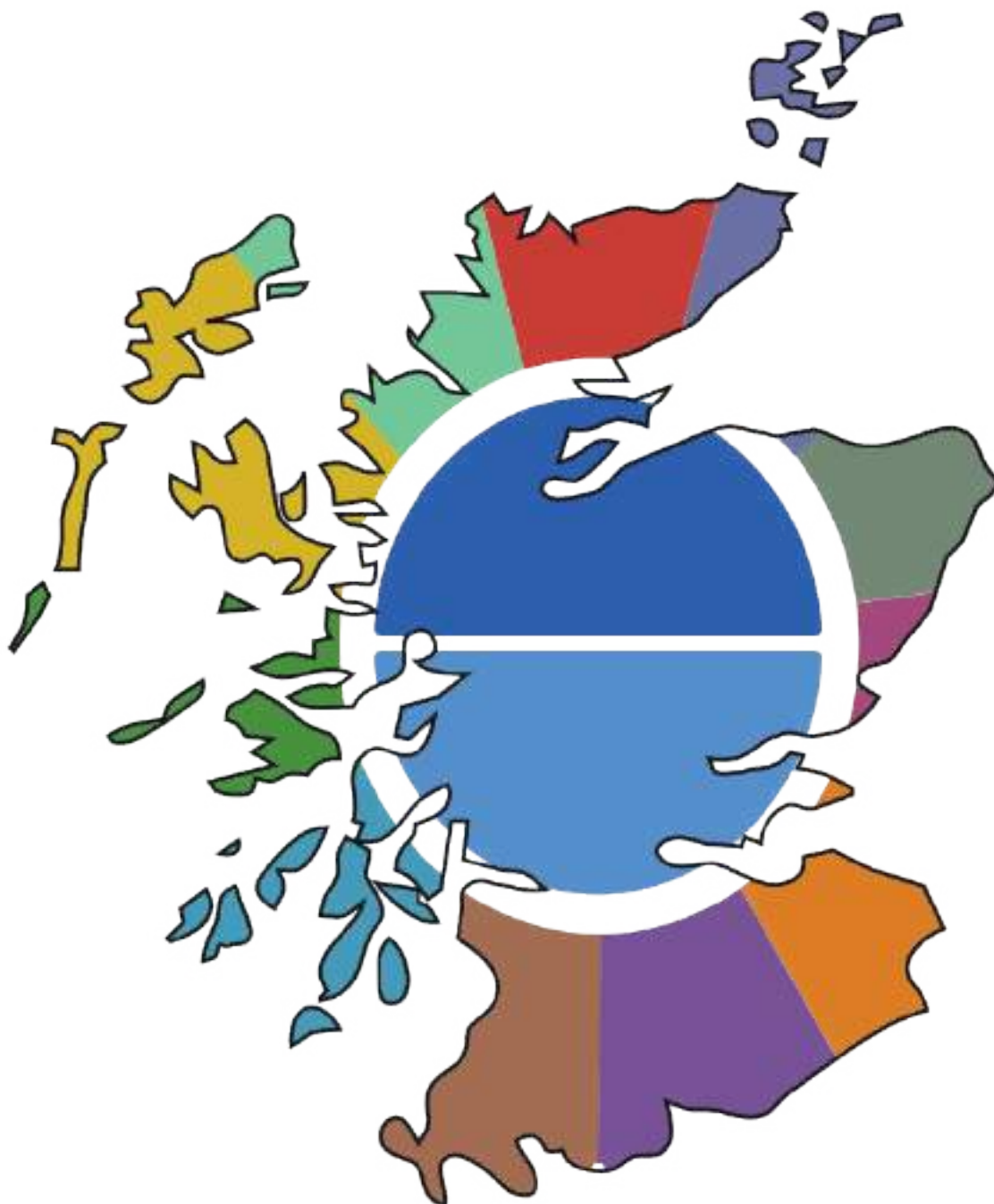


# Scotland's Wellbeing:

The Impact of COVID-19



December 2020



Scottish Government  
Riaghaltas na h-Alba  
gov.scot

# Contents

Foreword.....	2
Summary .....	4
1. Introduction .....	9
2. Health .....	11
3. Economy, Fair Work & Business, Culture.....	24
4. Communities, Poverty, Human Rights.....	40
5. Children, Education.....	49
6. Environment, International .....	57
7. Unequal impacts across the National Outcomes .....	64
What COVID-19 may mean for Scotland's Wellbeing in the Future .....	71
References .....	78

## Foreword



Together, the Convention of Scottish Local Authorities (COSLA) and the Scottish Government relaunched the National Performance Framework (NPF) in June 2018, following public consultation and cross-party agreement on the new National Outcomes in the Scottish Parliament.

Scotland has had a set of National Outcomes reflected in a National Performance Framework since 2007. Perhaps the most important aspect of this approach is that it gives all of the public sector, businesses, the third sector, and the citizens of Scotland a clear vision on what we are all working towards. It emphasises a shared responsibility to help deliver the whole, instead of concern only over the parts under any single organisation's control.

The NPF is about setting agreed outcomes, reporting performance against these outcomes openly and transparently, and bringing people together in a way that helps everybody understand the contribution they can make. A focus on the outcomes we are able to achieve together are at the core of our approach in normal times.

The times in which we live are far from normal. The COVID-19 pandemic has had a profound and continuing impact on our way of life: on our health and wellbeing; our businesses and economy; and how we relate to and connect with each other as members of society.

But this crisis has reemphasised the value of understanding as a nation the outcomes we want to deliver, and of having a framework that promotes our individual and collective wellbeing. Scotland's National Performance Framework and an outcomes-based way of working have never been more important.

This report has been prepared by analysts within the Scottish Government, with input from COSLA and the Improvement Service. It brings together evidence on the ways that the pandemic has affected Scotland's progress towards our National Outcomes, including what people have told us about their experience, and the ways in which it might continue to have an impact in the future. It provides data and

analysis to inform all those across Scotland who are faced with having to make decisions in response to COVID-19 where there are no easy answers. It summarises the significant ways in which the pandemic has affected Scotland and our communities and points to what this might mean for the future. We hope it will be of interest to many.

It will be a surprise to no-one that much of the evidence in this report describes how COVID-19 has harmed progress towards Scotland's National Outcomes in terms of health and wellbeing, the economy and our society more broadly. But there are also important grounds for hope and optimism. We have seen innovation in response to the crisis, for example in the swift expansion of digital services and solutions to aid control of the pandemic and to help mitigate its impact.

While the National Outcomes in the NPF set out what we want Scotland to become, the NPF Values – *we are a society which treats all our people with kindness, dignity and compassion, respects the rule of law, and acts in an open and transparent way* – describe the way we want society to get there. The rapid response in the early days of the pandemic by local authorities and charities working together to support virtually all people sleeping rough or staying in shelters to move into self-contained accommodation is a powerful example of these values in action.

There are more examples in this report of the ways in which the response to the pandemic has helped empower individuals and communities to collectively improve outcomes in line with the values of the NPF. We want to thank the hard work and efforts of communities, businesses and the public sector as we continue to chart Scotland's course through this crisis.

This report sets out evidence of the significant challenges resulting from the pandemic. But it also gives us optimism that action aligned with the values and vision of the NPF can have a significant role in shaping Scotland's wellbeing. We believe there is learning to be taken from this report now, and also in the coming months and years when the time comes to look back on the COVID-19 pandemic to learn and reflect.

**Kate Forbes MSP**

**Cabinet Secretary for Finance**

**Councillor Alison Evison**

**President of the Convention of Scottish Local Authorities**

## Summary

The COVID-19 pandemic has had a profound impact on our health, economy and society, with damaging impacts on the way of life and wellbeing of people in Scotland. Progress towards the National Outcomes is tracked through a set of National Indicators, but the necessary delay between data collection and publication means they do not yet reflect the unfolding impacts of COVID-19.

This report aims to report openly and transparently on how COVID-19 has affected progress towards Scotland's National Outcomes. It brings together a range of more timely evidence sources, as well as analysis and insight, to show the impact of COVID-19 across the National Outcomes to date and its potential future impacts. Understanding the breadth of impacts should aid a range of organisations and individuals who are considering how to reset progress towards the national outcomes in light of the pandemic.

### Impact on National Outcomes

**The evidence presented in this report shows that the pandemic is likely to have significant and wide-ranging impacts, right across the National Outcomes.** These impacts will be largely negative, but there are differences across the outcomes in terms of the direction of the changes, the depth and severity of impacts, the level of certainty over the effects and the timeframe over which they may occur. There is considerable uncertainty about long term impacts at present, as the pandemic and response continues to evolve. How these unfold will depend on a number of factors, including the progress of the pandemic and the measures put in place to control it, how businesses, public services, communities and individuals respond to the changes, the policy choices that are made, and changes in the external environment.

