

STATE OF WALES BRIEFING  
March 2022

## How Covid-19 changed Wales



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The Bevan Foundation is Wales' most influential think tank. We generate insights and ideas to end poverty and inequality.

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## About State of Wales briefings

State of Wales briefings are one of the benefits of a Bevan Foundation subscription. They provide independent insights into issues facing people in Wales today, based mostly on Welsh and UK Government data. Briefings can help your organisation to:

- understand how poverty and inequality affect the people or organisations you work with;
- be aware of differences across Wales;
- anticipate future trends and plan your services;
- strengthen your case-making e.g. for funding.

Links to sources of data are provided in full, either in the introduction, table notes or end-notes. This enables you to explore them further if you wish.

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# State of Wales Briefing: How Covid-19 changed Wales

March 2022

## What this briefing is about

This briefing identifies some of the key changes in the Welsh economy and society since the outbreak of the pandemic in March 2020 to date.

## Why it matters

As the last of the Covid-19 restrictions are lifted, it might seem that the economy and society are returning to 'normal'. However there are lasting impacts that are not always visible, which are considered in this briefing.

## Key messages

Covid-19 has had a dramatic effect on the population, health, the labour market, education and housing. In almost every area, inequalities between different groups have widened.

- Covid-19 has had a huge impact on the nation's health. Not only have there been more than 9,000 deaths and more than 800,000 infections, one in five people is now waiting for hospital treatment.
- The economy has partly but not fully recovered. Fewer people are in work, and unemployment is high amongst young people. It remains to be seen if working from home will persist.
- Children's education has been disrupted with high absence rates and skewed attainment. Attendance continues to be well below pre-pandemic levels, and the attainment gap between different groups of learners has widened.
- House prices have soared, and rents have also increased. While the threat of homelessness has decreased, the number of households becoming homeless has increased.

## What this means for you

Organisations need to understand that everyday life is still far from normal for many people in Wales. Inequalities that existed before the pandemic have deepened, with young people, people on low incomes, disabled people and people from Black, Asian and Minority Ethnic backgrounds being hardest hit.

