The impact of digital transformation on the UK economy:

Retail Sector

A Cebr report for Virgin Media Business

April 2021

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London, April 2021

Contents

Executive Summary

- This is a Cebr report for Virgin Media Business on the impact of Covid-accelerated digital transformation (CADT) in the **retail** sub-set of the private sector.

- Following the release of Cebr's extended report for Virgin Media Business on the topic of Covid-accelerated digital transformation, and its impact on the UK economy more broadly, this report focuses on the **retail sub-sector**.

- This is the fifth in a **series of sector-specific vertical reports** based on analysis undertaken in late 2020, providing a review of the role that digital transformation is expected to play in accelerating the UK's rebound from Covid-19.

- Within **retail**, we consider the digital impacts in the wider retail sector including **retail** and **wholesale**.

- As detailed in the main report, increased adoption of key digital technologies due to the pandemic could lead to a period of Covid-accelerated Digital Transformation (CADT). **Boosted investment and fast adoption of CADT technologies over the coming decades is set to increase UK GDP by £232bn**[1] **or 6.9% by 2040**.

- Across the three private sectors that were analysed in the wider report (professional services, construction and retail)**,** we estimate that **a total of £40bn of additional GVA** could be realised **in 2040.**

- This represents a combined **GVA uplift** of approximately **4.8% above the baseline** for the three "in scope" private sectors.

- In **retail**, the digital transformation uplift is estimated to be approximately **£21bn in 2040**, a gain over the baseline of around **6.2%,** bringing the size of the sector **to £361bn** in 2040.

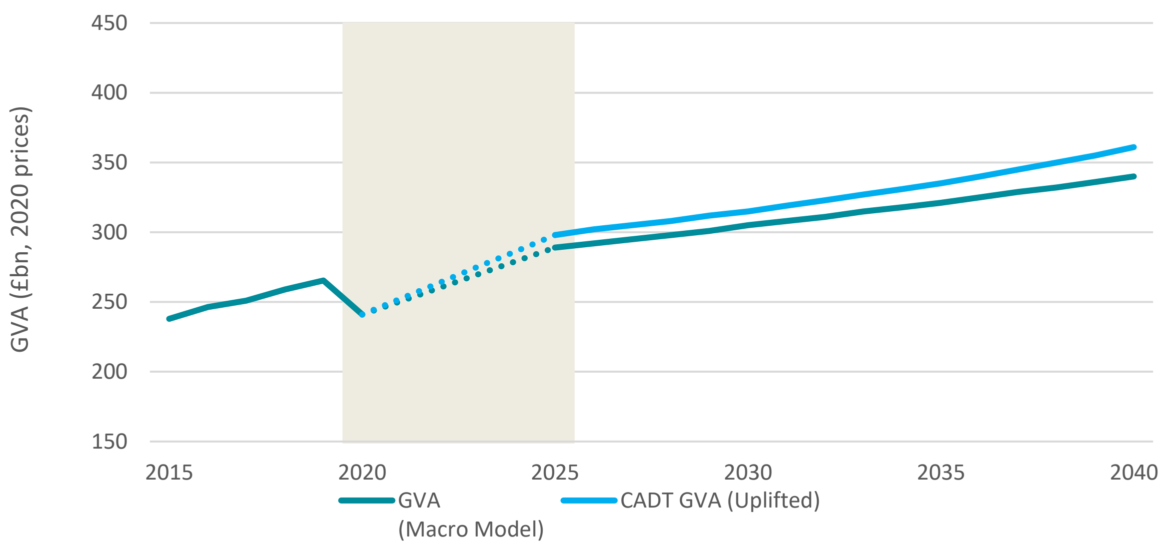
- The size of the retail sector **pre-COVID** is also shown in Figure A, where it can be seen that **GVA fell by approximately 9%** between 2019 and 2020 to **£241bn**.

- Under the **CADT scenario**, pre-COVID levels of GVA could be achieved by **2025**, when the size of the sector is estimated to be **approximately £298bn** – and a digital transformation uplift representing around **3% of total retail sector GVA in 2025**.

1 All figures are presented in 2020 prices.

- **Figure A**, below, sets out the **forecasted size of the retail sector** under the **baseline scenario** using estimates from **Cebr's baseline model**, together with the estimated **size of the uplifted sector**, as a result of accelerated digital transformation in the retail sector.