A key finding is that the **impacts of the pandemic have been, and are likely to continue to be, borne unequally.** Unequal outcomes between different groups existed pre-COVID, and the effects of the pandemic have only worsened this. It has produced disproportionate impacts across a range of outcomes for a number of groups, including households on low incomes or in poverty, low-paid workers, children and young people, older people, disabled people, minority ethnic groups and women. Overlap between these groups mean that impacts may be magnified for some people. The weight of evidence suggests that the pandemic may widen inequalities in income and wealth over the medium term, as well as being likely to make unequal outcomes more severe in a range of other areas.

The evidence to date suggests that **health, economy, fair work and business and culture outcomes have been deeply negatively affected** so far, and when the labour market impacts fully emerge, this is likely to also have a **negative impact on the poverty outcome. Education and children outcomes are also likely to be**

**impacted negatively**, but the evidence on the scale of the impact so far is limited and these impacts are likely to take longer to emerge. **The picture is more mixed for communities, human rights, environment and international outcomes.** Each has been impacted in both positive and negative ways, with the eventual impacts currently less clear and, in some cases, with limited data to draw upon at present.

## Health

The impacts on health are profound and include the direct impacts of the virus itself, indirect impacts through reduced access to care, and the health impacts of the response measures. There have been upwards of 6,000 deaths registered where COVID-19 was mentioned on the death certificate, with the oldest age groups most affected. Those with certain underlying health conditions, men, those in the most deprived areas, some minority ethnic groups and disabled people are also at higher risk of dying from COVID-19.

“Excess deaths”, which also takes account of indirect health impacts, stood at 4,306 over the year to September 2020. Many health services were paused during lockdown, which is likely to impact negatively on health inequalities in the future. Mental health has also been negatively impacted, by anxiety about the pandemic and potential risk to individuals, as well as from the social restrictions. The delivery of health and care services has also been profoundly altered – including an increased use of remote consultations, with the potential to transform care experiences in the future.

## Economy, Fair Work and Business, Culture

The COVID-19 pandemic has resulted in the deepest and fastest economic contraction on record, with the Scottish economy contracting by 19.4% between April to June 2020 – its biggest fall in quarterly GDP on record. The size of this contraction is not surprising given that large parts of the economy were required to close during lockdown in order to protect lives. Business activity strengthened over the summer of 2020 but there are signs that the pace of recovery has slowed in the autumn of 2020 amid continued heightened uncertainty, subdued demand and the introduction of local restrictions. There is a risk of a further contraction in economic output in the final quarter of 2020. The economic recovery is therefore expected to be gradual and is fragile, with economic activity at risk from ongoing and future restrictions, resulting in considerable uncertainty. The economic recovery is, at present, “K-shaped”, with some sectors of the economy recovering relatively quickly and other sectors, particularly those that were impacted more in the initial lockdown, struggling to recover. Business resilience remains a concern, with some businesses having weak cashflow and facing the risk of insolvency.

While the labour market impacts, in terms of unemployment, have not yet come through in official statistics, in part due to the job retention scheme, there is likely to be an increase in unemployment over time as support schemes unwind. It is likely

that this will be borne unevenly, primarily affecting younger and older workers, women, ethnic minorities and people in low-paid jobs. Longer term, the increase in remote working seen during lockdown could lay the foundations for more enduring changes, but the scale and speed of this is highly uncertain. There could be wide ranging impacts on labour market participation, on regional and city centre economies, on travel and transport and on housing.

The pandemic has had significant negative impacts on tourism, hospitality and culture, entertainment and recreation businesses. This includes workforces in the entertainment and creative industries, and on cultural participation and attendance. Physical audiences are not likely to return to pre-COVID levels in the medium term, due ongoing restrictions coupled with potential safety concerns. While there has been a turn to online cultural activity, few people anticipate paying for online cultural activities in the future. Many businesses in the sector are struggling and some are expected to close permanently. This may increase inequalities among those who participate in cultural, entertainment and recreation activities.

### **Communities, Poverty and Human Rights**

Households in Scotland are already feeling the economic impacts of the COVID-19 crisis in terms of job loss and earnings reductions. This was reflected in a drop in household incomes, UK-wide, of 4.5% this year when compared to last. This average figure masks variations, with higher falls in earnings among lower income households (although increases in benefit levels gave some protection) and increases in debt. Conversely, for those on high incomes, household budgets were often strengthened during lockdown, because of a reduction in spend which more than offset any loss of income. The balance of evidence suggests that income inequality will widen in the future, while planned changes to UK-wide benefits in April 2021 are predicted to increase the numbers of people in relative poverty.

There has been a mixed picture of impacts on communities and human rights outcomes. Social connections in neighbourhoods and communities have been disrupted and an increase in isolation and loneliness has been seen. Some groups of people have reported reduced access to support and services during lockdown, particularly disabled people. There has been reported increases in hate crimes, domestic abuse and sexual exploitation, though caution needs to be applied before attributing all the changes seen in these to the pandemic. Access to justice has also been impacted by backlogs in the courts.

However, there is evidence of positive impacts on community cohesion and empowerment – seen in examples of strong community spirit, informal support, volunteering and organising. The overwhelming level of need also catalysed new ways of working among service providers and prompted the emergence of innovative and person-centred support, for example, for rough sleepers, for Gypsy/Traveller communities and for the shielding and at risk populations.



## Children, Education

Children and young people missed out on education during lockdown and are re-entering education with ground to catch up. There are widespread concerns about negative impacts on future attainment for more disadvantaged students, who saw less educational input during lockdown. This could potentially slow the previous progress made on reducing the attainment gap. Scottish Qualifications Authority (SQA) results this year in National 5, Higher and Advanced Higher were high but are not directly comparable with previous years due to the change in approach to certification. The number of applicants securing places at Scottish universities through the Universities and Colleges Admissions Service (UCAS) was also up this year. However, in future years a squeeze on household incomes could close down higher education options for young people from poorer households, while the shift to online provision will reconfigure the higher and further education offer, with as yet unclear impacts for equality of access.

It is feared that the personal and social development of children may also have been impacted by a period out of education, and that the closure of early learning and childcare (ELC) facilities could have long term consequences for children who were in their early years in 2020. Parents have reported problems such as poorer sleep, mood, behaviour, activity levels, eating behaviour and mental wellbeing for younger children, while 11 to 25-year-olds reported concern about the impact on their social relationships with family or friends. More positively, there have also been reports of some families growing closer during lockdown, but it is likely that experiences vary widely. Particular difficulties around loneliness and isolation have been reported among care experienced young people and young carers.

## Environment, International

The steep contraction in economic activity during lockdown resulted in improvements in some environmental measures (such as some measures of air quality and early estimates of greenhouse gas emissions) and travel patterns also changed. However, some of these changes may prove to be temporary. The pandemic has also had harmful environmental impacts, such as increased use of plastics and packaging materials, reduced environmental monitoring and enforcement and delays to domestic and international negotiations and actions on climate. The future shape of travel and transport (an important source of greenhouse gas emissions) is also currently unclear and dependent on the evolution of the pandemic, the societal response, and whether any positive changes in behaviour around low carbon travel are maintained. In the longer term, a shift towards remote working and digital service delivery may reduce the need for some travel. Around half of people expect that they will spend more time visiting outdoors for recreation after lockdown, though it remains to be seen whether this behaviour change is realised.



COVID-19 has reduced all types of international travel, including for work, study, for business and for tourism, meaning that fewer people will be coming to Scotland from overseas in the short term. It is unclear to what extent there will be any longer lasting impacts on international travel. Any potential long term impacts on Scotland's cultural industries and higher education institutions could also have negative impacts on international visitor numbers.

Trust in the Scottish Government has remained relatively high through the pandemic and the UK has seen an increase in international reputational perception ranking in 2020. While COVID-19 has impacted on the ability, in the short term, to collect data that is used for decision making, performance assessment and scrutiny, it has also underscored the value of responsive evidence and new sources of data and analysis have emerged.

### **What might this mean for Scotland's National Outcomes in the future?**

The evidence presented suggests that COVID-19 has had, and is likely to continue to have, significant impacts across all of Scotland's National Outcomes. Progress across the NPF has been hindered and in some cases deeply set back. However, the depth and longevity of these impacts varies across the outcomes, and how the impacts play out in the future will depend on a number of factors including the progress of the pandemic and the measures put in place to control its spread; the response of businesses, public services, communities and individuals; other changes in the external environment, such as EU exit; and the policy choices that are made by governments in response.

The key medium term impacts are likely to be seen on health, economy, fair work and business, education and poverty outcomes. These are all closely related impacts, with interacting effects across these outcomes and others. In addition there are a number of cross-cutting impacts, some of which are much more uncertain, that could have wide ranging effects across the NPF in the medium term. These include an entrenchment of existing inequalities and a potential for new inequalities to emerge; an acceleration of trends towards digitisation and automation; potential changes to Scotland's international profile and outlook; an increase in uncertainty and the need for enhanced resilience to future shocks; and potential shifts in relationships and responsibilities between governments, the third sector and communities.