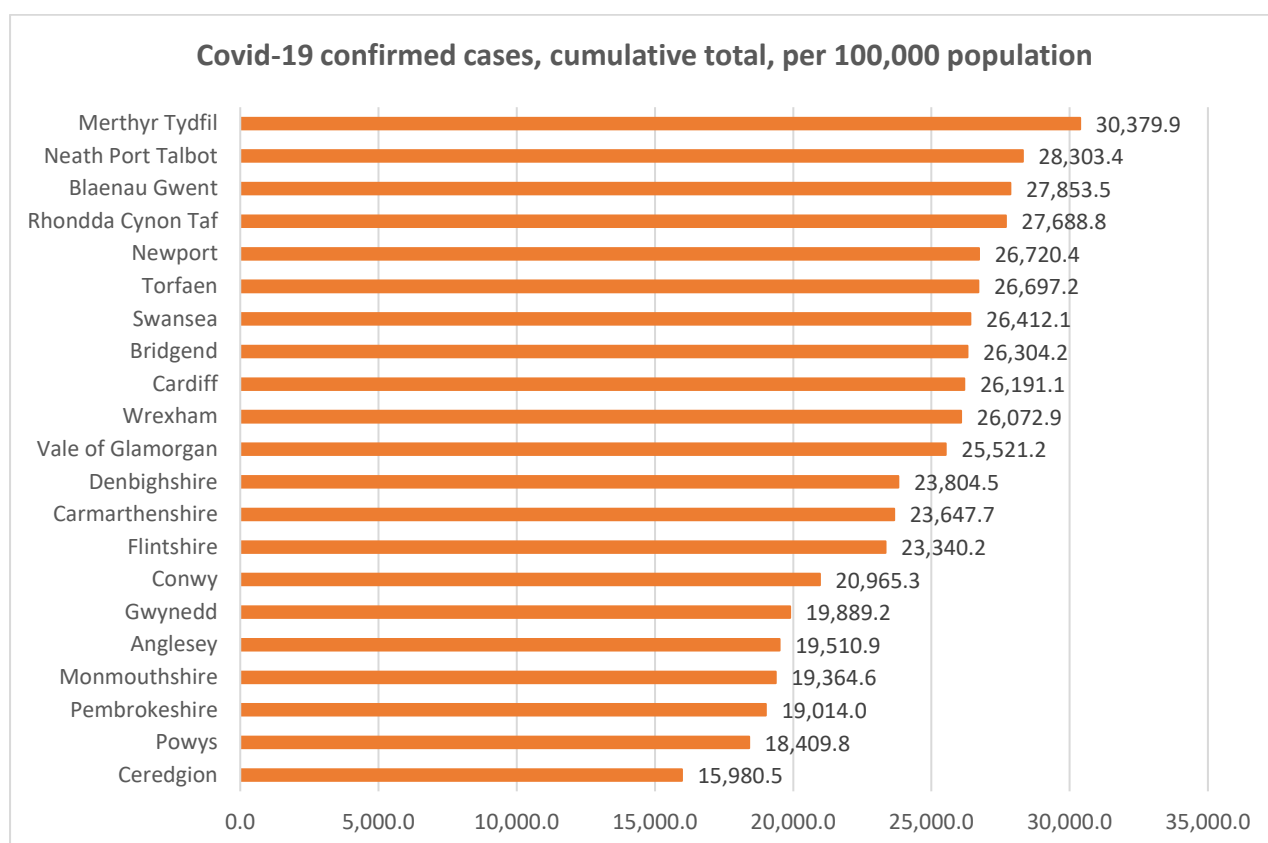
## Sources of data

The briefing uses a wide variety of governmental sources of data, focusing on that which is relatively recent. Links to data sources are given below graphs, tables and in the end notes. Please note that some data is updated very frequently (including some which is updated daily).

# 1. Health

## Infections

A total of 818,146 cases of Covid-19 have been confirmed in Wales by a PCR test from the start of the outbreak up to 27<sup>th</sup> February 2022. The highest rates of infection per 100,000 population over the whole pandemic have been in Merthyr Tydfil and Blaenau Gwent. The lowest rates of infection have been in Ceredigion, where the infection rate was almost half that of Merthyr Tydfil and Blaenau Gwent.



Source: Public Health Wales **Rapid COVID-19 virology**

<https://public.tableau.com/app/profile/public.health.wales.health.protection/viz/RapidCOVID-19virology-Public/Headlinesummary>

## Deaths

In total, 9,687 deaths were registered with Covid-19 mentioned on the death certificate between January 2020 and week ending 18 February 2022. The highest number of deaths were in Aneurin Bevan University Health board area.

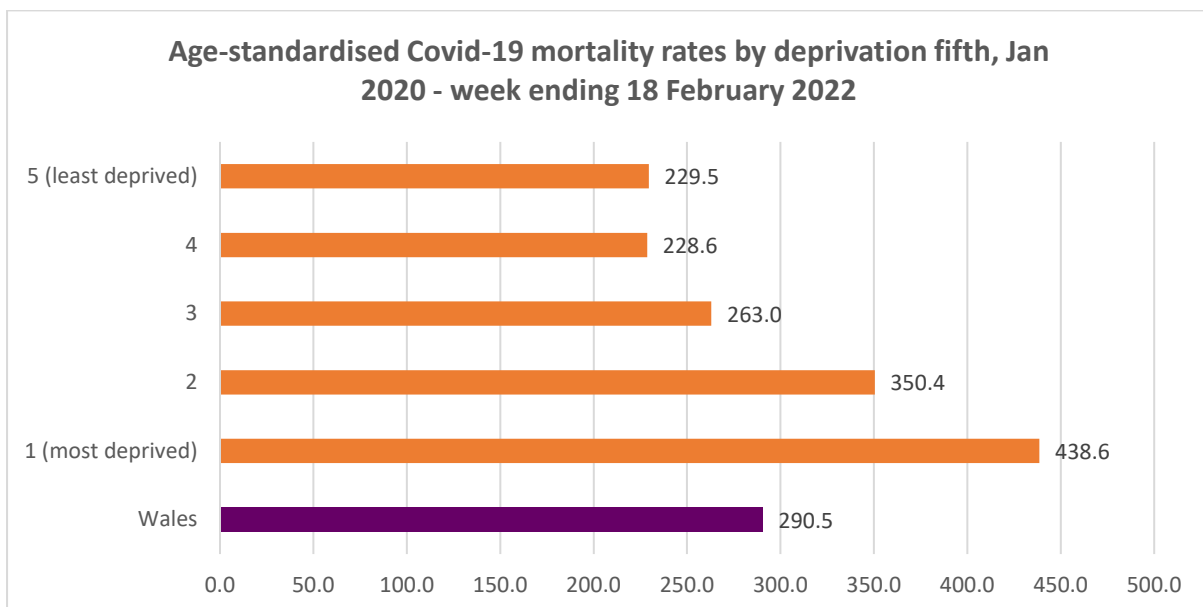
Total number of deaths registered with COVID-19 mentioned on the death certificate (week ending 3 January 2020 to week ending 18 February 2022)

Aneurin Bevan	1,902
Betsi Cadwaladr	1,812
Cardiff and Vale	1,422
Cwm Taf Morgannwg	1,884
Hywel Dda	980
Powys	332
Swansea Bay	1,355
Wales	9,687

Source: Public Health Wales ONS Deaths as at 4<sup>th</sup> March 2022

<https://public.tableau.com/app/profile/public.health.wales.health.protection/viz/RapidCOVID-19virology-Public/Headlinesummary>

The most deprived areas have Covid-19 mortality rates almost twice as high as in the least deprived areas.



