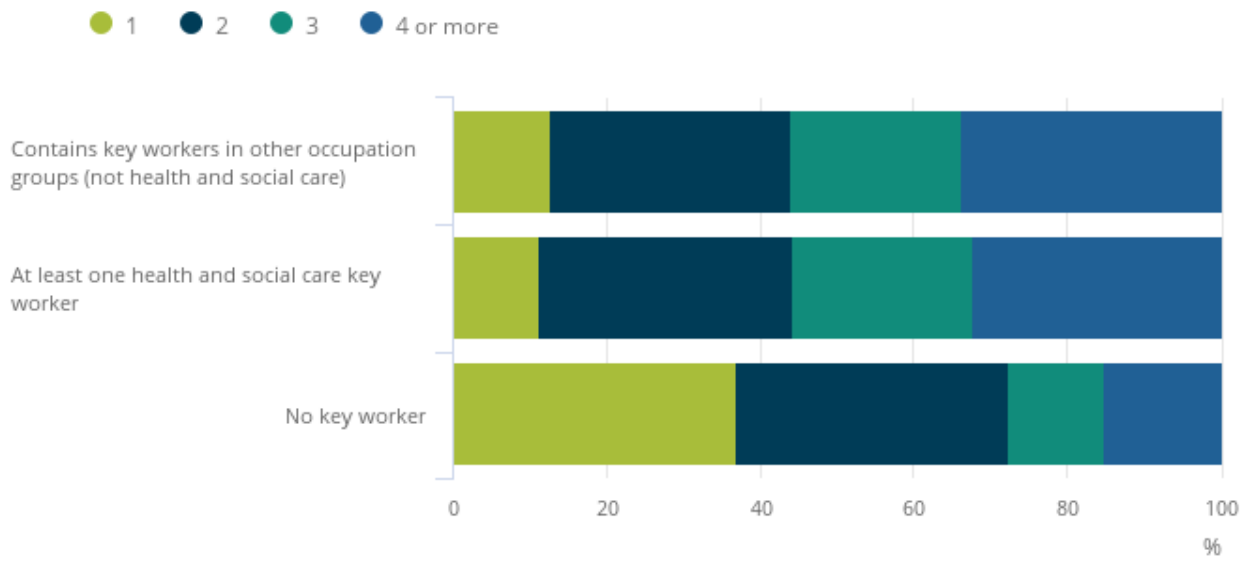
Lead analyst: Pamela Cobb

Households containing key workers are more likely to be larger than other households in the UK, increasing the risk of COVID-19 exposure

- 30% (8,340,132) of households in the UK contain at least one key worker. 10% (2,809,000) of households contain at least one health and social care key worker.
- Over 30% of households containing at least one key worker include four or more people (32% for those containing a health and social care key worker and 34% for households with other key workers only) compared with only 15% of households without a key worker.
- Households containing a key worker may be at more risk of exposure to COVID-19.
- Households without key workers are more likely to contain someone aged 65 years or over (41%) than those that contain at least one health and social care key worker (8%) or other key worker only (9%).

Around one in three households containing a key worker contained four or more people

Households by presence of health and social care key workers, and number of people in the household, UK, April to June 2019



Sources: Estimated number of households by presence of key workers and people age 65 years and over, English regions and other UK countries, 2019 and Labour Force Survey (LFS) – Quarter 2 (Apr to June) 2019

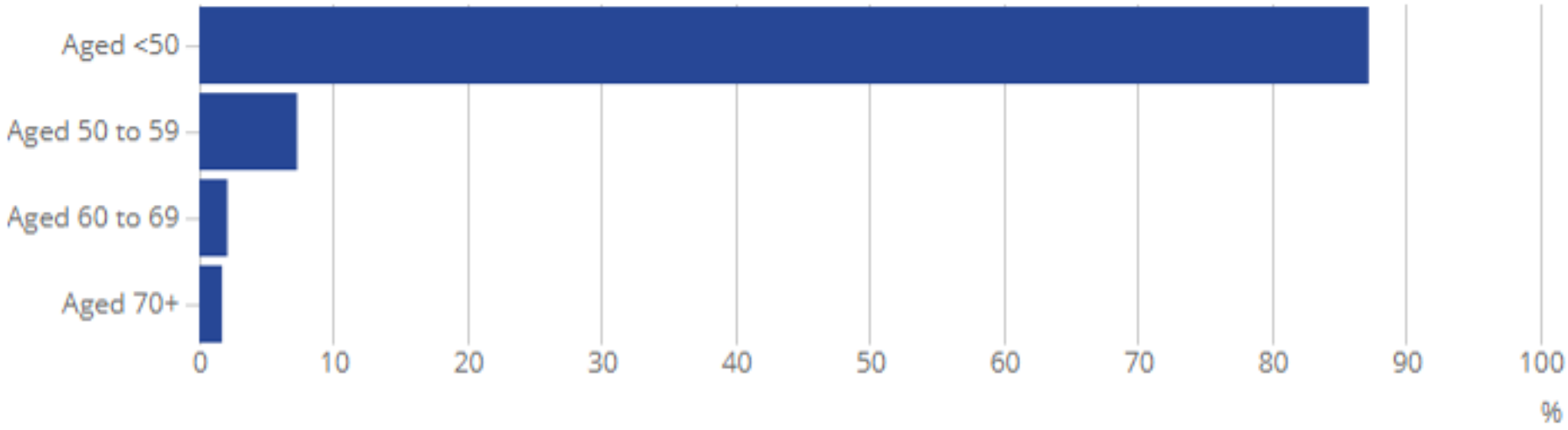
Lead analyst: Pamela Cobb

People living with primary school-aged children may have been more exposed to COVID-19 following a return to school from 1 June 2020 in England

- As part of guidance set out by the government, children in reception, year 1 and year 6 in England were strongly encouraged to return to school from 1 June 2020.
- We estimated that there were approximately 2.1 million children in these year groups (43% of all primary school-aged children).
- Up to 680,000 (17.5% of all families with primary or early years aged children) of families could have expected all their children to return to school.
- This could have potentially allowed an estimated 1 million people in employment in these families to return to work (3.8% of the total workforce in England).
- The majority of parents living with one or more primary school-aged children are themselves aged 35 to 39 years (27%) or 40 to 44 years(25%).
- The majority (87.2%) of primary school-aged children do not live with anyone over the age of 50, but 7.3% live with someone aged 50 to 59 years and 1.7% live with someone aged 70 years and over.

A small minority of primary school-aged children are living with someone aged 70 years and over

Primary school aged children living in a household, by age of oldest household member, England, October to December 2019



Sources: ONS Coronavirus (COVID-19) roundup: Children returning to school and Estimates of the age distribution of parents of primary school aged children: England, Oct to Dec 2019

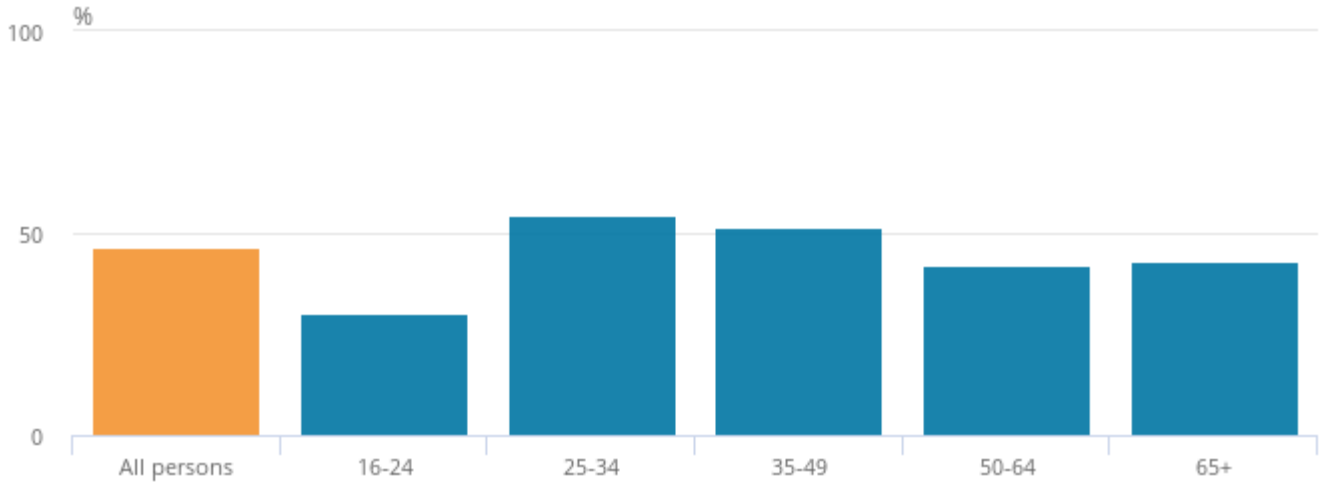
Lead analyst: Pamela Cobb

During April 2020, most people who did some work at home did so as a result of COVID-19

- 46.6% of people in employment did some work at home during April 2020. 86.0% of these individuals did so as a result of COVID-19.
- Of those who did some work from home, around one-third worked fewer hours than usual (34.4%) and around one-third worked more hours than usual (30.3%).
- Women were slightly more likely to do some work at home than men, at 47.5% and 45.7% respectively.
- People aged 16 to 24 years were less likely to do some work from home than those in older age groups.
- Occupations requiring higher qualifications and more experience were more likely to provide homeworking opportunities than elementary and manual occupations.

People aged 16 to 24 years were less likely to do any work from home than other age groups

Homeworking rates, by age, of those in employment (aged 16 years and over), UK, April 2020



Source: Coronavirus and homeworking in the UK: April 2020

Lead analyst: Alastair Cameron

Nearly two-thirds of working adults said their work was being affected by COVID-19 in May, but this has decreased to just under half of working adults in October

The percentage of working adults[1] who said their work had been impacted because of the pandemic has been gradually declining. During May, around two-thirds of working adults[1] said this, but by August this had fallen to under half. The main impacts have remained consistent over these months:

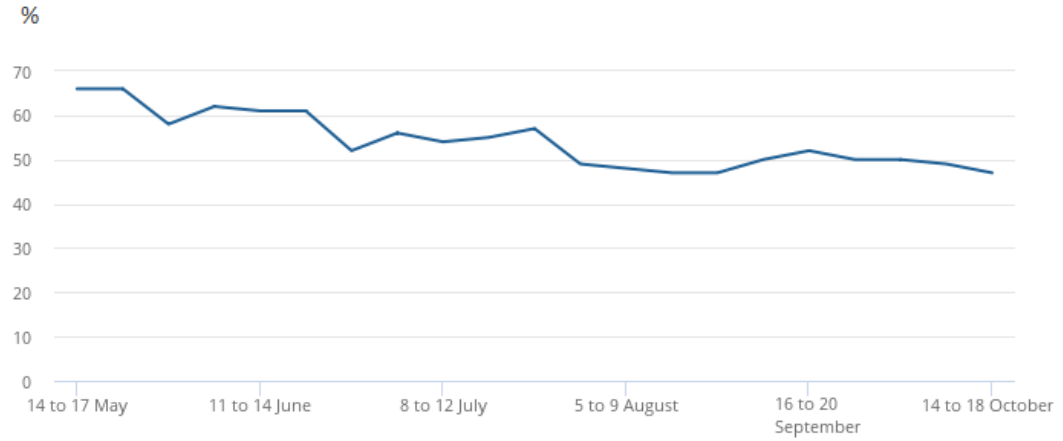
- furloughed;
- asked to work from home;
- decrease in hours worked and
- finding working from home difficult.

As lockdown restrictions eased, there has been a steady rise in the percentage of working adults travelling to work, either exclusively or in combination with working from home.

[1]The working population is those who said they had a paid job, either as an employee or self-employed; or said they did any casual work for payment; or said they did any unpaid or voluntary work in the previous week.

The percentage of working adults[1] that say their work is being affected by the coronavirus pandemic is gradually declining

Percentage of working adults, Great Britain, May to October 2020



[1]The working population is those who said they had a paid job, either as an employee or self-employed; or said they did any casual work for payment; or said they did any unpaid or voluntary work in the previous week.

Source: Opinions and Lifestyle Survey, ONS

Lead analyst: Andrea Lacey

The reasons for working from home have changed during the pandemic. Among those adults that were working from home (either exclusively or in combination with travelling to work), some of the reasons were:

	18 to 21 June	26 to 30 August
Workplace was closed	38%	23%
Employer asked them to work from home	69%	59%
Following government advice	48%	32%
Preferred to work from home	9%	20%

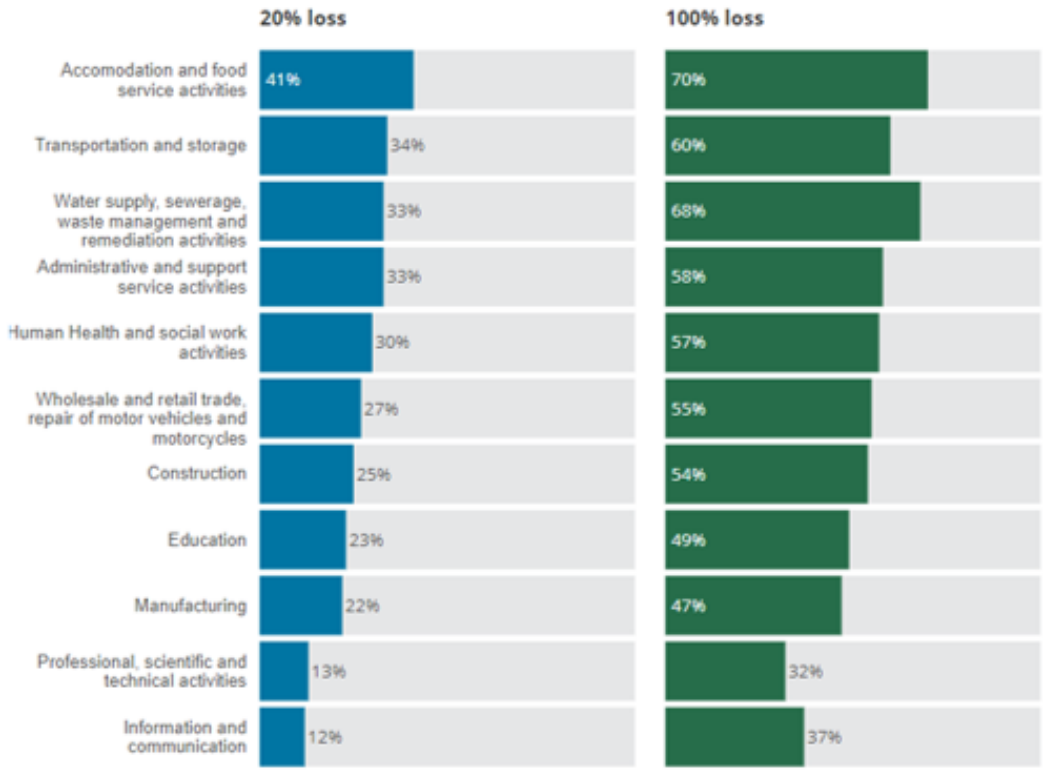
Source: Opinions and Lifestyle Survey, ONS

In normal times, around 75% of households (where the head is employed) have enough savings to cover a 25% loss of employment income over three months; however, many are less financially resilient to the kinds of losses in income faced during the COVID-19 pandemic

- In previous years, around three in four households have had enough savings to cover a 25% loss of employment income for three months, while around two in four could cover a a total loss of employment income over this period.
- However, even in “normal” times, at least 1 in 10 adults report difficulties meeting their financial commitments and regularly run out of money before the end of the week or month.
- Households less likely to cope with a sudden loss of income include those who rent their home (particularly in the North East); have lower household income; are lone parents with dependent children; or where the head of the household is younger, has a long-term illness or disability, or works in accommodation and food services.

Households where the head works in accommodation and food services, an industry largely shut down in lockdown, are the least equipped to cope with a loss of income

Percentage of households unable to cover a three-month loss of income, by industry: Great Britain, April 2016 to March 2018



Sources: Financial resilience of households (by household type, standard industrial classification, region and housing tenure), Great Britain, April 2016 to March 2018; and Coronavirus (COVID-19) roundup: Covering a sudden loss of household income

Lead analyst: Hilary Mainwaring

At the UK-wide level, there was an increase in voluntary and involuntary household savings in response to the pandemic

- In response to the coronavirus pandemic, lockdown restrictions were imposed, which led to a very sharp contraction in non-essential spending.
- Mandatory business closures were in effect, while forms of social distancing affected those transactions that require direct contact between consumers and businesses.
- There were particularly large falls in consumer spending on restaurants, transport and recreation and culture, which include forms of social consumption.
- The households saving ratio increased to a record 29.1% in Quarter 2 (Apr to June) 2020, compared with 9.6% in Quarter 1 (Jan to Mar) 2020. This reflects an increase in the ability of individuals to work from home, or that there has been a large number of individuals who have been furloughed.
- It is also possible that households have chosen to increase their savings in response to the higher levels of uncertainty around their future employment prospects.

The households saving ratio hit a record high in Quarter 2 (Apr to June) 2020

Households saving ratio, UK, Quarter 1 (Jan to Mar) 2000 to Quarter 2 (Apr to Jun) 2020

Source: Quarterly sector accounts, UK: April to June 2020 and Quarterly economic commentary: April to June 2020

Lead analyst: Michael Rizzo and Sumit Dey-Chowdhury

The initial shock to household finances at the beginning of the lockdown disproportionately affected certain parts of the population more, and the effects have continued as financial resilience worsened for some despite easing of restrictions

- People expressed initial concern surrounding their finances during the first few weeks of lockdown, with strong doubts about their ability to save; those already impacted financially had higher anxiety on average.
- The self-employed, parents and those who rent were at a greater disadvantage during lockdown as they were at an increased likelihood of having to use savings to cover living costs, working reduced hours and also being unable to save for the future, compared with the general population. These impacts also continued until the end of July.
- Parents and those who rent were also seen to have worse financial resilience (which can have repercussions such as mental health issues, low productivity and long-lasting debt) near the end of July as 47.5% of parents could not afford an unexpected but necessary one-off expense of £850, compared with an average of 32.8% for the population; this means there were approximately 3 million fewer parents that could afford the expense, when compared with 2018.

Parents and those who rent were seen to have worse financial resilience near the end of July 2020

	3 to 20 April				22 to 26 July			
Percentage of group that specified they had:	Self-employed	Parents	Those who rent	Total population	Self employed	Parents	Those who rent	Total population
Reduced income	60	35	32	28	29	23	26	19
Used savings to cover living costs	23	12	15	9	27	7	8	6
Were unable to afford a one off expense	15	49	62	33	25	48	63	33

Source: Personal and conomic Well-being in Great Britain: September 2020

Despite some easing of restrictions by the end of July 2020, more economically vulnerable people were worse hit financially and more expected their finances to get worse as they thought life would take longer to get back to normal

- Between 20 March and 26 July 2020, there were trends of growing economic inequality, as more low-income individuals were negatively impacted by COVID-19 than high-income individuals.
- People's expectations surrounding their own finances and the UK economy continued to worsen after lockdown, especially as more people expected it would take longer than a year for life to return to normal, if ever.

Source: Personal and economic well-being in Great Britain: September 2020

Lead analyst: Gueorguie Vassilev

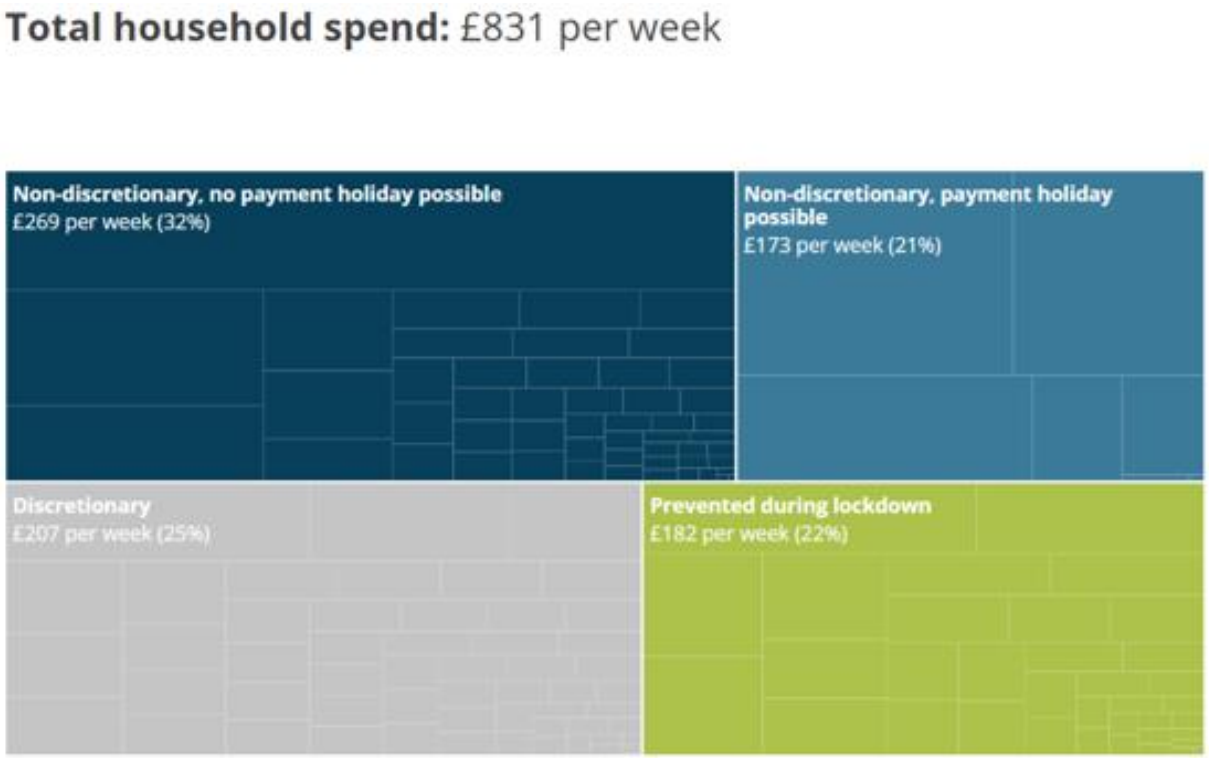
More than one-fifth of usual household spending was largely prevented during lockdown; however, young people and renters may have found it difficult to cut back on spending

- In the financial year ending March 2019, 53% of UK household spending covered essential items, such as food and housing, and the remaining 47% was spent on discretionary items.
- Approximately 22% of usual household budgets was spent on activities that were later largely prevented by government guidelines during lockdown (such as travel, holidays and meals out); this is equivalent to an average of £182 per week that households may have been able to save, spend elsewhere or use to cover lost income resulting from the COVID-19 pandemic.
- Younger households, renters and those living in London usually spend a large proportion of their budget on essentials and relatively little on the goods and services that were unavailable under lockdown; this could limit their ability to cut back on spending if their income were to fall.
- Younger households and renters are also less likely to have enough savings to cover a loss of income.

Source: More than one-fifth of usual household spending has been largely prevented during lockdown

More than one-fifth of usual household spending has been prevented by the lockdown

Weekly household expenditure by category, UK, financial year ending March 2019



Source: More than one-fifth of usual household spending has been largely prevented during lockdown

Lead analyst: Carla Kidd

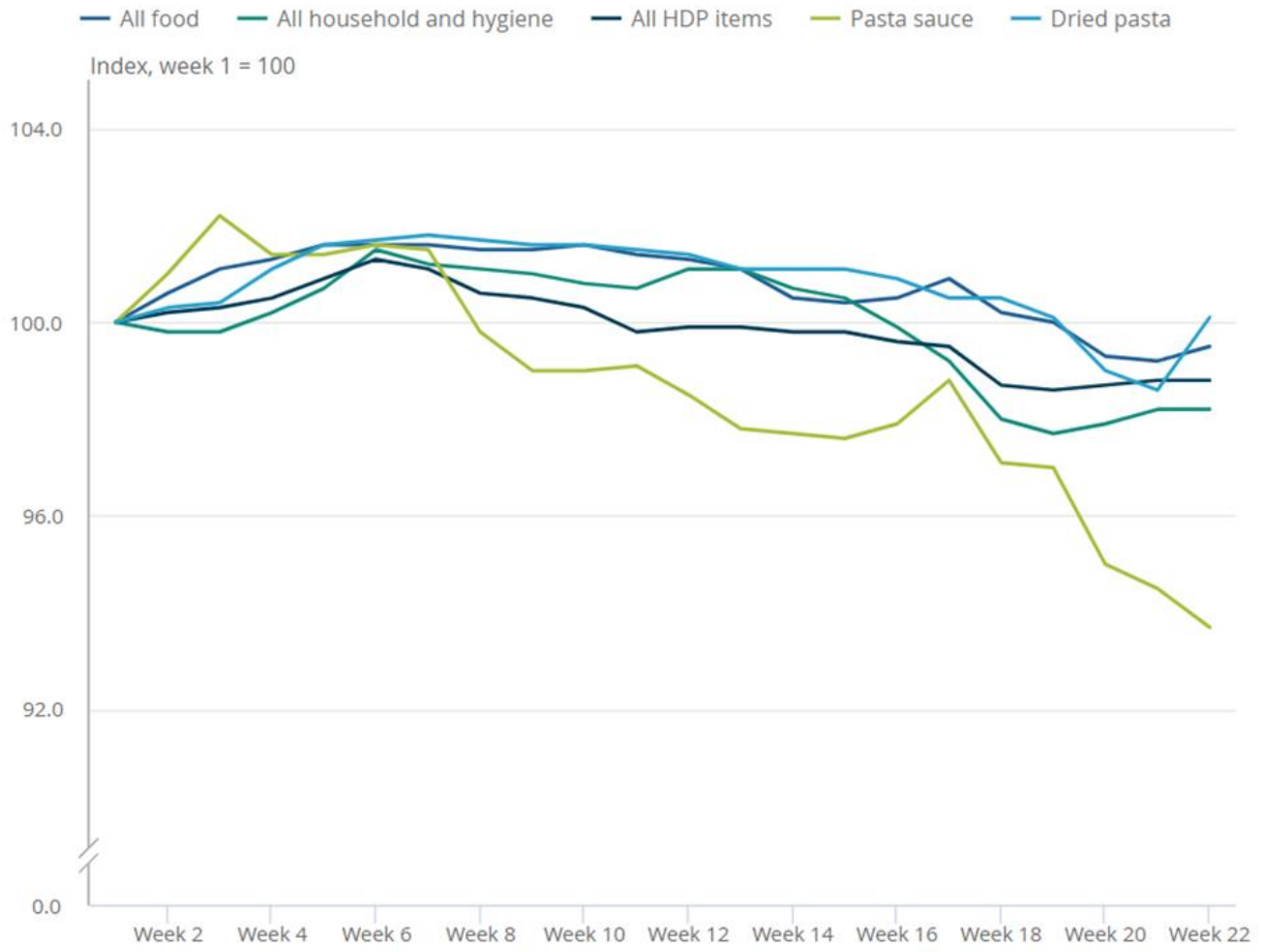
Higher prices and demand for certain items could have had a potential further impact on household spending

- Overall, prices for items in the high-demand product (HDP) basket peaked between 20 and 26 April 2020 (week 6), at 1.3% above the week prior to lockdown (16 to 22 March 2020). Products that saw the biggest price rises between March and June included tomato puree; spray cleaning; tinned beans; antibacterial wipes; and handwash.
- Since then, prices have stabilised or fallen below pre-lockdown levels, but we expect that during the early period of lockdown, higher prices and demand for common household items could have had a further impact on household spending.
- To help households under increased financial pressure, some companies, including mortgage providers and utility suppliers, offered payment holidays; we estimate that 39% of non-discretionary household spending may have been subject to a payment holiday, equivalent to £173 per week.

Note: The HDP basket includes long-life food (for example, dried pasta, tinned soup and flour), household and hygiene products (for example, antibacterial wipes, toilet rolls and nappies) and health products (for example, anti-inflammatory medication, cough and cold medication, and vitamin C). From September 2020, the HDP basket was replaced with a broader selection of food and drink items as shopping habits during the pandemic changed.

All three aggregate indices continued to remain below their week 1 level (16 to 22 March 2020)

Online price change of selected high-demand products 16 March to 16 August 2020: index week 1 (16 to 22 March 2020) = 100, UK



Source: Coronavirus and the latest indicators for the UK economy and society: 20 August 2020

Lead analyst: Chloe Gibbs

With schools closed to most children, homeschooling impacted both parents' and children's well-being

On Monday 23 March 2020, schools closed to most children because of the coronavirus pandemic.

Between 3 April and 10 May 2020:

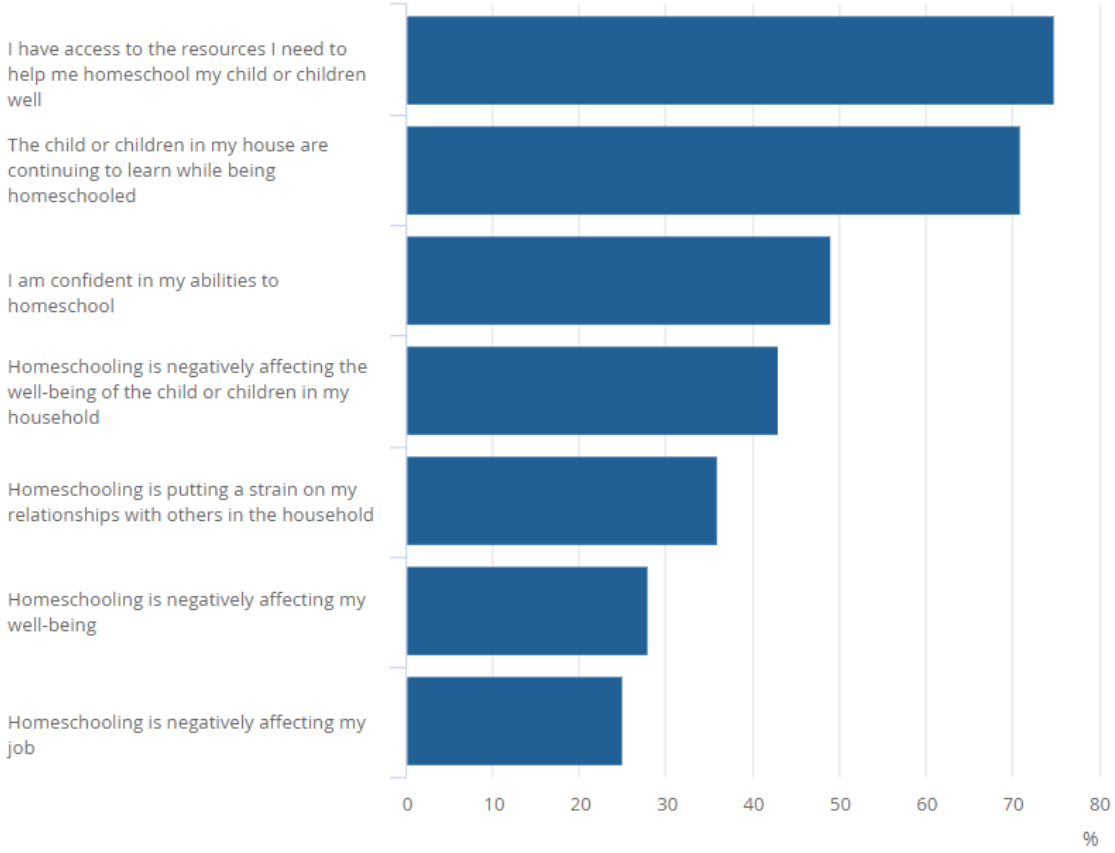
- 77% of parents with a school-aged child in their household said they had homeschooled their children in the past seven days because of the pandemic.
- Of these, 34% of women agreed that it was negatively affecting their well-being compared with 20% of men.
- 43% of homeschooling parents agreed that it was negatively affecting the well-being of their children.

Between 7 May and 7 June 2020:

- 87% of parents said a child in their household had been homeschooled because of the pandemic.
- On average, children aged 5 to 10 years did 10 hours of school work per week compared with 16 hours for children aged 11 to 15 years.
- 52% of parents with school-aged children said a child in their household was struggling to continue their education while at home, with lack of motivation being the most common reason.