Each of these has the potential to alter the likelihood of realising the National Outcomes for everyone in Scotland and enhancing overall wellbeing. The direction these changes will take are not yet visible and an understanding of COVID-19 impacts on the NPF over the longer term will be essential to support everyone in Scotland to re-set progress towards these outcomes.

# 1. Introduction

## Scotland's National Performance Framework (NPF)

The [National Performance Framework](#) sets out a purpose, values and 11 National Outcomes for Scotland, showing the kind of country we want to be. It is Scotland's wellbeing framework, and reflects the issues that affect people in Scotland now and for future generations. The 11 National Outcomes are aligned with the 17 UN [Sustainable Development Goals](#) (SDGs) which set out the major global challenges to be achieved by all nations by 2030.

Progress towards the vision in the NPF is tracked through 81 National Indicators covering a broad range of social, environmental and economic measures. Performance against these measures is reported openly and transparently on the NPF website.

## COVID-19 and NPF Indicators

Existing National Indicators are based on robust data sources that typically have a delay of many months between the point in time when the data are collected, and when the data are published. As a result, the impact of COVID-19 from March 2020 onwards will not be seen for some time within the NPF indicator set itself.

This report **draws on a range of data and evidence from beyond the National Indicators to show the impact of COVID-19 across the National Outcomes**. It also brings together analysis and insight from a range of sources that **suggest what the impact may be in the future**.

Also, importantly, it draws on a range of sources to reflect the lived experience of our people, particularly the fears, needs and hopes of those disproportionately impacted. Chiefly, this includes drawing on the work of the [Social Renewal Advisory Board](#) and the Community Listening Events it has coordinated across Scotland during the pandemic. The full report of the Social Renewal Advisory Board will be published early in 2021.

## Scottish Government's "Four Harms" approach to COVID-19

Recognising the harms of COVID-19 go beyond its impacts on health alone, the Scottish Government monitors and publishes evidence on the direct health, indirect health, economic, and social impacts, on its [Four Harms analytical dashboard](#) and a [recent evidence paper](#) on assessing the four harms of the crisis.

This approach helps bring transparency to the Scottish Government's work and decisions on the difficult issues raised by the COVID-19 pandemic. It recognises that

many outcomes are interconnected and that there is a need to think deeply about these relationships when making decisions informed by the best available evidence.

## How was Scotland performing before COVID-19?

The 2019 NPF publication “[Scotland’s Wellbeing](#)” reported on key long term trends in data from the National Indicators and other sources to provide an overall picture of Scotland’s national wellbeing.

It highlighted areas where Scotland has made strong progress, including:

- Labour market performance and reducing the gender pay gap
- Renewables performance with three quarters of gross electricity consumption from renewables in 2018
- Reduction in Scotland’s carbon footprint and greenhouse gas emissions
- Crime victimisation becoming less common over the last decade
- Significant progress in reducing premature mortality
- Reduction of the gap in educational attainment between the most and least deprived
- Scotland’s strong international reputation, cultural sector and cultural engagement

But it also highlighted areas where substantial challenges remain, particularly around unequal outcomes experienced between different groups of people in Scotland, including:

- Levels of in-work poverty and low pay for some groups and sectors
- The prevalence of food insecurity for some households in Scotland
- Employment gaps for people with a disability and in some ethnic groups
- Substantial differences in healthy life expectancy by deprivation
- Drug related deaths at the highest number ever recorded
- Declines in reported satisfaction with some public services
- A relatively low proportion of people who think they can influence decisions in their local area

Updated information on the performance of the National Indicator set and detail on how performance is assessed is always available on the [NPF website](#). A pre-COVID-19 review [of progress towards the UN Sustainable Development Goals](#) is also available, bringing together evidence, actions and stories of how Scotland is making progress towards the SDGs.

## 2. Health



### Overview

#### On Health:

- COVID-19 has had a profound negative effect on physical and mental health through both direct and indirect means
- The depth, severity, and longevity of some of these impacts are less certain and strongly interrelated with impacts and mitigating measures on other outcomes such as the labour market and economy
- Uncertainties over the eventual trajectory of the pandemic persist, but it is likely the patterns seen to date, including the poorer health outcomes experienced by some groups, will continue for some time to come

#### Related outcomes

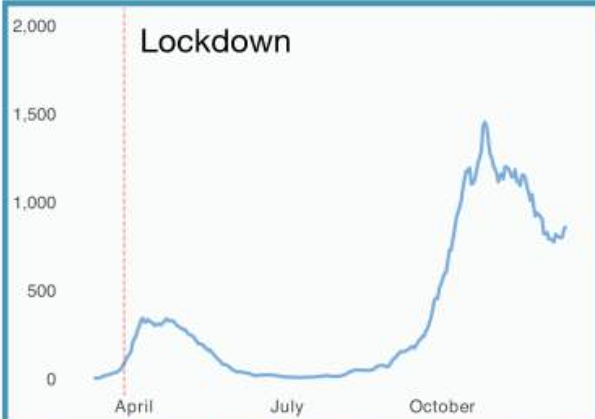
- A deterioration in health may affect the ability to maintain employment, which in turn will affect public finances, household income, levels of poverty, and children's wellbeing and educational participation
- Poorer mental health may increase isolation from friends, family and neighbours leading to feeling less connected to a local community, which in turn may lead to poorer mental health
- Discrimination may occur for those at highest risk of COVID-19 due to curtailment of labour market and other activity
- At-risk individuals are less able to use public transport which in turn will also affect their employment and participation in cultural activities and tourism – with consequent economic implications

#### More evidence

As the COVID-19 pandemic continues to progress, data on impact changes regularly. The sources below are regularly updated.

- [Scottish Government 4 Harms dashboard](#)
- [COVID-19 daily data for Scotland](#)
- [NRS Deaths involving COVID-19 in Scotland](#)
- [Public Health Scotland COVID-19 Dashboard](#)

# Direct Health Impacts of COVID-19

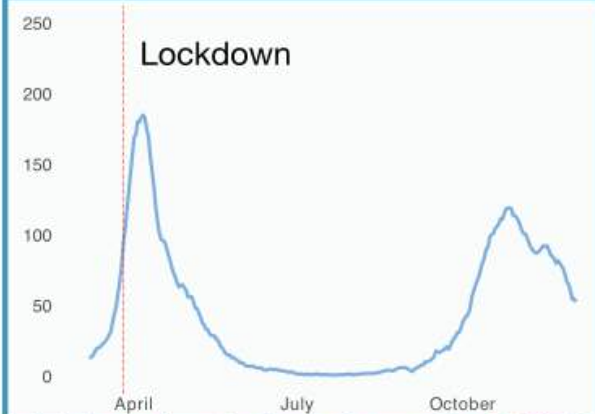


## Cases of COVID-19

As of December 15th, there have been a total of **107,749** cases of COVID-19 in Scotland.

From the **peak in late April** there was a **sustained decline** in cases, before rising to a **second peak in October**. Since then, cases have gradually declined.

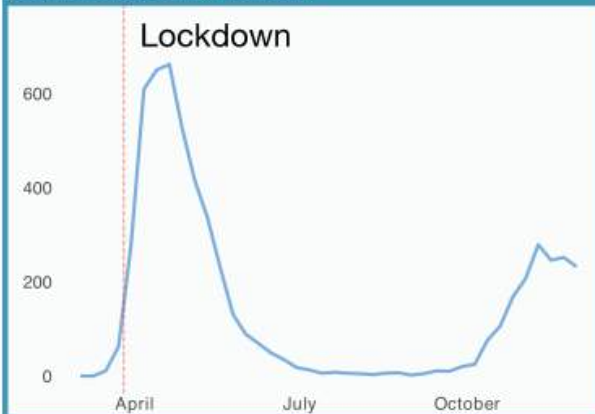
Cases are the number of cases reported by diagnostic laboratories to Health Protection Scotland.



## COVID-19 Hospital Admissions

After **admissions increased over September and October** to an average of over 110, they have now **decreased to an average of 53 COVID-19 admissions per day** in the week up to 3rd December.

Admissions are based on those who were either COVID-19 positive up to 14 days before admission, or had a positive result during their stay.



## Deaths involving COVID-19

According to **National Records of Scotland**, deaths involving COVID-19 **peaked in the week ending 26th April**, with **662 deaths reported**.

As of **December 13th**, there have been **6,092 deaths** registered with COVID-19 mentioned on the death certificate.

Of these deaths, **half (3,246 deaths)** have been in hospital settings, with less in care home settings (**2,455 deaths**). The remainder occurred in home settings/non-institutional settings (**381 deaths**) or other institutional settings (10 deaths).

These figures are drawn from deaths where COVID-19 was mentioned on the death certificate (either as a confirmed or suspected cause of death).



# Deaths from COVID-19



There are substantial differences in the risk of dying for different groups of people within Scotland

## Age



The **oldest age groups** have been most affected, with more **than three quarters (77%)** of deaths from among those **aged 75 and over**.