Figure A: Retail sector GVA, 2015-2040



Source: Cebr analysis

1. The impact of COVID-accelerated digital adoption

This section sets out the findings of the research, that is, the estimated sector-specific impact of accelerated adoption of digital and technological initiatives in response to Covid-19, estimated over a 20-year time horizon.

For reference and context, Table 1 sets out a summary of the results for the **whole of the UK** economy, after which the retail sub-sector results are presented.

Table 1: UK-wide impact of post-Covid digital transformation adoption

Year	Baseline GDP (£bn, 2020 prices)	Uplifted GDP (£bn, 2020 prices)	Additional GDP (£bn, 2020 prices)	Percent Boost
2020	2,178	2,178	0	0.0%
2025	2,651	2,725	74	2.8%
2030	2,891	3,018	127	4.4%
2035	3,143	3,314	171	5.4%
2040	3,361	3,593	232	6.9%

Source: Cebr analysis

The 2021 – 2025 short run

It should be noted that this research was carried out in real-time, against an uncertain economic backdrop with particular respect to the long-awaited Brexit deal announcement, and indeed Covid-19 – the surrounding circumstances of which have been subject to frequent and last minute changes. Results were estimated using assumptions based on the state of the world in late 2020. As noted in Cebr's extended report, the shape of 'economic recovery', in the period 2021 – 2025, was uncertain at the time that this analysis was carried out (late 2020).[2] Opinion ranged from a quick 'V-shaped' to a prolonged period of lower output. The economic and forecast models driving the findings in this report are reflective of the conditions presented in late 2020.While there is continued uncertainty as to the speed of the economic recovery, data on vaccine efficacy and rollout –together with early macroeconomic indicators – suggest a faster economic recovery than previously expected.

We therefore placed greater focus on the medium and longer-term findings by excluding annual estimates for the years between 2020 and 2025. Longer-term findings are more robust and less likely to be impacted by the current – and ongoing – changes to government policy and pandemic trajectory. By the start of the long-term steady state period (currently estimated to be 2025), increased Covid-accelerated Digital Transformation is estimated to have added £74bn to GDP.

2 The immediate term between 2021 and 2025 can be thought of as the of the 'economic recovery' period, before the UK transitions into a long term steady state. 2025 has been chosen as a suitable analytical starting point from which to undertake the analysis because that is asteady state marker that is identified.

It can be seen in Table 1 that under the baseline scenario, sectors operate under normalised, assumptions, following non-accelerated technological usage trajectories. In this case, GDP across the UK economy as a whole is estimated to be approximately £2,891bn by 2030. However, the results of the model in which we consider accelerated technological adoption, indicate that GDP could increase to approximately £3,018bn – an uplift of £127bn, or 4.4%.

By 2040, the counterfactual GDP – with normalised assumptions regarding technology adoption – is estimated to be approximately £3,361bn. However, with increased use of digital technologies, it could be uplifted by around 7% to £3,593bn – an increase of £232bn.

As detailed in the extended report, the private sector is treated differently from the public sector. Increased efficiency in the private sector – attributable to accelerated adoption of technology – raises employee productivity, which manifests itself in the form of increased sectoral output, a portion of which is assumed to be channelled into increased investment. The gains of such investment lead to higher GDP from the year after the investment is made, and in turn, bring about a further increase in sectoral GDP.

Table 2 summaries the results in 2040 for the three "in scope" private sub-sectors. It can be seen that the total digital transformation uplift is approximately £40bn in 2040 – representing a combined GVA uplift of approximately 4.8% above the baseline for the three sectors.

Table 2: Summary of private sector digital transformation GVA uplifts in 2040

(Real, £bn, 2020 prices)				
Private Sector	**Baseline 2040**	**Size of Uplifted Sector in 2040**	**Digital Transformation Uplift**	**Percent Gain**
Construction	164	167	3	1.8%
Professional Services	333	349	16	4.8%
Retail	340	361	21	6.2%

Source: Cebr analysis

The importance of the interaction between worker productivity and technological transformation drives the larger impacts in retail and professional services, as digital technologies enable more efficient work – and hence the uplift is greater, relative to that of the construction sector.

The following section sets out the results for the retail sector.

