

How many workers in Suffolk are exposed to the shutdown as a result of social distancing and lockdown?

Author: Michael Barker
Editor: Michaela Breilmann

Acknowledgements

This analysis is based on the Institute for Fiscal Studies (IFS)¹ analysis into the sector shutdowns during the coronavirus crisis. Whilst the themes and construct will therefore bear similarities to the IFS report, this report has been created as a direct response to understand the impact of COVID-19 on workers and industries in Suffolk rather than nationally. A link to the IFS study can be found here: <https://www.ifs.org.uk/publications/14791>

Limitations

The IFS report, using the Quarterly Labour Force Survey (LFS) Q1-Q4 2019, Waves 1 and 5 Only, produced detailed analysis on the percentage of workers in shutdown sectors by gender, age and individual earnings. Whilst this level of analysis would be ideal when looking at county and district/borough level, the LFS lowest geographical level is regional. As such SODA has used the Business Register Employment Survey (BRES)^{2 3} as its primary dataset in order to access at a District and Borough level, however this comes with its own disadvantages. SODA is unable, via publicly available datasets, to access the same level of data (in terms of Gender, Age and individual earnings) as the LFS and as such the analysis in this report will only contain the share of employees in the shutdown sectors.

About the BRES dataset: An employer survey of the number of jobs held by employees broken down by full/part-time and detailed industry (5-digit SIC2007). The survey records a job at the location of an employee's workplace.

Summary

The government lockdown as a response to the COVID-19 disease, has effectively caused several sectors to shut down. Select retail, arts and leisure, domestic services and accommodation and food establishments have been instructed to close, with air travel ceased and most public transport severely reduced. Bespoke analysis of Suffolk as a county as well as its Districts and Boroughs shows:

- **Suffolk as a county employs ~323,390 employees (full and part time), of which ~56,660 are employed in sectors directly affected by the shutdown.**
- **The lockdown will affect nearly a fifth of all employees across Suffolk, with Babergh and East Suffolk being the hardest hit districts.** On average, 17.5% of employees across Suffolk are employed in sectors

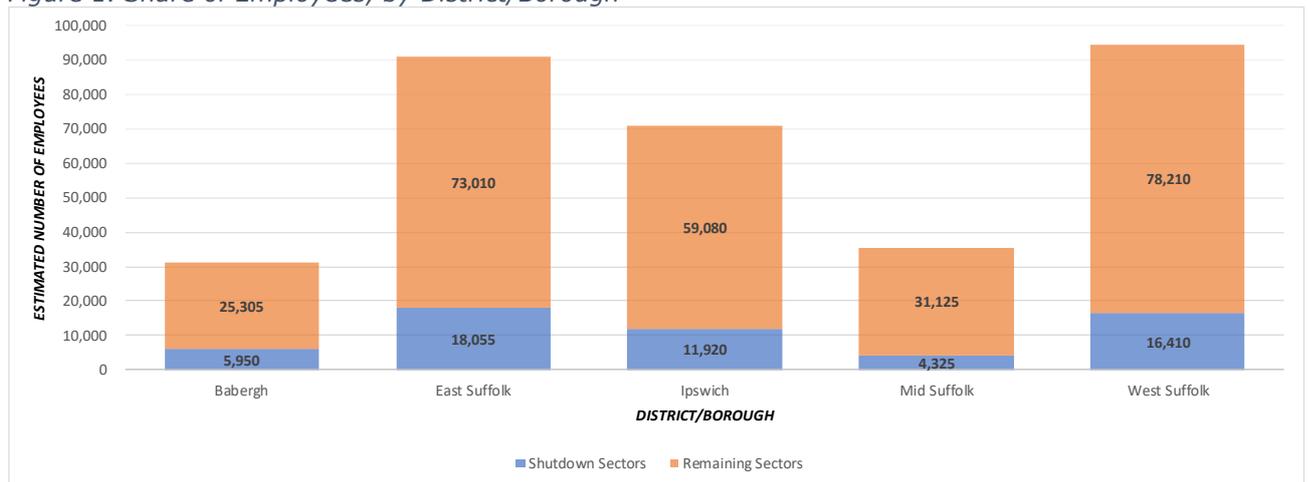
directly effected due to the implementation of social distancing measures. This varies across the districts: in Babergh 19.0% are employed in these sectors, in Mid Suffolk 12.2%, in Ipswich 16.8%, in East Suffolk 19.8% and in West Suffolk 17.3%.