## Sex



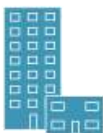
After adjustment for age, **males were 1.4 times more likely to die than females**.

## Ethnicity



There is evidence that **minority ethnic groups** are at **higher risk of dying from COVID-19 than the rest of the population**, and the risk may not be the same for all ethnic groups.

## Location



People in **large urban areas** were **4 times more likely to die** than those in **remote rural areas**.

## Poverty and Deprivation



People in the **most deprived areas** were over **twice as likely to die** as those in the **least deprived areas**.

## Existing Health Conditions



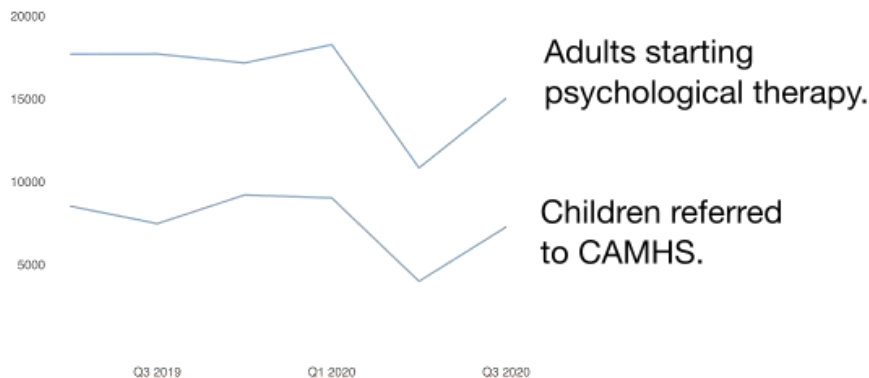
**Most people (92%)** who died between March and August **had an existing underlying health condition**.



# The Impact of COVID-19 on Mental Health



**Mental health services** have been impacted, with a **fall in referrals to CAMHS**, as well as a **fall in the number of adults starting psychological therapy**. These figures reflect mental health services having **less capacity due to lockdown**, but appear to be recovering.



Groups that appear to be **reporting higher levels of psychological distress** are:



Individuals with **pre-existing mental health conditions**.



**Young adults (16-24)**




**Women**




Individuals in **lower socio-economic groups**.


Studies suggest that the pandemic has had an **overall negative effect on mental health**, suggesting:




**increasing**



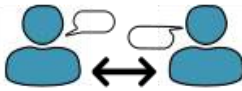
**loneliness**




levels of **distress, depression and anxiety**



**decreasing**



**social contact**



number of adults starting **psychological therapy**.

## Direct impacts of COVID-19

The direct impacts of the virus are in terms of deaths and serious illness. Particular groups, such as older people, those with underlying health conditions, people from some ethnic minorities,<sup>1</sup> those who are obese or people living in deprived areas, have a higher risk of dying from the disease.

### Deaths in Scotland

People dying from COVID-19 peaked in April – where 662 people died in the week ending 26 April.<sup>2</sup> As at 13 December, there have been a total of 6,092 deaths registered in Scotland where the novel coronavirus (COVID-19) was mentioned on the death certificate.<sup>3</sup> About half (46%) of COVID-19 registered deaths related to deaths in care homes and about half (47%) were in hospitals.<sup>4</sup>

- **Age:** The oldest age groups have been most affected, with more than three quarters (77%) of deaths among those aged 75 and over. The average age at death for those who died with COVID-19 was 79 for males and 84 for females<sup>5</sup>
- **Sex:** Males were 1.4 times as likely to die than females<sup>1</sup>, although recent evidence suggests higher infection rates amongst women than men<sup>6</sup>
- **Location:** People in large urban areas were more than four times as likely to die than those in remote rural areas<sup>1</sup>
- **Deprivation:** People in the most deprived areas were over twice as likely to die as those in the least deprived areas<sup>1</sup>
- **Other health conditions:** Most people (92%) who died between March and August 2020 had an existing underlying health condition. The most common pre-existing conditions were: dementia and Alzheimer's disease (31% of those who died); ischaemic heart disease (13%); and chronic lower respiratory diseases (11%)<sup>7</sup>
- **Disability:** Evidence from England and Wales<sup>8</sup> found that the death rate for those disabled and "limited a lot" in their daily activities was 2.4 times higher for females and 2.0 times higher for males<sup>2</sup>
- **Ethnicity:** There is evidence that some minority ethnic groups are at higher risk of dying from COVID-19 than the rest of the population – and that the risk may not be the same for all ethnic groups. In Scotland, an analysis showed deaths amongst people in the South Asian ethnic group were almost twice as likely to involve COVID-19 as deaths in the White ethnic group<sup>3</sup> during the period March to June 2020<sup>9</sup>

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<sup>1</sup> After adjusting for age.

<sup>2</sup> After adjusting for age and other characteristics.

<sup>3</sup> After adjusting for age and other characteristics.

Many of the factors above are interrelated. For example: those in the lowest paid jobs have been the least likely to work from home during the pandemic and consequently most at risk of infection. Those with disabilities and underlying health conditions are more likely to be living in poverty. Some areas in Scotland have a higher proportion of older people living in them and, given the importance of age in terms of vulnerability to the virus, this may affect area risk. It has been estimated that, for England and Wales, over half of the increased risk of death for Black people was accounted for by geographic and socio-economic factors.<sup>10</sup>

### **Other factors affecting diagnosis, illness and death**

Most of the information above is from recorded deaths and does not provide information about relevant circumstances of the people who died: for example, whether they had been voluntarily shielding. However, evidence about other risk factors is building. Obesity is associated with greater risks of hospitalisation for COVID-19, increases the likelihood of being admitted to intensive care, and there is a potentially a higher risk of COVID-19 related death with increasing Body Mass Index.<sup>11</sup>

Data about the impact on people with learning difficulties in Scotland is not readily available. However, in England, adults with learning disabilities were over represented among the numbers of people dying in the first wave – especially in younger age groups.<sup>12</sup>

Those receiving social care support, including care home residents, may be more at risk due to factors such as age, underlying conditions, nature of care provided and living conditions (e.g. large numbers of residents and staff in a care home).

### **Long term direct impacts of COVID-19**

Evidence is emerging of long term impacts for individuals who have had COVID-19.<sup>13</sup> Where people were hospitalised, the effects of severe COVID-19 often continue after the individual leaves hospital. Approximately one third are estimated to develop serious mental health consequences, including depression, anxiety, Post Traumatic Stress Disorder, and cognitive problems.<sup>14</sup>

There is also growing evidence of people reporting persistent symptoms of COVID-19, regardless of how ill they were initially or whether they were hospitalised. The term “long COVID” is commonly used to describe signs and symptoms that continue or develop after acute COVID-19 infection and are not explained by an alternative diagnosis. It includes both “ongoing symptomatic COVID-19” (from 4 to 12 weeks) and “post-COVID-19 syndrome” (12 weeks or more).<sup>15</sup> This points to poorer health outcomes for some people – and may not be confined to the same groups that are at highest risk of death.<sup>16</sup>

## Indirect impacts of COVID-19

### Excess deaths

One way of measuring the impact of COVID-19 on the number of people dying is excess deaths, which includes both direct deaths and also those from other causes that might be related to factors like delayed access to care.

National Records of Scotland (NRS) data shows Scotland experienced excess mortality in Spring 2020. After peaking in April, the number of excess deaths has reduced. For the most recent week (ending 13 December) excess deaths were 3% above the normal level.<sup>17</sup> Over the year to September 2020, NRS reported that there were 4,306 more deaths registered than would have been the case if numbers were similar to the average over the last five year years. Most of these excess deaths (91%) had COVID-19 recorded as the underlying cause of death.<sup>18</sup>

### Health service attendance

There were changes to some health services early in 2020 to ensure maximum NHS capacity was available to treat people with COVID-19. Primary care and Accident and Emergency (A&E) services remained available, however secondary care was paused in some areas. Changes in the use of services can result from several factors: reduced availability or accessibility; reduced demand (e.g. people not attending when they otherwise would have); and real changes in demand (e.g. fewer road traffic accidents or sports injuries).