Retail Sector

Table 3 sets out the estimated size of the retail sector, starting in 2020, and then each year from 2025-2040.

Under the uplifted CADT scenario, GVA in 2025 is estimated to be approximately £298bn, bringing the size of the sector above pre-COVID levels of GVA. By 2040, the size of the retail sector is estimated to be £361bn, an uplift of approximately £21bn over the counterfactual baseline, which assumes normalised levels of digital adoption, as opposed to accelerated levels.

By 2040 the £21bn CADT uplift represents a 6% boost to the sectoral GVA. This is the largest digital transformation uplift observed of the three “in scope” private sectors. It is larger both in absolute and relative terms. With the next largest uplift being seen in the professional services sector of £21bn (5%) by 2040 (see Table 2).

Table 3: Impact of accelerated digital transformation in the retail sector

	(Real, £bn, 2020 prices)		
Year	**Retail sector baseline GVA**	**Size of uplifted retail sector GVA**	**Digital Transformation Uplift**
2020	241	241	0
2025	289	298	9
2026	292	302	10
2027	295	305	10
2028	298	308	10
2029	301	312	11
2030	305	315	11
2031	308	319	11
2032	311	323	12
2033	315	327	12
2034	318	331	13
2035	321	335	14
2036	325	340	15
2037	329	345	16
2038	332	350	18
2039	336	355	19
2040	340	361	21

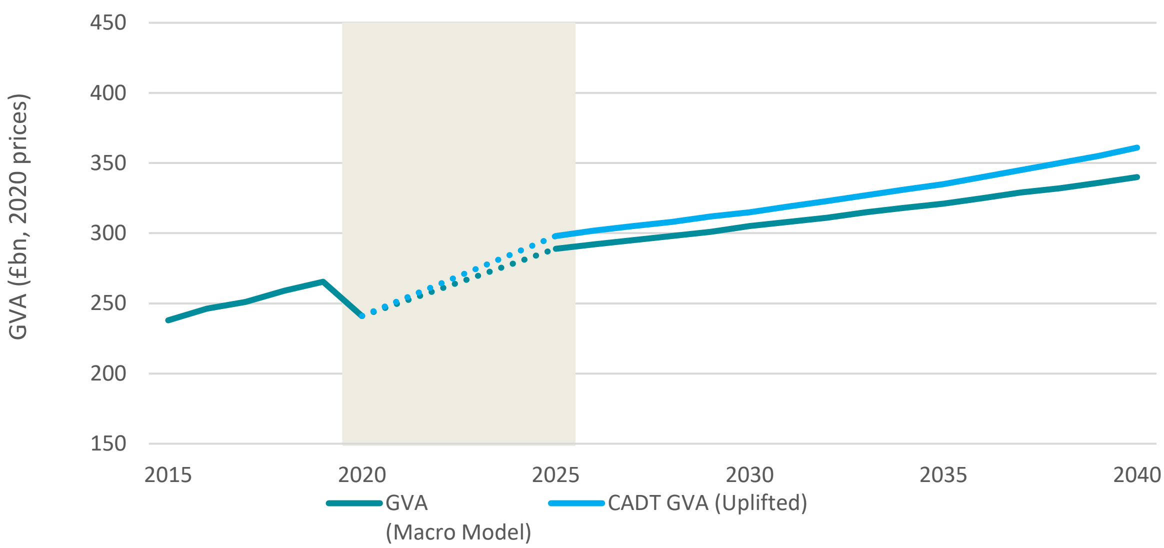
Source: Cebr analysis

As noted in the literature (see Section 3), the retail sector has already adapted rapidly with the sector improving upon its already high proportion of online sales by global standards. Furthermore, within the food retail subsector there has an unprecedented doubling of the proportion of retail purchased online (see Figure 2).

Figure 1 shows the GVA of the retail sector between 2015 and 2040 – with the CADT uplift scenario also indicated from 2020 onwards. The delta between the two lines indicates the size of the uplift brought about by accelerated digital transformation based on assumptions made in late 2020.

Between 2015 and 2019, the sector grew by around 12%; however, owing to the events of 2020, sectoral GVA fell by approximately 9% to £241bn in 2020. It is expected to return to pre-COVID levels before 2025 and is estimated to reach a GVA of £361bn under the CADT uplift scenario by 2040.