Source: Public Health Wales ONS Deaths as at 4<sup>th</sup> March 2022

<https://public.tableau.com/app/profile/public.health.wales.health.protection/viz/RapidCOVID-19virology-Public/Headlinesummary>

## Hospital admissions

Since April 2020 and up to 8<sup>th</sup> March 2022, more than one in twenty hospital admissions has been of people with suspected or confirmed Covid-19, a total of 39,018 admissions.<sup>1</sup> Although the number of Covid-related hospital admissions has decreased, in week ending 27<sup>th</sup> February 5% of hospital admissions – 257 – were of people who were either known to have Covid-19 or who tested positive on admission.<sup>2</sup>

## Bed occupancy

Although numbers have fallen, as at 1<sup>st</sup> March 2022 858 beds were occupied with patients with confirmed, suspected or recovering from Covid-19, almost one in ten (9.8%) of all hospitalisations.<sup>3</sup> The number of patients in acute hospitals with Covid-19 is smaller at 353 beds in acute hospitals. Ten invasive ventilated beds were occupied with Covid-19 related patients. It is important to note that the number of beds occupied with Covid-19 related patients fluctuates, with the figures at 1<sup>st</sup> March being considerably lower than in the previous week.

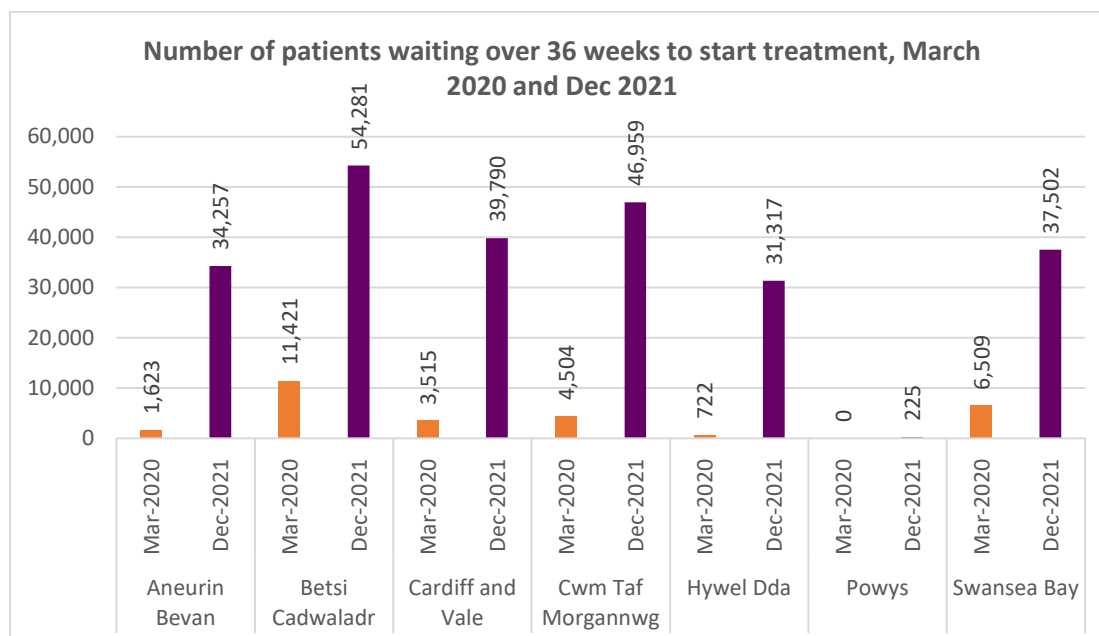
## 'Long Covid'

Long Covid or Post Covid syndrome is when symptoms continue, or when new symptoms develop, more than 12 weeks following the infection. Public Health Wales estimates that about 10% of people who have had a Covid-19 infection will experience Long Covid,<sup>4</sup> suggesting that approximately 81,000 people in Wales have experienced lasting symptoms.

## Waiting to start treatment

The pandemic has had a dramatic effect on the waiting times for treatment. The total number of patients waiting for treatment is up from 456,809 in March 2020 to 683,331 in December 2021. One in five of the Welsh population is now waiting for treatment.

By far the largest increase has been in the number waiting more than 36 weeks to start treatment. These increased from 28,294 in March 2020 to 244,331 in December 2021.<sup>5</sup> All health boards experienced a large increase in the number of patients waiting but the biggest percentage increase is in Hywel Dda Health Board.



Source: Patient pathways waiting to start treatment by month, grouped weeks and stage of pathway <https://statswales.gov.wales/Catalogue/Health-and-Social-Care/NHS-Hospital-Waiting-Times/Referral-to-Treatment/patientpathwayswaitingtostarttreatment-by-month-groupedweeks>