- **Accident and Emergency:** There was initially a large drop in attendances at A&E – to 60% of normal pre-COVID-19 levels in the week ending 29 March. As of week ending 22 November, A&E attendances are about 75% of normal levels – which has fallen slightly since August and September<sup>19</sup>
- **Planned admissions:** The number of planned hospital admissions dropped to 27% of normal pre COVID-19 levels in April, and now stand at 76% for the week ending 22 November.<sup>20</sup> Over the year from September 2019 to September 2020, planned hospital admissions fell by over a third (38%)<sup>21</sup>
- **Cancer treatments:** the 31-day waiting times standard from the date of decision to treat to start of first cancer treatment applies to all eligible patients, regardless of the route of referral. There were 4,970 eligible referrals within the 31-day standard who received their first cancer treatment in the period July to September 2020, a decrease of 1.7% from the previous quarter and a decrease of 23.9% on the same period in 2019. The reduction in first treatment is likely to be a combination of patients not seeking out help so as to be referred during lockdown, pausing of the three cancer screening programmes from March – September and because of delays in patients having diagnostic tests and/or starting treatment due to infection control, clinical guidance and hospital capacity due to treating Covid-19 patients<sup>22</sup>

- Mental health:** Between April and June 2020 there was a decline in both referrals and patients to Child and Adolescent Mental Health Services. There was a decrease in children and young people starting treatment compared with both the period before the pandemic (14.1% decrease) and the same time last year (11.6% decrease), alongside an apparently greater impact on referrals<sup>23</sup>. However, in the period July – September 2020 there was an increase in children and young people starting treatment – by 13.6% since the previous quarter and a 3.3% increase in those starting treatment in the same quarter the previous year.<sup>24</sup> For adults, in the period July to September 2020, there was a 15% decrease in people starting psychological therapies compared to the same period last year and a decrease (39.6%) compared with January – March 2020<sup>25</sup>

It will take time to address this backlog. Waiting times are likely to increase for many people and these delays in care may mean poorer outcomes in the future. The consequences of the postponement of screening and other preventative service will take time to emerge. This has led some commentators to suggest that past progress made in some areas – for example cancer survival rates – may be at least partially lost.<sup>26</sup>

### Healthcare seeking behaviour

The reduction in health service attendance during the pandemic is also likely to be driven by a reduction in people seeking out care or deciding not to present for treatment in some instances. Delays in seeking health care, or not seeking it at all, are likely to lead to poorer health outcomes as treatable conditions are picked up later or not at all. Reductions in A&E attendance and delays in attending GPs were observed earlier in the year and since the end of October between 25-30% of people agreed that they would avoid contacting a GP practice at the moment even if they had an immediate medical concern.<sup>27</sup>

#### Living through the pandemic

*“The stopping of non-essential services means we stopped a lot of prevention work and my long-term condition was physically a mess by the time I could re-access a services. That could have been prevented. Some of us got sicker.”<sup>4</sup>*

**Voices from Scotland on COVID-19’s impact**

### Impacts of measures to address COVID-19

Measures to reduce the transmission of the virus have had and will continue to have significant impacts on health and other outcomes.

<sup>4</sup> Social Renewal Advisory Board. Community Listening Events. 2020.

The economic consequences of measures imposed are likely to have negative long term impacts on health. It has been estimated that a 1% fall in employment leads to a 2% increase in the prevalence of chronic illness.<sup>28</sup> A relationship between unemployment and poorer health outcomes,<sup>29</sup> including mental ill-health<sup>30 31</sup> is well established, as is the link between low income and poorer health outcomes.

### Isolation and loneliness, mental health

Isolation and loneliness have established impacts on health outcomes<sup>32</sup> and loneliness increased dramatically during lockdown with 40% reporting feeling lonely in the previous week compared to 21% pre COVID.<sup>33</sup>

#### Living through the pandemic

*“Everything changed and stopped abruptly. Left with little to zero support. Had to leave my job to provide 24 hour care for my daughter. Abandoned and exhausted. Isolated.”<sup>5</sup>*

[Parent of a child with a complex disability]

*“For me the worst part was the isolation. I live alone and not being able to see anyone was awful”<sup>5</sup>*

Voices from Scotland on COVID-19’s impact

Young people and women<sup>34</sup> in particular found the restrictions on socialising and meeting with friends and family difficult. Other groups, such as those who were shielding, also found lockdown had negatively impacted on their life – even when they thought they were coping well.<sup>35</sup> Even as restrictions eased, over the period July to September just under half of respondents reported loneliness.<sup>36</sup>

The findings of many studies in the UK<sup>37</sup> suggest that mental health has been negatively impacted by the pandemic, across the population as a whole and for some groups in particular.

Whilst the highest levels of anxiety and depression were early on in lockdown and improvements have been seen since then, levels in Great Britain were and are still higher than pre-pandemic.<sup>38</sup>

In a representative survey of adults in Scotland over the period 27 April - 3 May 2020:<sup>39</sup>

- over a third (36%) of adults reported high level of psychological distress

<sup>5</sup> Social Renewal Advisory Board. Community Listening Events. 2020.



- a quarter of adults reported levels of depressive symptoms and almost one in five (19%) anxiety symptoms of a level that indicated possible need for treatment
- 10% reported suicidal thoughts in the week prior to data collection
- some groups in the survey reported higher than average prevalence of mental health problems than the survey average: young adults (18-29 years); women; individuals with pre-existing mental health conditions; individuals from a lower socio-economic group; and potentially Black, Asian and minority ethnic respondents, though the small numbers surveyed in this group means this finding is more uncertain.

Whilst there is no directly comparable pre-COVID data, levels of distress are higher than reported in surveys such as the 2019 Scottish Health Survey.

For groups who were generally at higher risk of mental ill health – such as younger people and women – these risks persisted through lockdown and following it. Across the UK (as of early October 2020) depression and anxiety are still highest in young adults, people living alone, people with lower household income, people living with children, and people living in urban areas.<sup>40</sup>

Commentators have suggested that mental ill health as a result of the pandemic – including concern over the virus, the measures implemented to deal with it and the worsening economic situation – will continue to be a long term health issue.<sup>41</sup>

### Living through the pandemic

Many respondents in Social Renewal Advisory Board Listening Events reported negative impacts on their mental health and wellbeing.

*“I struggled with mental health and had nowhere to escape”*

*“I have mental health problems and lockdown made it much worse”*

*“I often feel lonely and distressed now”*

*“There was no socialising in the community due to the lockdown which again was a strain on people’s lives in different ways. It caused depression in some people I know or made their anxiety much worse”<sup>6</sup>*

**Voices from Scotland on COVID-19’s impact**

<sup>6</sup> Social Renewal Advisory Board. Community Listening Events. 2020.

## Health related behaviours

The evidence on health related behaviours (e.g. diet, physical activity, alcohol, smoking) is mixed, describing both potentially positive and negative impacts on health. It will be some time before the longer term impact on population health is clear.

There are suggested increases in cooking meals from scratch, eating together as a family and a reduction in eating takeaway foods. However, there were also indications of increases in snacking on unhealthy foods and generally eating more out of boredom.<sup>42 43</sup>

Population level data during lockdown suggests there has been a change to the way people drink. While some drank less as a result of lockdown and felt the benefits, others reported engaging in more harmful drinking behaviour.<sup>44 45</sup>

In Scotland in late April - early May the SCOVID Mental Health tracker survey of adults found that:<sup>46</sup>

- 33% said that there had been no change in their **drinking**, 17% reported drinking less than usual and 15% of respondents felt they had drunk more than usual
- Among **smokers** in the survey, smoking more than usual was more common than smoking less, particularly amongst younger age groups. Over a third (38%) of respondents aged 18-29 and just under a third (32%) of 30-59 year olds and 13% of those aged 60 and over reported smoking more than usual in the past week. This was also true amongst those who had a pre-existing mental health condition where over half reported smoking more than usual
- Respondents reported that their **physical activity increased** during the COVID-19 lockdown with men reporting significantly more vigorous physical activity than women. Those without a pre-existing mental health condition reported more vigorous activity than those with a pre-existing mental health condition

A survey of adults in England introduced in April<sup>47</sup> suggested that whilst some appeared to report doing more physical activity than previously, especially during the initial lockdown, a sizeable proportion reported doing less. Certain groups were particularly negatively impacted: older people, those on low incomes, people living alone, people self-isolating due to age or a health condition and people in urban areas. Even where there were increases, such patterns do not appear to have been sustained.

COVID-19 has also had impacts on drug use at the population level and for those most in need of support. Specialist referrals for drug treatment, needle exchange and opium substitution therapy all dropped at lockdown and had not fully recovered by early July.<sup>48</sup> Drug-related A&E admissions spiked post lockdown.<sup>49</sup>

## The changing nature of health care contact

For those who have used health care during the pandemic or as services resume, the nature of the encounter in many instances has been different due to infection control measures (e.g. changed appointment systems and procedures) and the increased use of digital technology as consultations have increasingly moved to remote consultations using telephone and video.

In February 2020 there were around 300 “Near Me” video consultations per week in Scotland, while by June this figure had reached 17,000 per week, and this high level of use has been maintained.<sup>50</sup> An evaluation of Near Me prior to the pandemic<sup>51</sup> showed benefits reported by patients including reduced travel, greater convenience and time savings. Video consulting was particularly suitable for managing stable long term conditions.

Disadvantages found by the evaluation and also a public engagement exercise conducted during the pandemic included: low digital literacy, limited access to technology and lack of private space at home. Video consultations were less appropriate for people with ill-defined conditions. Both the evaluation and the engagement exercise highlighted that people can experience both benefits and disadvantages of video consultations, and that these need to be weighed against each other when deciding on the most appropriate type of appointment for people.