Only half of parents who were homeschooling (49%) because of the coronavirus pandemic agreed that they were confident in their abilities

Percentage of parents homeschooling children in their household aged 5 to 18 years, who agreed with the statement on homeschooling, Great Britain, 3 April to 10 May 2020



Source: Coronavirus and homeschooling in Great Britain: April to June 2020

Lead analysts: Ruth Davies and Andrea Lacey

Homeworking hours were condensed into the morning, allowing parents to provide more developmental childcare in the afternoons

On days when someone was working from home:

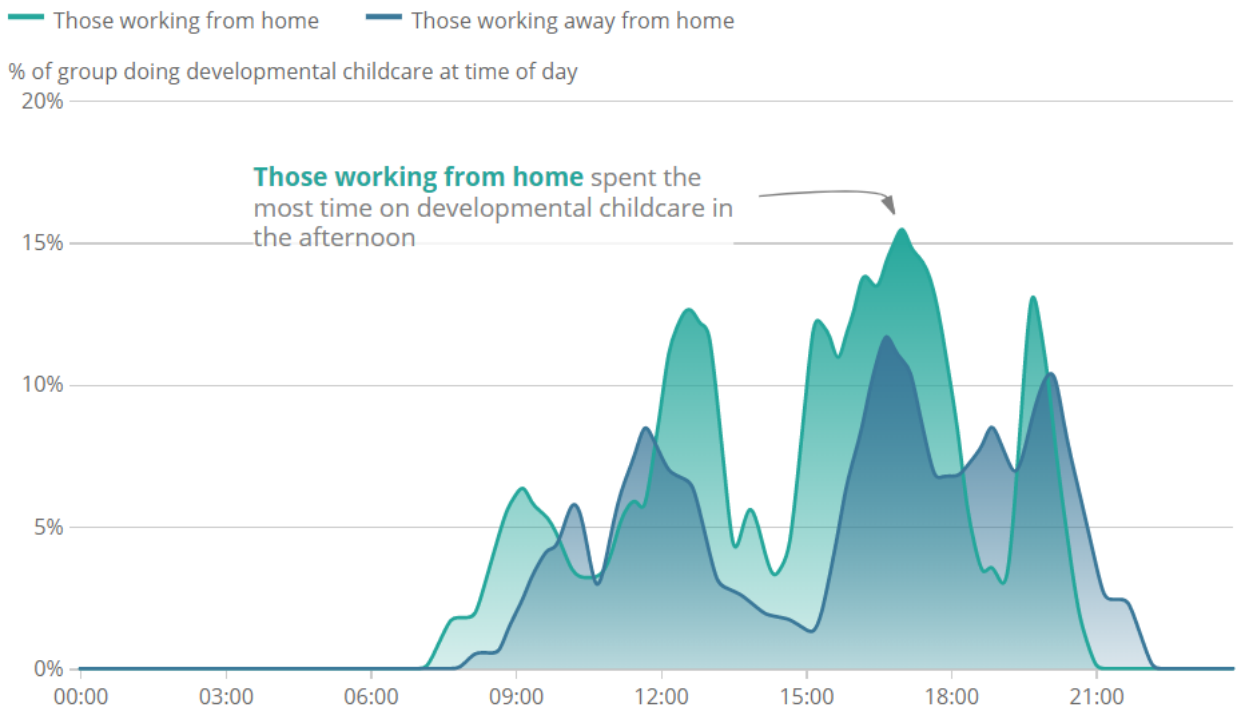
- work hours tended to be in the mornings and often afternoons involved some sort of developmental childcare (reading to children, playing with children or helping children with homework).

On days when someone worked away from home:

- work hours were more likely to be unsociable with a higher proportion of the group working earlier and stopping work later.
- developmental childcare provided by the group tended to be slightly later in the evening
- women provided more childcare time than men, particularly for younger children

Parents working from home delivered most childcare in the afternoon

Percentage of group doing developmental childcare by time of day (weekdays only), Great Britain, 2020



Source: Parenting in lockdown: Coronavirus and the effects on work-life balance

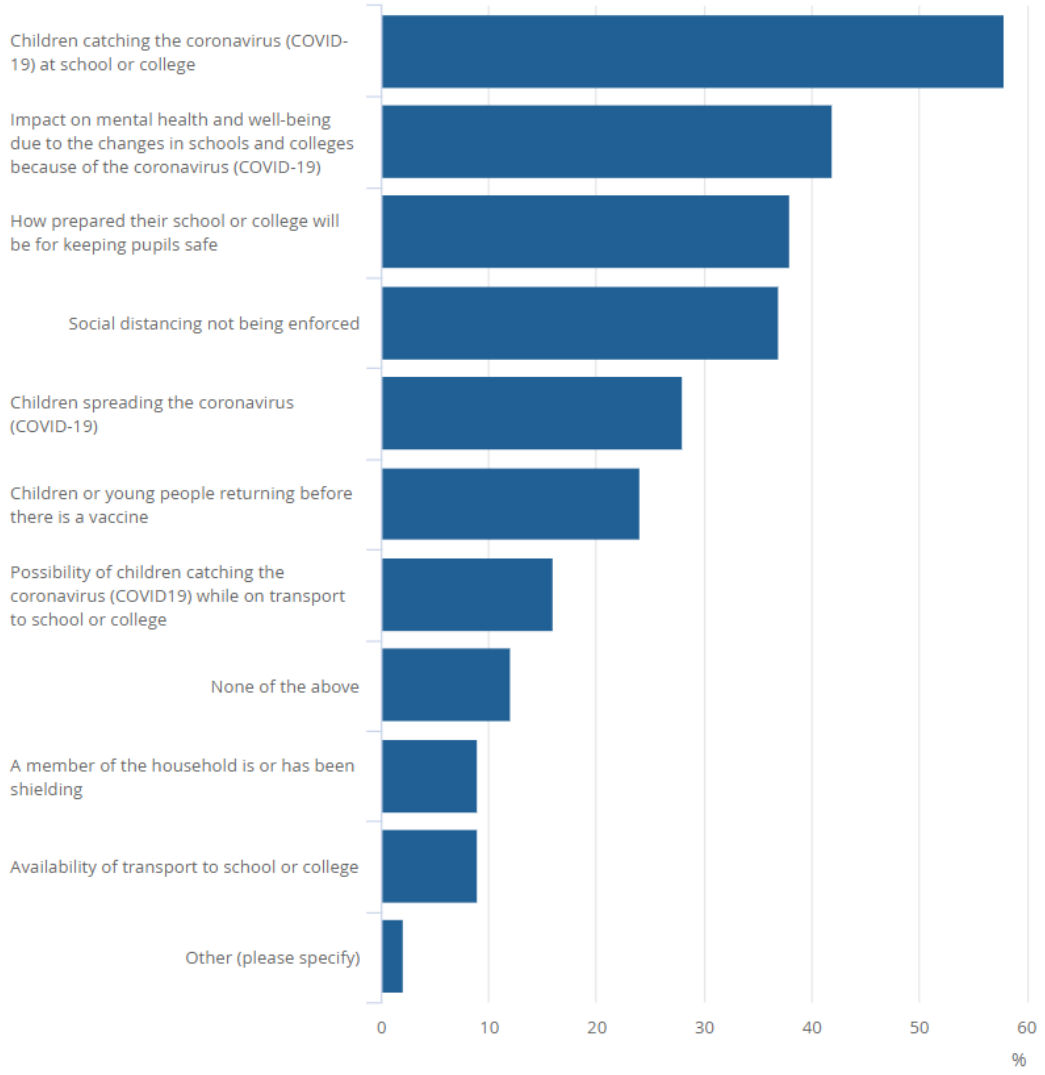
Lead analyst: Chris S Payne

Over half of parents reported they were very or somewhat worried about their children returning to school or college

- Children in Scotland returned to school in late August, and as September approached many parents in England and Wales were looking ahead to the new school term.
- Over half of parents reported they were very or somewhat worried about their children returning to school or college, and this remained consistent through July and August.
- The most common concern among parents was their child catching COVID-19 and the school's ability to maintain social distancing, and some expressed other worries:
  - **"My son was too anxious and did not like the new bubble system as he was not with his friends"**
  - **"My daughter is just starting school, I'm worried that settling in will be affected."**
- However, some parents spoke positively about their child's return to school:
  - **"No worries [about returning to school.] Children attended school through lockdown. School were amazing dealing with everything and keeping children in bubbles, I have every confidence this will be the same in September"**

The main concerns parents had about sending children back to school or college were the risk of catching the coronavirus and the impacts on mental health and well-being

Great Britain, 15 to 19 July 2020



Source: Opinions and Lifestyle Survey, ONS

Lead analyst: Andrea Lacey

Young people (aged 16 to 29 years) were less likely to be very worried about the effect the coronavirus pandemic was having on their lives than the older age groups

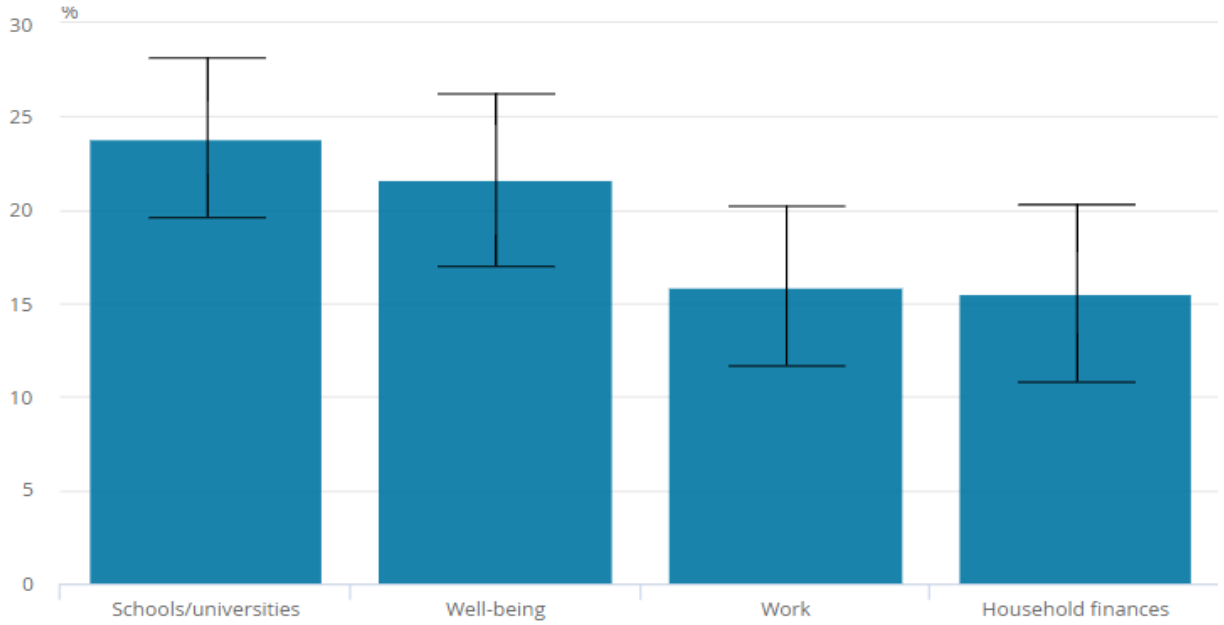
- They were generally more optimistic about lockdown than the older age groups, with more than half expecting life to return to normal within six months; they were also significantly less likely to expect the impact on their lives to last more than a year (13%).
- While they were more optimistic as a whole, young people who reported that their well-being was being affected were much more likely to report being bored and lonely during the lockdown period, and 42% reported that it was making their mental health worse.
- One of their biggest worries was the impact on schools and universities; by far the most commonly reported concern among this group being that they were unable to attend their places of education, with almost 8 in 10 reporting this.
- Uncertainty over exams and qualifications (58%) and concerns over the quality of education being affected (46%) were also common concerns.
- A sizeable percentage (18%) were also worried about the move to homeschooling.

Young people (aged 16 to 29 years) were less likely to be very worried about the effect the coronavirus was having on their lives than the older age groups

- Young people aged 16 to 29 years who reported concerns about the impact of the coronavirus on their relationships were much more likely than 30 to 59-year-olds to report being most worried about their relationships with friends (60% and 34% respectively) and with their grandparents (36% and 13% respectively).
- Friends includes girlfriends and boyfriends, with whom young people are less likely to live, so may have been unable to see during lockdown.
- Over three in four (76%) of those aged between 25 and 29 years who were worried about the effect of the coronavirus on their lives reported that the coronavirus pandemic has affected their work. This was significantly higher than those aged 30 to 59 years (65%), possibly reflecting their less secure status in the labour market and the types of jobs they are likely to do.

The top worries for young people were the effects on schools and universities, well-being, work, and household finances

Percentage of adult population aged 16 to 29 years who were worried about the effect the coronavirus pandemic was having on their lives by main concern, Great Britain, 3 April to 10 May 2020

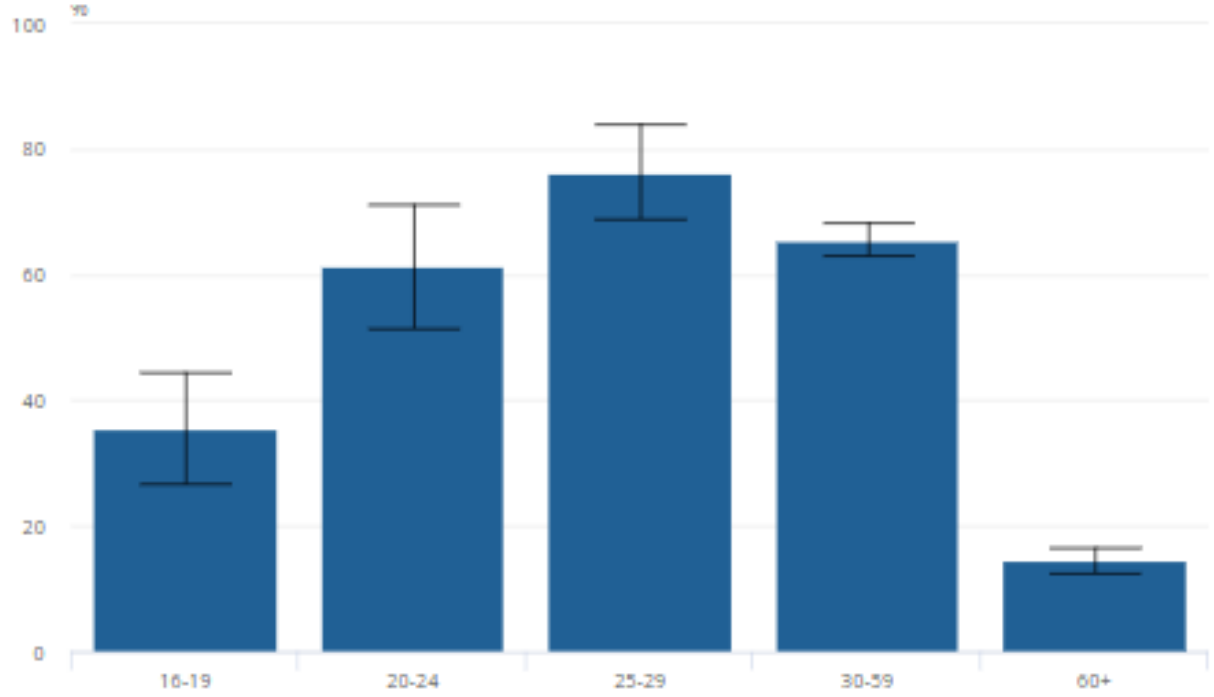


Source: Coronavirus and the social impacts on young people in Great Britain: 3 April to 10 May 2020

Lead analyst: Paola Serafino

Those aged between 20 and 59 years were most likely to report an impact on their work

Percentage of adult population worried about the effect of the coronavirus pandemic on their lives who reported an impact on their work by age group, Great Britain, 3 April to 10 May 2020



Source: Coronavirus and the social impacts on young people in Great Britain: 3 April to 10 May 2020

Lead analyst: Paola Serafino

Older people reported higher levels of well-being than younger people, except for anxiety, which was similar across age groups during the lockdown period 3 April to 10 May 2020

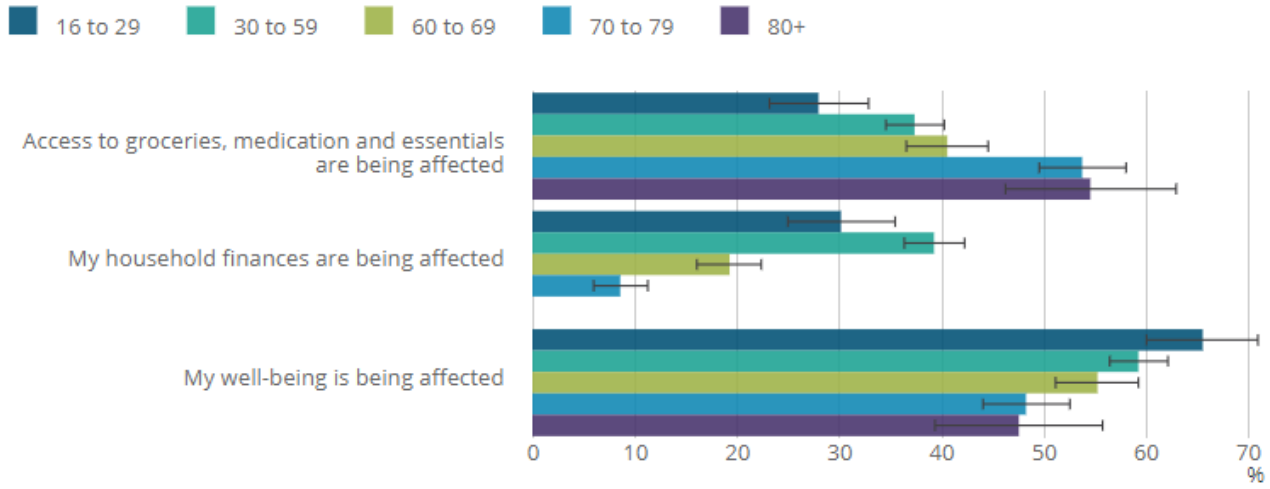
- Among older people (aged 60 years and over) who were worried about the effect COVID-19 was having on their lives, their main concerns were being unable to make plans in general (64.5%), personal travel plans such as holidays (53.4%), and their own well-being (51.4%).
- Of those who said their well-being had been affected by the coronavirus pandemic, the most common ways older people said it had been affected were being worried about the future (70%), feeling stressed or anxious (54.1%) and being bored (43.3%).
- People aged in their 60s were the least optimistic about how long it will take for life to return to normal, with a higher proportion saying it will take more than a year or that life will never return to normal, than those aged under 60 years and those aged 70 years and over.

In the lockdown period of 3 April to 10 May 2020, older people were more likely than younger people to be coping by reading or gardening

- Staying in touch with family and friends remotely was the main way those aged 60 years and over said they were coping while staying at home, followed by gardening, reading and exercise.
- Those aged in their 60s and 70s were equally as likely as younger age groups to say that exercise was helping them to cope.
- People aged in their 60s and 70s were more likely to have checked on neighbours who might need help three or more times and they were equally as likely to have gone shopping or done other tasks for neighbours at least one or two times as those aged under 60 years.

In the period of 3 April to 10 May 2020, older people were more likely to have had difficulties accessing essentials and less likely to have had their finances or well-being impacted than younger people

Percentage of the population aged 16 years and over worried about the effect of COVID-19 by selected aspects of life affected and age group, Great Britain, 3 April to 10 May 2020



Source: Coronavirus and the social impacts on older people in Great Britain: 3 April to 10 May 2020

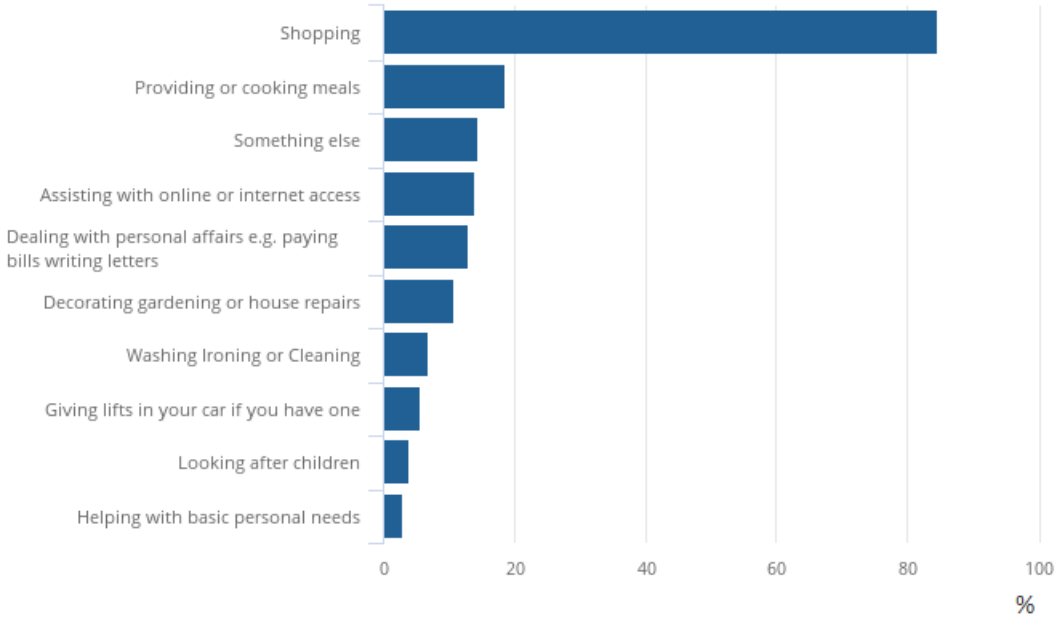
Lead analyst: Angele Storey

Nearly half of UK adults provided help or support to someone outside of their household during lockdown

- Almost half (48%) of UK adults reported providing help or support to someone outside of their household during April 2020; this contrasts with pre-pandemic findings of 11% of adults providing some regular service or help for an elderly, disabled or ill person living outside their household
- Of adults who reported providing help in April 2020, 32% were helping someone who they did not help before the pandemic and 33% reported giving more help to people they helped previously.
- Those aged 45 to 54 were the most likely group to report providing support, with 60% of this age group reported doing this; women were more likely than men to provide support, as were people who were employed and those with dependent children
- Of those providing help and support to others in April 2020, 16% felt they played a useful role more so than usual, compared with 9% of those who felt they had not; nevertheless, those supporting others were not immune to the increased feelings of anxiety common to different sections of the population as a whole during this time.

Shopping was the most common support provided in April 2020

Ways in which people provided help and support, UK, April 2020



Source: Coronavirus and the impact on caring

Lead analyst: Andrea Lacey

In 2018 to 2019, those aged 65 years and over in England were most likely to feel “very comfortable” asking a neighbour to collect essentials for them if they were ill (40.4%)

At the beginning of the coronavirus lockdown, we considered the ways in which vulnerable groups normally receive support from their family, friends and wider community, to understand how a period of isolation might impact those in need of extra support.

We focussed on two of the three groups identified by the government that may be considered vulnerable. These are older adults and those with a self-defined disability or who are Equality Act Disabled.

Our analysis found:

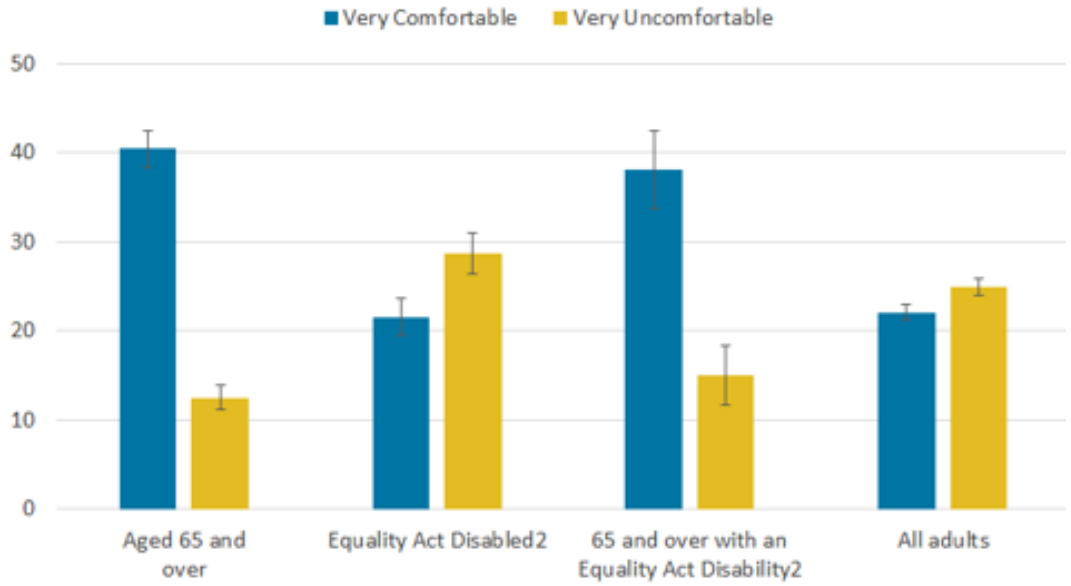
- at a UK level, parents were more likely to receive help from an adult child not living with them if they were in any of the vulnerable groups we analysed, when compared with the population aged 16 years and over as a whole.
- around one in seven UK parents who belonged to one of the vulnerable groups regularly received cooked meals from an adult child not living with them in the period 2017 to 2018.

In 2018 to 2019, those aged 65 years and over in England were most likely to feel “very comfortable” asking a neighbour to collect essentials for them if they were ill (40.4%)

- Over the same period, nearly 3 in 10 UK parents aged 70 years and over with a self-defined disability (28.9%) got their shopping regularly from an adult child not living with them.
- In 2018 to 2019, those aged 65 years and over in England were most likely to feel “very comfortable” asking a neighbour to collect essentials for them if they were ill (40.4%). However, looking at the wider population, almost one in four adults aged 16 years and over (24.9%) said they would feel “very uncomfortable” asking for this help from their neighbours; this proportion was higher among those who were Equality Act Disabled (28.7%).
- Data for England show that people who were Equality Act Disabled were less likely than the general population to definitely agree that they had people who would be there for them if they needed help (58.8% compared with 68.4%).

Older people were most comfortable with neighbours collecting their shopping for them

Percentage who would feel “very comfortable” or “very uncomfortable” with neighbours collecting a few shopping essentials for them, England, 2018 to 2019



Source: Coronavirus and social relationships and support for vulnerable groups: 2017 to 2018 and 2018 to 2019

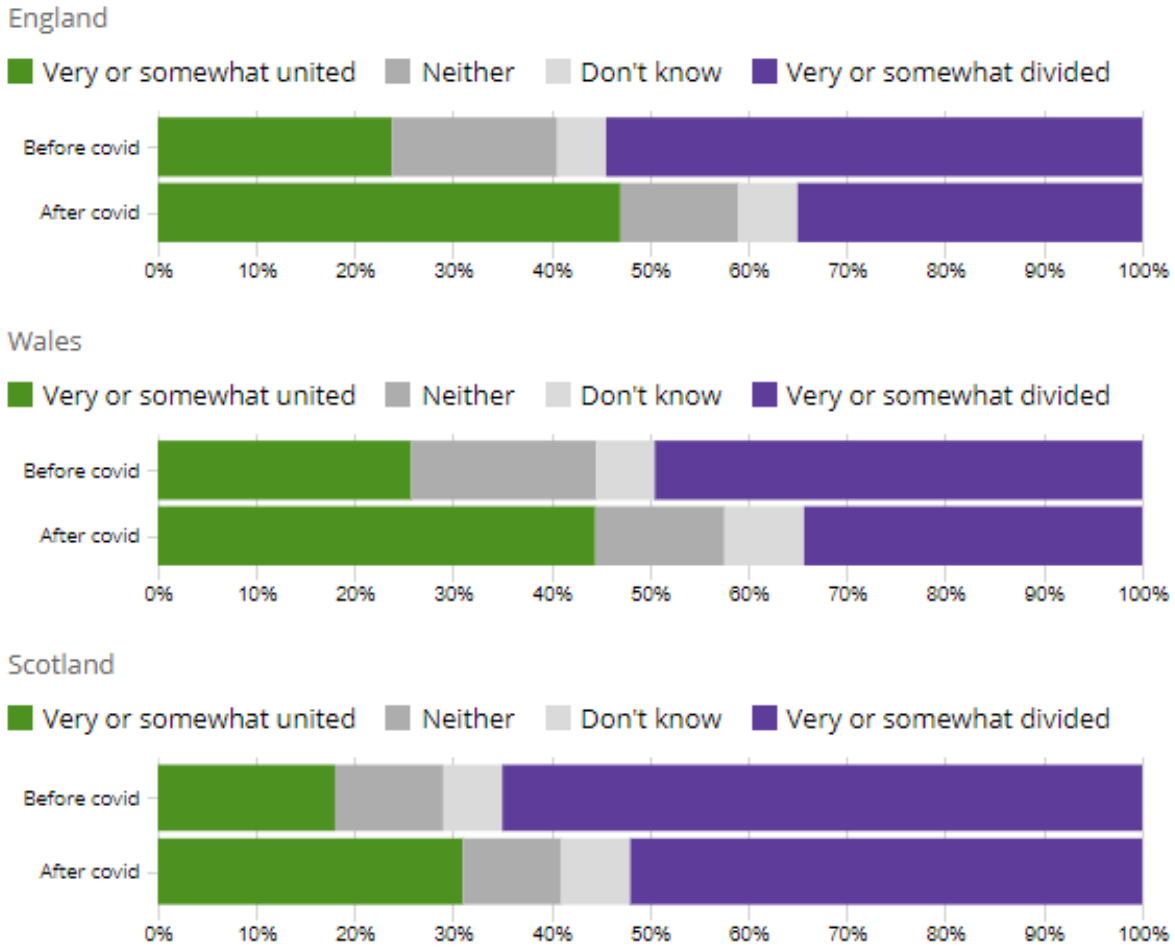
Lead analyst: Eleanor Rees

From 24 April to 28 June 2020, more adults on average thought that Britain will be united after we have recovered from the pandemic than thought that we were united before the pandemic

- In this same period, adults in Scotland were less likely (31%) to say that Britain will be united after the pandemic than those in either England (47%) or Wales (44%).
- Although women were as likely as men to say that Britain was united before the pandemic, they were more likely than men to think that Britain will be united after it, with half (50%) saying that Britain would be either very or somewhat united compared with 41% of men.
- Perceptions of unity within Britain are associated with higher average life satisfaction, happiness and feelings that things done in life are worthwhile as well as with checking on neighbours, feeling like the community is available to support you and thinking people are doing more to help others.
- As time progressed through the period, the percentage of adults who thought that Britain would be more united after the pandemic declined by 29 percentage points (from 57% in the first week of the period to 28% in the last week) so that by the end of this period, there was no difference between the percentage of people who thought that Britain was united before the pandemic and those who thought it would be united after.

Percentage of people reporting different levels of unity in Britain before and after the coronavirus pandemic by country

Great Britain, 24 April to 28 June 2020



Source: Unity and division in Great Britain: 24 April to 28 June 2020

Lead analyst: Lucy Tinkler

Social impacts

This section includes analysis on the impact of the pandemic on people's lives and how activities have been affected

Lack of freedom and independence, inability to make plans and disruption of personal travel plans are the most common ways in which peoples lives have been affected by COVID-19 pandemic

- The proportion of people reporting a lack of freedom and independence was highest in mid-May with 65%; this figure dropped to 46% at its lowest early September but has since started to increase again, which may be because of the introduction of local lockdowns.
- The proportion of people reporting they were unable to make plans peaked at 58% in mid-May and although this fell to 40% both at the end of July and end of August, the proportion of people who feel they are unable to make plans has been gradually increasing throughout September and October.
- Worries about being able to access groceries, medication and essentials was reported by 40% of adults during the first few weeks of the national lockdown; since then, the proportion of people who raise this reason as a way in which their life has been affected has steadily declined.
- The proportion of people who have struggled to get access to health care for non-COVID-19-related issues peaked at 28% in mid-May, remained around 25% from the end of May until the end of August but peaked again at 28% throughout September.

Lack of freedom, inability to make plans and personal travel have remained the most common ways in which people's lives have been impacted throughout the pandemic

Impact on life overall, Great Britain, April to October 2020

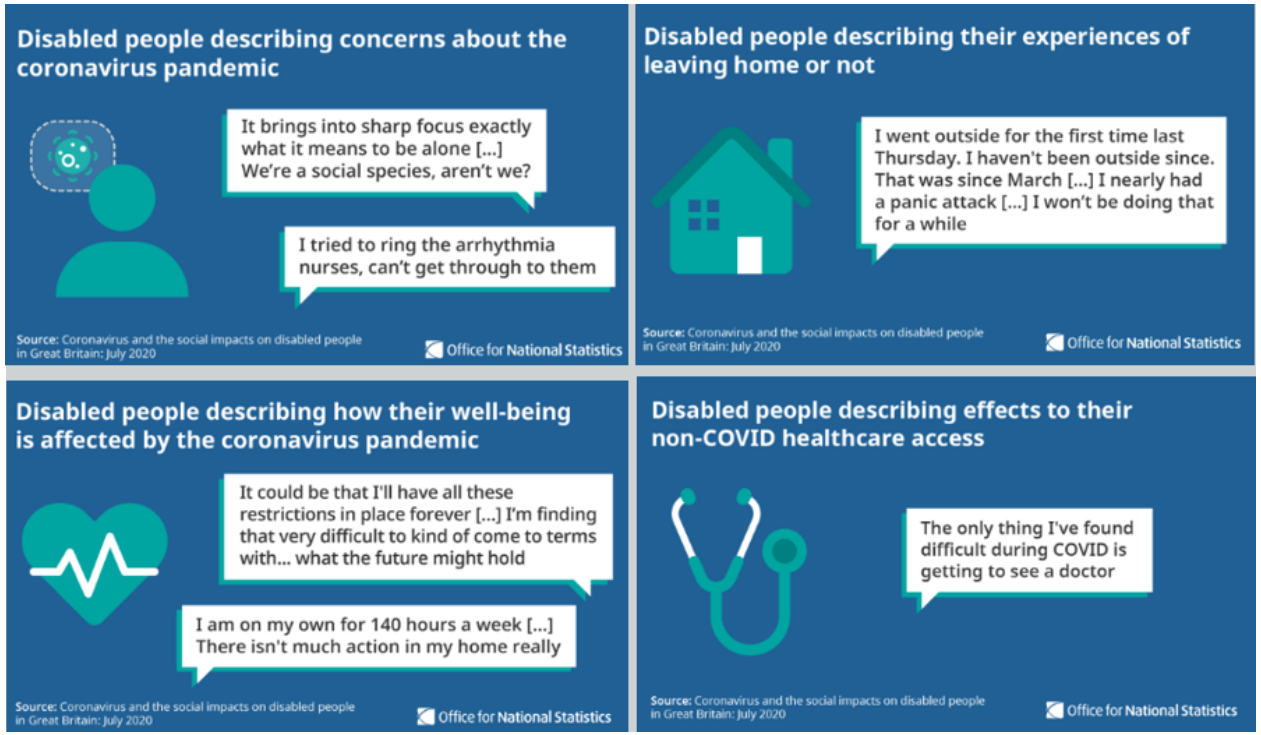
Source: Opinions and Lifestyle Survey, ONS

Lead analyst: Andrea Lacey

Disabled people were most concerned about the impacts of COVID-19 on their well-being and access to health care in July 2020

- 25% of disabled people who were receiving medical care before the pandemic reported now receiving treatment for only some of their conditions (7% for non-disabled people in a similar situation).
- Disabled people were more likely to report leaving their homes for medical needs or to provide care to a vulnerable person (19%) than non-disabled people (7%) but less likely to report leaving their home to eat or a drink at a restaurant, café, bar or pub.
- More disabled people (37%) had still not met up with other people outside their home than non-disabled people (29%).
- 9% of disabled people indicated feeling very unsafe outside their home because of COVID-19, compared with 3% of non-disabled people.