Figure 1: The impact of accelerated digital transformation in the retail sector



Source: Cebr analysis

2. VMB case studies

The following case studies supplied by Virgin Media Business serve to demonstrate the forms of digital transformation organisations working in throughout the public sector have successfully implemented throughout Covid-19.

2.1. Rebooting the Garden Centre

Last spring, Hilliers Nurseries' online shop was a dormant entity that hadn't been updated for five years.

Its online order dispatch area had been repurposed as a potting shed.

Almost a year later the company has hit sales nudging £1 million a month online and is working on plans for a virtual garden centre to make them true industry leaders.

What changed?

"Everything," said Chris Francis, Retail Director of the group, which runs 17 garden centres across southern England.

"When I joined the company the website was so poor it was losing money, so we mothballed it while we addressed more pressing stuff. But then lockdown shut us down overnight, right at the beginning of our busiest time of year. It was a disaster."

Chris and his team went back to that dysfunctional website and organised the biggest of reboots.

"We joined forces with a web development and design consultancy to get us out there. We rebuilt the website top to bottom. We joined forces with a courier company. And we created a dispatch system from scratch – all in a matter of weeks.

"It was scary to invest when we had lost all income but it worked. The public were at home and wanted gardening more than ever before. We were knocking on an open door. We went from zero online sales to almost £250,000 a week in barely a month."

The company's digital transformation isn't over though.

"We want to be the most cutting edge in the whole gardening scene now. We're working on creating a new virtual garden centre, more ambitious than anything we've ever done before, and we're investing in building a dispatch centre at our nursery to get plants to homes in optimal condition.

"Lockdown is thought to have turned millions of people to gardening for the first time, many of them younger with the expectation of fully functional online ordering. We want to meet that demand and the only way is to be the best growers but also the best digitally too. It's crucial to our future now."

2.2. Small Can Become Big

How you can find new customers online by thinking small and acting fast

Agile digital innovation helped Mighty Small – an online supermarket selling only food from small British startups – grow quickly from nothing to something mighty big.

In less than a month during lockdown they created an online supermarket with thousands of loyal customers using only off-the-shelf solutions and a basic knowledge of technology.

Their approach is simple: a universal playbook that all wannabe digital disruptors should follow:

1. Identify a need
2. Make a plan to fulfil it
3. Act fast
4. Test, learn and adapt as you go

Mighty Small's Giles Moody explains: "It was born out of the crucible of Covid. We are the sister to a bigger business called Young Foodies.

"That's been going for three years, running a community growth centre services for startup food and drink businesses in the UK. A network of over 1,000 brands.

"When Covid hit, those producers and independent brands were quickly marginalised by the big supermarkets, as supply chain crunches meant they had to focus on tins of beans and toilet rolls.

"The smaller brands were deprioritised. Often, they didn't have an online, B2C presence of their own or an e-commerce site. They were quick to get that on their agenda in response to Covid."

The Young Foodies hosted regular "COBRA-style" meetings throughout the pandemic with members of their network. These delivered their lightbulb moment.

Giles says: "The concept of an online shop had been on our three-year plan. But we always had so much to do, we never wanted to get distracted by it.

"It was genuinely only because of Covid and feedback from the brands that we realised there was a need to help get them online and available in one place. We hit fast forward.

"We started from a great place of having great relationships. And it was aligned to our mission of supporting smaller businesses.

"This new channel is like an Amazon for small businesses. A single eCommerce place for consumers to find, discover and try new exciting products from British startups."

He adds: "From a tech perspective we were up and running, with a live website, in three-to-four weeks. Then it was all test and learn to see how consumers responded.

"There are platforms now that make it easy to spin up an e-commerce business.

"With no formal dev background I was able to use a lot of templates and do the small amount of tweaking that's needed from some self-taught coding.

"What would normally take a business months and months of development you can plug straight into existing technology. And get the core backbone in place.

"This was a real pivot for us. Before, we were not selling the brands in any way: we were providing services to those brands. We'd never been consumer facing, we were very much B2B.

"We took the leap into being a shop window for these brands. Now 60 companies sell through us, with around 400 products to choose from.

"It was born out of Covid but it will be a long-term initiative. It's got legs. We're learning and adapting to what our customers want. Those brands will benefit from being on a new platform."