Increased use of video consulting could improve access to services for those with barriers related to travel. However, it could also decrease access for people experiencing digital barriers, and others who may find this type of interaction difficult. This raises the potential of exacerbating or creating inequality among people seeking and accessing health care.

### Living through the pandemic

*“I can’t have face to face contact with the mental health nurse I work with so we can only have short phone conversations, which don’t provide as much support and my mental health including anxiety and paranoia has deteriorated.”<sup>7</sup>*

**Voices from Scotland on COVID-19’s impact**

## Impacts on those providing care

Overall the risk of being hospitalised was low for healthcare workers. However, those who had a patient facing role were more likely to be hospitalised than those who did not.<sup>52</sup> The social care workforce has relatively high levels of exposure and higher rates of deaths associated with COVID-19 compared to most other settings.<sup>53</sup>

<sup>7</sup> Young Minds [https://youngminds.org.uk/media/3708/coronavirus-report\\_march2020.pdf](https://youngminds.org.uk/media/3708/coronavirus-report_march2020.pdf)

As well as the nature of the work undertaken, which often requires close proximity in confined spaces, demographic and socio-economic characteristics of the workforce may also contribute to a higher risk.<sup>54</sup>

Concerns have also been voiced about the medium and longer term impact on health and social care workers who provided care during the pandemic.<sup>55</sup> It is expected that there will be an increase in mental ill health amongst the health and social care workforce,<sup>56</sup> as this has been found in previous pandemics.<sup>57</sup> Women and people from minority ethnic groups make up a large proportion of these workforces.

Much of the care given to people is provided by unpaid carers. The pandemic has had a profound impact on the care they are providing and their lives. There are reports that the amount of care being provided has increased<sup>58</sup> and the nature of care has changed in some instances. ONS reported that during early lockdown (April) one-third (32%) of adults who reported giving help or support, were helping someone who they did not help before the pandemic.<sup>59</sup> Financial worries are also reported.<sup>60</sup>

### 3. Economy, Fair Work and Business, Culture



#### Overview

##### Impact on **Economy, Fair Work and Business and Culture outcomes:**

- The Scottish economy contracted by 19.4% in the second quarter of 2020 and despite growth in output in the months May to September, Scotland's Gross Domestic Product (GDP) remained 7.6% below its pre-COVID level
- The economic recovery is fragile and is expected to be gradual, and remains at risk from the ways in which the pandemic continues to develop, resulting in considerable uncertainty
- Labour market impacts are continuing to emerge and are contingent on the size and nature of interventions in place, with evidence suggesting unequal impacts for a range of groups, including young people, older adults, low income workers, those in precarious employment and lone parents
- The pandemic has had significant negative impacts on tourism, hospitality and culture, entertainment and recreational businesses. Many businesses in the sector are struggling and some are expected to close permanently. This may act to increase inequalities in who participates in cultural, entertainment and recreation activities

##### Impact on related outcomes

- The economic circumstances in which people live and work have a strong role in determining future health outcomes and the broader wellbeing of communities in Scotland
- The unequal impacts of the pandemic on the labour market are likely to impact on household incomes and therefore on poverty and human rights outcomes
- Changes to our ways of working as a result of the pandemic (e.g. home working, digital adoption) have the potential to positively contribute to reductions in greenhouse gas emissions through reducing travel demand, though the future direction of these trends are subject to considerable uncertainty
- Beyond the human right to participate freely in cultural life, access to culture, recreation and entertainment has positive impacts on wellbeing, strong vocational potential, attracts people to live, work and do business here, and is a key aspect of learning. Impacts are likely on our health, business, Scotland's international reputation, and education, as well as historic sites as features of our environment

### **More evidence**

As the COVID-19 pandemic continues to progress, data on impact changes regularly. The sources below are regularly updated.

- [Scottish Government 4 Harms dashboard](#)
- [Scottish Government Monthly Economic briefs](#)
- [Scottish Government State of the Economy reports](#)
- [Business Impact of COVID-19 Survey](#)

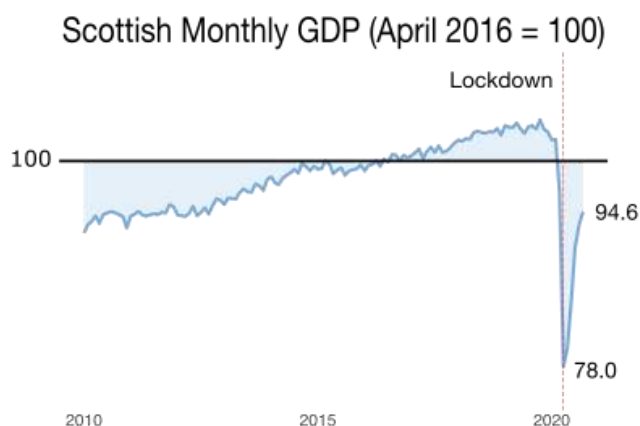




## Economic Performance

Scotland's **gross domestic product data** shows that the Scottish economy **declined sharply in March**.

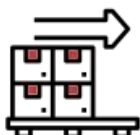
While there has been **some recovery since March**, there has **not yet been a return to pre-pandemic levels**.



## International Trade and Exports

There have also been **challenges for international trade and investment**.

The value of Scotland's **goods exports** remain notably **lower than last year**, and are anticipated to face challenges.



Comparisons between **April to June 2020** with the same period in **2019** show a **decrease in goods exports of 31.1%**

This **overall decrease** has largely been driven by:



**A 52.4% fall** in oil and gas exports



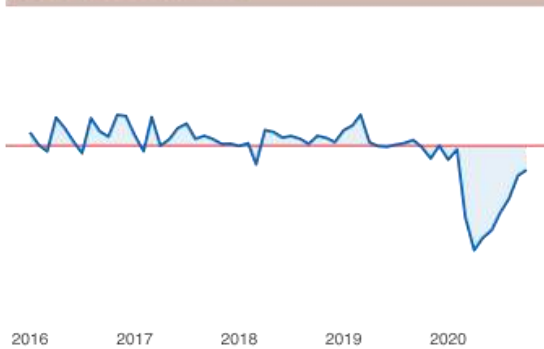
**A 39.9% fall** in the export of beverages.

# Economic Impacts of COVID-19



The **impact of COVID-19 on the economy has varied from sector to sector**, highlighted by differences in the Monthly Business Turnover rate.

## All Industries



Scotland's **business turnover index is recovering from its lowest value of 18.7 in August**, but **remains significantly below its normal range of 45 to 55 since 2011**.

The majority of sectors are showing a similar overall trend, including manufacturing.

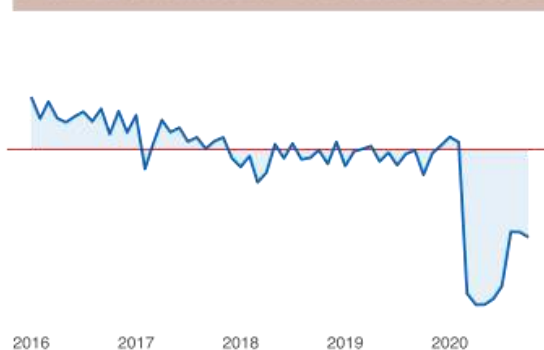
## Food Retail



**The food retail sector has showed a different trend.**

Unlike other sectors, it has performed well over the course of 2020.

## Accommodation & Food Services



**The Accommodation and Food Services sector has shown the worst performance over 2020**, with the greatest drops in turnover out of all sectors.

The Monthly Business Turnover Index is an experimental statistics release. It is based on ONS data, and reports the net balance of firms reporting increasing or decreasing turnover, in real terms, compared to 12 months previously. Values below 50 (the red line) indicate that more companies are showing decreased turnover than increased turnover.

## Impact of COVID-19 on the Labour Market



Structural changes in the job market will have a profound impact on many groups, and many of these impacts will be unequal.

### Unequal Age Impacts



**Young people have already borne the brunt of the early unemployment impacts** from the crisis to date. Young people are also **more likely than other workers to be in precarious forms of work** (e.g. zero hour contracts) which have been **more susceptible to job losses**.



Younger workers may also continue to feel the worst employment impacts of the crisis. Evidence suggests **only a third of 18-24 year-olds whose job had ended were back in work by September**, lower than for other age groups.



Older workers will also face challenges. **Older workers who become unemployed experience much more long-term unemployment than young people**. Older workers are also **less likely to participate in upskilling**.



Survey data shows that both the **youngest employees**, and **those aged 55 and older** were the **least likely to be working from home** during the crisis, and **the least likely to expect to do so in the future**.

## Impact of COVID-19 on the Labour Market



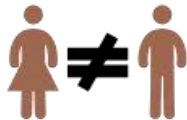
Structural changes in the job market will have a profound impact on many groups, and many of these impacts will be unequal in nature.

### Unequal Gender Impacts

It has been estimated that employees in the **lowest earnings groups** are **seven times more likely** than **those in the top 10% of earners to work in a sector that was shut down or subject to significant restrictions** during the pandemic.