Disabled people were most concerned about the impacts of the coronavirus (COVID-19) pandemic on their well-being and access to health care in July 2020



Source: Coronavirus and the social impacts on disabled people in Great Britain: July 2020

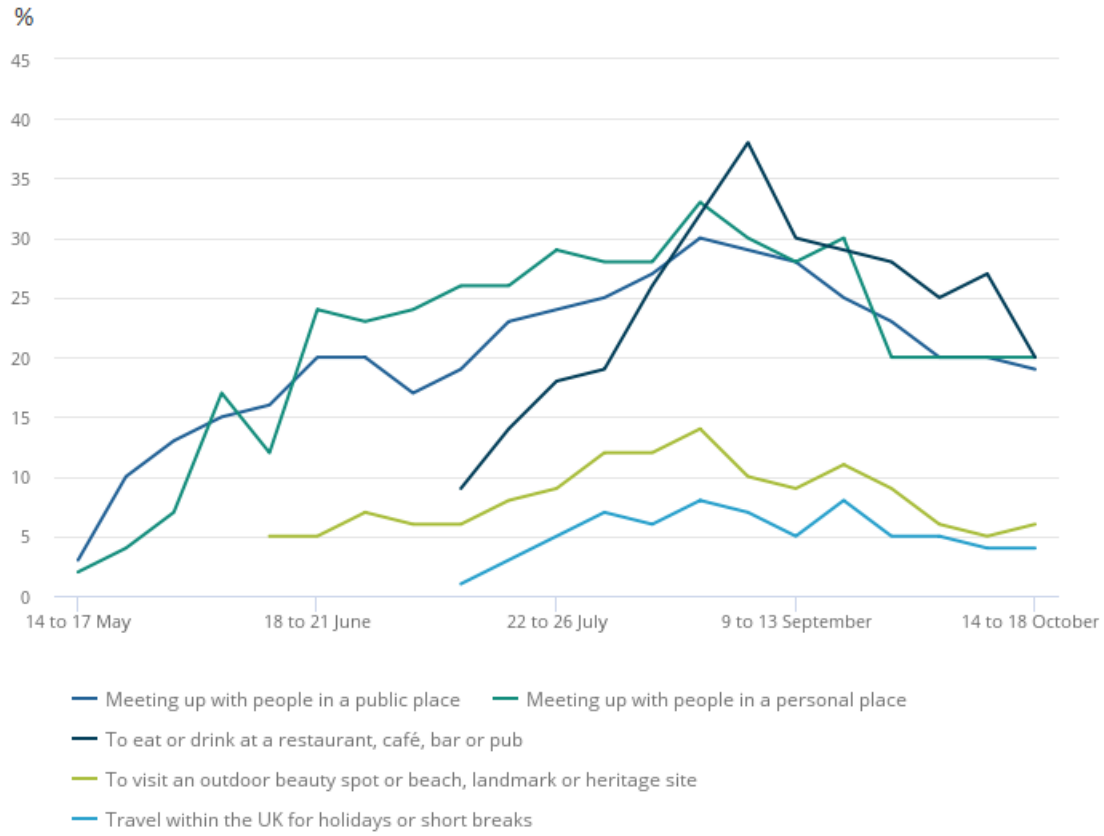
Lead analysts: David Ainslie and Josephine Foubert

There was a gradual return to socialising throughout the summer, but this began to fall through September

- As lockdown restrictions eased in May and June, there was a steady increase in the proportions of adults meeting up with other people throughout the summer.
- However, as more local lockdowns were announced in September, alongside guidance on the number of people you could meet with indoors or outdoors, measures of leaving home started to fall throughout September.
- Guidance varied and continues to vary across England, Scotland and Wales as to how many people you can meet with and in which situation, but overall the percentage of adults in Great Britain who met with people in a personal space, such as their home or garden, increased from 2% in mid-May to over 30% at the end of August.
- However, with local lockdowns, and guidance on the number of people you can meet with indoors or outdoors being introduced in more places, this fell to 20% by the end of September.
- There was a sharper rise in the percentage of adults who started to eat out or drink at restaurants, cafés, bars or pubs as they re-opened.
- Only 10% of adults who left their home visited these places in mid-July, but this rose to 40% by the end of August.
- The Eat Out to Help Out scheme ran throughout August, and 95% of adults reported they had heard of this scheme; of those, more than half (53%) said they had eaten out in August just to make use of the scheme.

Levels of socialising, eating out and travel increased through the summer, before falling again in autumn

Reasons for leaving home, Great Britain, May to October 2020



Source: Opinions and Lifestyle Survey, ONS

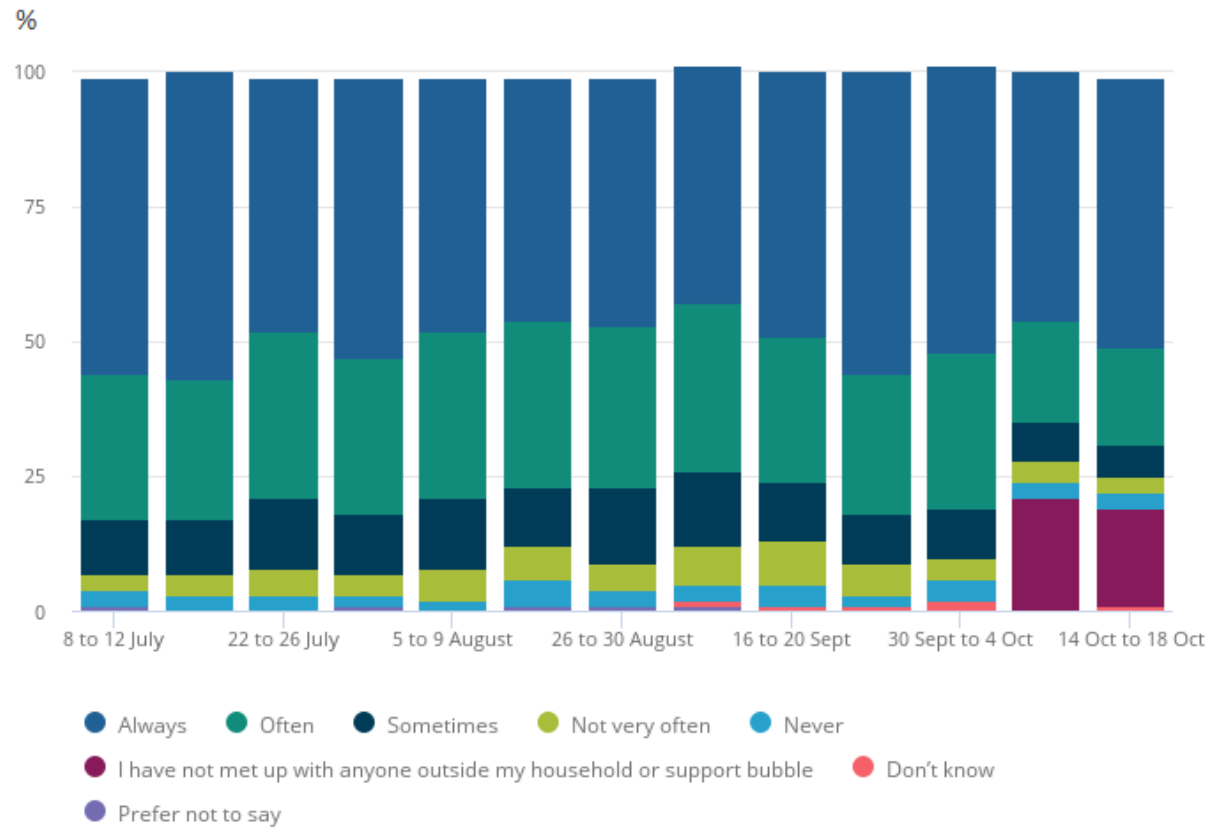
Lead analyst: Andrea Lacey

Over 80% reported they had maintained social distancing often or always, but a consistent proportion reported not social distancing when they met up with others

- Lower levels of socialising were reported in September, as the “rule of six” measures came into place; measures vary across Britain, but at the end of September over 6 in 10 adults (64%) strongly supported or tended to support the “rule of six” measures.
- Levels of socialising also varied by whether someone lives in a local lockdown area – of those in lockdown areas, 34% had not socialised with anyone outside their household, compared with 25% of those not in local lockdown areas.
- However, 7% of people in a lockdown area still said they had socialised in a group with six or more people; this was 9% for those not living in a lockdown area.
- As people continue to meet up with others where possible, social distancing is an important preventative measure; for those people who had socialised with others outside their household, 83% said they had always or often maintained social distancing in mid-July (15 to 19) – this remained at a similar level through the summer, with 82% saying this at the end of September.
- However, the proportion reporting they maintained social distancing sometimes, not very often or never also remained fairly consistent over this period and was at 17% at the end of September.

The proportions reporting they maintain social distancing, or do not maintain social distancing, have remained fairly consistent

Great Britain, May to October 2020

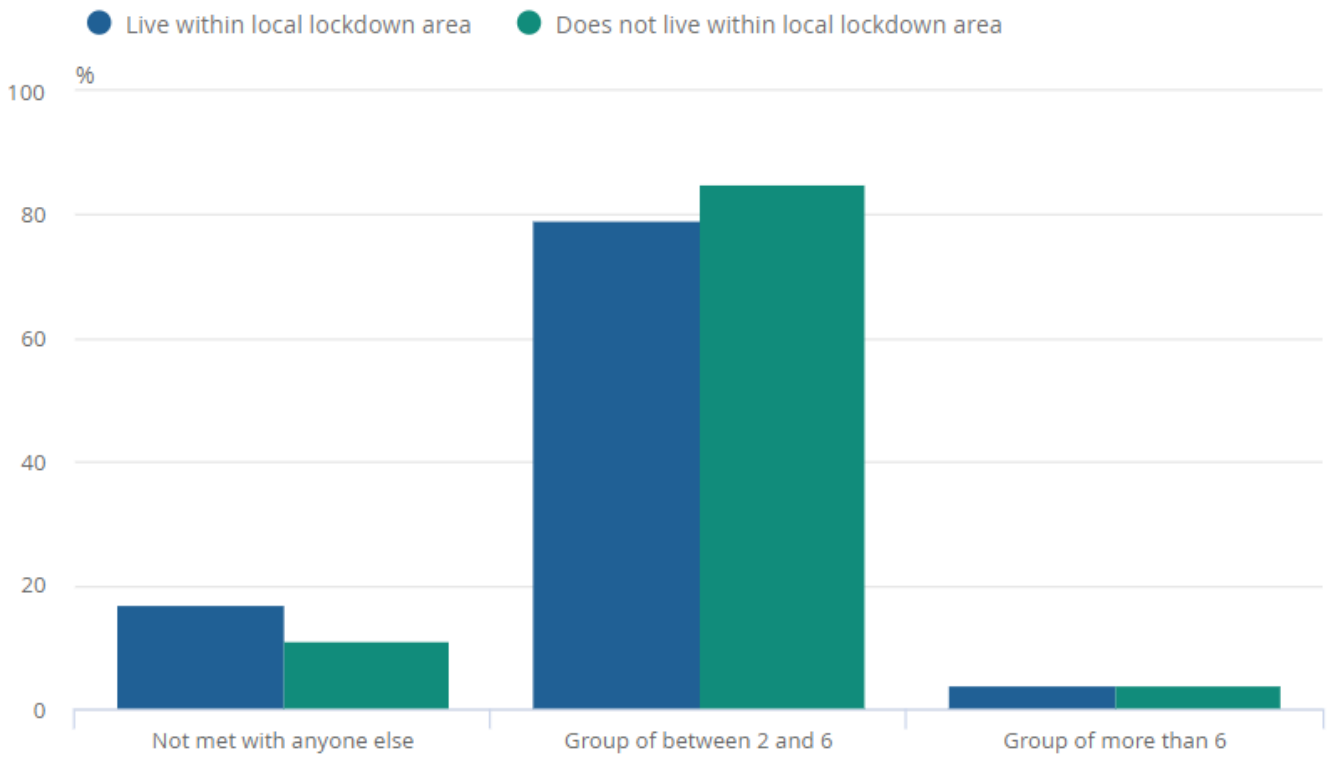


Source: Opinions and Lifestyle Survey, ONS

Lead analyst: Andrea Lacey

Levels of socialising indoors varied by whether someone was in a “local lockdown” area

Great Britain, 14 to 18 October 2020



Source: Opinions and Lifestyle Survey

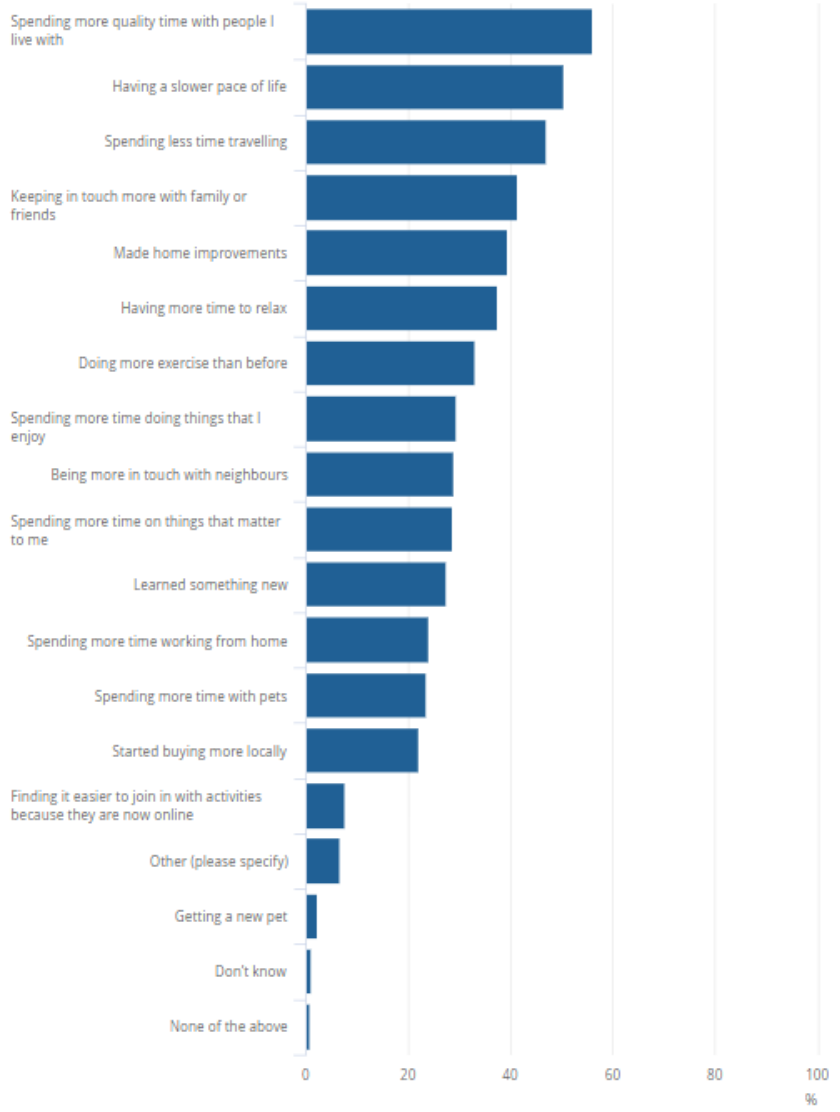
Lead analyst: Andrea Lacey

Over 40% of adults reported positive lifestyle changes resulting from the pandemic

- Some people have reported positive impacts resulting from the pandemic; 4 in 10 adults (43%) reported they had experienced positive lifestyle changes resulting from the pandemic.
- Of those who had experienced positive changes, the most common was spending more quality time with people they live with; half of adults who had made changes said they are enjoying a slower pace of life and 47% preferred that they are spending less time travelling.
- Other positive changes included cleaner air and less pollution, saving money through not commuting or going out, and having more time for hobbies and interests; quotes from respondents also reflected this: **“I don't spend money as freely because I can't. I appreciate the little things that matter more.” “I have tackled some tasks that might otherwise have been left undone.”**
- Around a quarter of adults said they planned to make big changes to their life after the country has recovered from the pandemic – the most popular ones being changes to work, relationships or where they live; people also said they wanted to continue exercising more and travel more after the pandemic.

The positive lifestyle change people most commonly reported was spending more quality time with the people they live with

Great Britain, 18 to 21 June 2020



Source: Opinions and Lifestyle Survey

Lead analyst: Andrea Lacey

Compared with a two-month average in the pre-lockdown period, there was a significant 32% reduction in total crime during April and May 2020 (excluding fraud and computer misuse)

Headline police recorded crime April 2020 figures compared to April 2019:

- ↓ 47% decrease – theft
- ↓ 31% decrease – criminal damage and arson
- ↓ 15% decrease – fraud and computer misuse
- ↓ 10% decrease – violence against the person
- ↑ 22% increase – drug offences

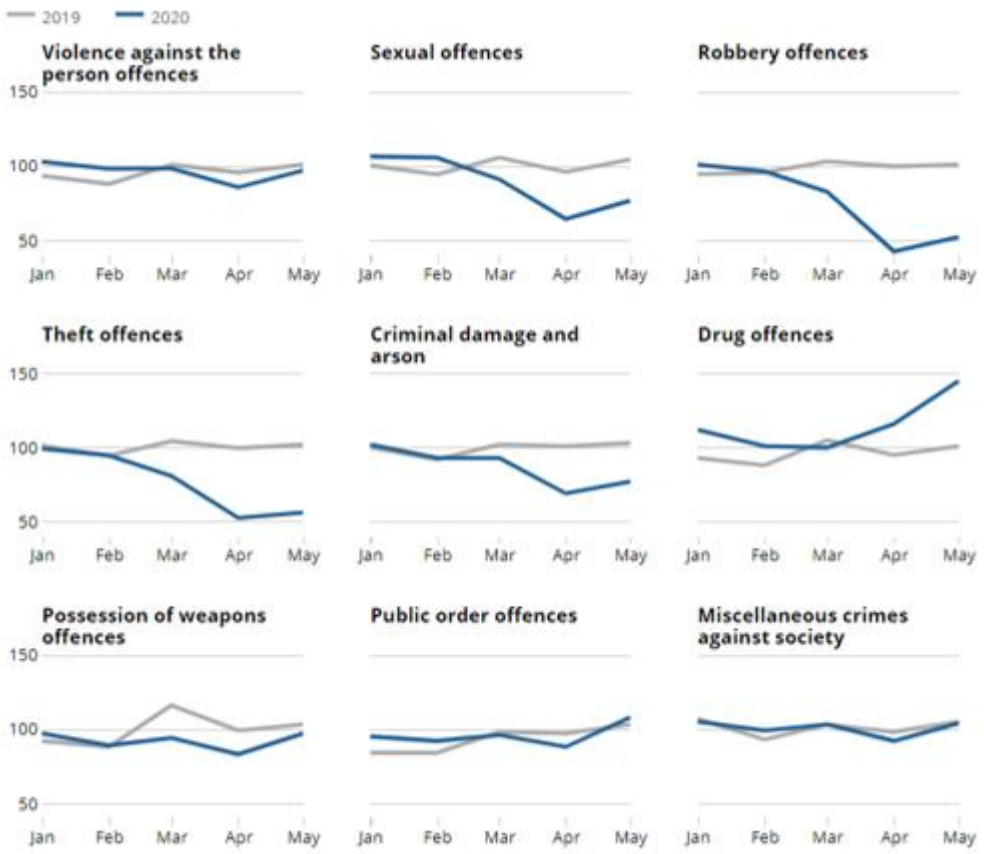
- The rise in recorded drug offences reflects proactive police activity in pursuing these crimes during lockdown.
- The Crime Survey for England and Wales showed 21% of adults perceived anti-social behaviour to have decreased in their local area during lockdown, while 20% reported witnessing or experiencing anti-social behaviour in the past three months.

Over half (51%) reported they had observed others breaching lockdown restrictions

- 51% reported they had observed others breaching lockdown restrictions; 7% said they had reported the breach to the police.
- 91% of adults were satisfied with the way local police were responding to the coronavirus (COVID-19) pandemic: 20% said the police were doing an excellent job in their local area, 49% thought they were doing a good job and 6% thought they were doing a poor or very poor job.
- 28% of parents thought their child was more at risk of negative experiences online; 8% of parents said they were aware their child had encountered a negative experience online in the last month.

Falls in police recorded theft offences and rises in drug offences during lockdown, compared with 2019 average

England and Wales, January to May 2019 and January to May 2020: scale indexed where 100 = 2019 monthly average level.



Source: Coronavirus and crime in England and Wales: August 2020

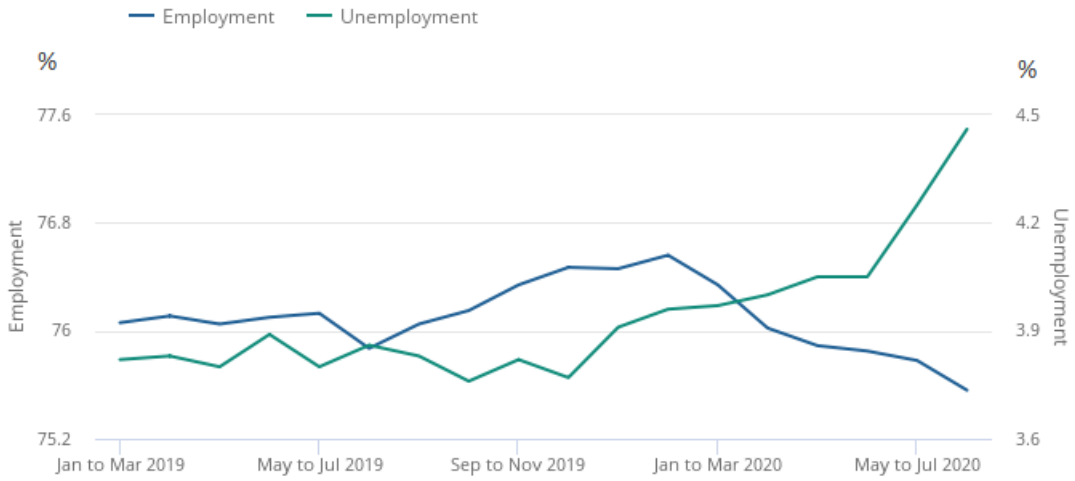
Lead analyst: Nick Stripe

Labour market impacts

This section includes analysis on the work situations of individuals throughout the pandemic including homeworking

Headline labour market estimates suggest the employment rate has been decreasing since the start of the coronavirus pandemic, while the unemployment rate has started increasing a few months later

UK employment rate (LHS) and unemployment rate (RHS), seasonally adjusted, between January to March 2019 and June to August 2020



Source: Labour marker overview, UK: October 2020

Lead analyst: Bob Watson

Employment and unemployment figures have remained relatively stable over the course of the pandemic partially reflecting those furloughed being classified as employed

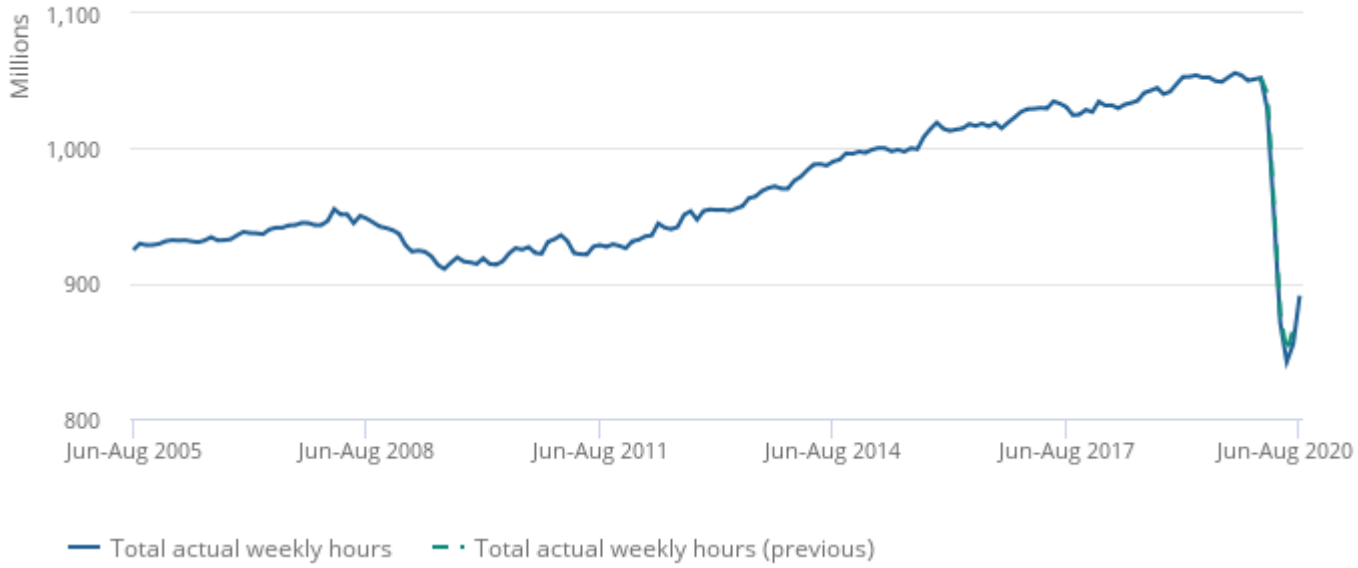
- The employment rate has been decreasing since the start of the coronavirus pandemic reaching 75.6% in June to August 2020; the unemployment rate for all people was 4.5% up by 0.6 percentage points from a year earlier.
- The number of people who are in employment but have been temporarily away from paid work, which includes those who have been furloughed, has fallen from almost 7.3 million people in April to June 2020 to 6.4 million people in June to August 2020.
- Redundancies increased in June to August 2020 by 113,000 on the year, and a record 114,000 on the quarter, to 227,000; the annual increase was the largest since April to June 2009, with the number of redundancies reaching its highest level since May to July 2009.
- HMRC estimates indicate that there were 28.3 million payroll employees in September 2020; a cumulative decline of 673,000 payroll employees since March 2020.

The impacts of the pandemic on the labour market are most evident in how total hours worked and vacancies are still, in September 2020, considerably below their pre-lockdown levels

- Total hours worked in July to September 2020, while still down 158.2 million hours on the previous year, show signs of recovering with a record increase on the quarter of 20.0 million covering a time when a number of coronavirus lockdown measures were eased.
- After a record low of 343,000 vacancies in April to June 2020, there has been an estimated record quarterly increase of 144,000 vacancies in July to September 2020; vacancies remain below the pre-COVID-19 pandemic levels and are 332,000 (40.5%) less than a year ago.
- The arts, entertainment and recreation industry has struggled the most during the coronavirus (COVID-19) pandemic with a large quarterly fall in vacancies of 90.7% from January to March 2020 to April to June 2020 and a small recovery in July to September 2020.
- Annual growth in employee pay strengthened in August 2020 as employees continued to return to work from furlough; this followed strong falls in months since April when pay growth was affected by lower pay for furloughed employees, and reduced bonuses.

Total hours worked, while still low, show signs of recovering with a record increase to Quarter 2 (Apr to June) 2020 covering a time when a number of coronavirus lockdown measures were eased

UK total actual weekly hours worked (people aged 16 years and over), seasonally adjusted, between June to August 2005 and June to August 2020

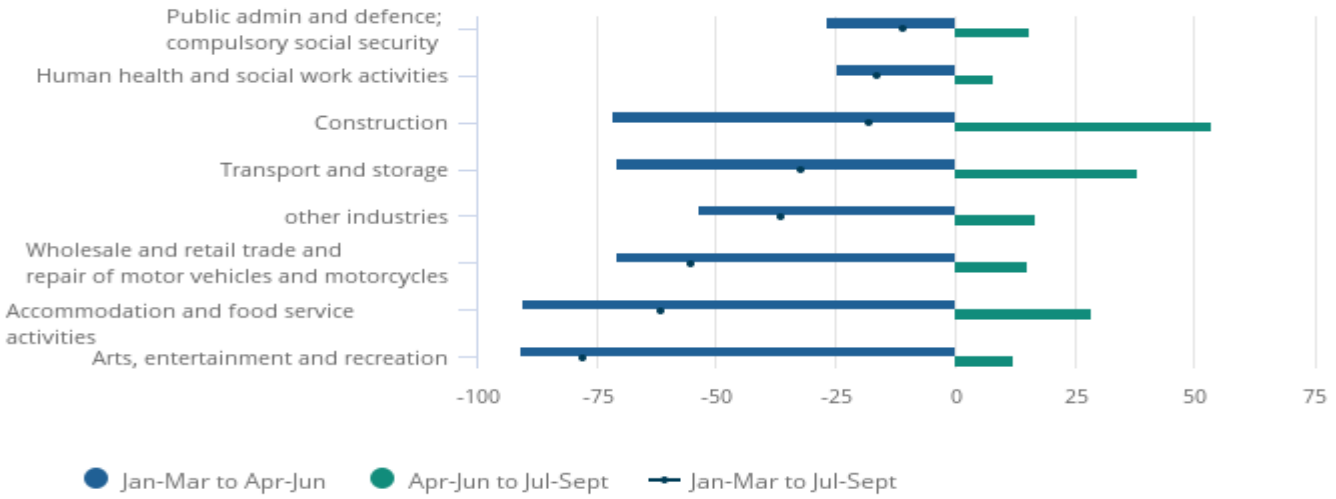


Source: Employment in the UK: October 2020

Lead analyst: Bob Watson

The impact of a sharp contraction in output and heightened level of uncertainty is reflected in the fall in labour demand immediately following the easing of lockdown restrictions

Three-month average vacancies in the UK, seasonally adjusted, between January to March 2020 and July to September 2020; index January to March 2020=100, difference in percentage points compared with January to March 2020



Source: Vacancies and jobs in the UK: October 2020

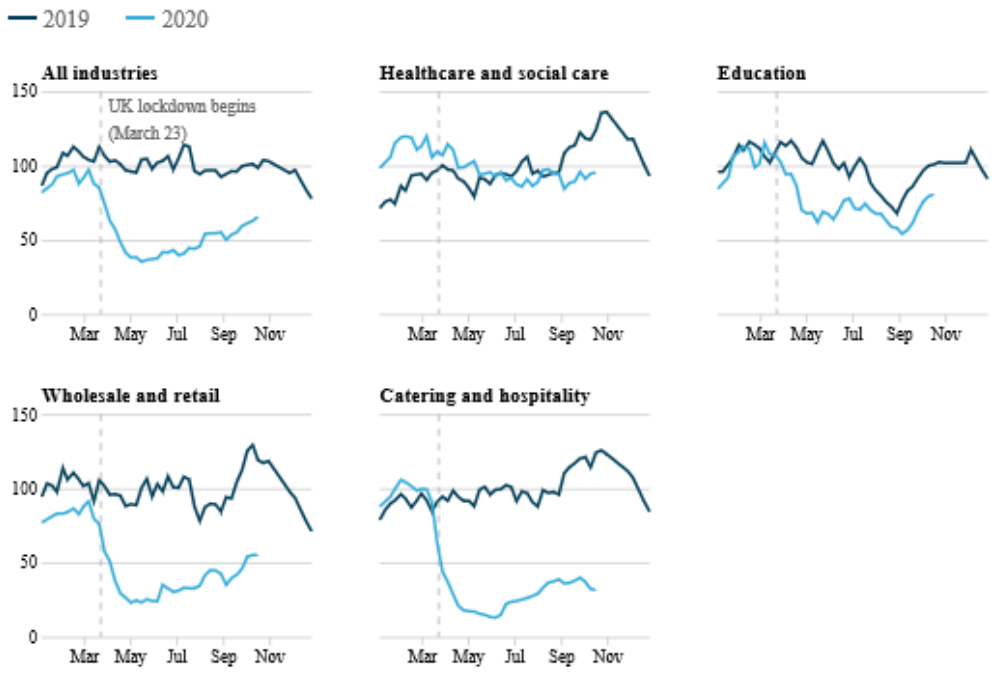
Lead analyst: Laura Caldwell

Experimental estimates suggest that total online job adverts fell to half of their 2019 average during April 2020

- The total number of online job adverts was relatively stable from the start of 2019 until the beginning of March 2020, after which it began to decline rapidly; this decline continued for two months, with total job adverts levelling off from the start of May to around 40% of its 2019 average.
- The categories of catering and hospitality, and wholesale and retail, both saw very large declines in job adverts, dropping to 13% (June) and 23% (May) of their 2019 averages respectively.
- In contrast, education saw a smaller decline and the volume of job adverts in health and social care saw little change from March to June.
- Between 9 and 16 October 2020, total online job adverts increased for the sixth consecutive week from 63% to 66% of their 2019 average, the highest recorded level since 3 April 2020; however, there may be a seasonal component to this increase, as it is consistent with the previous year's trend.
- London remained the region with the lowest volume of online job adverts for the eighth consecutive week, with 53% of its 2019 average volume; however, like the rest of the UK it has also seen a steady increase in the volume of online job adverts over the previous two months.