2.3. Cheers to Drinks Online

Millions of businesses worldwide turned to Zoom during lockdown, but few did it in the style of Anneka Rice running around in Treasure Hunt.

But that was the template for the couple behind one of the country's biggest boutique gin distilleries.

Husband and wife team Tom Warner and Tina Warner-Keogh were conscious that all the work they'd done on building a close relationship with their clientele since their launch ten years ago, going from startup to £10 million turnover trading in 27 countries, could be fatally undermined by lockdown.

So they were determined to create an interactive experience that was as dynamic as the vibe they wanted their gins to have.

"We wanted to tap into the buzz of Sophie Ellis Bextor and her kitchen discos or Tim Burgess from the Charlatans doing his listening parties online," said Tina. "Not just have a screen of talking heads but some real energy, make it fun"

And so the digital Warners' Gin parties were born.

These featured the couple zooming around their 100 acre Northamptonshire farm on quad bikes, hurtling from one planting area to another, highlighting the botanical ingredients they use and how they're grown and where and then the distillery process – all in the breathless Treasure Hunt style.

It proved an instant hit.

"We realised we'd hit on something – a new kind of digital engagement. People wanted something to watch and to feel part of it. And we could do that with a couple of iPhones, a quad bike, a Zoom account and lots of gin," said Tom. "No one else in our world was doing anything like it."

Soon they found their parties were getting booked out.

"We found the functionality maxed out at about 500 people and we'd have 3,000 trying to come on board so we had to lay on more and more events to accommodate them," Tina explained.

"Now, regardless of Covid, we want to expand the online participation as a digital strategy for the future. Getting 3,000 on the farm would be a logistical nightmare but they can party with us online no problem. It's made us completely rethink our digital strategy. Now we are looking at investing in studio-quality kit."

It was a similar story for cocktail events guru Johan Svensson and his company Drinksfusion.

"Our whole business was based on being there live at real time events, catering at parties for corporate clients, doing big weddings. And suddenly it all stopped, "said Johan, 42.

"We had to rethink what we were doing completely and become a digital only brand overnight."

The native Swede, a Londoner since the late nineties, tore up his business model last spring and relaunched as a collaborative experience.

“Yesterday I curated a party for 30 people all on Zoom in their respective homes tasting their way through a cocktail menu which we’d prepped and delivered to them,” he said. “The day before we teamed up with a Korean street food team for an online cooking tutorial for 300 people, and we did themed drinks, creating a Korean Iced Tea cocktail that paired with the food.”

Johan has built a catalogue of YouTube tutorials and provides ingredients and guidance. The guests provide the finishing touches and the fun.

“The videos and the website are the hub for us but Instagram has become huge too – everyone who creates something beautiful wants to share the experience,” he said. “Turning to digital has transformed what we do. And it’s not just a temporary thing – we can see this being integral to our future.”

2.4. Coming Up Roses for Digital Flowers and Veg

Business is blooming for market traders who embrace digital innovation

Traders in the historic New Covent Garden Market learned that businesses are never too old, too established, nor too stuck in their ways to learn new, valuable digital skills.

For 350 years, the world famous fruit, veg and flower market has proudly provided produce for the UK's top tables.

But the pandemic meant its wholesalers had to find new ways to connect with customers. Their fresh goods demanded a fast turnover. And going online offered a great solution.

Meg Morrison, Marketing and Development Manager for the market's landlords NCGMA, says: "Our market is behind every great chef in London.

"The tenants are all great, British independent businesses. It's a London institution. But prior to the pandemic, the estate operated in quite a traditional manner.

"There were lots of face-to-face relationships, pens and pads, no huge purchasing systems. It was based on building long term relationships over time.

"When the pandemic hit, 95% of their profits were obliterated. Gone! But we've seen a huge amount of unbelievable stories about our tenants pivoting."

Shifting gears to more digital operations was essential to preserve the livelihoods of New Covent Garden's 200 businesses and their 2,500 employees.

Seeing the damage caused to other parts of the supply chain acted as a catalyst.

Meg explains: "It was so sad listening to Kenyan farmers having to burn stock and Dutch businesses being decimated overnight, leaving rotting flowers in fields."

She adds: "It was a baptism of fire for our tenants. There was an enormous learning curve. They had to consider a book of possible IT systems.