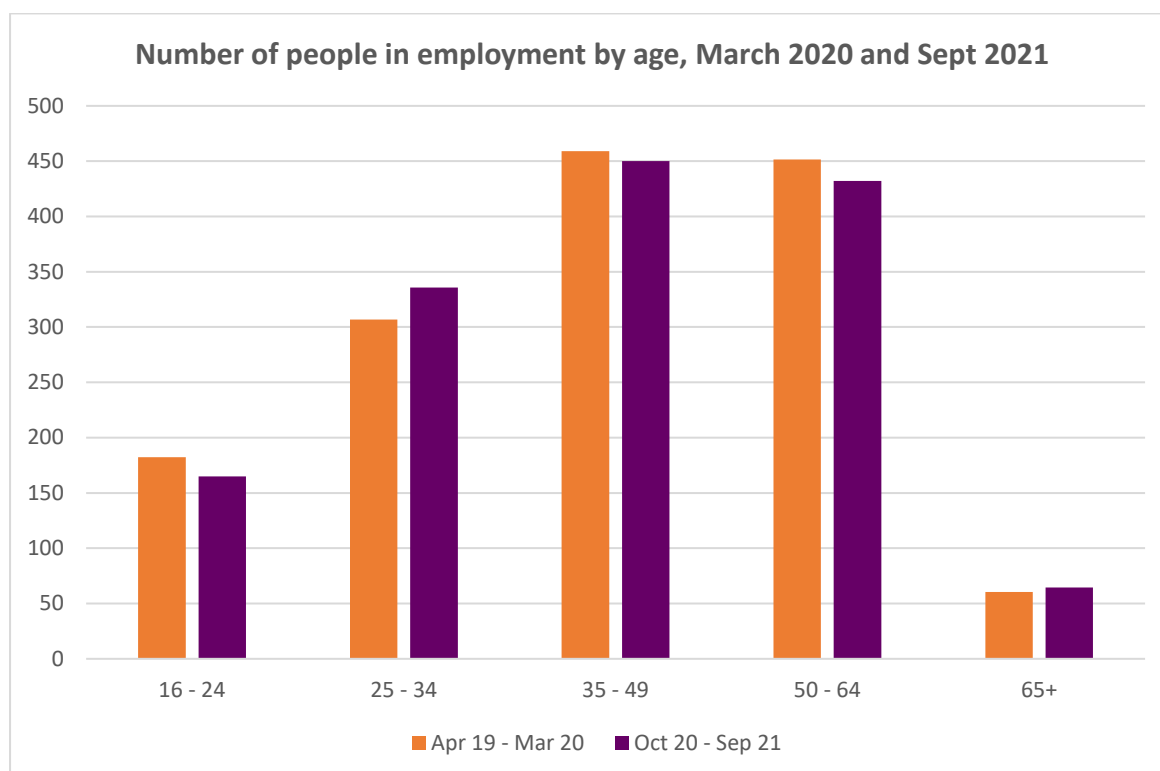
## 2. Work, employment and economic inactivity

The labour market in Wales has still not fully recovered to its pre-pandemic position.

### People in work

The total number of people in work in Wales remains below pre-pandemic levels. In the three months to January 2020 there were 1,420,000 16- to 64-year-olds in employment in Wales.<sup>6</sup> By comparison there were only 1,413,000 16- to 64-year-olds in work in Wales in the three months to January 2022.<sup>7</sup>

The number of people in employment has fallen for both men and women up to September 2021. For both genders, the largest decreases have been amongst 16-24 year olds and 50-64 year olds, while the number of workers aged 25-34 has increased.



Source: Office for National Statistics HI10 Regional labour market: Headline indicators for Wales 15<sup>th</sup> March 2022,

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/headlinelabourforcesurveyindicatorsforwaleshi10>

### Unemployment

The overall unemployment rate has fallen compared with the start of the pandemic, down from 3.3% for January - March 2020 to 3.1% in November 2021 – January 2022. However the unemployment rate for young people, and especially young males, has risen sharply: in the year to September 2021, unemployment amongst 16-24-year-old males was 14.3% and amongst 16-24-year-old females was 10.7%.