The change in the volume of job adverts has differed throughout the pandemic across industry categories

Total weekly job adverts on Adzuna, UK, 4 January 2019 to 16 October 2020, index 2019 average = 100



Source: Coronavirus and the latest indicators for the UK economy and society: 22 October 2020

Lead analyst: Laura Caldwell

The pandemic has appeared to have had little impact on the number of employed people switching occupations

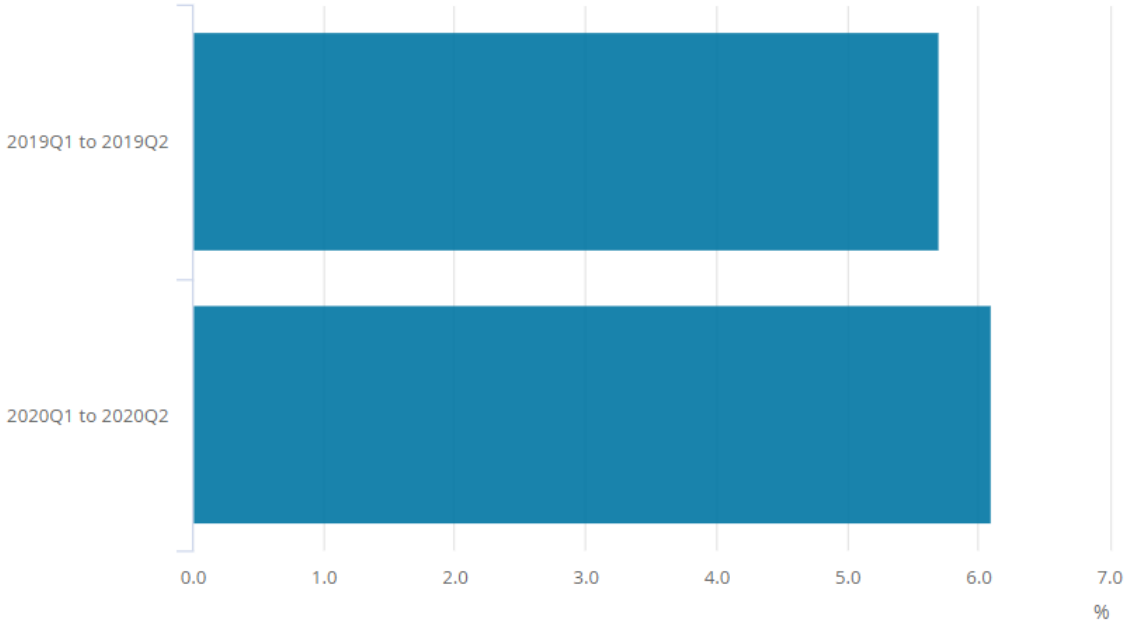
- Of those employed in Quarter 1 (Jan to Mar) and Quarter 2 (Apr to June) 2020, 6.1% changed occupation in the first half of this year compared with 5.7% in the same period last year.
- This may reflect the impact of the government's job retention schemes, which encourage an attachment between individuals and a specific job.
- Of those who have changed occupation in the first half of this year, the largest outflow was associate professional and technical occupations (20.9%). The largest inflow was also into this occupation group with 21.2% of individuals who switched occupation moving into this group.
- Of the workers who changed occupation between Quarter 1 and Quarter 2 2020, over half (52.6%) were men, 26.9% were aged 35 to 49 years and 26.9% were aged 50 to 64 years.

Notes: From 13 October 2020, the Labour Force Survey (LFS) estimates have been reweighted to account for the impact of the coronavirus (COVID-19) pandemic on survey interviewing methods. The LFS estimates used in this analysis have not been reweighted.

Occupational switching can be defined as a change in a worker's Standard Occupational Classification (SOC) from one quarter to the next, which would not be reflected in the traditional flows between employment, unemployment and inactivity. This analysis focussed on the population who has been in employment for both periods.

Of those employed in Quarter 1 (Jan to Mar) and Quarter 2 (Apr to June) 2020, 6.1% switched occupation

Proportion of those in employment who changed occupation in the pre-pandemic period (Quarter 1 and Quarter 2 2019) and during the pandemic period (Quarter 1 and Quarter 2 2020)



Source: Coronavirus and occupational switching: January to June 2020

Lead analyst: Marina Romiti

Nearly two-thirds of working adults said their work was being affected by the coronavirus pandemic in May, but this has decreased to just under half of working adults in October

The percentage of working adults[1] that said their work had been impacted because of the pandemic has been gradually declining. During May, around two-thirds of working adults[1] said this, but by August this had fallen to under half. The main impacts have however remained consistent over these months:

- furloughed;
- asked to work from home;
- decrease in hours worked and
- finding working from home difficult.

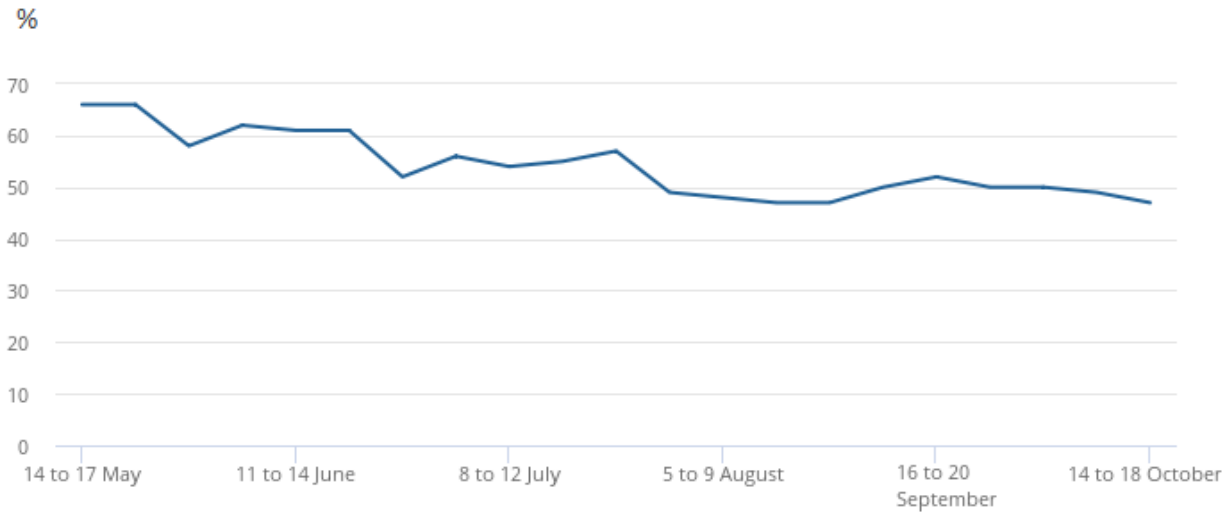
As lockdown restrictions eased, there has been a steady rise in the percentage of working adults travelling to work, either exclusively or in combination with working from home.

[1]The working population is those that said they had a paid job, either as an employee or self-employed; or they did any casual work for payment; or they did any unpaid or voluntary work in the previous week.

The percentage of working adults[1] that say their work is being affected by the coronavirus pandemic is gradually declining over time

Percentage of working adults, Great Britain, May to October 2020

[1]The working population is those that said they had a paid job, either as an employee or self-employed; or they did any casual work for payment; or they did any unpaid or voluntary work in the previous week.

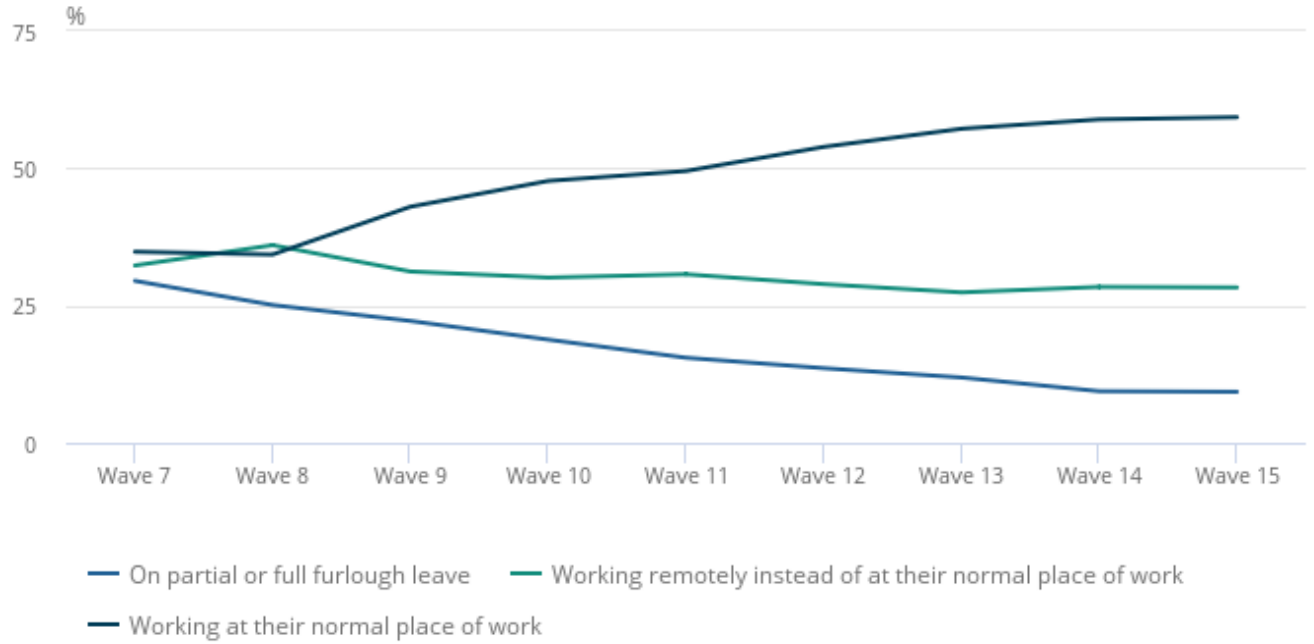


Source: Coronavirus and the social impacts on Great Britain

Lead analyst: Andrea Lacey

The proportion of the workforce on furlough has decreased from more than 25% as lockdown was announced to less than 10% in September

Working arrangements, businesses that have not permanently stopped trading, broken down by Wave, weighted, UK, 1 June to 4 October 2020



Source: Coronavirus and the economic impacts on the UK: 22 October 2020

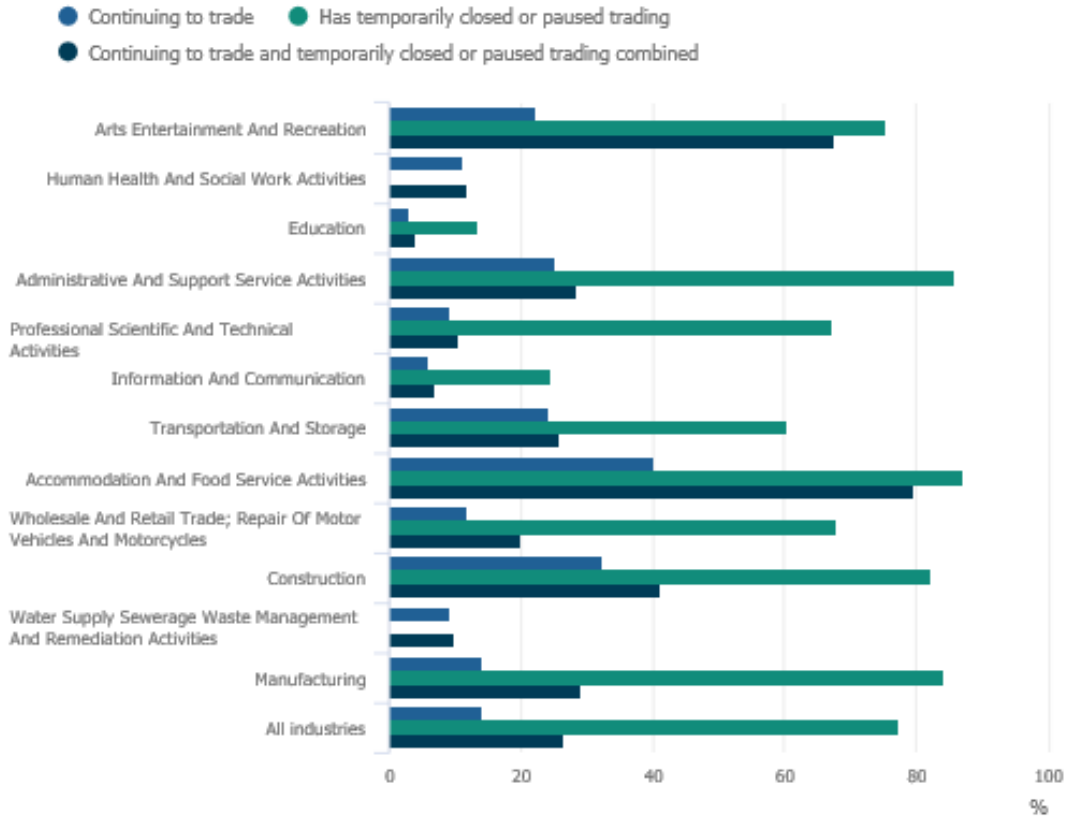
Lead analyst: Jon Gough

The proportion of the workforce been furlough differed over time and by industry

- According to estimates from the Business Impact of Coronavirus Survey, in the 2-weeks following the lockdown announcement, 23 March to 5 April 2020, 27% of the workforce had been furloughed across businesses that were still trading or had temporarily paused trading. Less than 1% of the workforce had been made redundant.
- For the workforce of businesses that had not permanently closed, the highest incidences of furloughing were in the accommodation and food service activities (80%) and arts, entertainment and recreation (68%) industries.
- Between 21 September to 4 October 2020, 9% of the workforce were on partial or full furlough leave, unchanged from early September and after a steady decrease from 30% in early June.
- The arts, entertainment and recreation and the accommodation and food service activities industries continued to have the highest proportions of their workforce furloughed at 28% and 24% respectively.
- Young people have higher employment intensity in industries that were significantly affected by the coronavirus.
- At a top level, estimates of the proportion of furloughed jobs from the BICS are similar to HMRC's proportion of employments furloughed, for the months of May, June and July 2020.

The arts, entertainment and recreation and the accommodation and food service activities industries had the highest proportion of their workforce on furlough leave during the pandemic

Proportion of the workforce furloughed by industry and trading status of the employing business, UK, 23 March 2020 to 5 April 2020

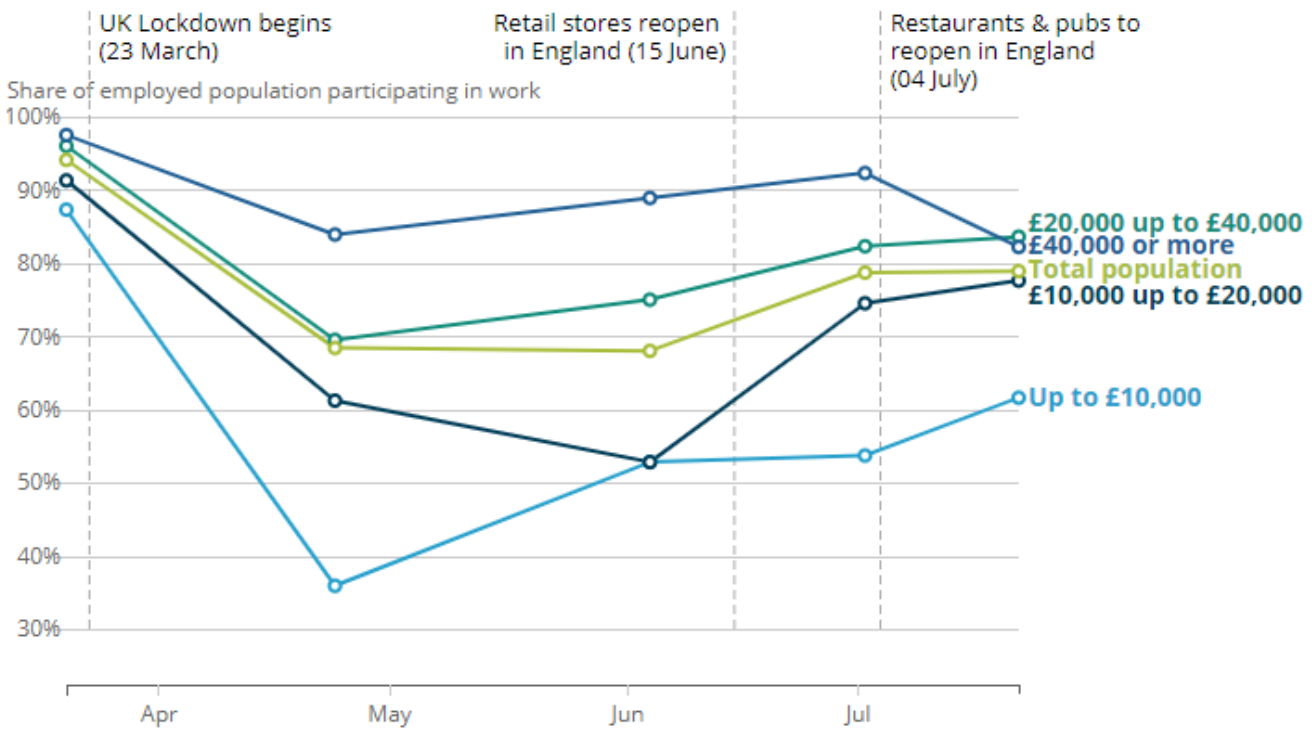


Source: Furloughing of workers across UK businesses

Lead analyst: Ellys Monahan

The share of the employed population participating in work throughout the pandemic differs by income level

Share of the employed population who said they did any work in reference week by annual personal income level, Great Britain, 20 March to 26 July 2020.



Source: Personal and economic well-being in Great Britain: September 2020

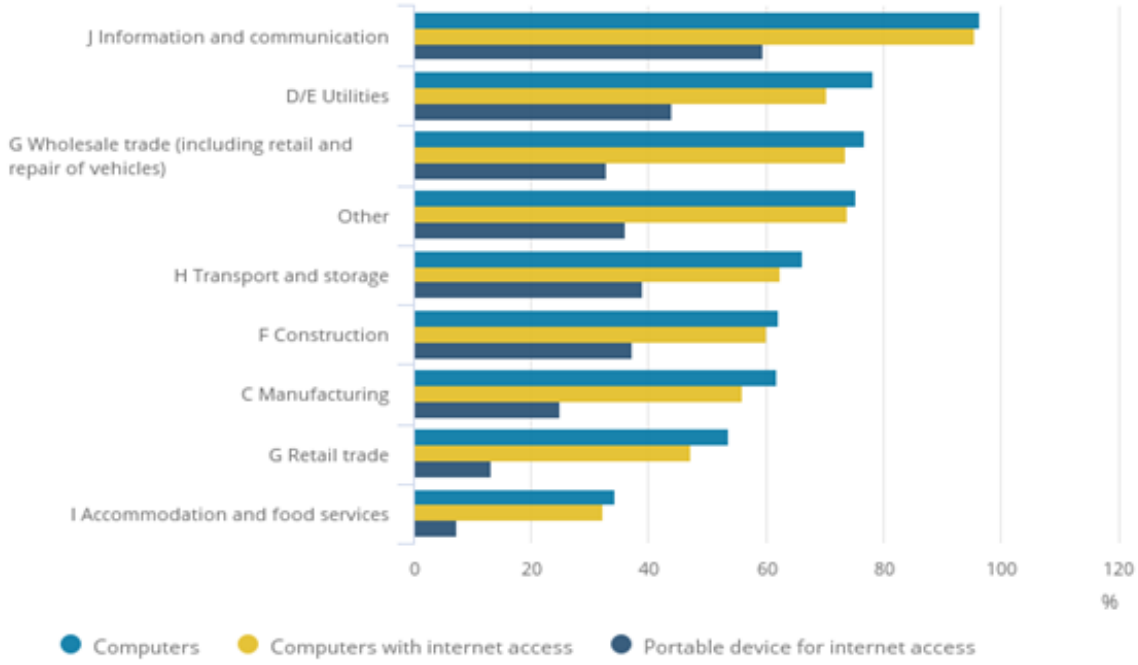
Lead analyst: Gueorguie Vassilev

Homeworking opportunities vary significantly between industries depending on the role

- Homeworking opportunities vary significantly between industries, with 10% of employees within the accommodation and food services industry reporting having ever worked from home (in 2019) compared with 53% of those in the information and communication industry.
- The extent to which an employee can work from home depends on whether a specific physical environment, tools, or proximity to other people are required for the role.
- Technology can be an enabling power for homeworking, providing employees have the access to, and skills required for, technology.
- The E-commerce Survey shows that in 2018, less than half of all employees were provided with a portable device for work, except in the information and communication industry where around 60% of employees were provided with a portable device.
- The Office of Communications (OFCOM) found superfast broadband coverage reached 95% of residential homes in the UK in September 2019.
- In the accommodation and food services, and retail industries, over 85% of businesses using social media, used it to develop brand image and for marketing purposes.

Less than half of all employees were provided with a portable device for work, except in the information and communication industry

Proportion of employees with access to use computers and the internet for work by industry, UK, 2018



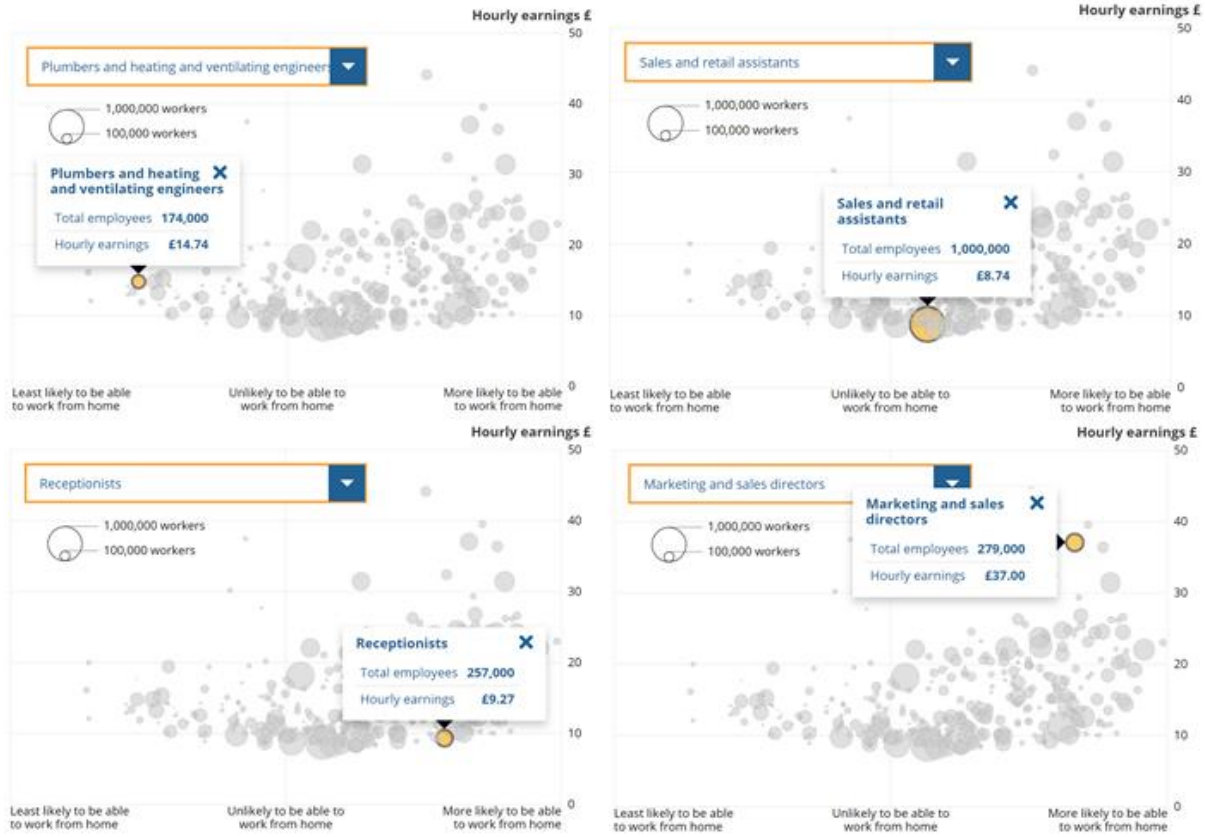
Source: Technology intensity and homeworking in the UK

Lead analyst: Darnell Wilkinson

Higher-paying jobs have most potential for homeworking

- Employees in higher-paying jobs are more likely to be able to work from home, according to analysis of how adaptable jobs are to remote working.
- Chief executives and senior officials, whose median hourly earnings are £44.08, are among those most able to work remotely, as are financial managers and directors (£31.38) and programmers and software development professionals (£21.97).
- In contrast, gardeners, whose median hourly earnings are £10.27, are very unlikely to be able to work from home, as are carpenters and joiners (£13.18) and elementary construction occupations like labourers (£10.25).
- The median earnings of employees in the 20% of the workforce most likely to be able to work from home is £19.01, compared with £11.28 for workers in the 20% of workers in jobs least likely to be adaptable to home working.

Jobs that pay higher hourly wages are more likely to be adaptable to working from home



Source: Which jobs can be done from home?

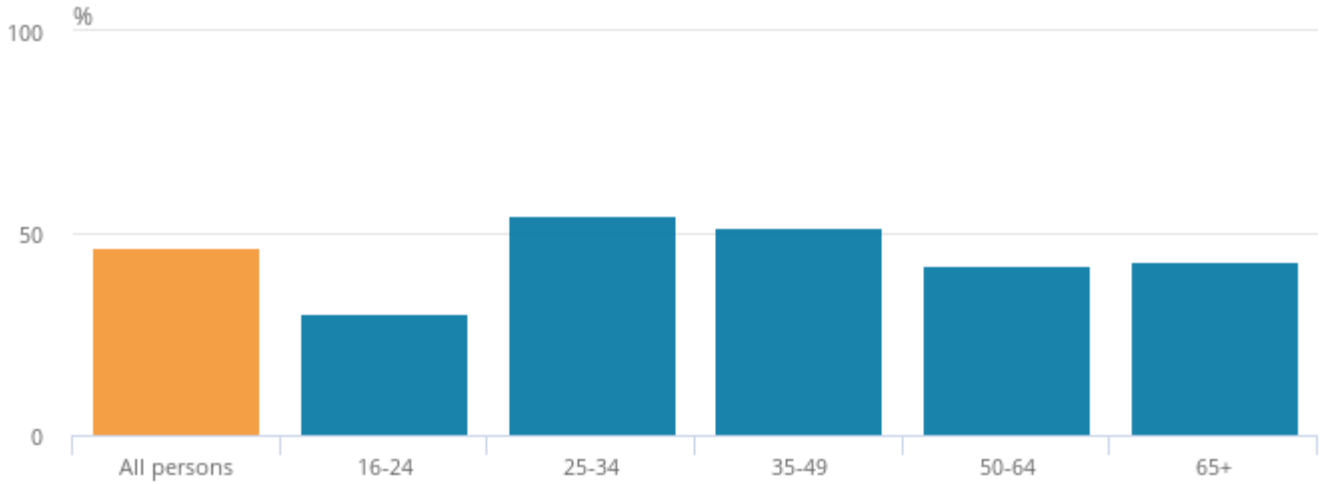
Lead analyst: Piotr Pawelek

During April 2020, most people who did some work at home did so as a result of COVID-19

- 46.6% of people in employment did some work at home during April 2020; 86.0% of these individuals did so as a result of COVID-19.
- Of those who did some work from home, around one-third worked fewer hours than usual (34.4%), and around one-third worked more hours than usual (30.3%).
- Women were slightly more likely to do some work at home than men, 47.5% and 45.7% respectively.
- People aged 16 to 24 years were less likely to do some work from home than those in older age groups.
- Occupations requiring higher qualifications and more experience were more likely to provide homeworking opportunities than elementary and manual occupations.

People aged 16 to 24 years were less likely to do any work from home than other age groups in April 2020

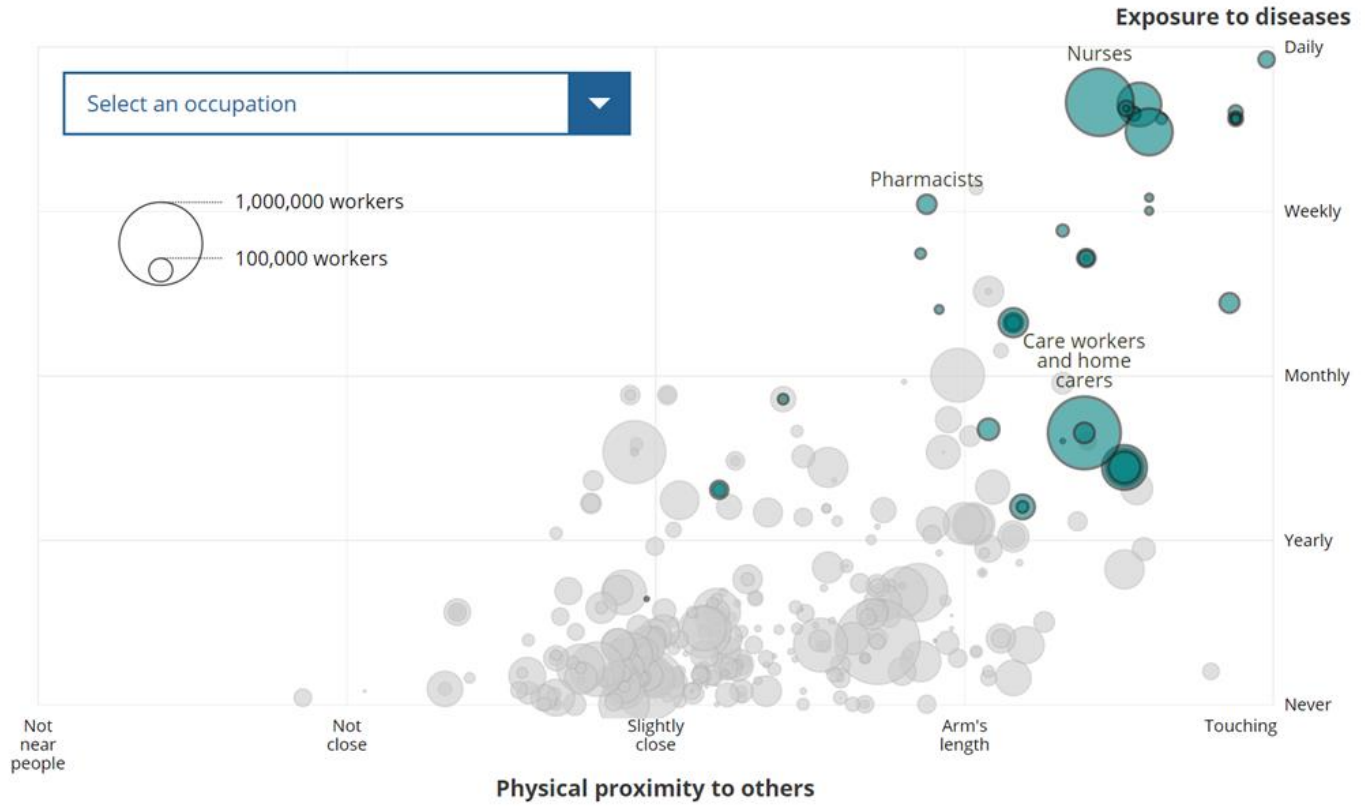
Homeworking rates, by age, of those in employment (aged 16 years and over), UK, April 2020



Source: Coronavirus and homeworking in the UK: April 2020

Lead analyst: Alastair Cameron

Healthcare workers such as nurses and dental practitioners unsurprisingly both involve being exposed to disease on a daily basis, and they require close contact with others, though during the pandemic they are more likely to be using PPE



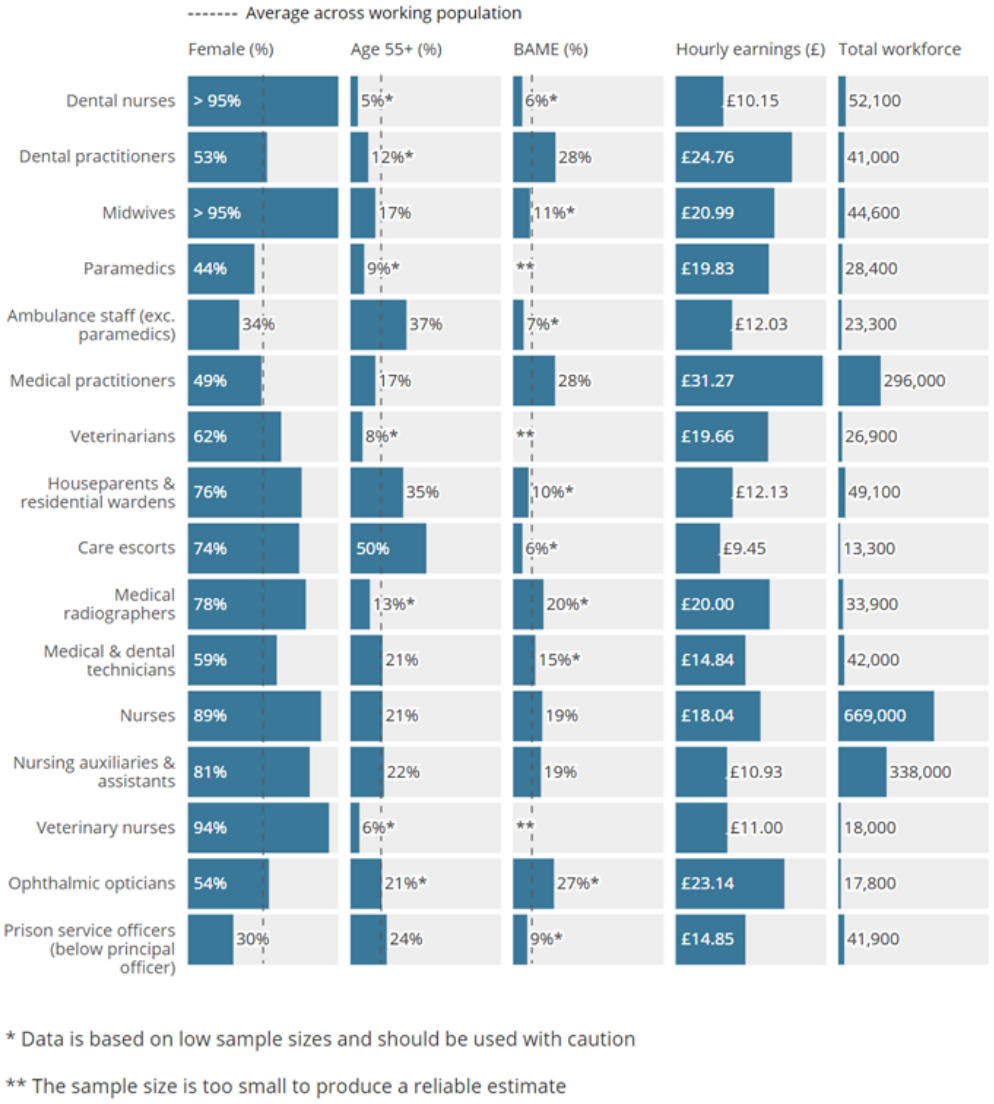
Source: Which occupations have the highest potential exposure to the coronavirus (COVID-19)?