- **The Accommodation and Food Service sector contains the greatest proportion of workers hit by the sector shutdown, with just over two fifths of all affected workers, coming from this sector alone.** East Suffolk and West Suffolk are the districts most adversely affected by the crisis, with 47% and 46% of all shutdown workers coming from this sector, respectively.

How many work in the most affected sectors?

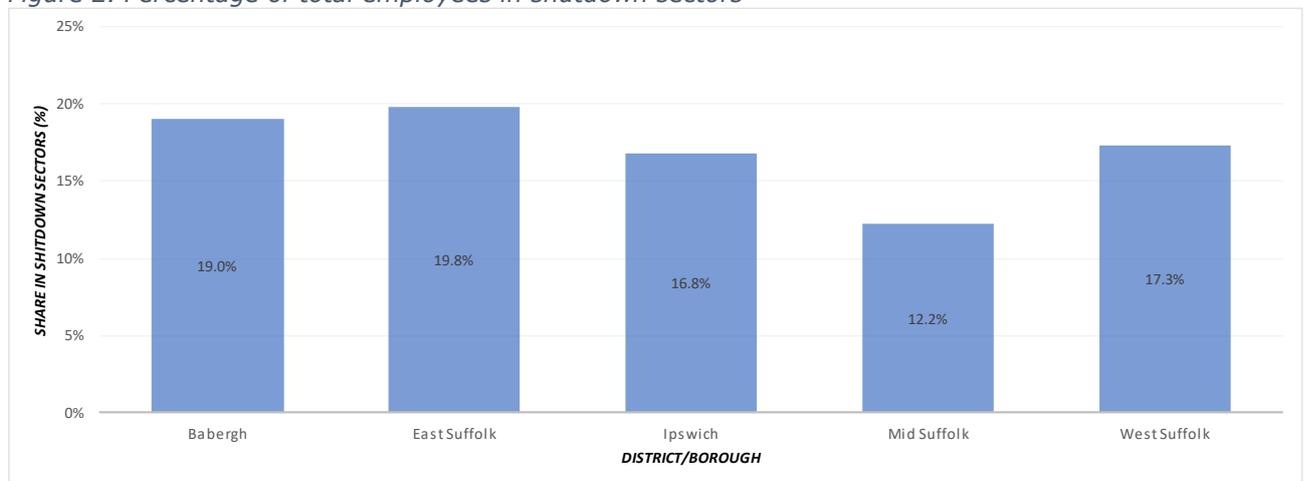
It is estimated that 17.5% of all employees across Suffolk worked in an industry that has been adversely affected or completely shutdown as a result of the COVID-19 crisis. The sectors considered at the greatest risk include, non-food retail, restaurants and hotels, passenger transport, personal services and arts and leisure services (a full list is included sectors and 4-digit codes can be found in the **Notes** section).