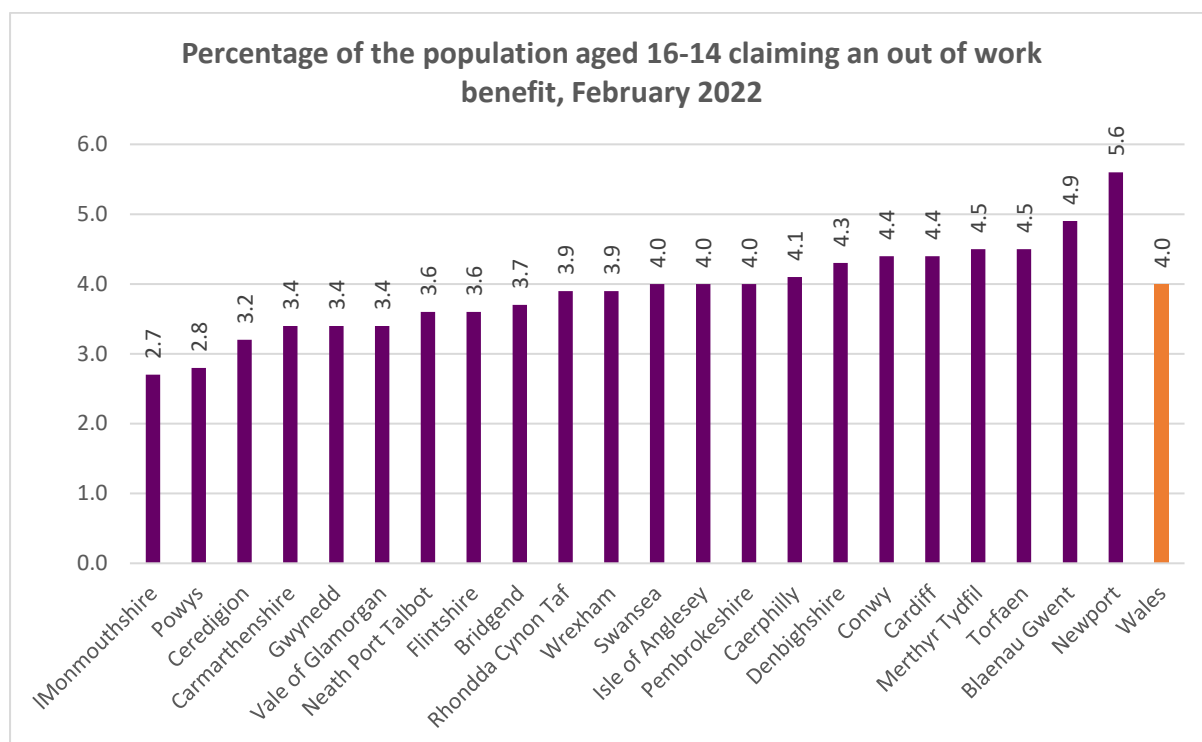


Unemployment rate, age groups, Wales					
		16 - 24	25 - 34	35 - 49	50 - 64
Males	Mar 20	11.8	3.2	2.6	2.2
	Sep 21	14.3	3.7	2.5	3.0
Females	Mar 20	10.7	3.8	2.4	2.1
	Sep 21	10.7	3.7	2.5	2.9

Source: Office for National Statistics HI10 Regional labour market: Headline indicators for Wales 15 March 2022

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/headlinelabourforcesurveyindicatorsforwaleshi10>

The number of people claiming an out-of-work benefit has dropped from the peak at the start of the pandemic but, unlike unemployment, remains higher than in March 2020. In February 2022, 16,660 more people were claiming an out-of-work than at the start of the Covid-19 outbreak, 4% of the population of working age. The highest claimant rates are in local authorities in south-east Wales.



Source: Claimant Count, via NOMIS

## Economic inactivity

After increases in economic inactivity, the number of people of working age who are out of the labour market has returned to close to pre-pandemic levels by January 2022.<sup>8</sup>

Current data by gender are not yet available – the figures for the year to September 2021 suggest that twice as many men as women had become economically inactive, with 20.4% of males and 27.6% of females being out of the labour market at that date.



## Working from home

Three in ten workers were working from home in Wales as of February 18 – 21<sup>st</sup> 2022.<sup>9</sup> This is down from a high of 48% reported in April 2020.<sup>10</sup> The proportion of workers working from home has increased from the position in November 2021 when 20 per cent of workers reported working from home.<sup>11</sup>

The data from 2021 predates the publication of strengthened guidance to work from home due to the emergence of the Omicron variant. It therefore appears too early to draw any firm conclusions about any long term trends on the prevalence of home working in Wales.

## 3. Education

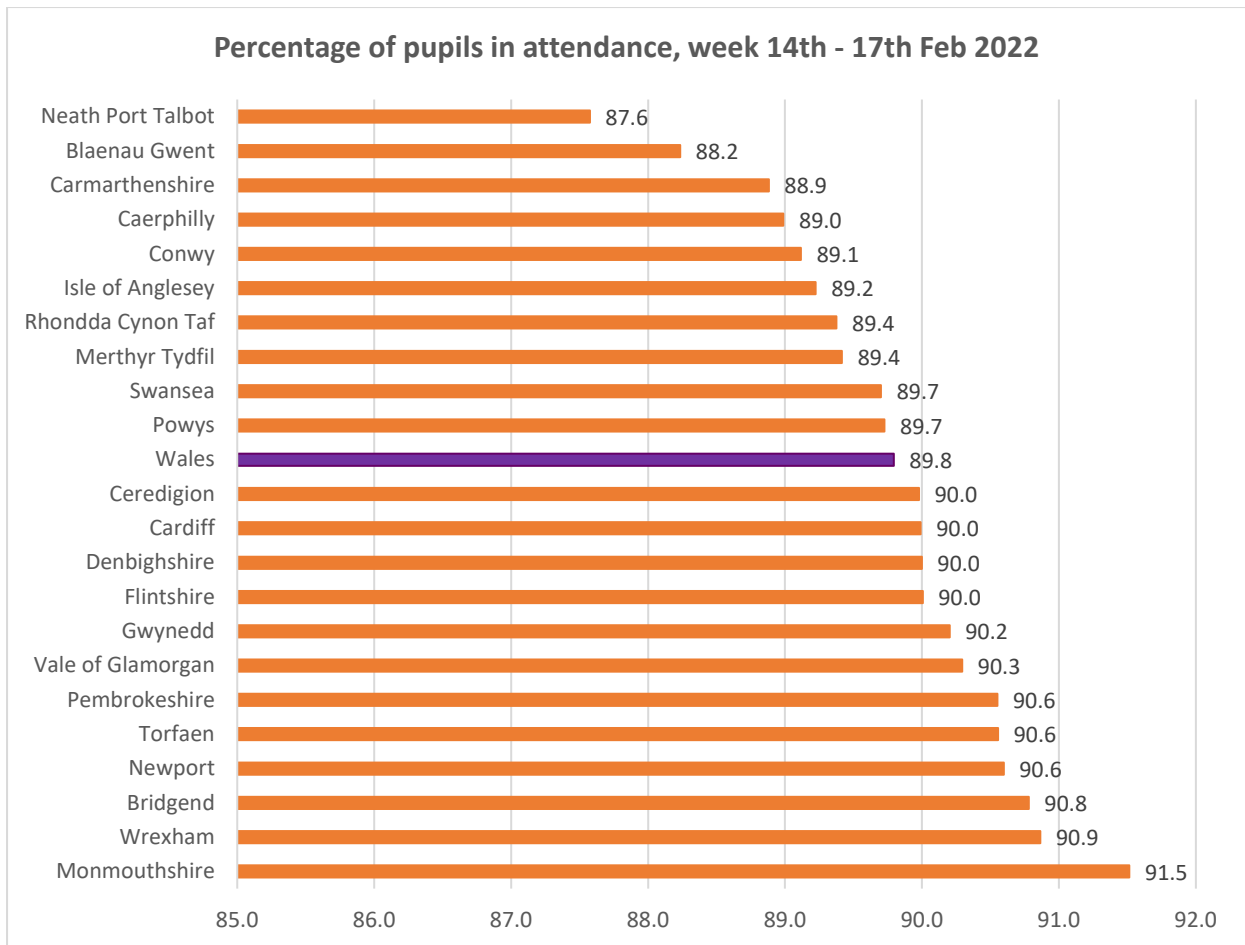
Covid-19 has had a dramatic impact on all aspects of education.