Lead analyst: Andrea Lacey

Looking at the characteristics of workers in highest exposure occupations provides insight into who is more likely to be exposed to the virus

- There are more women working in occupations that are more likely to be in frequent contact with people and also frequently exposed to disease. Three in four workers (75%) in these roles are women. These include dental nurses, midwives, and veterinary nurses, where women make up the majority of workers.
- One in five of those working in these occupations are aged 55 years or over.
- One in five workers in these occupations are from black and minority ethnic (BAME) groups, compared with 11% of the working population.
- When it comes to pay, 6 out of 16 of these occupations have a median pay of lower than £13.21, the median hourly pay across the UK.

Characteristics of workers in highest exposure occupations



Source: Which occupations have the highest potential exposure to the coronavirus (COVID-19)?

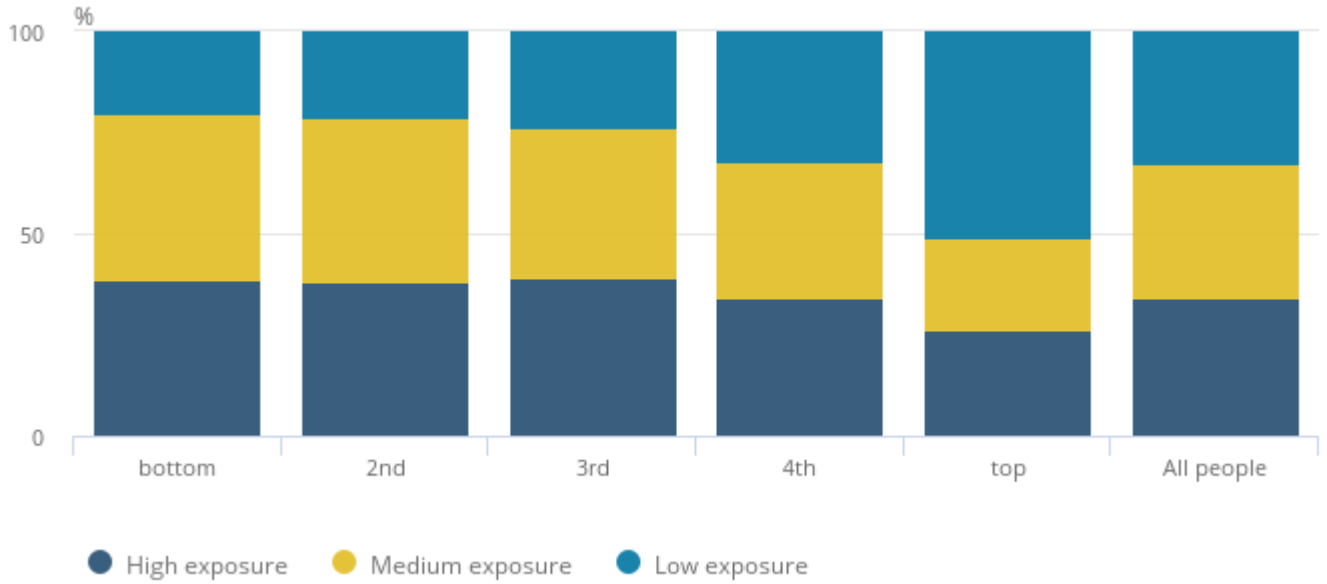
Lead analyst: Andrea Lacey

A higher proportion of workers (40%) in the poorest fifth of people has greater potential exposure to COVID-19 than the richest fifth of people (25%)

- Almost 40% of workers in the poorest fifth of people worked in occupations that have greater potential exposure to the COVID-19 – for instance, care workers and catering assistants – in the FYE 2019, compared with just over 25% of workers in the richest fifth of people.
- While overall employees who were defined as key workers had similar household incomes to non-key workers (£35,300 versus £35,400), key workers in the food and necessary goods occupation group had an average household disposable income of £28,000.
- Employees who were working in occupations with a higher propensity for homeworking were on average more likely to have higher household disposable income in the FYE 2019.

Almost 40% of workers in the poorest fifth worked in occupations that had the highest exposure to COVID-19, compared with just over 25% of the richest fifth

Proportion of employees within each quintile, by exposure to COVID-19, UK, financial year ending 2019



Source: Effects of taxes and benefits on UK household income: financial year ending 2019

Lead analyst: Dominic Webber & Jeena O'Neill

Occupations involving close and frequent interaction with others generally had the highest rates of death involving COVID-19 among those of working age in England and Wales (9 March and 25 May 2020)

- Among men, elementary workers had the highest rate of death involving COVID-19, double the rate seen among men of the same age in the general population. This group includes jobs such as factory workers, security guards, construction workers, and cleaners.
- Men working in a range of other occupations with either direct or indirect contact with others had elevated rates, including bus drivers and taxi drivers, chefs, and sales and retail assistants.
- Women and men working in health and social care occupations, those on the frontline of the pandemic, also had elevated rates when compared to those of the same age and sex in the population.
- Social care occupations had the highest rates in the health and social care sector, explained by the number of registered deaths among men and women working as care workers and home carers.

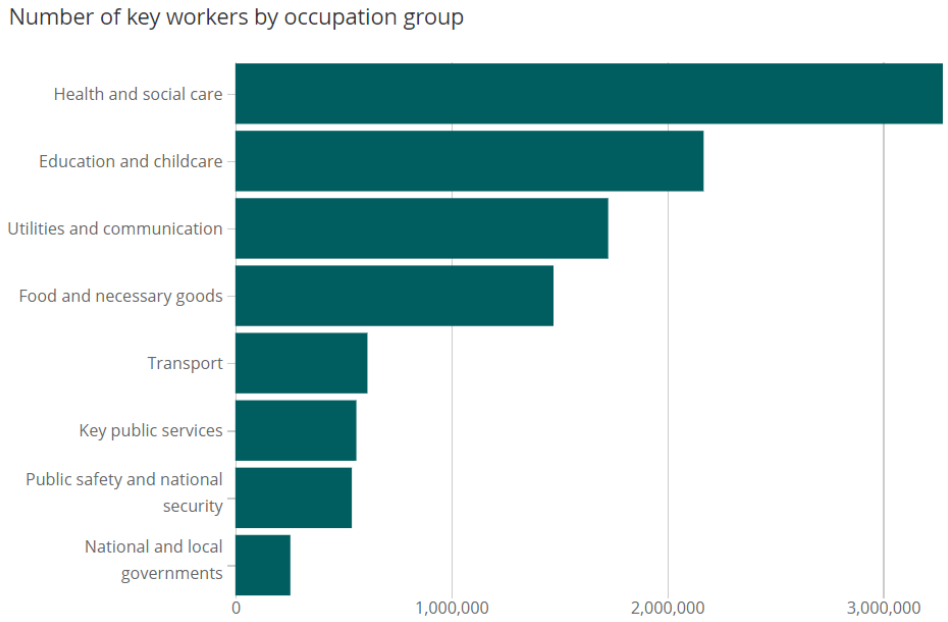
Source: Coronavirus (COVID-19) related deaths by occupation, England and Wales: deaths registered between 9 March and 25 May 2020

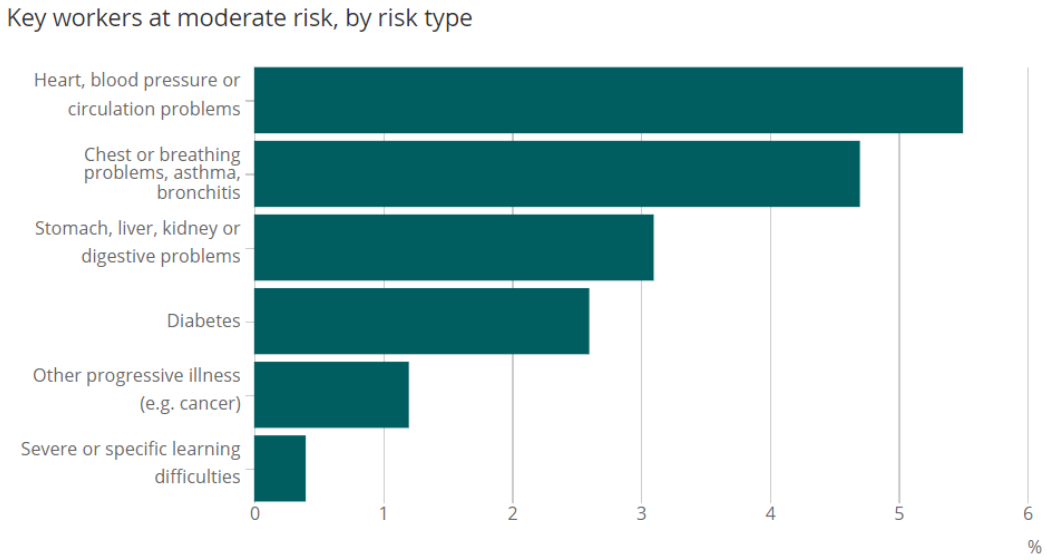
Lead analyst: Ben Windsor-Shellard

In 2019, 33% of the total workforce were in key worker occupations and industries

- The largest group of those employed in key worker occupations worked in health and social care (31%).
- 31% of key workers have children aged between 5 and 15 years; 16% have children aged 4 years or under.
- Nearly three-fifths of all key workers were women (58%) and 42% were men.
- The majority of key workers were of White ethnicity (86%), with 14% belonging to an ethnic minority. Of the ethnic minority categories, Asian and Black/African had the highest proportions of key workers at 8% and 4% respectively.

The largest group of key workers worked in health and social care and heart problems were the most common condition for key workers at moderate risk





Source: Coronavirus and key workers in the UK

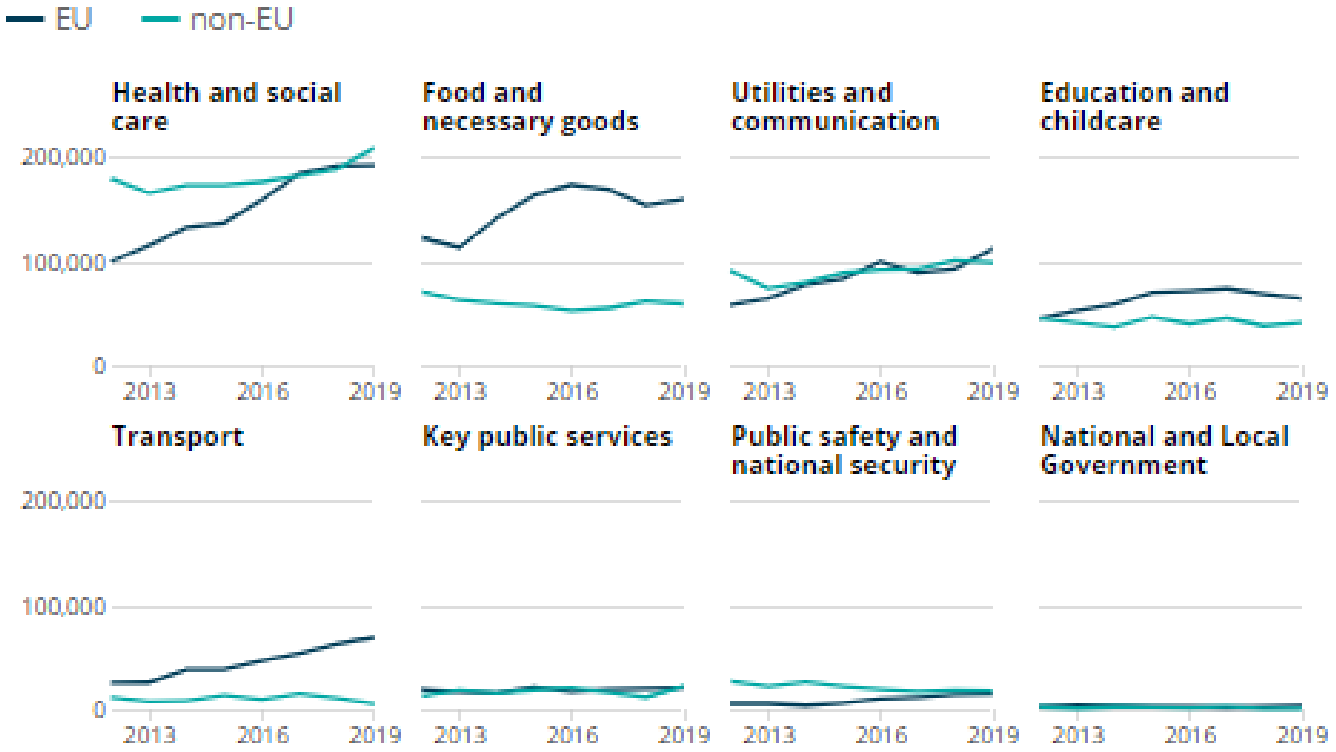
Lead analyst: Rachel McSweeney

Between 2017 and 2019, the largest group of key workers worked in health and social care (3.2 million), of which 12% were non-British nationals with an equal split between EU and non-EU nationals

- Data collected between 2017 and 2019, indicates there were 32.3 million people employed in the UK workforce, with roughly a third (10.5 million) employed in key worker occupations and industries.
- 10% of key workers were non-British nationals, with EU and non-EU nationals making up 6% and 4%, respectively; 18% of key workers were born outside of the UK.
- The largest number of key workers worked in health and social care (3.2 million), of which 12% were non-British nationals with an equal split between EU and non-EU nationals.
- The key worker occupation group with the largest proportion of non-British nationals was food and necessary goods; there were around 1.5 million people who worked in that group, of which 15% were non-British nationals, including 11% EU nationals.
- From 2012 to 2019, the number of non-British nationals employed in key worker occupations and industries grew (from 826,300 to 1,097,100); this was mainly driven by a steady increase in EU nationals working in health and social care (from 100,200 in 2012 to 192,300 in 2019).

The number of non-British key workers has varied over time

Count of EU and non-EU nationals by key worker occupation group, 2012 to 2019



Source: Coronavirus and non-UK key workers

Lead Analyst: Megan Bowers

Mobility and Trade

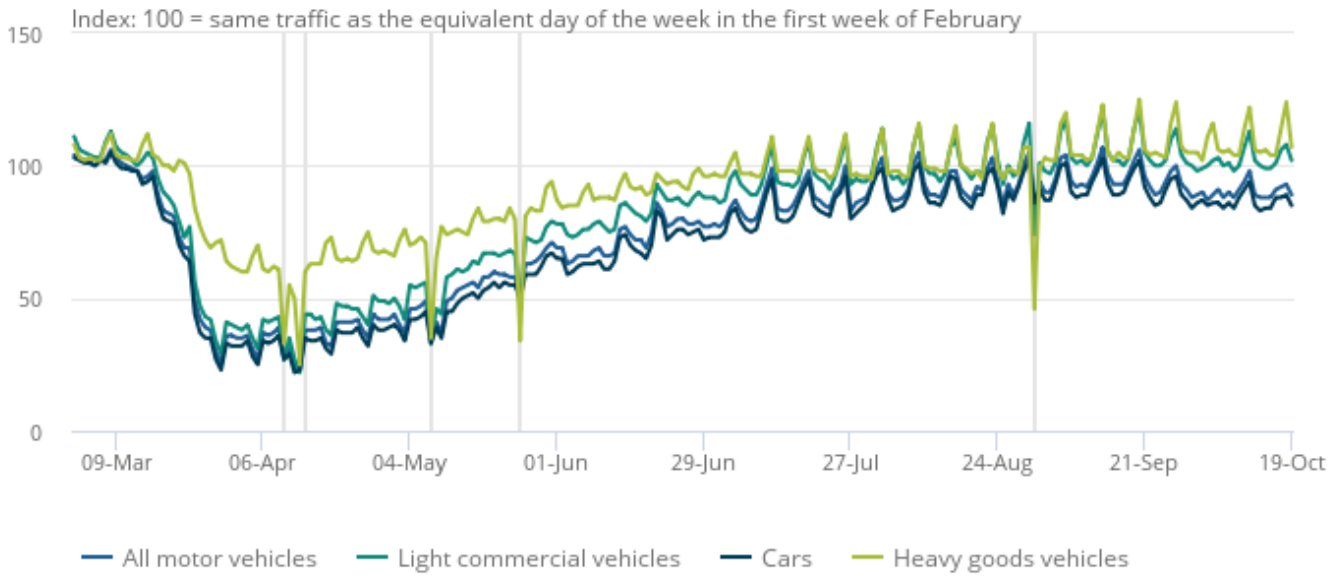
This section includes our data on trade in goods and services, on the balance of payments as well as on how different types of transport or movement have been affected by the pandemic

Road traffic across total motor vehicles has fallen slightly in October 2020 and has yet to reach levels seen in February 2020

- Road traffic across total motor vehicles has fallen slightly in October, although it has stabilised in the week to 19 October 2020.
- This follows a gradual increase since the lockdown restrictions were eased but continues to remain below levels seen in the first week of February 2020.
- On Monday 19 October, car traffic remained at 15 per cent lower than the equivalent Monday in the first week of February.
- Light commercial vehicle traffic has remained stable whilst heavy vehicle traffic increased by 1 per cent in the week to 19th October, with both remaining slightly above traffic seen on the equivalent Monday in the first week of February.

On Monday 19 October 2020, the volume of all motor vehicle traffic was 11 per cent below the levels seen on the first Monday of February

Daily road traffic index: 100 = same traffic as the equivalent day of the week in the first week of February, 1 March 2020 to 19 October 2020, non-seasonally adjusted



Source: Coronavirus and the latest indicators for the UK economy and society: 22 October 2020

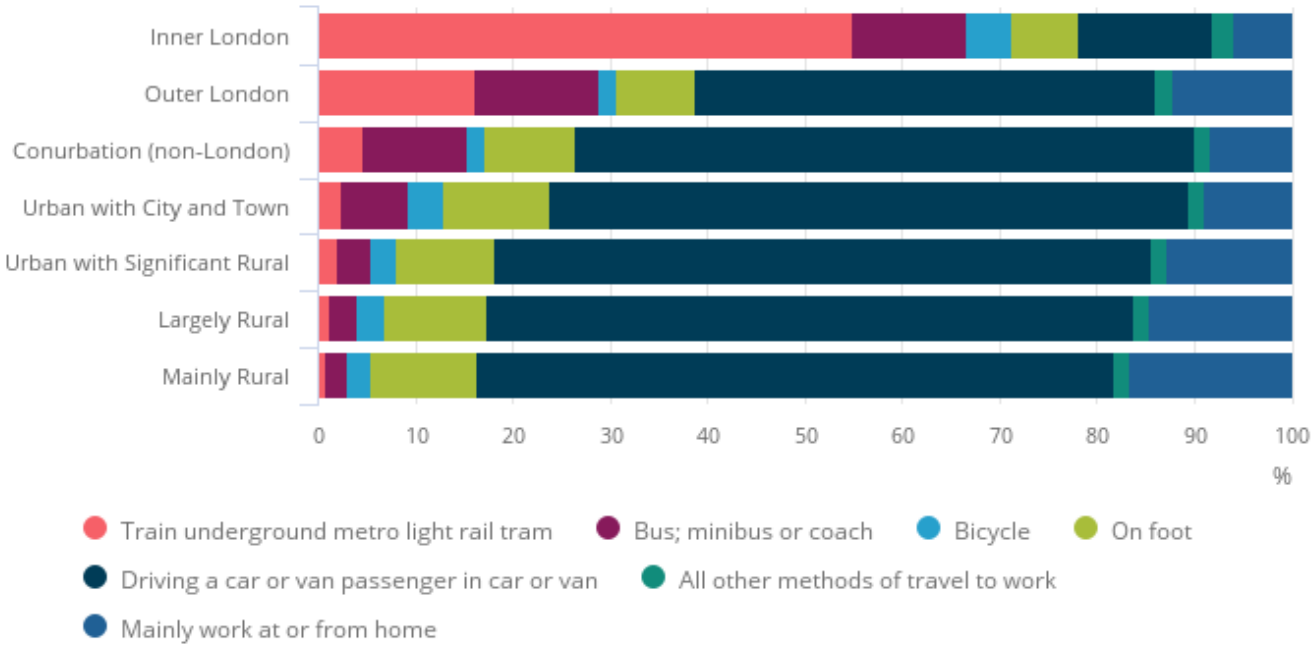
Lead analyst: David Matthewson

Public transport use was significantly higher in London than in rest of England

- In Great Britain, more people in employment returned to work as restrictions eased.
- Although cars or vans are the most commonly used transport for workers in England, public transport use in London is more common; 66.6% in Inner London, 28.8% in Outer London compared to 3.1% across mainly rural local authorities in England.
- Understanding the different patterns in different sectors is important at present because different parts of the economy are returning to work on different time scales, and the industry detail therefore allows us to see the implications for different places as lockdown measures are eased.
    - City of London, 84% of the workforce used public transport (40% working in the finance sector, 18% in the professional services sector). Most of these commutes were by rail rather than bus.
    - West Suffolk, just 2.6% of the workforce employed at locations within the local authority used public transport (retail, health and accommodation sectors).

Inner London local authorities are the most reliant on public transport

Mode of travel to work to rural and urban workplaces, England, 2011



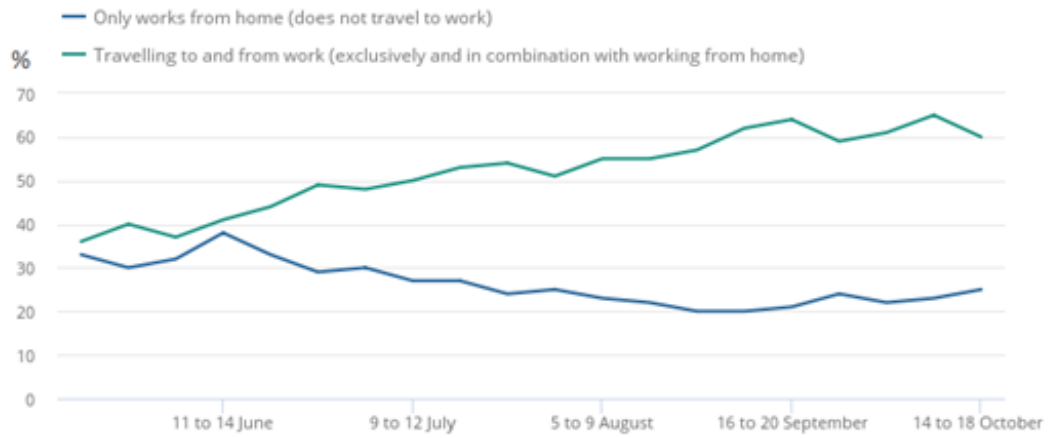
Source: Coronavirus and travel to work: June 2020

Lead analyst: Richard Prothero

As lockdown restrictions eased, there has been a steady rise in the percentage of working adults[1] travelling to work, either exclusively or in combination with working from home

Location of work, Great Britain, May to October 2020

[1]The working population is those that said they had a paid job, either as an employee or self-employed; or they did any casual work for payment; or they did any unpaid or voluntary work in the previous week.



Source: Coronavirus and the social impacts on Great Britain

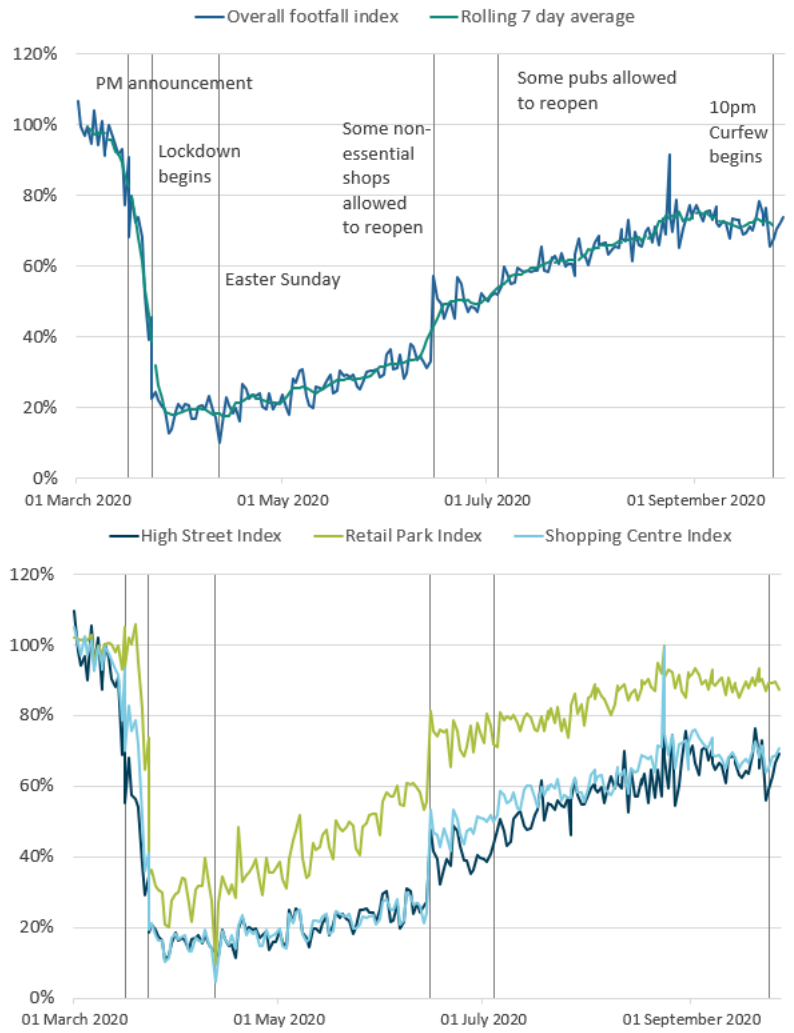
Lead analyst: Andrea Lacey

The reopening of many non-essential shops and businesses in England on 15 June coincided with a large rise in footfall to retail parks, shopping centres and high streets

- From 14 June to 15 June 2020, there was a large rise in the three footfall indices of Retail Parks, Shopping Centres and High Streets; this coincided with the reopening of many non-essential shops and businesses in England on 15 June.
- On 28 June, footfall in retail parks rose to around 70% of its level the same time last year, while footfall in shopping centres was just under 50% and that in high streets was below 40% of its level in the same period last year.
- In the week ending 18 October 2020, overall footfall decreased to below 70% of its level in the same period of the previous year.
- This indicates a continuing of the slight decrease that followed the gradual but steady increase in footfall since the reopening of non-essential shops and businesses in England on 15 June.

The flattening in the trend since August followed the gradual but steady increase in footfall since the reopening of non-essential shops and businesses

Volume of footfall, year-on-year percentage change between footfall on the same day, UK, 1 March to 18 October 2020



Source: Coronavirus and the latest indicators for the UK economy and society: 22 October 2020

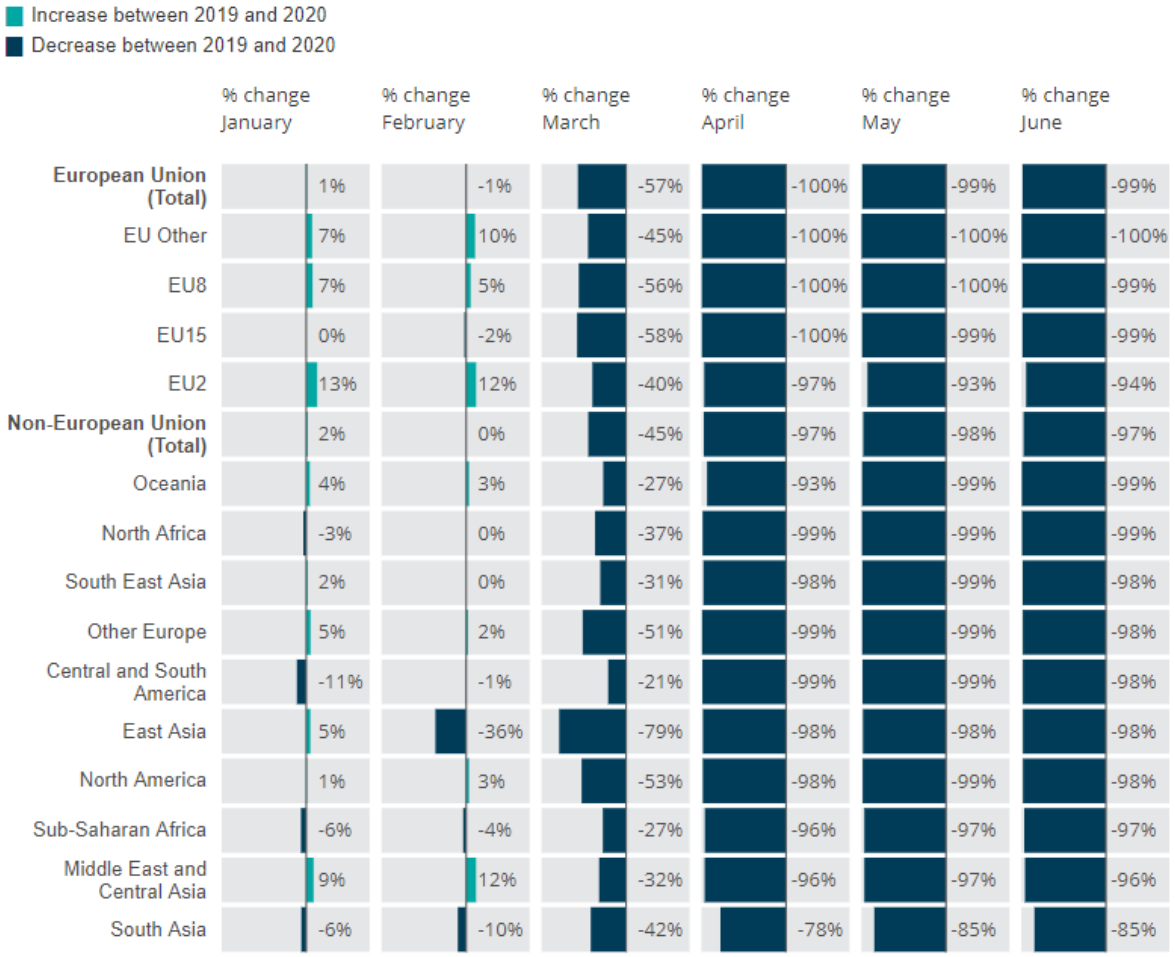
Lead analyst: David Matthewson

There has been widespread decline in international air travel to and from the UK since March 2020 compared to the same period in 2019

- Restrictions on international travel have been in place since early 2020 because of the coronavirus (COVID-19). In August 2020, the Foreign and Commonwealth Office (FCO) have started to ease travel restrictions for British travellers where countries are assessed as “no longer presenting an unacceptably high risk to British people traveling abroad.”
- Analysis of the Civil Aviation Authority (CAA) data show the volume of air passengers arriving to and departing from the UK was significantly lower in March 2020 compared with March 2019.
- April to June 2020 then saw further reductions compared with the same months in 2019, with differences of over 95% for travel to and from most world regions.
- Home Office statistics using Advanced Passenger Information (API) show that there were an estimated 1.3 million passenger arrivals (including returning UK residents) in April to June 2020
- Number of applications for visitor visas in the second quarter of 2020 was 99% lower than in the same period in 2019.
- Department for Transport figures show a decrease of 85% in short international ferry routes to Ireland and other European countries compared with the previous year.