"It was all very, very different. They had to start thinking about how to deal with being inundated with home delivery orders. How do they logistically get them across London?

"They were literally going from pen and paper to getting 500 orders out of their units. They've honed their systems so they can deal with these new home deliveries.

"Now that's the profit centre for many of those businesses. They've really invested in home delivery: great websites and great ordering platforms.

"They're getting better and better week on week"

There's been a marked difference between fortunes of the wholesalers who invested in tech solutions and those who chose not to.

And those benefits of digital innovation are likely to be felt long after the pandemic.

Despite all the disruption to everyday operations, NCGMA has ambitious plans to expand its operations. And tech-savvy food startups will form the heart of that.

While digital innovation is important, the experience remains key to retail success, and the changes will see the market welcoming more ordinary customers.

Meg says: "Old Street's got tech. Nine Elms [the London home of New Covent Garden Market] will have food. Through the transformation we will become London's food quarter by 2025."

The Food Exchange (launched in 2018) is central to the redevelopment, showcasing the best of Britain's "foodie challenger brands".

Tenants already include healthy ice-cream brand Oppo, food waste charity FoodCycle, and startup community Young Foodies.

The Food Exchange is an exciting space where next generation food businesses can network with each other, innovate and grow.

2.5. Taking Digital in Retail Well Beyond Click and Collect

Technical innovation is the key to retail success after Covid.

That's the view of leading retail analyst Richard Hyman, who has consulted for the likes of M&S, John Lewis and Tesco.

"There is a future beyond the pandemic and it isn't just about websites, it's about building in tech at every stage of the retail process. It doesn't matter whether you're trading online, in catalogues, shops, concessions, all of those sectors have a future but the way forward for all of them is digital," says Richard.

"So much of the legacy infrastructure in retail is problematic. The turnaround time for orders is too long. And the solution has to be to embrace digital innovation. It makes you light on your feet and more cost-effective."

He explains how tech can work at multiple levels of the process: "Traditionally you'd have designers in Europe dealing with factories in Asia sending samples back and forward before placing orders which is time consuming and expensive and leads to over-ordering and long turnaround times. But by using 3-D design you can slash this time and expense.

"Then the old way of monitoring stock flow would be manual which was crude and slow. With a digital system you can instantly see what's selling and what's not which informs your future orders, so you can reduce your overheads, reduce waste and react to demand more quickly. All of which means reduced costs and increased profits. This kind of thinking is transformative."

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His views are echoed by Andrew Goodacre, chief executive of the British Independent Retailers Association. From his perspective, the pandemic sparked the country's smaller retailers into a digital revolution.

"At the beginning of last year, 50% had a digital presence, but that had risen to 80% by the year end," Andrew explains. "And it's not just getting web sales up and running but also engaging with customers on social media for the first time and finding digital solutions to refine their operations."

He adds: "People want to shop locally but they also want to shop online so there's a huge opportunity for those willing to engage with people in their area online."

3. Literature review and panel insight

In order to undertake the analysis, it was first necessary to conduct an in-depth literature review of each "in scope" industry. This enabled sector-specific assumptions to be made which were then further verified through panel interviews and workshops with industry practitioners. These assumptions were used as modelling inputs in support of estimating the impact of accelerated digital transformation on each of the UK sectors of interest.

This section sets out the findings from the literature review. Of particular importance was data on current levels of technological adoption for each sector, from which it would be possible to estimate trends in tech adoption. It was also important to gather evidence on the tech-enabled productivity increases that *could* be realised across a variety of industries – which would provide an indication of the potential gains that could be achieved with accelerated use, owing to events such as Covid-19.