### Attendance

One of the most striking effects has been on attendance. The initial period of school closures saw attendance fall, but learning has continued to be affected by Covid-19 infections amongst staff and pupils.

Before the pandemic, in the academic year to 2018/19, the overall absence rate was 6.2%. Schools closed in March 2020 and mostly re-opened in September 2020. Since then, attendance has been much lower than before the pandemic, with the average for the academic year 2021/22 up to 25<sup>th</sup> February being 87.1%.

The most recent data (for week 14<sup>th</sup> – 17<sup>th</sup> February) show attendance ranging between 87.6% in Neath Port Talbot and 91.5% in Monmouthshire.



Source: <https://gov.wales/attendance-pupils-maintained-schools-6-september-2021-25-february-2022>

In general, lower attendance rates are found amongst pupils entitled to free school meals, with a difference in attendance of 6 percentage points between pupils entitled to free school meals and other pupils in the week of 14 - 17 February 2022. Older pupils (year 11) also have lower average attendance rates than other year groups.

The cumulative impact of absence has been huge. Seven out of ten pupils (71.0%) have missed more than a week of face-to-face learning for any reason since 6<sup>th</sup> September 2021. Around one in six (16.6%) of pupils have missed more than four weeks' (20.5 days or more) of education.

## Post-16 outcomes

Covid-19 brought major changes in the way that post-16 learners were assessed. These were accompanied by changes participation in post-16 education and in learners' achievements.<sup>12</sup>

The pandemic saw an increase in the proportion of year 11 school students moving on to study A levels and a smaller proportion moving on to full time vocational courses. The likelihood of learners switching course or provider or dropping out of post-16 learning also increased in 2021/22 compared with previous years.

There were large improvements in outcomes for A level learners. Most of the improvements were higher grades: in 2020/21, 27% of learners achieved at least three As, compared to 21% in 2019/20 and 12% in 2018/19.

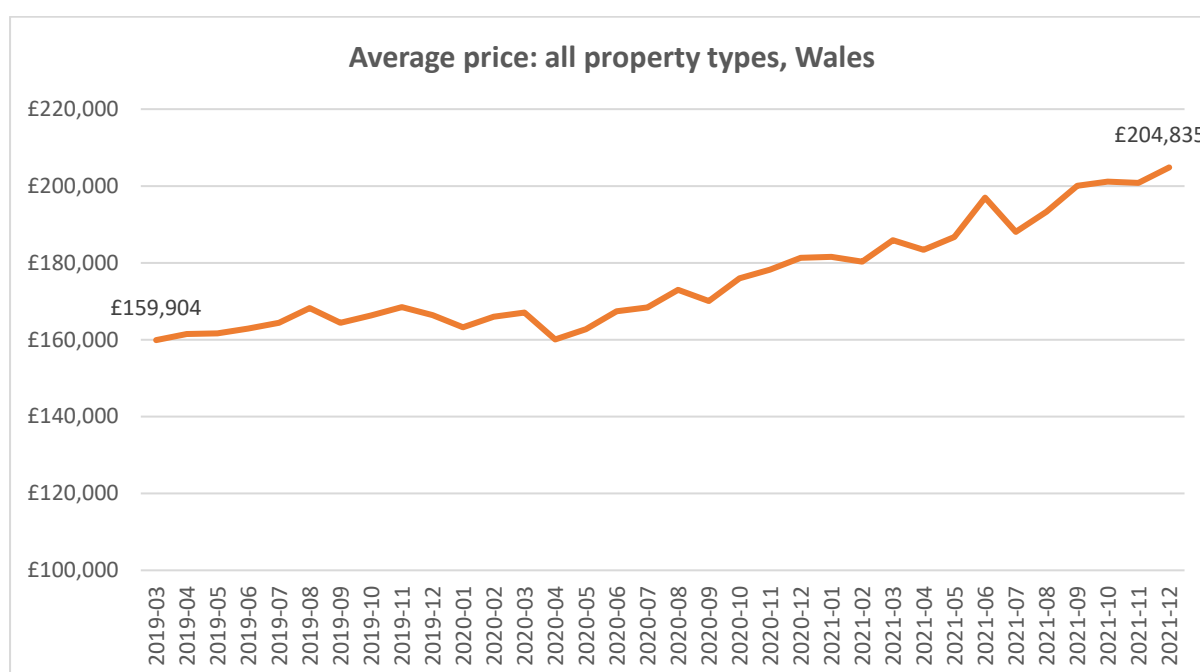
Many inequalities widened in 2020/21. The gap in attainment increased between learners living in the most and least deprived areas, between girls and boys, and between White learners and learners with Black, African, Caribbean, Black British backgrounds.