Annual percentage change in monthly air passenger arrivals at airports in the UK from airports in regions of the world

January to June 2020



Source: ONS analysis of Civil Aviation Authority data, [Migration Statistics quarterly report: August 2020]

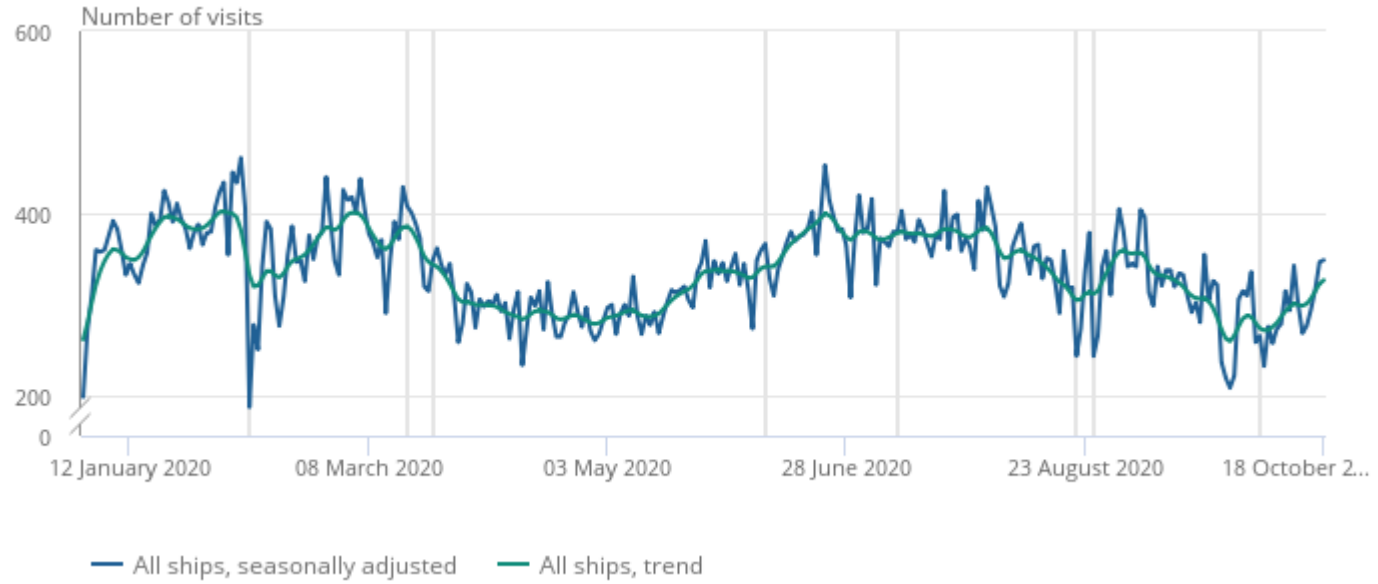
Lead analyst: [Mike James]

There has been a gradual decrease in daily ship visits to major ports in the UK since September following an increase as lockdown ended

- Shipping indicators offer a fast signal of the level of shipping activity, which is related to trade in goods.
- Following an initial increase in daily ship visits as lockdown restrictions were eased, there has been a gradual decrease in daily ship visits to major ports in the UK during the past few weeks.
- Despite the decreasing trend, in the week ending 18 October 2020, the average number of daily ship visits increased slightly compared with the previous week, from 291 visits to 308.
- This slight increase when compared with the previous week was seen for cargo ships, from 94 visits to 100.

Despite the generally decreasing trend since September, the average number of daily ship visits slightly increased in the week ending 18 October

Daily movements in shipping visits, UK, seasonally adjusted, 1 January 2020 to 18 October 2020



Source: Coronavirus and the latest indicators for the UK economy and society: 22 October 2020

Lead analyst: David Matthewson

There was a sharp narrowing in the current account deficit in Quarter 2 (Apr to June) 2020

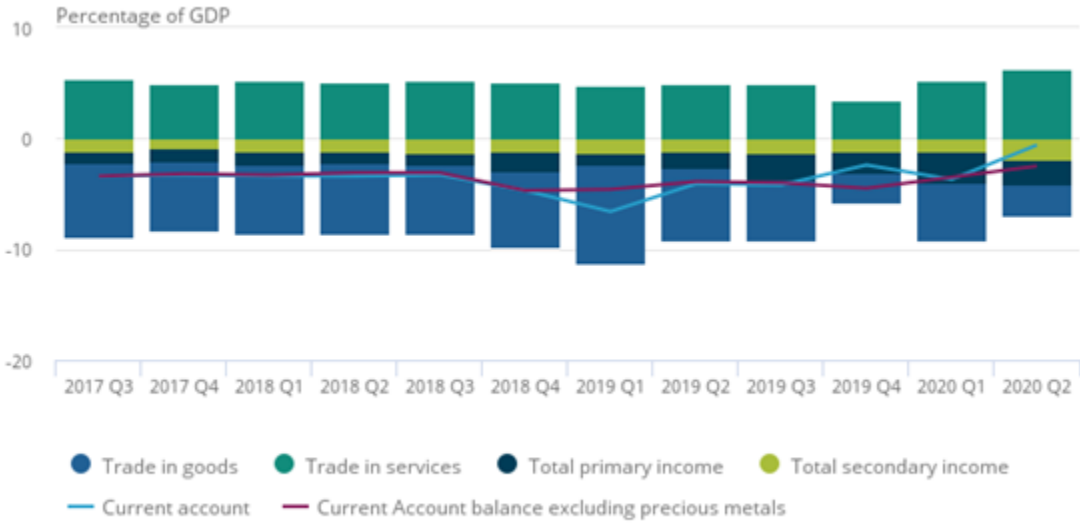
- Net lending from the rest of the world stood at 0.6% of gross domestic product (GDP) in Quarter 2 (Apr to June) 2020, which is the lowest recorded since Quarter 2 2011; this reflects a marked improvement in the trade balance which recorded a surplus of 3.6% of GDP, underpinned by large gross movements of trade this year.
- Some of this reflects pronounced trade movements in unspecified goods, which reflects the unwinding of previous volatile trade in non-monetary gold. There have been large declines in the exports and imports of finished manufactured goods.
- The UK has historically been a net importer of oil and other fuels, but this net trade position also improved in Quarter 2 2020; the movements in gross trade flows largely reflect the reduced demand in response to the restrictions on mobility as well as the lower price of oil.
- There have also been notable impacts on the gross trade flows in travel and transport services, reflecting the imposition of physical restrictions have reduced such international activity.

There was a sharp narrowing in the current account deficit in Quarter 2 (Apr to June) 2020

- There has also been a decline in the UK's investment income of late on its external assets and liabilities, most notably on foreign direct investment (FDI).
- Net investment income has improved in Quarter 2 2020 as there was a larger fall in foreign earnings on FDI that are held in the UK.
- It is possible that these lower flows in inward and outward flows of earnings reflect the lower interest rates that were imposed in many countries.
- There is also some evidence that businesses may be responding by retaining a higher level of earnings and reducing and/or cancelling dividend payments, which would have an impact on investment income.

The UK’s current account deficit narrowed substantially in Quarter 2 (Apr to June) 2020 because of trade in precious metals

Contributions to the UK’s current account balance as a percentage of gross domestic product, Quarter 3 (July to Sept) 2017 to Quarter 2 (Apr to June) 2020



Source: Balance of payments, UK: April to June 2020

Lead analyst: Jamie Pritchard

Financial flows have reflected the response of financial markets around the start of the COVID-19 pandemic

- There have been large cross-border financial flows in the first half of this year, where there were particularly large flows of other investment in Quarter 1 (Jan to Mar) 2020.
- It is likely that these financial flows have reflected the response of financial markets around the start of the COVID-19 pandemic, leading to a shift in the risk appetite of investors.
- However, there appears to have been some unwinding of these effects, as the UK reduced its gross external assets and gross external liabilities in loans and deposits in Quarter 1 2020.

There have been large cross-border financial flows in the first half of this year

Gross financial inflows and outflows, UK, Quarter 1 (Jan to Mar) 2008 to Quarter 2 2020 (Apr to Jun)

Source: Quarterly economic commentary: April to June 2020

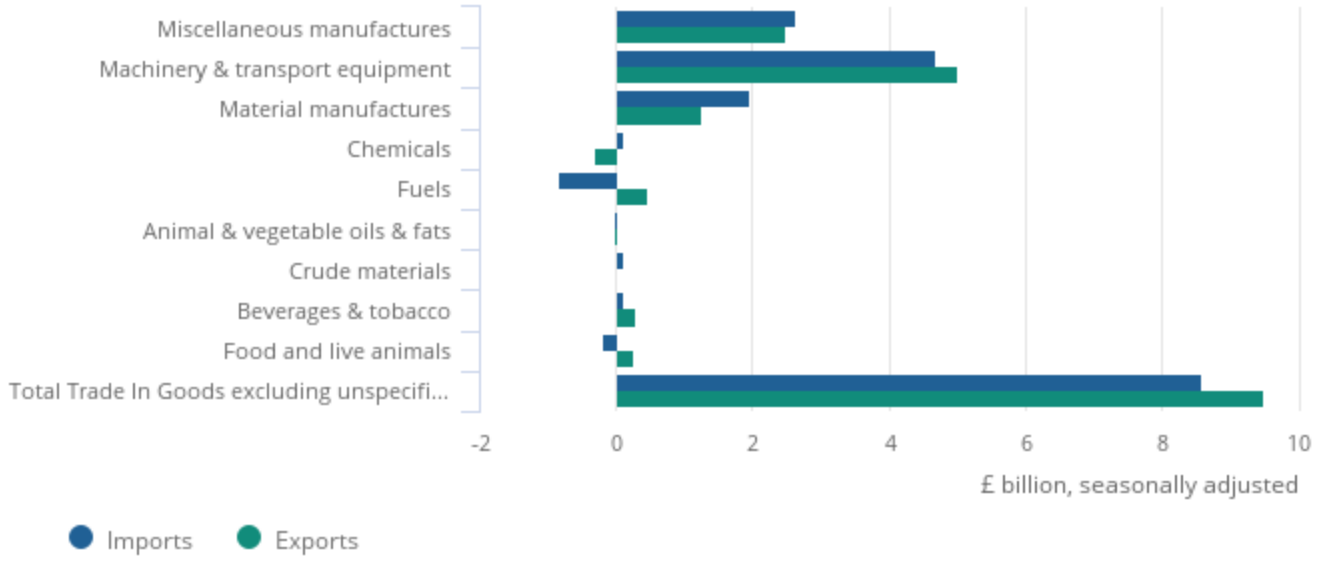
Lead analyst: Sumit Dey-Chowdhury

UK total trade surplus widened to £7.7billion in the three-months to August

- Most of the UK's top trading partners have been significantly affected by COVID-19, and analysis suggests evidence of pandemic-related impacts on UK trade.
- The UK total trade surplus, excluding non-monetary gold and other precious metals, increased by £3.8 billion to £7.7 billion in the three months to August 2020, as exports grew by £21.4 billion and imports grew by a lesser £17.5 billion.
- The widening of the total trade surplus in the three months to August 2020 was driven by an £11.9 billion increase in services exports, compared with a lesser £8.9 billion increase in services imports.
- The underlying trade in goods deficit narrowed in the three months to August 2020 driven by fuels, with exports increasing by £0.5 billion and imports decreasing by £0.8 billion.
- Road vehicle imports increased by £3.9 billion in the three months to August 2020 as dealerships fully opened.
- UK car finance applications rose by a quarter during July and the first few weeks of August as many car owners had extensions to renew their personal contract purchase contracts during lockdown, which pushed their purchase of new cars into the summer.

Rising imports and exports were largely seen in machinery and transport equipment in the three months to August 2020

Changes in imports and exports, by goods commodity group, excluding unspecified goods, three months to August 2020 compared with three months to May 2020



Source: UK trade: August 2020

Lead analyst: Abi Casey

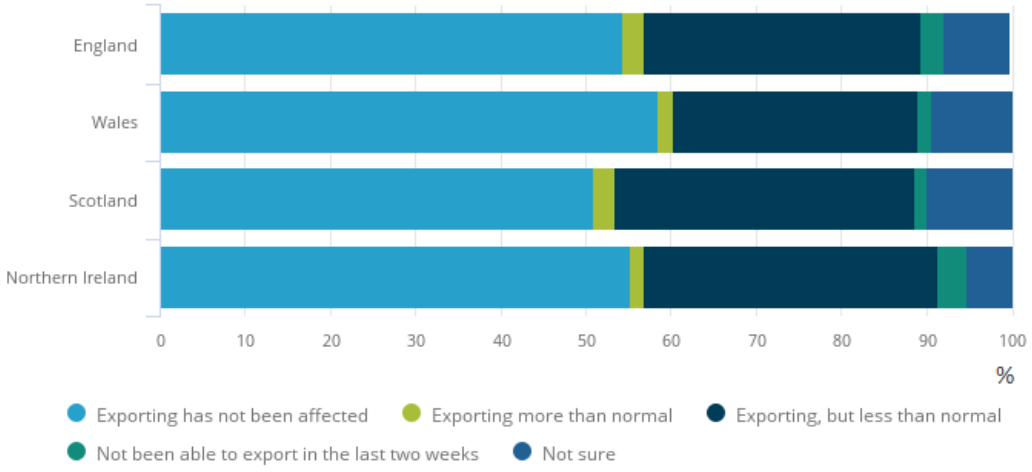
Rising share of businesses reporting no importing or exporting challenges

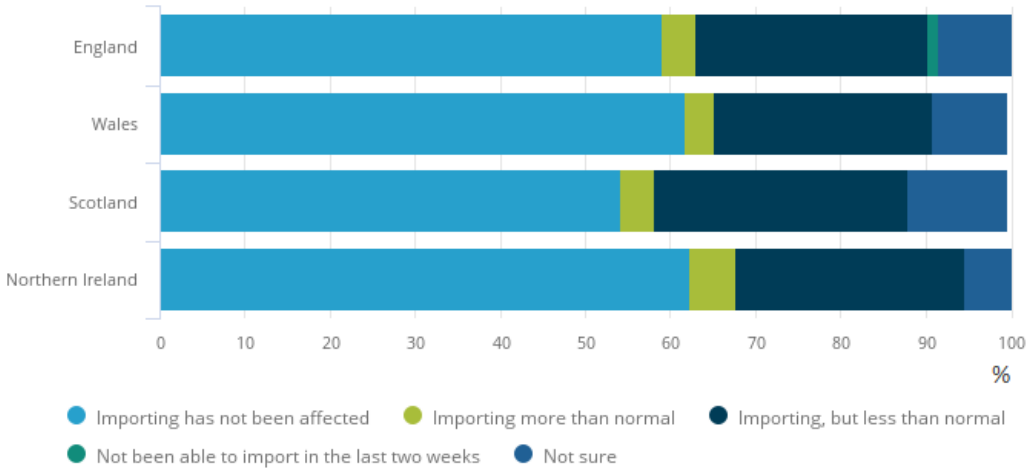
- 59.7% of importing businesses that have imported in the last 12 months reported that “importing has not been affected” in late September. This has improved from 27.6% in late April.
- The proportion of exporting businesses that have exported during the coronavirus pandemic reporting that their business has been “exporting less than normal” has fallen from 71.9% in late April to 32.3% in the period 21 September to 4 October 2020.
- Analysis of BICS for mid-May suggests coronavirus-related transport restrictions are the biggest challenge for responding businesses that are continuing to trade, both in relation to exporting (reported by 31% of respondents) and importing (reported by 36%); a quarter (25%) reported that increases in transportation costs are an exporting challenge and 30% an importing challenge.

Note: estimates on this slide are unweighted.

The proportion of businesses “exporting less than normal” has fallen from 72% in late April to 32% in late September

Effect of the coronavirus pandemic on importing and/or exporting reported by businesses that have imported and/or exported during the coronavirus pandemic, by region, unweighted 21 September to 4 October 2020





Source: Business Impact of COVID-19 (BICS) results

Lead analyst: Jon Gough

UK output and productivity

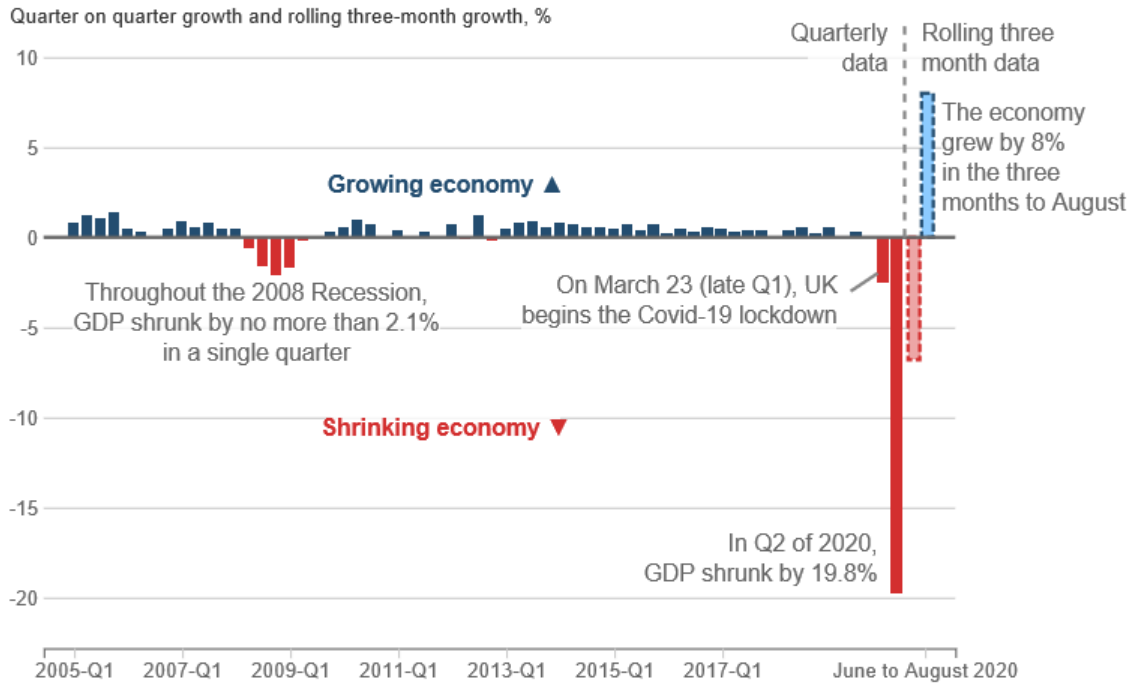
This section includes the main statistics on gross domestic product (GDP), and analysis of our measures of productivity, reflecting the impact of the pandemic

The largest quarterly contraction in the UK economy since records began in 1955 was seen in Quarter 2 2020

- UK gross domestic product (GDP) contracted by a record 19.8% in Quarter 2 (Apr to June) 2020, following a decline of 2.5% in the previous quarter, as a result of the COVID-19 pandemic and the restrictions subsequently applied in the UK.
- Widespread falls in output, as well as sharp reductions in spending by households and businesses, reflect the mandatory closures of non-essential businesses and voluntary social distancing to protect public health.
- Services output decreased by 19.2% in Quarter 2 2020 reflecting declines in the vast majority of industries, most notably accommodation and food services.
- Production output fell by 16.3% in Quarter 2 2020, marking the fifth consecutive quarterly decline. The fall was mainly the result of the record monthly decline in production output in April, which was driven by a fall in manufacturing output.
- Construction output fell by 35.7% in Quarter 2 2020 reflecting declines in both new work, and repair and maintenance; most notably, private new housing declined by 49.5% as housebuilding activity was affected by various social distancing measures.

UK Gross Domestic Product contracted by a record 19.8% in Quarter 2 2020, following a decline of 2.5% in the previous quarter

UK GDP growth, Quarter 1 (Jan to Mar) 2005 until June to August 2020

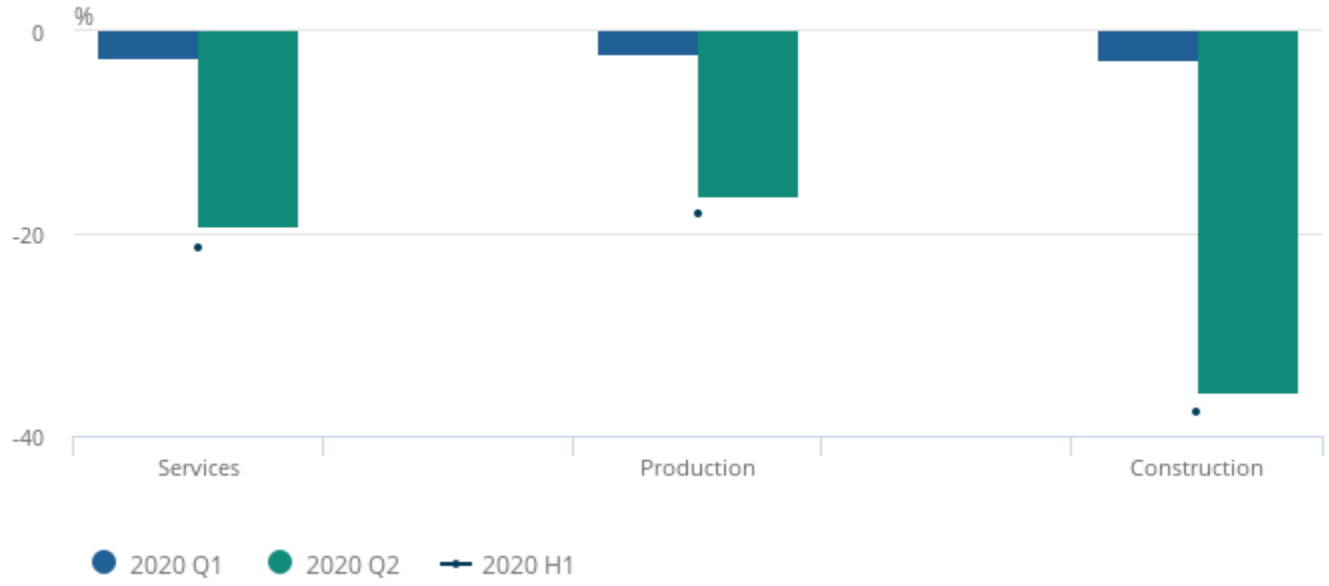


Source: GDP monthly estimate, UK: August 2020

Lead analyst: Niamh McAuley

The decline in GDP in the second quarter reflects widespread falls in output across the services, production and construction sectors

UK GDP component growth, Quarter 1 (Jan to Mar) 2020 and Quarter 2 (Apr to June) 2020, %



Source: GDP quarterly national accounts, UK: April to June 2020

Lead analyst: Ryan May

More timely estimates for August 2020 show that while it has continued steadily on the path towards recovery, the UK economy still has to make up nearly half of the GDP lost since the start of the pandemic

- Monthly GDP grew by 2.1% in August 2020 as lockdown measures continued to ease; This is the fourth consecutive monthly increase following a record fall of 19.5% in April 2020.
- GDP in August 2020 GDP is now 21.7% higher than its April 2020 low; however, it remains 9.2% below the levels seen in February 2020, before the full impact of the coronavirus (COVID-19) pandemic.
- The accommodation and food services sub-sector contributed 1.25 percentage points to the 2.1% growth in GDP for August 2020, as the combined impact of easing lockdown restrictions, Eat Out to Help Out Scheme and “stay-cations” boosted consumer demand.
- Despite an increase of 2.4% in services, the level of services output is 9.6% lower than the level in February 2020 before the main impacts of the COVID-19 pandemic were seen.
- Production grew by 0.3% in August 2020, with manufacturing growing by 0.7%; despite this growth, production output is 6.0% lower than the level in February 2020, with manufacturing 8.5% lower.
- Construction grew by 3.0% in August 2020 but the level of output remains 10.8% lower than February 2020, before the full impact of the pandemic.

Gross Domestic Product grew by 2.1% in August 2020, the fourth consecutive monthly increase, but it remains 9.2% below the February 2020 level

Monthly index, January 2007 to August 2020

Source: GDP monthly estimate, UK: August 2020

Lead analyst: Niamh McAuley

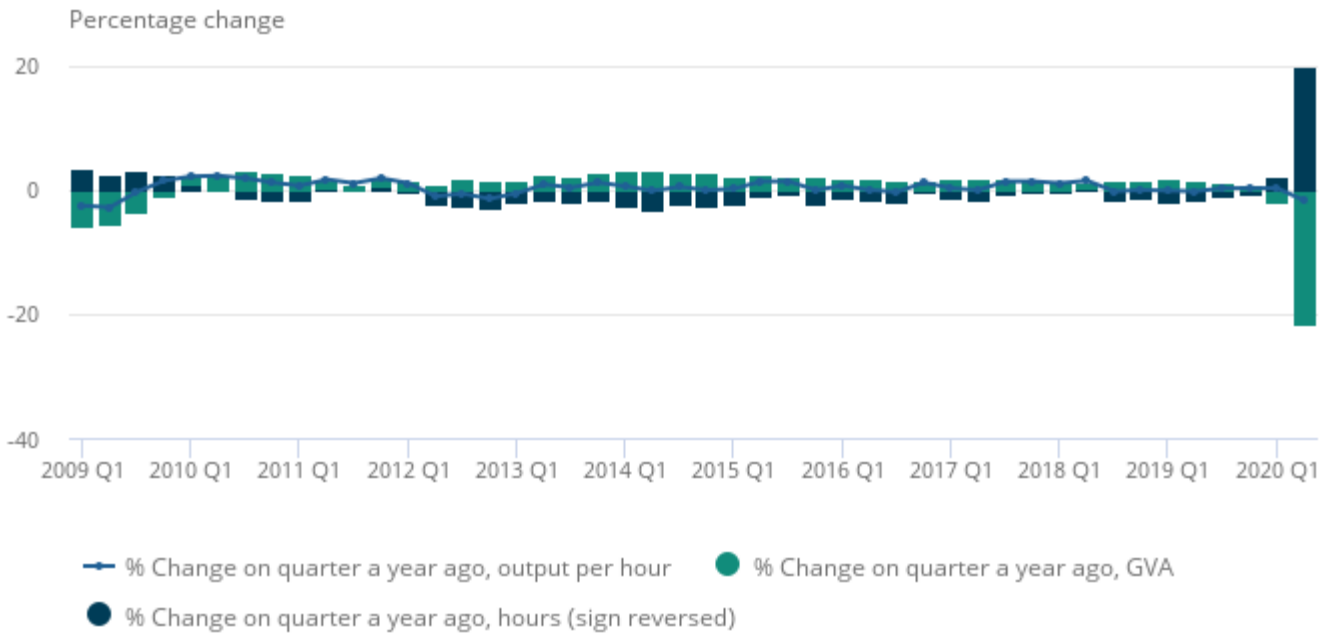
Gross Value Added fell faster than hours worked, driving productivity down in Quarter 2 2020

- Output per hour fell by 1.8% in Quarter 2 (Apr to June) 2020 compared with the same quarter the previous year, the largest fall since Quarter 2 2009; this was driven by gross value added (GVA) falling faster than hours worked, compared with the previous year, GVA fell by 21.5% and hours worked fell by 20%.
- In Quarter 2 2020, output per worker, decreased by 21.1% compared with the same quarter in the previous year.
- Historically, output per hour and output per worker have been much closer aligned, but the Coronavirus Job Retention Scheme (CJRS) has resulted in a large disparity between the two measures; the CJRS allows companies to furlough workers, keeping them employed and allowing them to work zero hours; the total number of workers fell by 0.4% on the previous year, which is a much smaller movement than would be expected in response to a 21.5% fall in GVA.

Note: Output is calculated as gross value added GVA. It is divided by the number of hours worked or the number of workers to give output per hour or output per worker measures, respectively.

Output per hour fell by 1.8% in Quarter 2 2020, the largest fall since Quarter 2 2009

Seasonally adjusted, UK, Quarter 1 (Jan to Mar) 2009 to Quarter 2 (Apr to June) 2020



Source: Labour productivity headline measures, UK: April to June 2020

Lead analyst: Stuart Newman

Public service productivity has fallen considerably in Quarter 2 2020 compared with the same quarter a year ago

- Public service productivity decreased by 35.7% in Quarter 2 (Apr to June) 2020 compared with the same quarter a year ago.
- This fall was driven by an increase in inputs of 15.8% and a fall in output of 19.9%.
- Healthcare and social protection were the main drivers of the overall inputs growth, while the larger contributions to the output fall were observed in healthcare and education.
- The increase in inputs likely reflects government procurement of personal protective equipment (PPE) and construction of Nightingale hospitals as well as the additional social care responsibilities taken on by local government in response to the COVID-19pandemic.
- The fall in healthcare output reflected the impact of the pandemic on healthcare, with reductions in GP appointment services and attendance at A&E, alongside the scaling back of non-emergency surgery, the cancellation and postponement of outpatient activity and dental and ophthalmic services, and the increase in critical care activity.
- The adjustment in education output takes into consideration the widespread school closures from March onwards and the shift to "remote learning". This resulted in a decrease in the education output measures.

Public sector productivity decreased by 35.7% in Quarter 2 2020 compared with the same quarter a year ago

Public service productivity, inputs and output, quarter-on-same-quarter a year ago growth rates, UK, Quarter 1 (Jan to Mar) 2018 to Quarter 2 (Apr to June) 2020

Source: Productivity economic commentary: April to June 2020

Lead analyst: Stuart Newman and Sara Zella

Inflation and retail sales

This section includes analysis of the change in prices throughout the pandemic and of the volume of retail sales

During the pandemic, the CPIH 12-month inflation rate fell to the lowest since December 2015

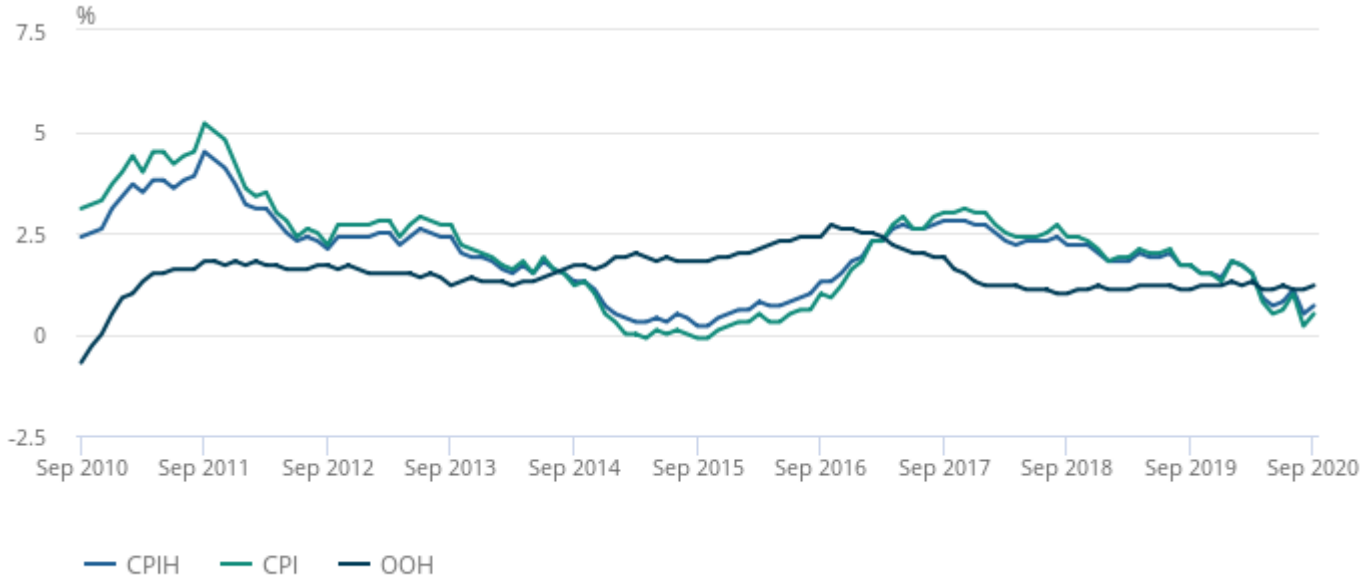
- Consumer price inflation has been volatile in 2020; the 12-month rate of Consumer Prices Index including owner occupiers' housing costs (CPIH) inflation decreased from 1.1% in July 2020 to 0.5% in August (lowest seen since 2015) and up to 0.7% in September, this follows a fall at the start of 2020 from 1.8% in January and reflects the impact of the coronavirus pandemic.
- The coronavirus (COVID-19) pandemic has had wide-ranging demand and supply effects on the UK economy, which will have implications for consumer price inflation.
- Restaurants and hotels were the largest driver of the decline between July and August 2020.
- Prices fell by around 4.7% on the month and 2.8% on the year to August 2020, largely driven by restaurants; this reflects the impact of the Eat Out to Help Out Scheme and captures the reduced rate of Value Added Tax (VAT) applicable to firms in the hospitality industry from 20% to 5%.
- Prices for clothing usually follow seasonal patterns with discounts typically applied at certain times.
- Unusually, prices fell between February and April in 2020 likely reflecting discounting by retailers in response to falling consumer demand for clothing during lockdown, as well as consumers' inability to go to shops due to the restrictions imposed in response to the coronavirus (COVID-19) pandemic, with non-essential retailers, including clothing stores, being closed from 23 March.