**Women** are around a **third more likely** to have **worked in these sectors**.

**Single mothers with low qualifications** are particularly **concentrated in these sectors**.



**Early analysis** of the **furlough scheme** suggests that while an **equal share of men and women in Scotland** took up furlough, **men** have been **more likely to be retained by their employers** than have women.

**Concerns have been expressed** that **women** may find it **more difficult to secure alternative employment and income streams following lay-off**, due to their **disproportionate share of caring responsibilities**.



## **Economic performance**

The latest monthly GDP data<sup>61</sup> shows that the Scottish economy declined in March to April but subsequently grew for five consecutive months to September, and over that period recovered around 68% of the output that had been lost during the unprecedented falls in March and April. However, like the UK as a whole, the pace of growth slowed notably in August and September compared to July.

Slower growth in September was evident in both the services and construction sectors, alongside a slight fall in output in the production sector, highlighting the gradual pace at which output will return to pre pandemic levels and potential for significant sectoral differences in recovery.

Overall, in September GDP remained 7.6% below the level it had been in February, however the scale of the impact, the subsequent pace at which demand has recovered and the need for local restrictions means that sectoral and regional differences are significant.

Business activity data for Scotland (the Purchasing Managers Index) signalled that the slower growth continued into September, with the services sector in particular reporting only marginal growth, and then contracted in October and November.<sup>62</sup>

## **International trade and exports**

Falls in output also highlight the global challenges for international trade and investment. The value of Scotland's goods exports remain notably lower than last year and are anticipated to face ongoing challenges.

Comparing the second quarter of 2020 (April to June) with the same period in 2019, shows a significant negative impact of COVID-19 on Scotland's trade. An overall decrease in goods exports of 31.1% was driven largely by a fall in oil and gas exports (down 52.4%) and a fall in the export of beverages (down 39.9%).

## **Business activity**

Improvements in business turnover across most sectors in August reflected the further reopening of the economy over that period, although business turnover in both manufacturing and services remains lower compared to last year, emphasising the challenging position that many businesses are facing.

The fall in demand and turnover has resulted in businesses using a combination of cash reserves, cost cutting, government support and loans to accommodate their ongoing costs and maintain cash flow.



Cashflow and cash reserves remain a critical aspect of business viability, as firms continue to operate in an environment with ongoing restrictions on activity and subdued demand. Of businesses that had not permanently stopped trading in the second half of October, almost three in ten (28.6%) reported that they had cash reserves lasting for three months or less, and 15% reported a severe to moderate risk of insolvency.

This situation also presents ongoing risks to business investment going forward, which on the back of a downward trend over 2019, fell by 38.5% over the year to Quarter 2. Looking ahead, there are clear challenges for businesses as to how they adapt to the changing trading environment. Business optimism improved as restrictions eased, however many businesses expect to continue operating at reduced levels of capacity and with reduced staffing levels as the pandemic, public health measures and business support schemes evolve.

Consumer sentiment in Q3 was also at its lowest point in the quarterly time series, which is likely to have an impact on consumer spending in the final quarter of the year, particularly in the lead up to the festive season which is so important for the retail sector. Retail sales remain significantly down on last year but have continued to stabilise in recent months.

The short term outlook for the final quarter of the year remains uncertain as cases have risen in Scotland, the rest of the UK and internationally. This has been reflected in weakening business and consumer optimism, presenting greater uncertainty for the medium term outlook. Restriction in activity across various sectors of the economy in October, and following the levels approach in the Coronavirus (COVID-19): Strategic Framework in November and December will also have impacted on business activity.

## **Sectoral and regional impacts**

In September, Scotland's business turnover index was 41.4 - up from 34.4 in August, but it remains significantly below its normal range of around 45 to 55.<sup>63</sup> The results for September indicate that business turnover has increased for the fifth month in a row but remains significantly below pre-pandemic levels. Compared to August, most industries in the manufacturing and services sectors were continuing to expand, apart from the communications subsector.

More recent data from the Office for National Statistics (ONS) Business Impact of Coronavirus Survey, for 2 November to 29 November, showed that just under half of Scottish businesses reported lower turnover than normally expected for the time of year, and this was most pronounced in accommodation and food services (77.9% of businesses) and in arts, entertainment and recreation (75.7% of businesses).<sup>64</sup>

The accommodation and food and the arts, entertainment and recreation sectors have been two of the hardest hit over the pandemic. In November these sectors had the largest proportion of businesses temporarily closed (38% in the accommodation and food sector and 11% in the arts, entertainment and recreation sector); the largest proportion of employees on furlough (49% and 40% respectively); and the largest proportion of businesses reporting that turnover had substantially decreased compared to the previous year. Businesses in the accommodation and food sector were also most likely to report being at severe to moderate risk of insolvency.<sup>65</sup>

Sectoral variation in business activity and output is also a key driver of geographical variation in impacts. Areas with a high proportion of employment in hospitality and tourism, for example, have been particularly affected by the crisis, which has led several commentators to argue that rural and coastal areas look particularly exposed to economic risks.<sup>66</sup> While most of the jobs in the accommodation and food services sector in Scotland are in cities, cities also have more diversity of employment and so the declines in these sectors are not as notable in terms of overall employment in most urban areas. However cities have also been disproportionately affected by the closure of nonessential offices and their associated trade.

Combining data on output by sector during the pandemic with data on the sectoral composition of employment by area, analysis from Fraser of Allander shows which areas in Scotland are most vulnerable to employment loss.<sup>67</sup> This suggests that a wide range of places right across Scotland are vulnerable to the employment impacts of the pandemic.

Analysis of claimant count data by local authority also presents a similar picture, with substantial increases across a broad range of council areas. There is some relationship to deprivation, with areas that are more deprived (with a higher claimant count rate) in general showing higher rates of increase. However some council areas have also seen large rises despite below average claimant count rates, such as Edinburgh city and Aberdeen city.

A key factor in the speed with which different areas can recover is the level of available job vacancies. Fraser of Allander analysis shows that rural local authorities in Scotland experienced a smaller decline in the number of vacancies over the lockdown period and have now recovered above pre-lockdown levels. Cities, meanwhile, lost more vacancies at the height of lockdown and have been recovering more slowly.<sup>68</sup>

Evidence from local authorities in Scotland shows similar findings. In terms of retail and recreation activity, urban local authorities have shown slower returns to baseline compared to rural and semi-rural authorities. Similarly, urban local authorities, as well as councils with the lowest levels of deprivation, remain significantly further from the baseline for workplace activity than do rural or deprived local authorities.<sup>69</sup> Differences between areas are likely to be further exacerbated over the forthcoming



months by the economic impacts of local restrictions. This may be influenced by the sectoral profile of the areas under restriction or the dependencies these areas have with other regions under restrictions.

## Public finances

COVID-19 and the response to it has had a deep and complex impact on both UK and Scottish public finances. At the UK level, tax revenues have fallen as a consequence of the contraction of economic activity as well as through the granting of new reliefs and payment holidays (e.g. for VAT). UK government tax and national insurance receipts (combined) in the seven months to October 2020 fell by £38.3 billion (or 9.7%) compared with the same period in 2019.

At the same time, UK Government spending has also risen, again in part as a consequence of the economic contraction and associated rising benefit claims, but also because of additional spending on the NHS and the creation of new UK-wide employment support schemes. UK Government support for individuals and businesses during the pandemic contributed to an increase of £123.5 billion (or 28.5%) in UK Government day-to-day (or current) spending. This has also generated significant additional income for the Scottish Budget through consequential on devolved expenditure.

The extra funding required to support coronavirus support schemes combined with reduced cash receipts and a fall in GDP have all helped push public sector net debt as a ratio of GDP to levels last seen in the early 1960s. Public sector net debt (excluding public sector banks) at the end of October 2020 was equivalent to 100.8% of GDP. This will have implications for UK Government fiscal headroom going forward and could impact on the availability of future funding for public services.

Scotland's funding position is fundamentally dependent on the UK fiscal stance, as the Scottish budget receives a population share of UK spending, social security and tax decisions through the Barnett formula. For devolved taxes, the operation of the Fiscal Framework means that the impact will depend on Scotland's relative economic performance compared to rest of the UK.<sup>8</sup> If Scotland's economy is less resilient to the economic impact of COVID-19, and its tax revenues fall proportionately more, this would have a negative fiscal impact on the Scottish public finances, with implications both for direct employment in the public sector, as well as services delivered by the public sector.

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<sup>8</sup> The Scottish Government's Medium-Term Financial Strategy to be published in Jan 2021 will set out the impact of the pandemic on Scotland's public finances in more detail.