## 4. Housing

The pandemic brought the importance of a safe, secure home into sharp focus. After a period in which the housing market was all but frozen, there has been considerable market activity which has affected house prices, rents and homelessness.

### Increase in accommodation costs

The price of buying a home has increased significantly during the Covid-19 pandemic years. Between March 2019 and December 2021, the average house price in Wales increased by 28%, a jump of £44,931, to £204,835. The largest increases in both cash and percentage terms were in the price of detached houses, and the smallest was in the price of flats.



Source: Land Registry UK House Price data: search tool  
<https://landregistry.data.gov.uk/app/ukhpi>

There is a large variation between local authorities. The Vale of Glamorgan experienced the greatest increase in price, an average increase of over £66,000 since 2019. Pembrokeshire, Ceredigion, and Monmouthshire experienced the next largest increases, up by an average of around £53,000. Merthyr Tydfil experienced the smallest increase but still saw house prices increase by over £16,000.<sup>13</sup>

Private sector rents also rose during the pandemic. ONS estimates that rents grew by 1.4% in the 12 months to January 2022. The index of rents, set at 100 in January 2015, rose to 107.5 by January 2022.<sup>14</sup>

## Discretionary housing payments

DHPs are emergency funds issued to people in receipt of Housing Benefit or the housing element of Universal Credit. Both the number of DHP awards, and the value of DHP awards increased during the pandemic. In total, over £10,000,000 was spent on DHPs during 2020/21.

Discretionary Housing Payments 2019/20 and 2020/21		
	2019/20	2020/21
Total number of DHP awards	23,404	25,402
total value of DHP awards (£)	8,456,101	10,217,714
Average DHP award (£)	361.31	402.24

Source: UK Government. (2020, August 13). Use of Discretionary Housing Payments: financial year 2019 to 2020. Retrieved from UK Government: <https://www.gov.uk/government/statistics/use-of-discretionary-housing-payments-financial-year-2019-to-2020>

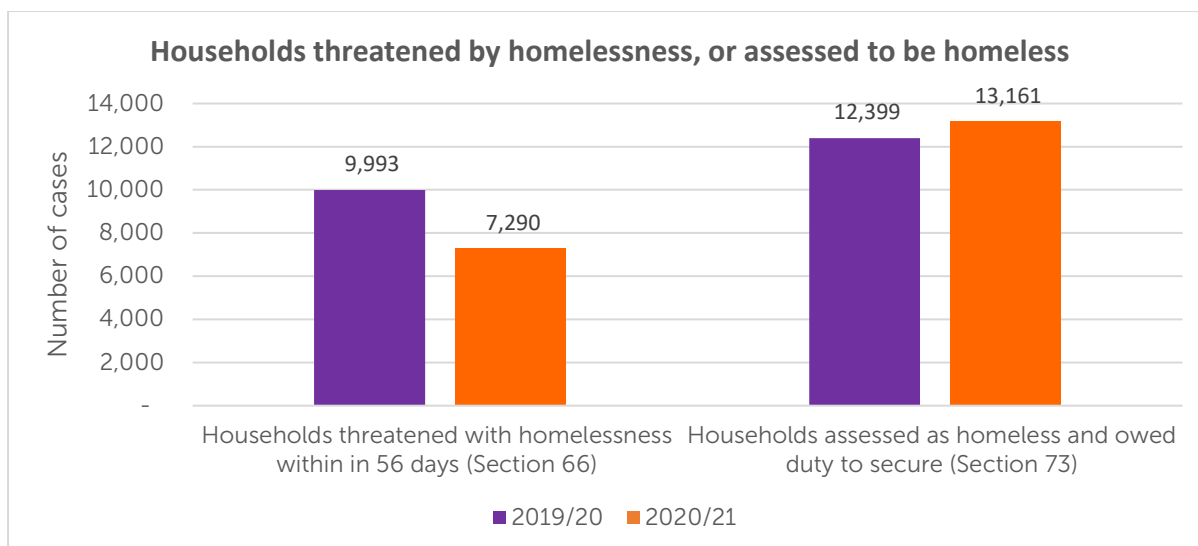
UK Government. (2021, July 8). Use of Discretionary Housing Payments: financial year 2020 to 2021. Retrieved from UK Government: <https://www.gov.uk/government/statistics/use-of-discretionary-housing-payments-financial-year-2020-to-2021>