The COVID-19 pandemic has had wide-ranging demand and supply effects on the UK economy, which will have implications for consumer price inflation

- Transport has had a downward pull on the headline inflation rate between April and September 2020 because of falls in fuel prices.
- Most parts of the transport component were affected during lockdown with non-essential travel being prohibited and car retailers closed to the public; meanwhile, demand for fuels and lubricants fell sharply as many people started to work from home and avoid unnecessary journeys.
- Similar restrictions on travel and the transport of goods elsewhere in the world greatly reduced global demand for crude oil.
- Prices began to rise slowly following output cuts from OPEC+, and a gradual increase in demand as various pandemic-related restrictions eased around the world.
- Transport costs, and restaurant and café prices, following the end of the Eat Out to Help Out scheme, made the largest upward contributions (of 0.23 and 0.27 percentage points, respectively) to the change in the CPIH 12-month inflation rate between August and September 2020.
- This was partially offset by smaller downward contributions from furniture, household equipment and maintenance; games, toys and hobbies; and food and non-alcoholic beverages.

The CPIH 12-monthly inflation rate rose to 0.7% in September 2020

CPIH, OOH component and CPI 12-month inflation rates for the last 10 years, UK, September 2010 to September 2020



Source: Consumer price inflation, UK: September 2020

Lead analyst: Andy King

The experimental re-weighted consumer prices basket adjusts for consumption changes during lockdown

- Experimental series that update the Consumer Prices Index including owner occupiers' housing costs (CPIH) and Consumer Prices Index (CPI) baskets monthly throughout Quarter 2 (Apr to June) 2020 to account for changing consumption patterns, result in annual inflation rates of just 0.1 percentage points higher, on average, than consistently calculated versions of the official rates.
- Adjustments to the underlying weights based on the Retail Sales Index, payment processing and transaction data, and other data sources, suggest that consumer expenditure shares for food and drink, housing, education, and communication increased during the lockdown period, while expenditure shares for restaurants and hotels, transport, clothing, and recreation and culture fell.
- Changing consumption patterns had an impact on the contributions from different categories of spending to inflation, however, these are largely offsetting, resulting in minimal differences at the aggregate level.

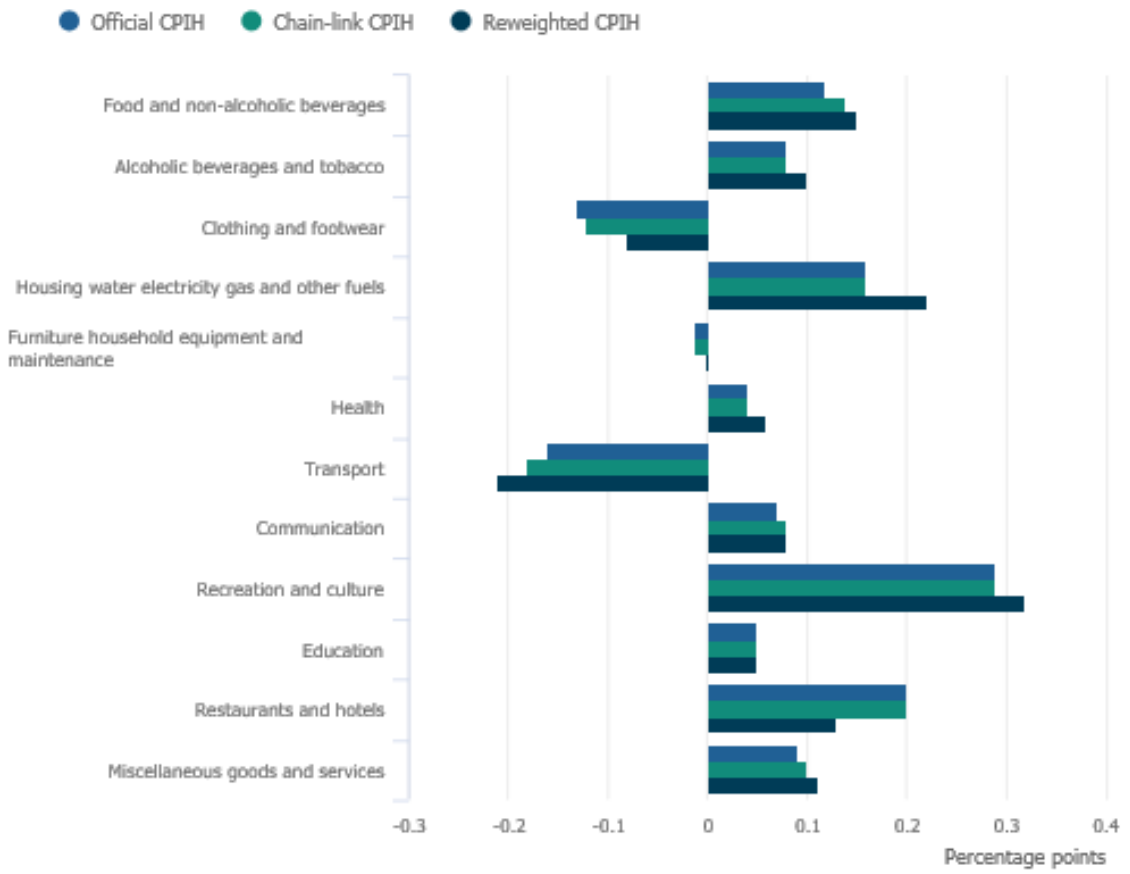
Reweighting the CPIH basket in Quarter 2 (Apr to June) 2020 increased the annual inflation rate by 0.1 percentage points on average

Annual growth rate values for adjustments to the CPIH, UK, April to June 2020

	April 2020	May 2020	June 2020	Quarter 2 2020
Official CPIH	0.9%	0.7%	0.8%	0.8%
Chain-link CPIH	0.9%	0.7%	0.9%	0.8%
Reweighted CPIH	1.0%	0.8%	1.0%	0.9%

Six divisions made larger upward contributions to the annual growth rate of the CPIH in the reweighted series than in the official series in Quarter 2 (Apr to June) 2020

Division-level contributions to the experimental CPIH annual growth rates, UK, Quarter 2 (Apr to June) 2020.



Source: Re-weighted consumer prices basket

Lead analyst: Kathryn Keane

In the absence of Eat Out to Help Out and the VAT reduction, the inflation rate would have been approximately 0.9% in August 2020

- The Consumer Prices Index including owner occupiers' housing costs (CPIH) annual growth rate fell to 0.5% in August 2020, the lowest since December 2015; this was mostly driven by lower prices in restaurants and cafés, as a result of the Eat Out to Help Out scheme and the temporary reduction of Value Added Tax (VAT) from 20% to 5% for firms in the hospitality sector.
- In the absence of Eat Out to Help Out and the VAT reduction, our analysis estimates that the inflation rate would have been approximately 0.9% in August, most of this difference comes from Eat Out to Help Out.
- Card transaction data from the fintech company Revolut show there are normally fewer transactions at the beginning of the week, rising gradually from Monday to Thursday, and considerably more transactions on Friday and Saturday.
- The average for August, when Eat Out to Help Out was running, showed a flattening of this trend with a higher than usual proportion of transactions earlier in the week and a lower proportion than usual at the weekend; this suggests that the discount offered earlier in the week may have incentivised some people to eat out on days when they otherwise would not have.

Source: Impacts of Eat Out to Help Out on consumer prices: August 2020

Lead analyst: Kathryn Keane

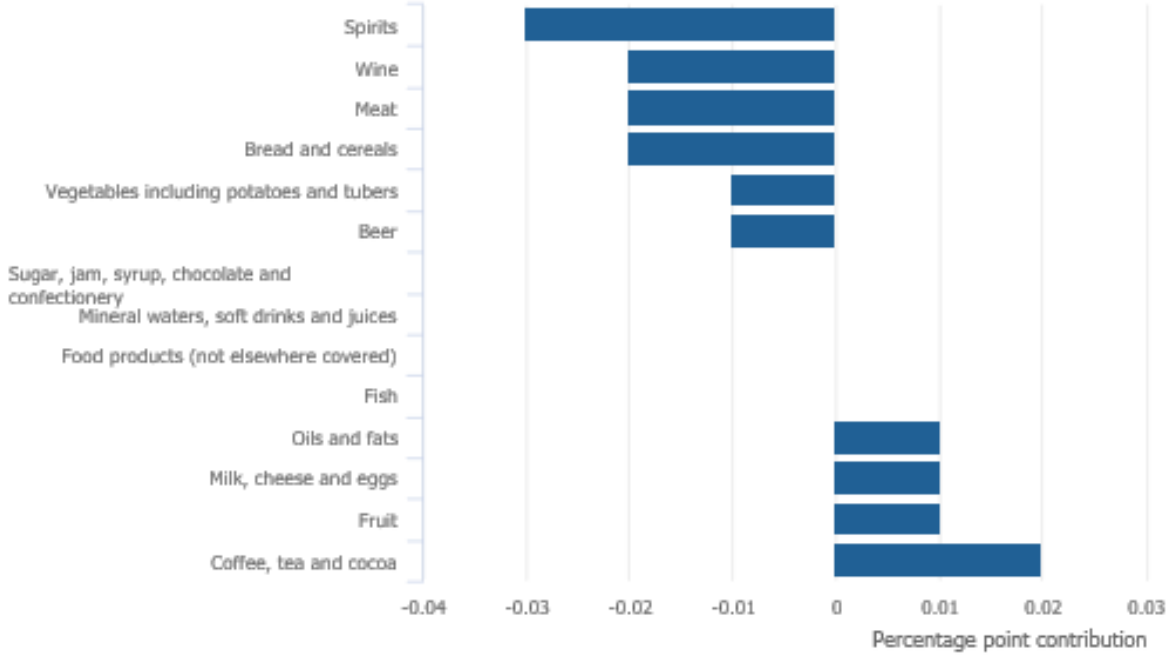
The overall price index for items in the food and drink basket remain 0.6% below the starting point of the data series

- Timely experimental analysis for the week commencing 12 October 2020 found that prices in the food and drink basket decreased by overall 0.1%.
- The largest downward contributions to the weekly change were in the categories of spirits, wine, bread and cereals, and meat.
- The largest positive contributions to the weekly change were in the categories of coffee, tea and cocoa, followed by fruit, then milk, cheese and eggs, and oils and fats .
- The overall index remains 0.6% below the starting point of the data series (1 June); oils and fats have had the largest reduction in prices since the series began, showing an overall decrease of 4% since the beginning of June 2020 (but dropping by 5.1% in mid-September).

Note: A timely indication of weekly price change for a selection of food and drink products from several, large UK retailers has been developed, covering the period 1 June to 18 October 2020. This analysis is experimental and should not be compared with our regular consumer price statistics.

Prices of items in the food and drink basket decreased by 0.1% in mid October 2020

Contributions to online price change of a selection of food and drink products, UK, percentage point contributions to the percentage change between Week 19 (5 October to 11 October) and Week 20 (12 October to 18 October)



Source: Coronavirus and the latest indicators for the UK economy and society: 22 October 2020

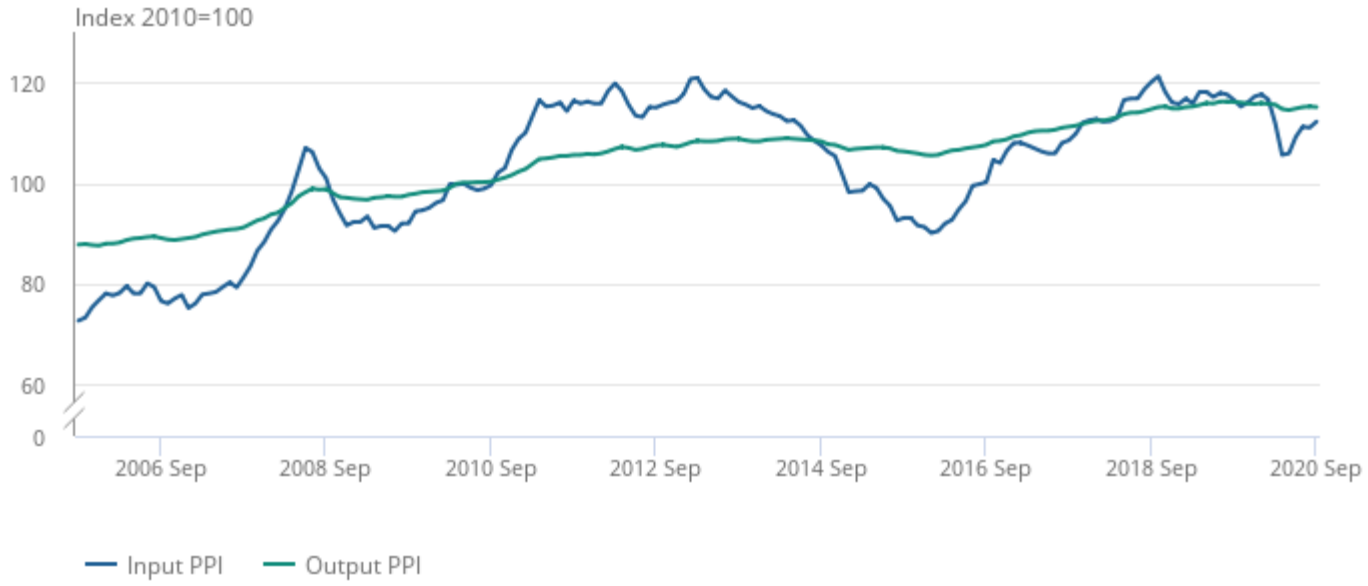
Lead analyst: Helen Sands and Tanya Flower

The annual output inflation rate for goods leaving the factory gate shows negative growth for the sixth consecutive month in September 2020

- The headline rate of output inflation for goods leaving the factory gate was negative 0.9% on the year to September 2020; this is the sixth consecutive month that the rate has been negative, following 45 consecutive months of positive annual inflation.
- Petroleum provided the largest downward contribution to the annual rate for output inflation; price movements for petroleum products broadly follow trends seen in crude oil in 2020.
- The price for materials and fuels used in the manufacturing process (input inflation) showed negative growth of 3.7% on the year to September 2020, up from negative growth of 5.6% in August 2020.
- The largest downward contribution to the annual rate of input inflation came from crude oil with negative annual price growth of 34.1%; the annual rate has slowed following four consecutive months where the rate had picked up, whilst remaining negative.
- Price movements in crude oil are likely to reflect both demand and supply side factors during the ongoing coronavirus (COVID-19) pandemic; the fall in crude oil prices in September 2020 is attributed to the change in demand because of extended lockdowns in some countries alongside travel restrictions being placed.

Input producer price inflation is more volatile over time than output inflation

Input and output PPI, UK, September 2005 to September 2020



Source: Producer price inflation, UK: September 2020 including services, July to September 2020

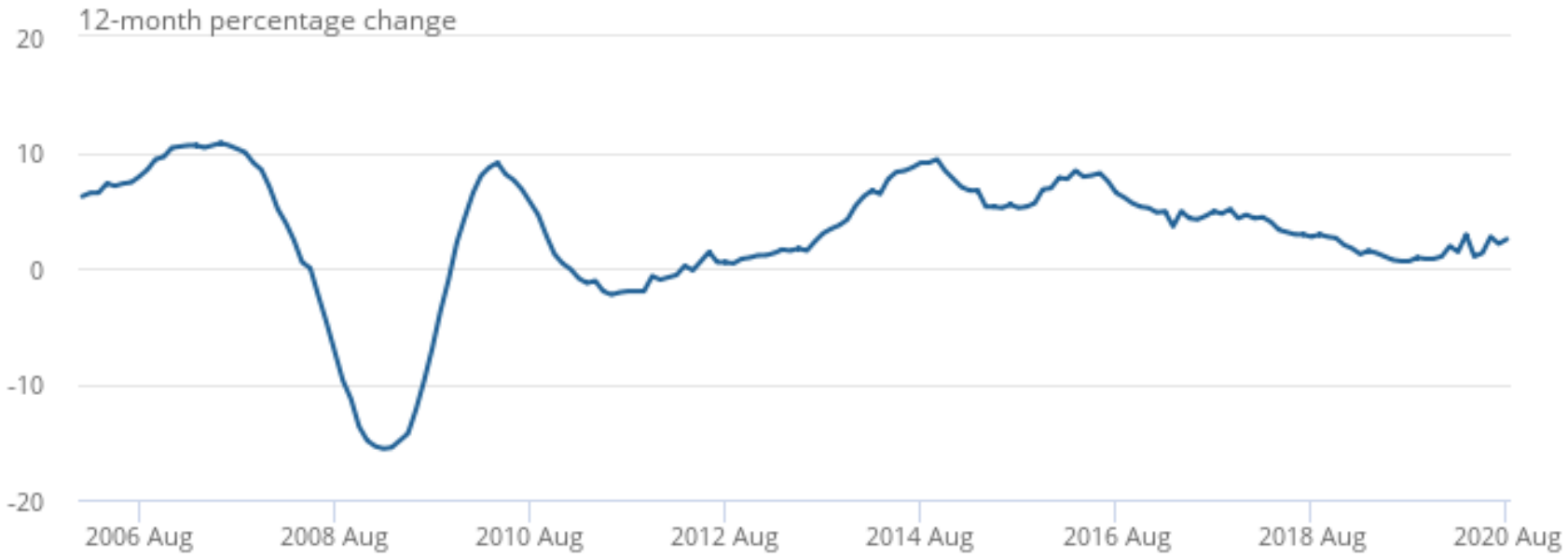
Lead analyst: Chris Jenkins

Average house prices continued to rise in August 2020

- The UK's average house prices increased by 2.5%, to £239,000, over the year to August 2020, up from 2.1% in July 2020; this is £6,000 higher than last year.
- Annual private rental price growth has been relatively steady between 1.4% and 1.5% since November 2019.
- Over the past three years, there has been a general slowdown in UK house price growth, driven mainly by a slowdown in the south and east of England. The beginning of 2020 saw a pick up in annual growth in the housing market before the coronavirus (COVID-19) restrictions were put in place at the end of March 2020.
- Energy Performance Certificates (EPCs) are used as a timely experimental indicator for the number of completed domestic constructions and number of transactions for domestic properties. With the exception of the week ending 6 September 2020, the volume of existing dwelling EPCs was higher than the same week the previous year for every week between 8 June and 18 October. This can be explained by lower than usual residential property transactions during March to June 2020 and a catch-up in property transaction demand up to September 2020.

UK house price growth has generally slowed since mid-2016, but has picked up this year despite falling to the lowest growth seen since 2012 during the pandemic

Annual house price rates of change for all dwellings, UK, January 2006 to August 2020



Source: UK House price index: August 2020

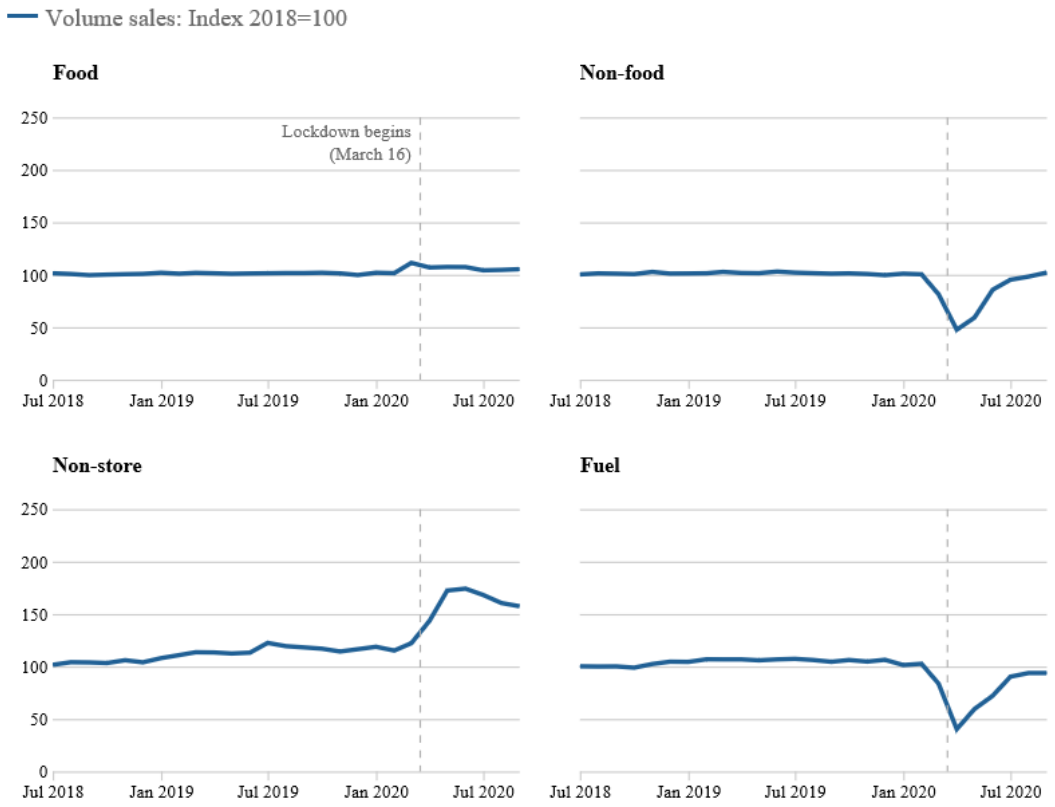
Lead analyst: Natalie Jones

Total retail sales recovered from the sharp falls experienced during the coronavirus pandemic in July 2020

- In September 2020 retail sales volumes increased by 1.5% when compared with August; this is the fifth consecutive month of growth, resulting in an increase of 5.5% when compared with February's pre-pandemic level.
- When compared with February, volume sales within food stores were 3.7% higher in September. Food retailers had suggested that the peak in March 2020 was because of panic buying at the start of the pandemic, and despite seeing a notable fall in sales following this peak, spending remained high. This may be a result of the government tightening restrictions for other services such as bars and restaurants at the end of September, which may have encouraged spending in food stores.
- Many stores within non-food stores were classified as non-essential retailers and were negatively affected by the pandemic because of many temporary store closures within the sector. Non-food stores also have now (in September) made a recovery at 1.7% above their February levels.
- Fuel was the only main sector to remain below February's pre-pandemic level with volume sales 8.6% lower in September when compared with February 2020. As lockdown eased, we saw an increase in travel and the quantity of fuel bought. However, as many people remained working at home and with certain restrictions still in place, fuel sales were yet to fully recover.

In September, food and non-store retailing were at higher levels than in February, while fuel still remained lower

Volume sales, seasonally adjusted, Great Britain, September 2017 to September 2020



Source: Retail sales, Great Britain

Lead analyst: Rhian Murphy

The proportion of online spending peaked during lockdown and in September still remained higher than in February

- In September, the proportion of online spending was at 27.5%; this is a slight fall from the 29.4% reported in July. The declines may be because of many businesses reopening from July, resulting in less online spending in September.
- Despite monthly declines across all sectors except department stores, the proportion of online sales was over 7% higher than in February. The proportion of online sales increased across all sectors with food stores nearly doubling their online proportions from 5.4% in February to 10.4% in September.
- Volume sales within non-store retailing increased sharply in April and May, and sales in September were 36.6% higher than February 2020. This was driven by a shift to online orders during lockdown because of temporary store closures for non-essential stores. Despite some contraction from the sharp rate of increase in this sector, consumers were still carrying out much of their shopping online when compared with February.

Sector accounts and government finance

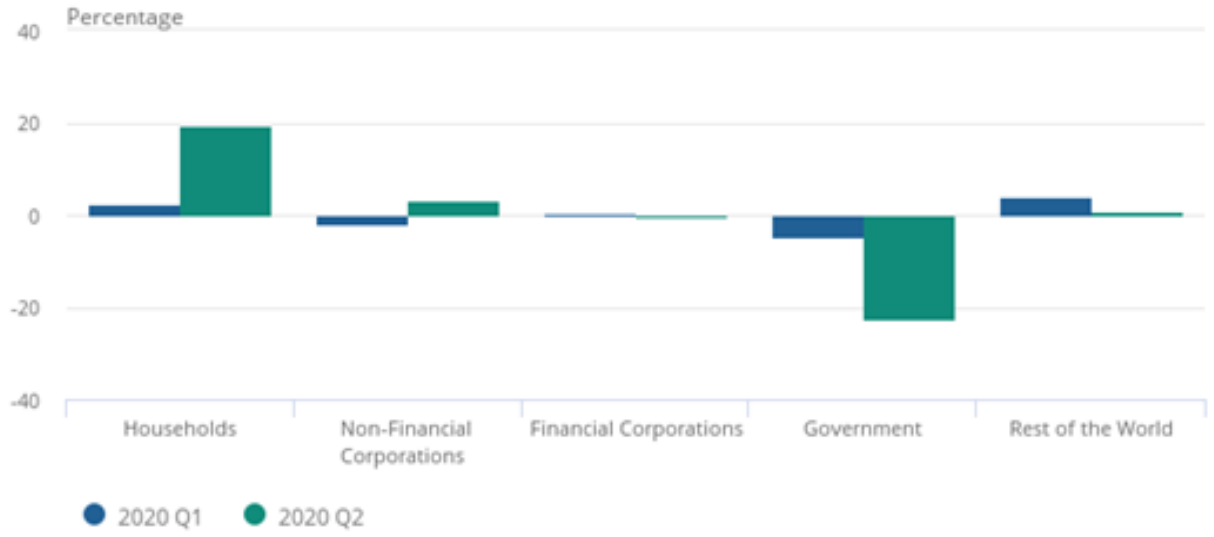
This section includes our analysis on the financial position of households, the government and corporations during the pandemic

There have been large movements in the financial positions of households and the government in response to the pandemic

- The sharp increase in the net lending position of households to 20.0% of gross domestic product (GDP) in Quarter 2 (Apr to June) 2020, reflects the record contraction in consumption expenditure.
- General government saw a record increase in their net borrowing position to 22.6% of GDP driven by the continuation of the Coronavirus Job Retention Scheme, the introduction in this quarter of the Coronavirus Self Employment Income Support Scheme and the Small Business Grant Fund.
- There was an improvement in the financial position of private non-financial corporations, which became net lenders at 3.2% of GDP in Quarter 2 for the first time since the years that followed the 2008 economic downturn; this was the result of government support through tax deferrals, subsidies and grants combined with reduced capital investment outpacing a reduction in gross operating surplus (partially reflecting enforced restrictions).
- The Business Impact of Coronavirus (COVID-19) Survey estimates show that in late September, 48% of businesses experienced a decreased in turnover, continuing the flattened trend since mid-August and following a decreasing trend since June.
- In the financial accounts, financial corporations saw record increases in the holdings of currency and loan repayments of households and non-financial corporations.

There was a sharp increase in the net lending position of households to in Quarter 2 2020

Net lending and borrowing, UK, Quarter 1 (Jan to Mar) 2020 to Quarter 2 (Apr to June) 2020



Source: Quarterly sector accounts, UK: April to June 2020 and Quarterly economic commentary: April to June 2020

Lead analyst: Michael Rizzo and Sumit Dey-Chowdhury

The ongoing unprecedented impact of the COVID-19 lockdown, and the government's support for individuals and businesses, have had a substantial impact on the UK's public sector finances

- Provisional estimates indicate that the amount borrowed in the first half of the current financial year (Apr to Sept 2020) was nearly four times the £54.5 billion borrowed in the whole of the last full financial year (Apr 2019 to Mar 2020) at £208.5 billion.
- Borrowing estimates are subject to greater than usual uncertainty because of their partial reliance on forecast tax receipts and National Insurance contributions data.
- The COVID-19 lockdown has meant central government tax receipts and National Insurance contributions in the six months to September 2020 were down by 11.6% on a year earlier.
- Over the same period, the government's support for individuals and businesses contributed to an increase of 34.0% in central government's day-to-day spending compared with a year earlier; the job furlough schemes alone have added £59.8 billion to borrowing since the start of the financial year.
- The extra funding required to support government coronavirus support schemes combined with reduced cash receipts and a fall in gross domestic product (GDP) have all helped push public sector net debt at the end of September 2020 to 103.5% of GDP, the highest debt ratio since the financial year ending 1960.

The stark fiscal impact of the pandemic is still emerging and it will take many months before the true scale of the shock becomes clear

Public sector net borrowing excluding public sector banks, UK, cumulative financial year-to-date (April to September 2020) compared with official borrowing estimates for the financial year ending March 2021 (April 2020 to March 2021)

Source: Public sector finances, UK: September 2020

Lead analyst: Fraser Munro

Business impact

This section includes analysis of our Business Impact of Coronavirus Survey (BICS), as well as statistics on business demographics throughout the pandemic

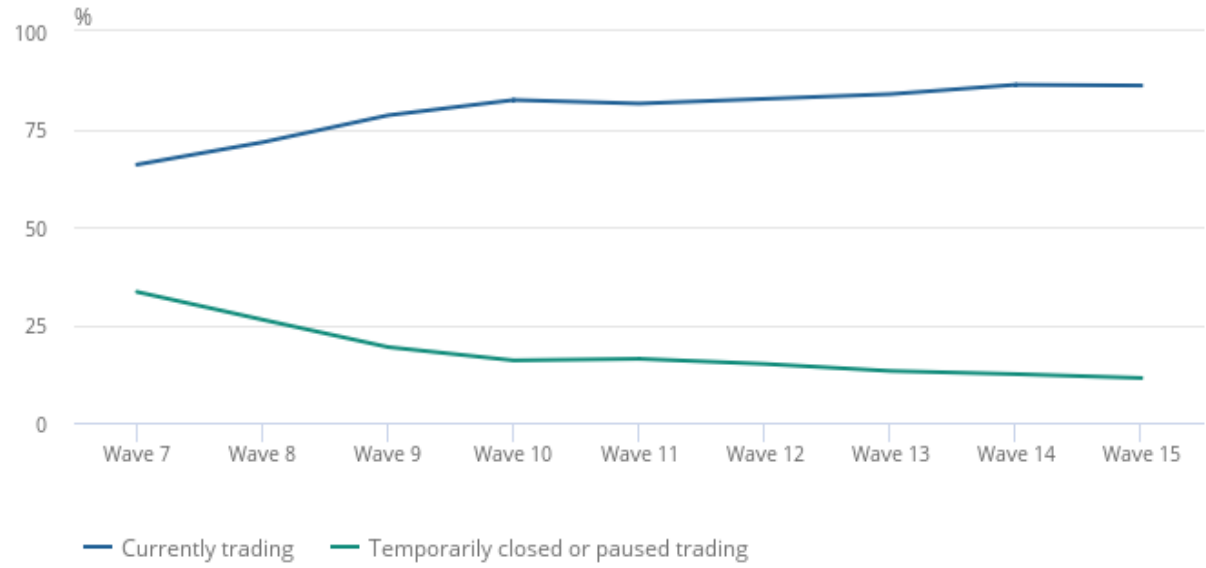
In late September 85% of micro businesses were currently trading, compared with 97% of businesses with 250 or more employees

- In 21 September to 4 October 2020, 86% of businesses were currently trading, compared with 66% in 1 to 14 June 2020 according to the Business Impact of coronavirus Survey.
- In late September, the arts, entertainment and recreation industry had the lowest percentage of businesses currently trading, at 70%; along with the administrative and support service activities, these industries had the highest percentages of businesses that were temporarily closed or paused trading, at 30% and 21% respectively.
- Of businesses trading between 21 September to 4 October, 48% experienced a decrease and 11% experienced an increase in turnover, compared with what is normally expected for this time of year.
- The arts, entertainment and recreation, and accommodation and food service activities industries had the highest proportion of businesses experiencing a decrease in turnover at 75% and 68%.
- The wholesale and retail trade industry had the highest percentage of businesses experiencing an increase in turnover, at 19%.

86% of businesses were currently trading between late September compared with 66% in early June

Percentage of businesses, current trading status, broken down by Wave, weighted, UK, 1 June to 4 October 2020

Note: Late September refers to wave 15 (21 September to 4 October) and early June refers to wave 7 (1 June to 14 June).