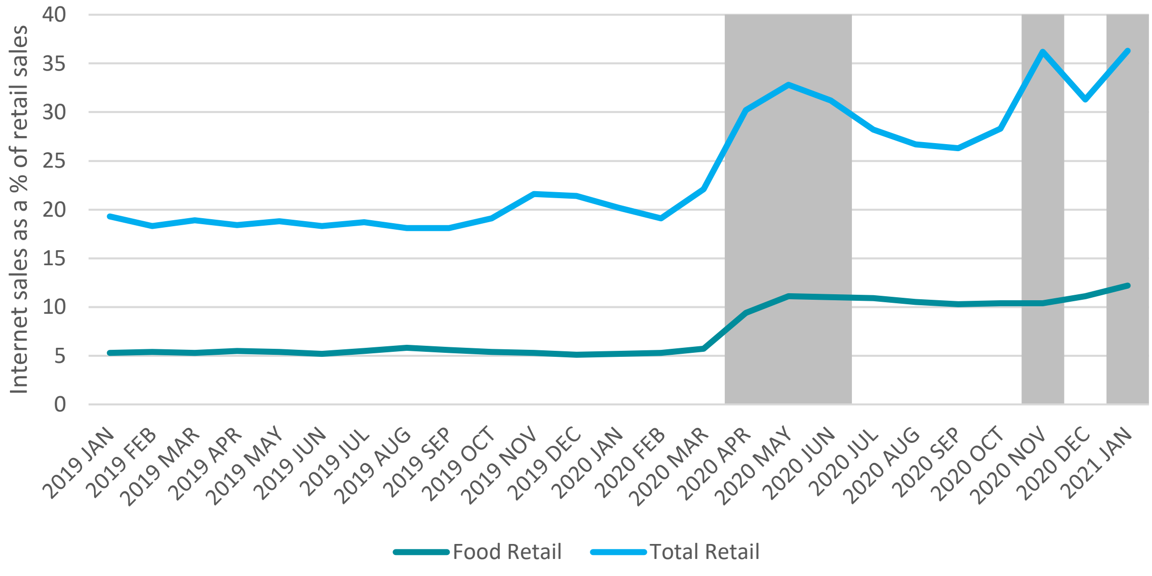
The literature review and panel insight also provide important background information against which findings from the research can usefully be contextualised.

Retail Sector

According to the research, the retail industry in the UK has been one of the most advanced in the world with regards to recent digital transformations. Throughout our research and panel interviews, the clear consensus was one of uneven distribution of coronavirus impacts across the sector. Lockdown restrictions have been highly suppressive of non-essential retail, while the closure of offices and restaurants provided a spur for essential retail demand.

Both essential and non-essential retail (despite differing legal restrictions) have had to adapt rapidly by increasing digital purchases and the widespread adoption of hybrid and multi-channel models such as 'click and collect' (see Figure 2).

Figure 2: Online sales as a percentage of retail purchases. Shading indicates non-essential retail closure in England.



Source: ONS, Cebr analysis

According to a paper in the Journal of Retailing, retailers have been shifting towards a more integrated model known as 'omni-channel retailing' where browsing and purchases are blended between online, mobile and in-store channels.[3] With stores serving both as galleries within which to discover and view products, as well as pick-up locations for online and mobile purchases. This model emphasises a seamless experience between all channels. The increase of retailers engaging in online transactions due to restrictions brings retailers with strong in-store experiences further into the digital space. Thus, accelerating the trend of multi and omni-channel retail.

Prior to the pandemic, Dunelm saw a boost in 33% online like for like sales growth after the adoption of a new digital platform, with improved checkout, search and click and collect services.[4] This new platform was a cloud-native shopping environment. The cloud has been recognised as a 'catalyst' for digital retail, with Mckinsey listing six key advantages associated with cloud migration in the sector:[5]

1. Price management;
2. Website and recommendation optimization;
3. Loyalty programme management;
4. Real-time inventory;
5. Omni-channel order fulfilment; and
6. Inventory optimization.

Figure 2 demonstrates the impact that lockdowns and restrictions have had on increasing the shift to online retail. Despite the relaxation of restrictions in June, online retail as a share of total purchases has remained well above its previous peak over the 2019 Xmas shopping period. Regarding food retail purchases, due to the essential nature of the business, there have not been enforced closures. The share of food retail driven by online sales can be seen to not vary with national lockdown, but rather it quickly increased to twice its previous level and has remained stable at around 10% throughout the Covid-19 period. Covid-19 has acted as a period of digital retail incubation, where customers and businesses who increased their use of online retail by necessity will continue their new consumer habits post-Covid.

While Figure 2 shows a clear difference in the impact of Covid-19 on the essential and non-essential areas of retail, there are two other aspects that point to an uneven impact across the sector. One of these is city centre and non-city centre retail. As many high streets and local shops have seen an increase in sales thanks largely to commuters remaining close to home. The second is digital and non-digital retail. As clearly evidenced throughout all of the Cebr research into PCDT, there is a marked shift towards the digital delivery of goods and services that is expected to continue throughout the subsequent period of further transformation.