## Homelessness

The picture in respect of homelessness is mixed. On the one hand, the number of households at risk of becoming homeless and designated as requiring additional support to prevent them becoming homelessness decreased during the Covid-19 pandemic years. On the other hand, the number of households assessed as actually being homeless increased during the same timeframe.

In addition, the number of homeless households in temporary accommodation has increased. Prior to Covid-19 there were 2,325 households residing in temporary accommodation, which increased to 3,729 in 2020/21.<sup>15</sup>

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Source: StatsWales. (2021, December 16). Prevention of Homelessness by Area and Measure (Section 66). <https://statswales.gov.wales/Catalogue/Housing/Homelessness/preventionofhomelessness-by-area-measure-section66>

StatsWales. (2021, December 16). Relief of Homelessness by Area and Measure (Section 73). <https://statswales.gov.wales/Catalogue/Housing/Homelessness/reliefofhomelessness-by-area-measure-section73>

## End notes

<sup>1</sup> Welsh Government (2022) **NHS activity and capacity during the coronavirus (COVID-19) pandemic: 10 March 2022** <https://gov.wales/nhs-activity-and-capacity-during-coronavirus-covid-19-pandemic-10-march-2022-html>

<sup>2</sup> Public Health Wales **Rapid COVID-19 virology** <https://public.tableau.com/app/profile/public.health.wales.health.protection/viz/RapidCOVID-19virology-Public/Headlinesummary>

<sup>3</sup> Welsh Government (2022) **NHS activity and capacity during the coronavirus (COVID-19) pandemic** 3 March 2022 <https://gov.wales/nhs-activity-and-capacity-during-coronavirus-covid-19-pandemic-3-march-2022-html>

<sup>4</sup> Public Health Wales (undated) **Long Covid** <https://phw.nhs.wales/services-and-teams/healthy-working-wales/covid-19-information-and-advice-to-support-employers-and-employees/health-wellbeing/long-covid-post-covid-19-syndrome/>

<sup>5</sup> <https://statswales.gov.wales/Catalogue/Health-and-Social-Care/NHS-Hospital-Waiting-Times/Referral-to-Treatment/patientpathwayswaitingtostarttreatment-by-month-groupedweeks>

<sup>6</sup> Office for National Statistics **HI10 Regional labour market: Headline indicators for Wales**, available at - <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/headlinelabourforcesurveyindicatorsforwaleshi10>

<sup>7</sup> ibid

<sup>8</sup> Annual Population Survey, via NOMIS

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<sup>9</sup> Welsh Government, **Survey of public views on the coronavirus (COVID-19): 18 to 21 February 2022** available at - <https://gov.wales/survey-public-views-coronavirus-covid-19-18-21-february-2022>

<sup>10</sup> ibid

<sup>11</sup> ibid

<sup>12</sup> Welsh Government (2022) **Outcomes for learners in post-16 education affected by the coronavirus (COVID-19) pandemic: August 2020 to July 2021 1 (experimental statistics)** available at <https://gov.wales/outcomes-learners-post-16-education-affected-coronavirus-covid-19-pandemic-august-2020-july-2021>

<sup>13</sup> UK Government. UK House Price Index Wales: December 2020 and December 2021. Retrieved from UK Government: <https://www.gov.uk/government/statistics/uk-house-price-index-wales-december-2020/uk-house-price-index-wales-december-2020> and <https://www.gov.uk/government/statistics/uk-house-price-index-for-december-2021/uk-house-price-index-wales-december-2021>

<sup>14</sup> ONS. (2022, February 16). Index of Private Housing Rental Prices, UK: January 2022. Retrieved from Office for National Statistics: <https://www.ons.gov.uk/economy/inflationandpriceindices/bulletins/indexofprivatehousingrentalprices/january2022>

<sup>15</sup> StatsWales. (2021, December 16). Households accommodated temporarily by accommodation type and household type (Post 2015-16). Retrieved from StatsWales: <https://statswales.gov.wales/Catalogue/Housing/Homelessness/Temporary-Accommodation/householdsaccommodatedtemporarily-by-accommodationtype-householdtype>

<sup>16</sup> StatsWales. (2021, December 16). Households accommodated temporarily by accommodation type and household type (Post 2015-16). Retrieved from StatsWales: <https://statswales.gov.wales/Catalogue/Housing/Homelessness/Temporary-Accommodation/householdsaccommodatedtemporarily-by-accommodationtype-householdtype>