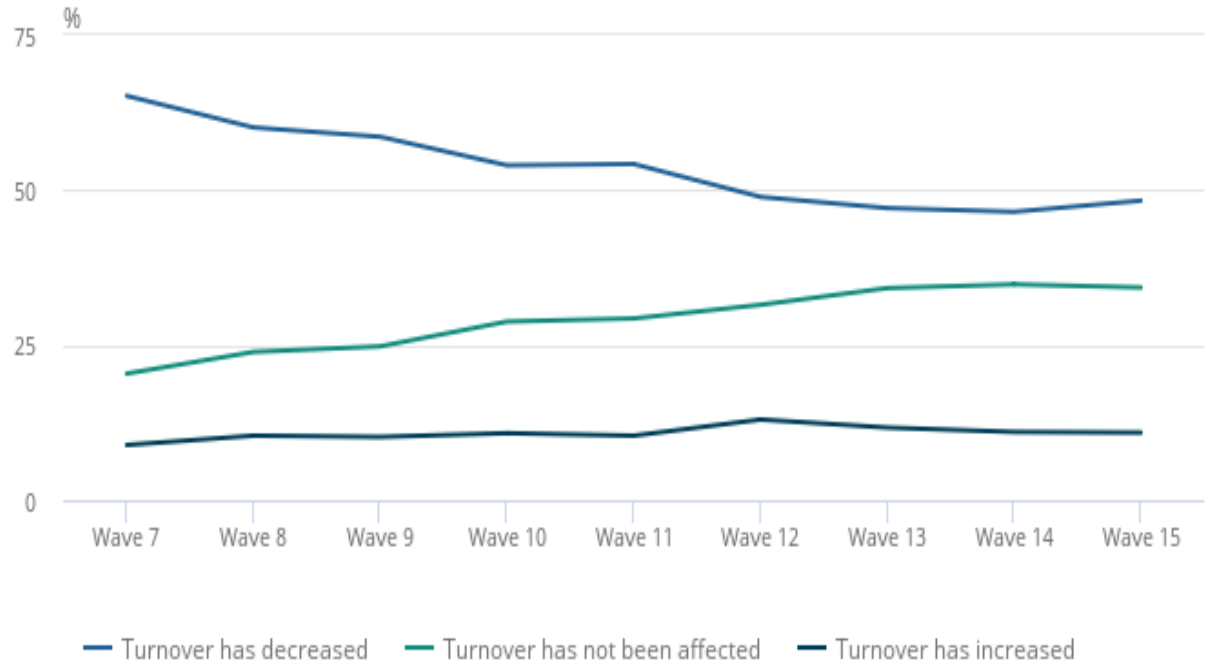


Source: Coronavirus and the economic impacts on the UK: 22 October 2020

Lead analyst: Jon Gough

In late September 48% of businesses experienced a decreased in turnover, continuing the flattened trend since mid August

Impact on turnover, businesses that are currently trading, broken down by Wave, weighted, UK, 1 June to 4 October 2020

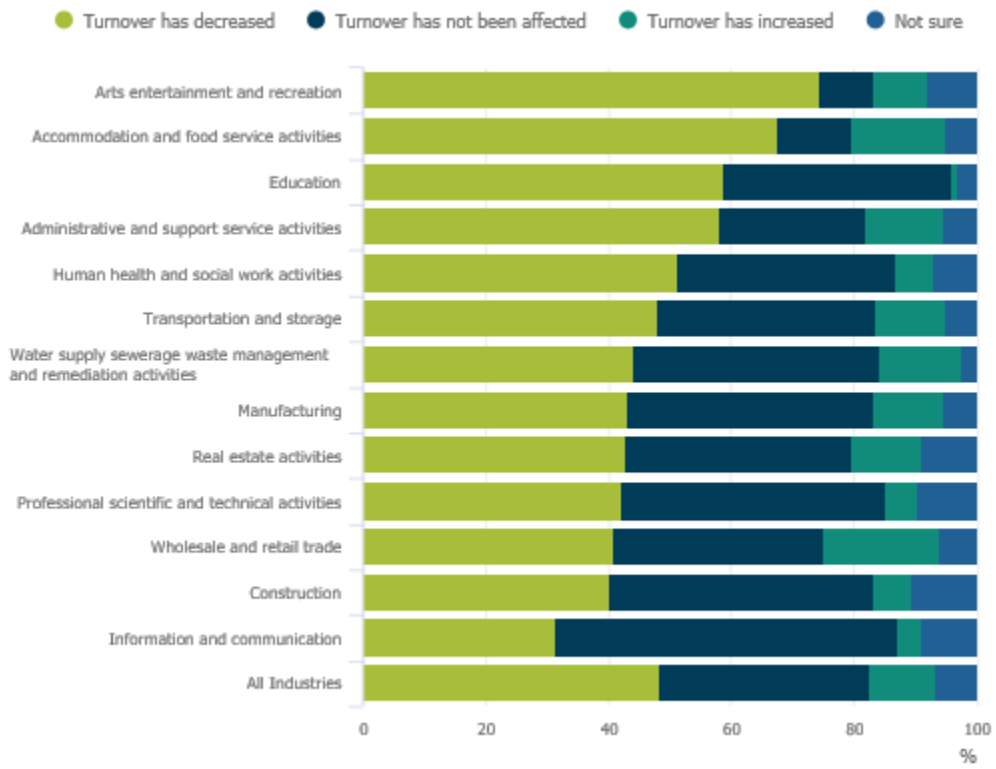


Source: Coronavirus and the economic impacts on the UK: 22 October 2020

Lead analyst: Jon Gough

The arts, entertainment and recreation industry had the highest percentage of businesses experiencing a decrease in turnover in late September

Impact on turnover, businesses that are currently trading, broken down by industry, weighted, UK, 21 September to 4 October 2020



Source: Coronavirus and the economic impacts on the UK: 22 October 2020

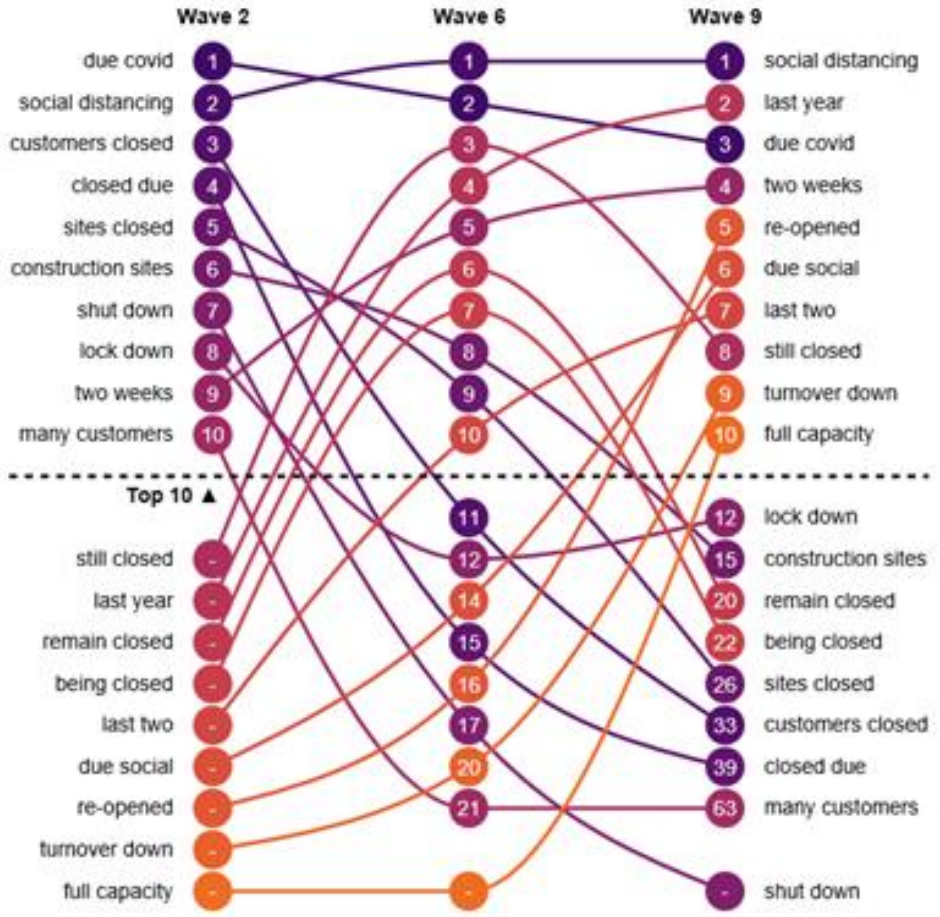
Lead analyst: Jon Gough

The COVID-19 outbreak, the subsequent UK lockdown restrictions and business closures have consistently been stated most frequently in two-word textual comments explaining turnover effects

- The figure presents the most commonly cited words that appear together in a pair from Waves 2 (23 March to 5 April), 6 (18 May to 31 May) and 9 (29 June to 12 July) in response to the question that asks businesses to explain why their turnover had been affected.
- Results demonstrate how business responses, in relation to the comments used to describe the reasons for their turnover being affected, have changed since the peak of the Coronavirus (COVID-19) outbreak.
- Phrases that do not occur in earlier waves but increase in the ranking order, for example, “still-closed” and “re-opened”, reflect how the nature of businesses responses changed to the question and what factors were dominating reasons for turnover being affected in later waves based on the changing circumstances.

Business responses to describe the reasons for their turnover being affected, have changed since the peak of the Coronavirus

Most common two-word comments from businesses responding to the question “Please explain in more detail how the coronavirus (COVID-19) pandemic affected your businesses’ turnover in the last two weeks”, Waves 2, 6 and 9.



Source: Coronavirus and the experiences of UK businesses, textual analysis: March 2020 to July 2020

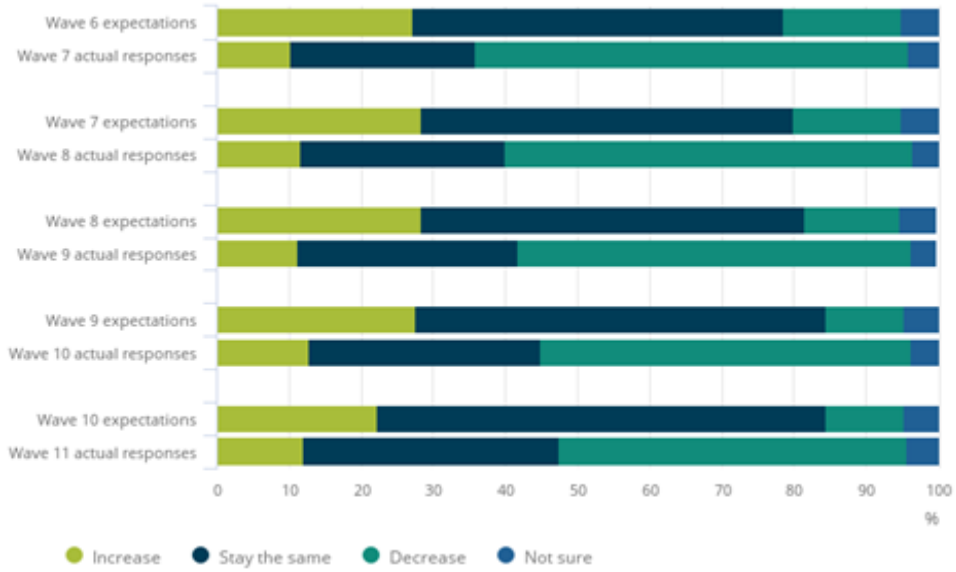
Lead analyst: Jon Gough

Optimism in this sample of businesses changed between late May and early August

- On average, between Waves 6 (18 May to 31 May) and 11 (27 July to 9 August), 13% of businesses expected a decrease in turnover in the two weeks after responding and when compared with the reported changes to turnover of those same businesses two weeks later, 54% reported a decrease.
- In contrast, on average, while 26% of businesses expected an increase in turnover in the two weeks after responding, only 12% reported an increase in turnover when asked two weeks later.
- Optimism in this sample of businesses changed over Waves 6 to 11; these businesses were most optimistic about an increase in turnover in Wave 8, when 28% expected an increase in turnover, compared with only 11% reporting an increase in turnover in Wave 9 – a difference of 17%; this reflects the further easing of restrictions impacting several industries in England and the lifting of travel restrictions in Wales at the beginning of July; by Wave 10, the difference in expected increase in turnover and an increase in turnover response in Wave 11 was at its lowest, at 10%.
- Businesses' expectations of a decrease in turnover have been more consistent with their actual responses over Waves 6 to 11, with the difference between percentage of businesses expecting a decrease in turnover and reporting a decrease in turnover in the following Wave steadily decreasing over time.

Businesses have consistently been optimistic in their turnover expectations between mid-May and early August

Percentage of responding businesses currently trading, broken down by previous Wave expectations and following Wave actual responses, UK, 1 June to 23 August 2020

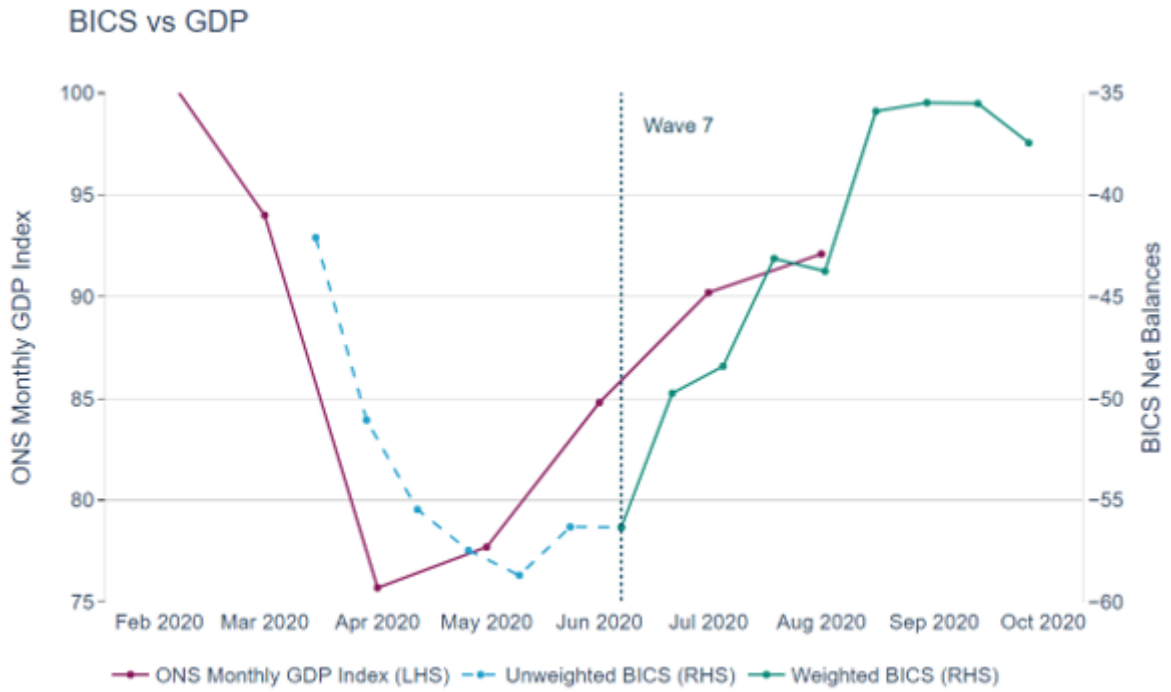


Source: Business Impact of Coronavirus (COVID-19) Survey, expectation responses over time, UK: 1 June to 23 August 2020 (Waves 6 to 11)

Lead analyst: Freddy Farias Arias

Fortnightly turnover estimates from BICS broadly reflect the published UK monthly GDP estimates

Net turnover balances of businesses currently trading against GDP monthly estimates, UK, 1 February to 4 October 2020



Source: Coronavirus and the economic impacts on the UK: 22 October 2020

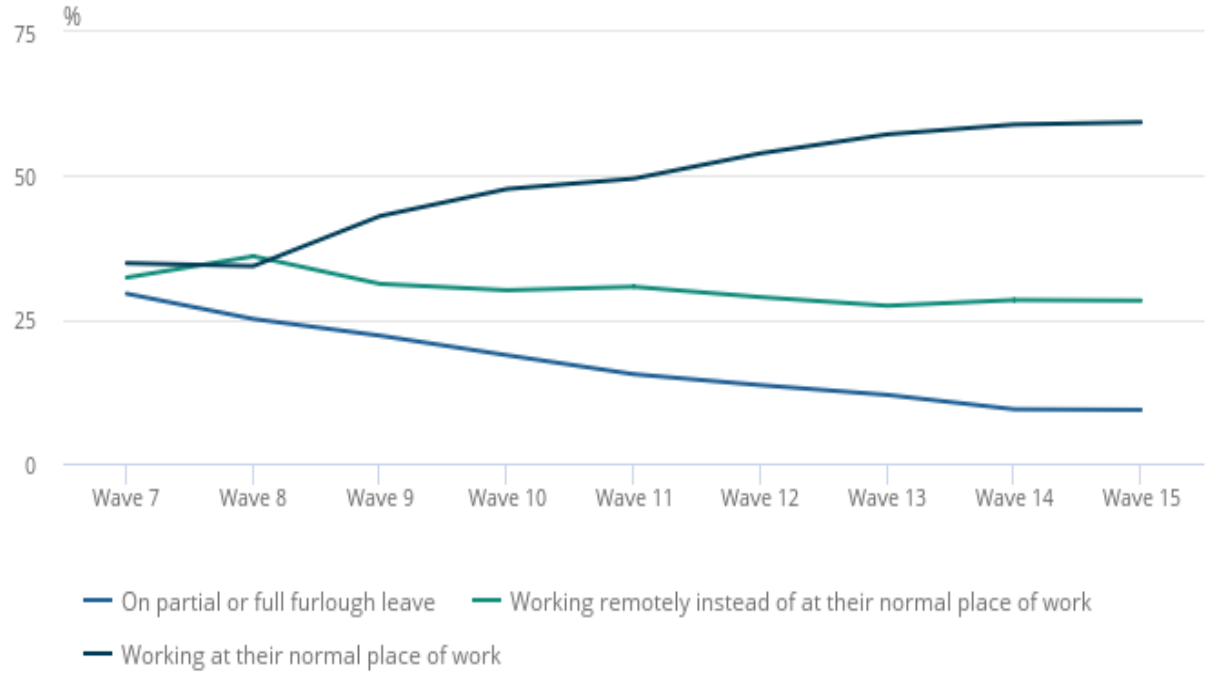
Lead analyst: Jon Gough

The arts, entertainment and recreation industry and the accommodation and food service activities industry had the highest proportions of their workforce on partial or full furlough leave throughout the pandemic

- In 21 September to 4 October 2020, 9% of the workforce were on partial or full furlough leave and 28% of the workforce were working remotely instead of at their normal place of work.
- Throughout the pandemic, the arts, entertainment and recreation industry and the accommodation and food service activities industry have had the highest proportions of their workforce on partial or full furlough leave under the terms of the UK government's Coronavirus Job Retention Scheme (CJRS), at 28% and 24% respectively in late September.
- The information and communication industry and the professional, scientific and technical activities industry had the highest proportions of their workforce working remotely instead of at their normal place of work, at 77% and 63% respectively.
- Across all industries, of businesses currently trading, 9% of the workforce returned from furlough leave and 5% of the workforce moved from remote working to the normal workplace in the two weeks prior to the survey wave.

In late September 9% of the workforce were on furlough leave after a steady decrease from 30% in June

Working arrangements, businesses that have not permanently stopped trading, broken down by Wave, weighted, UK, 1 June to 4 October 2020



Source: Coronavirus and the economic impacts on the UK: 22 October 2020

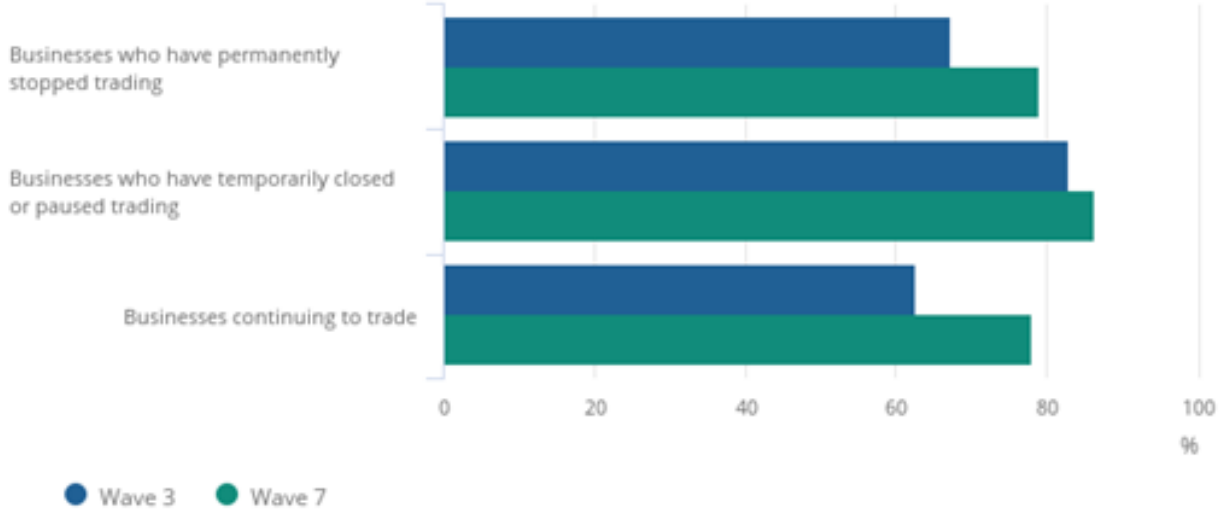
Lead analyst: Jon Gough

The Coronavirus Job Retention Scheme was the most popular government scheme applied to throughout the first seven months of the pandemic

- The Business Impact of Coronavirus Survey provides insights into the uptake of government schemes or initiatives, where they were asked if they were interested in applying for any.
- Of businesses who had not permanently stopped trading, 81% were interested in applying for the Coronavirus Job Retention Scheme in late March.
- From April onwards, businesses were asked what government schemes or initiatives they had applied for; trading businesses had reported that the CJRS was the one that was most applied for.
- Of businesses who have permanently stopped trading in early June, 79% (unweighted) of businesses applied for the CJRS, while 20% applied for either government-backed accredited loans or finance agreements, or business grants funded by the UK and devolved administrations.
- In late September, the CJRS appears to have been the most popular of the government schemes with 77% (unweighted) or 47% (weighted) of businesses having applied for it.

Across April to June, temporarily closed businesses reported a higher percentage applying for the CJRS, than those continuing to trade

Businesses who have not permanently stopped trading and applied for the CJRS, broken down by trading status, UK, unweighted, 6 April to 14 June 2020



Source: Insights of the Business Impact of Coronavirus (COVID-19) Survey: 23 March to 5 April (Wave 2) to 1 to 14 June (Wave 7) 2020

Lead analyst: Emily Hopson

In late September, 43% of businesses not permanently stopped trading had less than six months cash reserves, relatively stable from early June

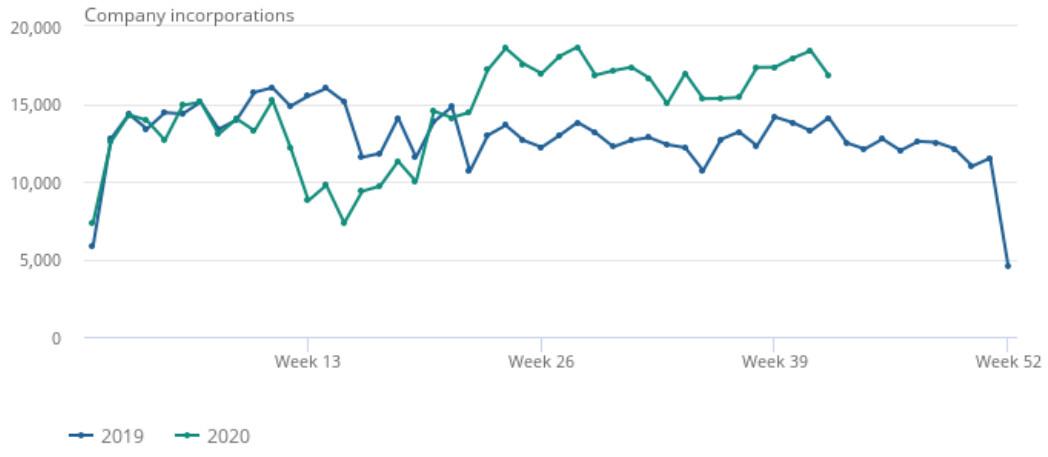
- In 21 September to 4 October 2020, the accommodation and food service activities industry had the highest percentage of businesses that had no cash reserves, at 7%; this was followed by the arts, entertainment and recreation industry and the transportation and storage industry, both at 6%.
- The information and communication industry and the wholesale and retail trade industry had the highest percentages of businesses that had cash reserves to last more than six months, at 46% and 45% respectively.
- Across all industries, of businesses not permanently stopped trading, 64% of businesses had a low to severe risk of insolvency.
- The accommodation and food service activities industry and the administrative and support service activities industry had the highest percentages of businesses with a severe risk of insolvency, at 17% and 9% respectively.

The observed fluctuations in weekly incorporations per working day coincide with government instigated lockdown measures and the subsequent easing of them in response to the COVID-19 pandemic

- There were 16,821 company incorporations in the week ending Friday 16 October 2020, which is lower than the previous week but remains for the twenty-first week higher than the same week the previous year (14,107).
- The observed fluctuations in weekly incorporations per working day between April to early May 2020 and June to the end of July 2020 coincide with government instigated lockdown measures and the subsequent easing of them in response to the COVID-19 pandemic; this is in line with official statistics published by Companies House.
- There were 4,974 voluntary dissolution applications in the week ending Friday 16 October 2020, similar to the previous week but lower than the same week the previous year (5,898).
- Voluntary dissolution applications throughout the pandemic have followed a similar trend to 2019.

Company incorporations in the week ending 16 October 2020 remained, for the twenty-first week, higher than the same week the previous year

Company incorporations and voluntary dissolutions per working day, UK, quarterly and weekly, Quarter 1 (Jan to Mar) 2019 to Quarter 2 (Apr to June) 2020, and week ending 6 March 2020 to week ending 25 September 2020.



Source: Companies House; Coronavirus and the latest indicators for the UK economy and society: 22 October 2020

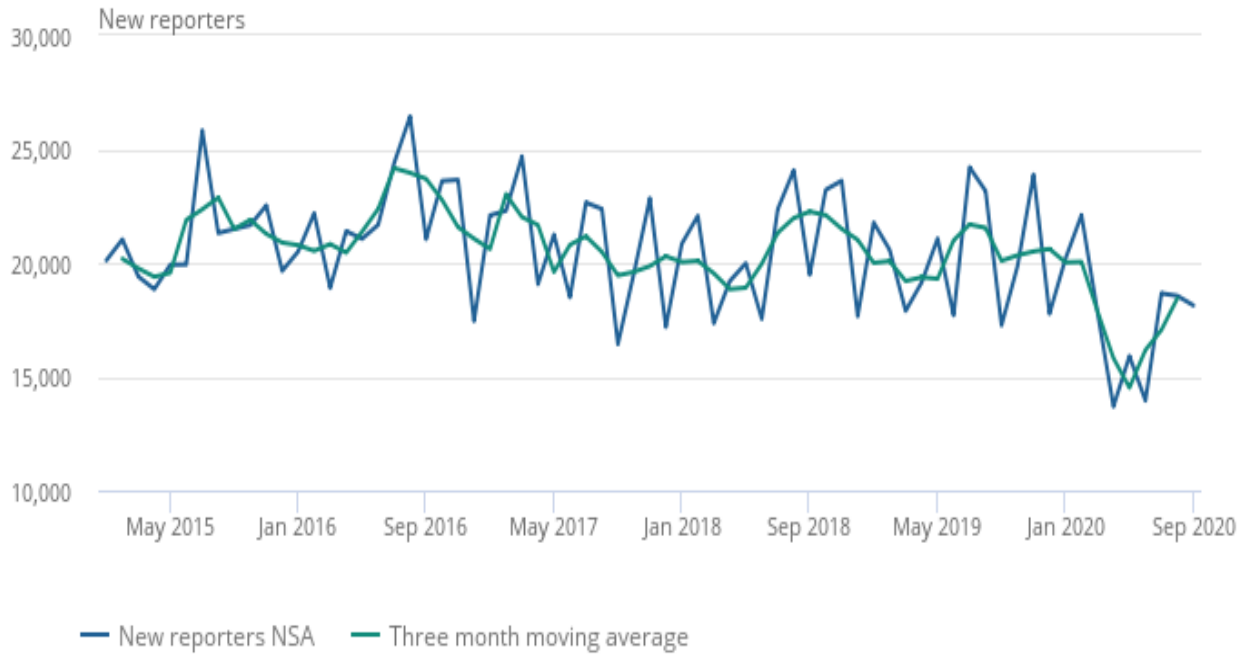
Lead analyst: David Matthewson

In September 2020, the level of new VAT reporters had not returned to the normal levels seen before the impact of the COVID-19 pandemic

- The new reporters index measures the number of firms sending VAT returns for the first time, which is related to the number of firm creations.
- In September 2020, there were 18,130 new VAT reporters, continuing the pick-up in the months of Quarter 3 (July to Sept) 2020 following a drop in Quarter 2 (April to June) 2020.
- The level of new VAT reporters has not returned to the normal levels seen before the impact of the COVID-19 pandemic, and this could be a result of the composition of business births.
- Experimental evidence from the Inter-Departmental Business Register (IDBR) on business demography up to Quarter 3 (July to Sept) shows that the types of businesses being created during the pandemic are on average smaller and may therefore not be included in the VAT reporters data.

September 2020 saw a continuation of the pick-up in the months of Quarter 3 (July to Sept) following a drop in Quarter 2 (Apr to June) 2020

The number of new firm reporters, January 2015 to September 2020, non-seasonally adjusted



Source: Coronavirus and the latest indicators for the UK economy and society: 15 October 2020

Lead analyst: David Matthewson

The impact of the COVID-19 pandemic may be seen in the slowdown in business creations in Quarter 2 (Apr to June) 2020

- The number of businesses removed from the Inter-Departmental Business Register (IDBR) (business closures) in the UK in Quarter 3 (July to Sept) 2020 was slightly lower than the average in the third quarter of the past three years. Business closures do not appear to have yet increased as a result of the COVID-19 pandemic, because of the time it takes for a business to close, delays in the reporting process, and government support for businesses.
- The number of businesses added to the IDBR (business creations) in the UK in Quarter 3 2020 was slightly higher than in the third quarter of the past three years, after a fall in Quarter 2 2020.
- Business creations tend to experience shorter lags than business closures, so the slowdown in Quarter 2 (Apr to June) 2020 and pick up in Quarter 3 2020 are more likely to reflect the coronavirus pandemic.
- The composition of business creations is markedly different to previous quarters – the average business is smaller and far more likely to be in industries less affected by the coronavirus pandemic.

Source: Business demography, quarterly experimental statistics, UK: July to September 2020

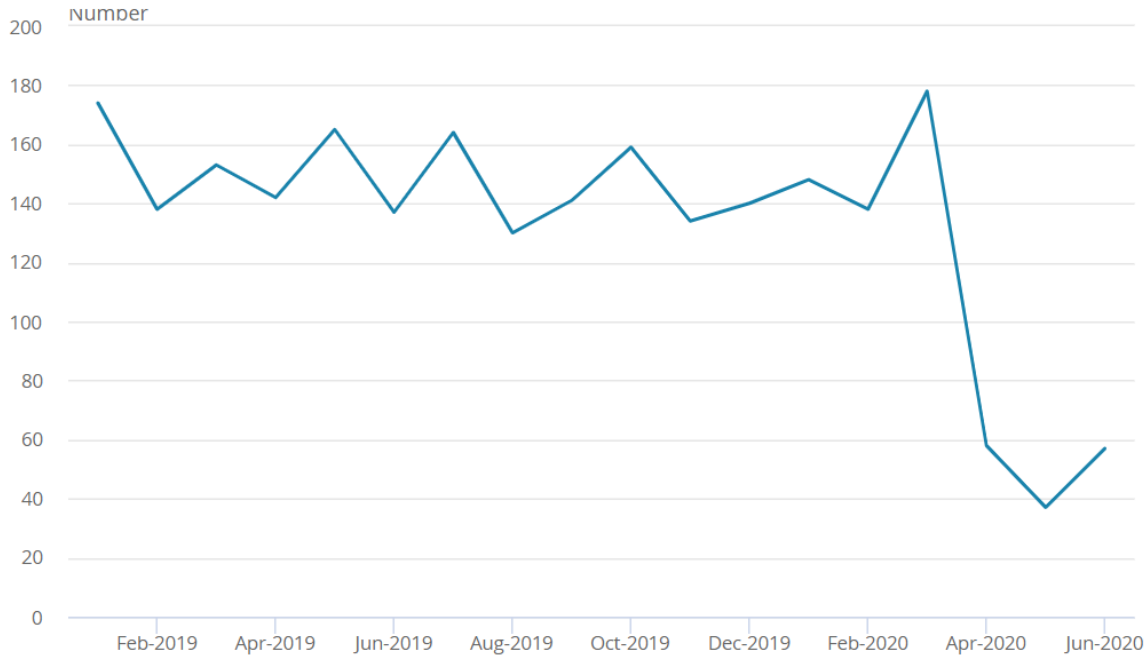
Lead analyst: Josh Martin

The number of domestic and cross-border mergers and acquisitions shows a considerable reduction from April 2020

- Domestic and cross-border M&A involving UK companies in Quarter 2 (Apr to June) 2020 saw 152 completed transactions, a sizeable fall of 311 when compared with the previous quarter (463) and 292 fewer than in Quarter 2 2019 (444).
- As these only measure completed transactions, they cannot provide evidence to explain a reduction in the number of transactions. However, the timing does follow the introduction of the restriction of movement in the UK, which began on 23 March 2020, in response to the coronavirus pandemic.
- There were expectations from external commentators that pandemic-related factors could cause delays to mergers and acquisitions transactions.
- Outward M&A (UK companies acquiring foreign companies abroad) was valued at £4.4 billion in Quarter 2 2020, a slight rise of £0.3 billion when compared with Quarter 1 (Jan to Mar) 2020 (£4.1 billion).
- The value of inward M&A (foreign companies abroad acquiring UK companies) in Quarter 2 2020 (£2.1 billion) was the lowest value recorded since Quarter 2 (Apr-Jun) (£1.9 billion).

The number of monthly domestic and cross-border mergers and acquisitions involving UK companies from January 2019 to June 2020 ranged from 37 to 178

The monthly profile of completed domestic and cross-border mergers and acquisitions shows a considerable reduction in the number of transactions from April 2020



Source: Mergers and acquisitions involving UK companies: April to June 2020

Lead analyst: Lee Mallett

For further information, visit our website: www.ons.gov.uk or our dedicated coronavirus (COVID-19) webpage for the latest data and analysis on the coronavirus (COVID-19) in the UK and its effects on the economy and society.