Figure 1. Share of Employees, by District/Borough



Source: Business Register Employment Survey (BRES) 2019

Figure 2. Percentage of total employees in shutdown sectors

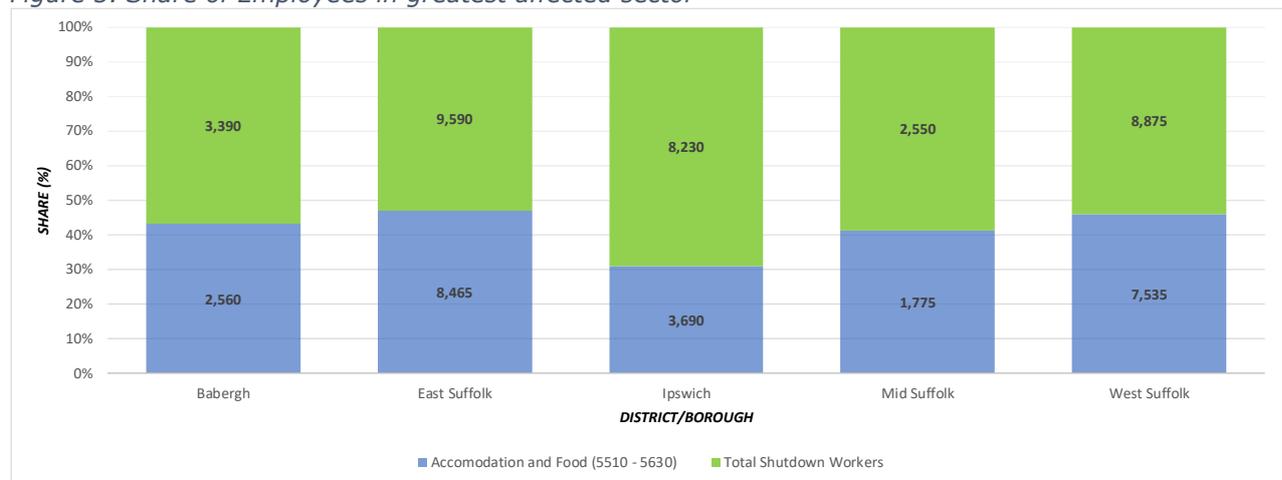


Source: Business Register Employment Survey (BRES) 2019

Babergh and East Suffolk are likely to be the most affected areas, as can be seen in Figures 1 and 2 above, 19.0% and 19.8% of all estimated employees working in a shut down sector. Whilst these two districts do not have the highest levels of affected workers, proportionately they are hit hardest.

No District remains unaffected, with Ipswich, Mid Suffolk and West Suffolk having workers caught by the shutdown, with 16.8%, 12.2% and 17.3% estimated to be affected. Whilst these percentages are significantly lower than Babergh and Mid Suffolk, the total employees in these geographical areas are substantially higher, and the overall number of affected workers also being greater (see Fig. 1).

Figure 3. Share of Employees in greatest affected sector



Source: Business Register Employment Survey (BRES) 2019

The lockdown is likely to impact the Accommodation and Food sector more substantially than any other affected sector. Of the shutdown sectors, 42% of those workers work in the Accommodation and Food industry, with East Suffolk and West Suffolk being the most affected by the lockdown with 47% and 46% respectively, of all shutdown workers coming from this sector. Babergh and Mid Suffolk are not far behind with 43% and 41%, and Ipswich being the less affected on 31%. **In terms of employee numbers for Suffolk as a whole, of the ~56,660 employees hit, ~24,025 work in the highlighted sector.**

Further Research & Analysis

Whilst we have highlighted some key exposures for workers in the directly affected industry due to the lockdown and social distances measures, we have been unable to provide further breakdown of the data by gender or age groups. The IFS study found that the lockdown was much more likely to

- Affect younger workers, with under 25s “about two and a half times as likely to work in a sector that is now shut down as other employees”⁴.
- Moreover, women nationally were found to be more affected due to the disproportionate number of women working in both the retail and hospitality industries.
- Lower earners are also more adversely affected, though there is some mitigation, albeit initially, that younger workers and the lower earners appear to live with parents or others.

Should lower geographical data become available, we will be able to gain a better understanding into the demographics of Suffolk workers affected short term and long term.

Notes

The sectors that have been categorised as being directly affected by the lockdown are: Non-food, Non-Pharmaceutical Retail (4719, 4730-4772, 4776-4799); Passenger Transport (4910, 4931-4939, 5010, 5030, 5110); Accommodation and Food (5510 – 5630); Travel (7911-7990); Childcare (8510, 8891); Arts and Leisure (9001-9329 with the exception of Artistic Creation 9003); Personal Care (9601-9609 with the exception of Funeral and related activities 9603); Domestic Services (9700).

References

¹ Institute of Fiscal Studies. Sector shutdowns during the coronavirus crisis: which worker are most exposed? Available at: <https://www.ifs.org.uk/uploads/BN278-Sector-shutdowns-during-the-coronavirus-crisis.pdf> (Accessed on 15th April 2019)

² Office for National Statistics. Business Register and Employment Survey: open access (2018). Available at: <https://www.nomisweb.co.uk/datasets/newbres6pub> (Accessed on 22nd April 2019)

³ The level of rounding applied varies by estimate. Please see article for further information on how rounding is applied <https://www.nomisweb.co.uk/articles/1103.aspx>

⁴ Institute of Fiscal Studies. Sector shutdowns during the coronavirus crisis: which worker are most exposed? Available at: <https://www.ifs.org.uk/uploads/BN278-Sector-shutdowns-during-the-coronavirus-crisis.pdf> (Accessed on 15th April 2019)