3 Verhoef, Kannan and Inman. (2015). 'From Multi-Channel Retailing to Omni-Channel Retailing: Introduction to the Special Issue on Multi-Channel Retailing'.

4 Dunelm. (2020) 'Dunelm Interim Results – Financial Year 2020, 12th February 2020'.

5 Mckinsey. (2018). 'The cloud as a catalyst for retail.'

4. Industries in practice

To supplement the literature review, we also consider recent industry data for each of the “in scope” sectors.

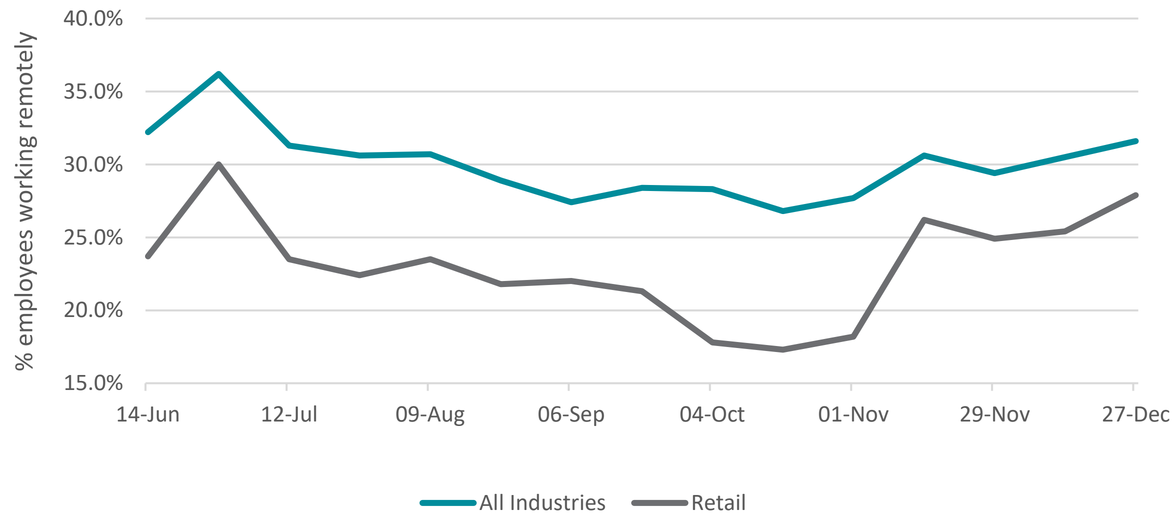
We use ONS data gathered from the voluntary fortnightly business survey (BICS)[6], which looks at financial performance, workforce, trade and business resilience across UK sectors. In the retail sector, this looks at the activity of businesses operating in Wholesale and retail trade including repair of motor vehicles and motorcycles.

Remote working in the retail sector

In the context of this research, it is particularly relevant to look at the data pertaining to remote working, and the associated gains and challenges that UK businesses have experienced.

Figure 2 sets out the proportion of retail sector employees who were working remotely as opposed to at their normal place of work from mid-2020 to the end of the year. It also shows the average across all industries in the UK.

Figure 3: Proportion of retail sector employees who are working remotely as opposed to their normal place of work



Source: BICS and Cebr analysis

Due to the nature of retail trade, it is unsurprising that the proportion of employees in the retail sector who were working from home was lower than the UK average. Interestingly, the number of retail workers working remotely is more volatile than that seen in the wider economy, once again emphasizing the continued importance of place and colocation to the wider retail sector. During the October and November period, retail had one of the lowest percentages of employees working remotely according to the survey.

6 ONS. (2021). ‘Business insights and impact on the UK economy: 14 January 2021’.

According to the BICs survey, fewer than 1% of retail businesses saw productivity increase due to remote work, although 7.4% of businesses intended to use increased homeworking as part of a permanent business model.[7] Retail businesses cited reasons such as reduced overhead and an ability to recruit from a wider pool of workers as driving plans to continue remote work.

7 Percentage of businesses that have not permanently stopped trading, broken down by industry, weighted by count, UK, 14 December to 23 December 2020