## Labour market

### Overall impact

The impact of the pandemic on Scotland's labour market is only starting to emerge, with government support schemes so far preventing a substantial rise in unemployment. At the end of August, 242,600 employees in Scotland were on furlough, helping the unemployment rate remain low, at 4.2% in August to October.<sup>70</sup> However, the claimant count – which can give a more timely picture (in terms of how quickly data becomes available) of those potentially affected by unemployment – reached 7.5% in November 2020<sup>71</sup>, more than double the number of people claiming in October 2019.<sup>9</sup> Payrolled employments were around 74,000 lower than in October 2019.<sup>72</sup> These figures emphasise the underlying challenges emerging in the labour market.

There has also been a sharp reduction in hours worked. In August these were down 6.7 million hours compared to a year ago, which represented the lowest weekly hours worked since 2013.<sup>73</sup> This is partly driven by people on furlough who are recorded as employed but working no hours, and in July-September data there was an increase seen in hours worked. Labour market uncertainty was also reflected in a UK-wide survey in September, which reported that over a quarter (28%) of respondents still in work were either worried about redundancies or had been told that a redundancy process would occur.<sup>74</sup>

The Scottish Government's future projections for unemployment published in September suggest that, in the central scenario, unemployment could peak at 8.2% in Q4 of 2020<sup>10</sup> and remain elevated for several years, only falling back to pre-pandemic levels towards the end of the scenario horizon in 2025.<sup>75</sup> The Bank of England forecast (in early November) predicted that the unemployment rate (UK-wide) would peak at around 7.75% in Q2 of 2021, with the extended furlough scheme mitigating the impact of weak economic activity on the unemployment rate.

### Unequal labour market impacts

The labour market shock has been highly concentrated in those sectors that were most impacted by the lockdown and subsequent restrictions, resulting in unequal impacts on workers. Workers in these sectors are more likely than those elsewhere to be young, women and low-paid. The accommodation and food services sector, for example, has the lowest hourly pay of all industry sectors in Scotland and among the lowest number of weekly hours.<sup>76</sup>

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<sup>9</sup> Not all of this increase is a result of increased unemployment. Eligibility criteria for benefits has been widened, and some new claimants may still be working but have experienced a fall in income and therefore become eligible to claim benefits.

<sup>10</sup> Though this was based on the less generous Job Support Scheme, rather than the furlough scheme, being in place.

It has been estimated that employees in the lowest earnings group are seven times more likely than those in the top 10% of earners to work in a sector that was shut down during the pandemic, and women around a third more likely to do so than men.<sup>77</sup> Single mothers with low qualifications are particularly concentrated in these sectors.<sup>78</sup> Some ethnic minority groups, for example, Pakistanis and Bangladeshis, are also concentrated in some of the hardest hit sectors, such as the passenger transport and food and beverage sectors, while migrant workers are also more likely to work in the hospitality sector.<sup>79</sup> People in low-paid jobs are also less likely to be able to work from home since their jobs are typically customer-facing or based on business premises (e.g. sales and customer service occupations),<sup>80</sup> which puts them more at risk of job loss or being placed on furlough. Young people are also more likely than other workers to be in precarious forms of work (e.g. zero hours contracts) which have been more susceptible to job losses.

### Living through the pandemic

Edinburgh Poverty Commission heard from organisations supporting people across the city that many had lost or were at risk of losing their livelihood as a result of the crisis. Many of those who had lost their job had never claimed out of work benefits, did not know where to get help and were struggling with delays in receiving Universal Credit payments.<sup>81</sup>

*“When COVID-19 spread in the UK, I had just started a new job in tourism doing something I really enjoyed, after months of searching for employment. As a new starter, I was made redundant, did not qualify for the furlough government scheme and was rejected by Universal Credit. I, like many others, fell through the gaps. Amid a global pandemic, I had to also face financial distress. It felt as if months of effort were wasted, just to be back to square one.”<sup>82</sup>*

**Voices from Scotland on COVID-19's impact**

## Living through the pandemic

*“Young people are facing many worries and challenges at this time. Some of us are on zero hours contracts and are losing jobs or their work has closed so they have zero income, and no-one is around to tell you what’s happening and help you understand it at all. Many people rely on jobs as an escape from my home life, especially me, and I have been so eager to go to work. Me myself, I have zero knowledge if my work will ever open again, it could be back to square one in the job hunt, which will be soul destroying for me”<sup>83</sup>*

## Voices from Scotland on COVID-19’s impact

A range of (UK-wide) survey data suggests that employees from minority ethnic groups are also more likely than other workers to have found themselves out of work as a result of the crisis.<sup>84</sup> There is also some evidence that disabled people may have been more likely to face redundancy during the crisis.<sup>85</sup>

Self-employed people have also seen disproportionate negative employment impacts. The number of people in self-employment fell at a record quarterly rate in the three months to June, UK-wide.<sup>86</sup>

The full labour market effects of the crisis have not yet been seen but the future impacts as it plays out are also likely to be unequal. Some signs of this can be seen from analysis of what has happened to workers who were furloughed. A (UK-wide) survey from September, found that the likelihood of a previously furloughed worker not being in work was higher for those working in hospitality, for younger workers, for those previously in insecure work and for minority ethnic workers. Over a fifth (22%) of UK minority ethnic workers who were furloughed were no longer working in September, more than double the overall rate.<sup>87</sup> Early analysis of the furlough scheme from HMRC also suggests that while an equal share of men and women in Scotland took up furlough, men have been more likely to be retained by their employers than women.<sup>88</sup>

Concern has also been expressed that women may find it more difficult to secure alternative employment and income streams following lay-off, due to their disproportionate share of caring responsibilities.<sup>89</sup> This risks widening gender disparities in pay and work over the longer term, particularly for lone parents.<sup>90</sup>

Evidence suggests younger workers will also continue to feel the worst employment impacts of the crisis – survey evidence suggests only a third of 18-24 year olds whose job had ended were back in work by September, lower than for other age groups, on top of their being more likely to lose their job in the first place.<sup>91</sup> It is also known that entering the labour market during a recession can lead to longer lasting scarring effects. It has been estimated that the current crisis could reduce the

chances of being in employment for lower-skilled young adults leaving education this year by more than a third after three years.<sup>92</sup>

### Living through the pandemic

A strong theme in reports from lived experience, especially among young people, is the challenge of an uncertain future. Career or developmental pathways now seem obscured, and the lack of clarity about what opportunities will be available, and how, once restrictions are eased, mean that people are not sure how they will fare or what will be possible for them.

*“I am due to graduate in June. All the jobs I had applied for have been put on hold and the sectors I am interested in have suspended the vast majority of recruitment. I have moved back in with my parents for the foreseeable future until places start recruiting again.”<sup>93</sup>*

### Voices from Scotland on COVID-19’s impact

Older workers may also fare less well. It is known that older workers who become unemployed experience more long term unemployment than younger people – which has well established adverse effects on health and wellbeing, as well as being a major driver of poverty – and that older workers are also less likely to participate in upskilling.<sup>94</sup> Survey data show that both the youngest employees and those aged 55 and older were the least likely to be working from home during the crisis, and least likely to expect to do so in the future.

Those groups that have suffered adverse health or social consequences from this crisis may also face employment limitations in the future. Evidence suggests that disabled people, for example, have faced a greater impact on their lives from COVID-19 (e.g. impacts on wellbeing and mental health), which could have implications for their future employment prospects.<sup>95</sup>

## Culture

Cultural participation and attendance is an important source of wellbeing and Scotland’s cultural and creative industries make an important economic contribution. COVID-19 has had a substantial impact on Scotland’s cultural life. Measures to reduce exposure to COVID-19 have included limits on large gatherings, closure of venues, and cancellation of productions or programmes and large scale cultural events such as Edinburgh’s festivals.

This has had a dramatic effect on how people attend and participate in culture, although access and ability to participate changed over the year as some elements of the cultural sector reopened in mid-July and some remain open.<sup>96</sup> A survey by Creative Scotland in August 2020 found that, while 96% of respondents said they

had engaged in some activity at home during lockdown, over half indicated that they had missed the opportunity to go to cultural events and venues, with around one third participating in “substitute” online cultural activities.<sup>97</sup>

COVID-19 may also have a bearing on the speed with which audiences return following relaxation of restrictions. When asked in August, around a third of respondents indicated they were comfortable attending cultural events in the near future, but the majority of people remained wary, mainly due to the desire to avoid crowds and be able to maintain social distance.<sup>98</sup> As a consequence, audience attitudes may be influenced by wider factors, such as uptake of vaccines, as well as restrictions on activities.

Prior to COVID-19, attendance at cultural events or enjoyment of cultural activity was disproportionately low among adults in areas of deprivation and older age groups, with less cultural participation among adults living in the most deprived areas and among economically disadvantaged groups compared with the population as a whole.<sup>99</sup> It is unclear at present whether COVID-19 has accentuated these issues, however there is a risk of it having done so.

COVID-19 has had a substantial effect on the cultural sector. Performing arts venues closed for performances with a live audience in March 2020 and many remain closed. Performing arts venues and organisations make a large proportion of their income from ticket and associated sales, which largely ceased in March. Additionally, many were required to issue refunds for cancelled performances. Some organisations have presented performances and participation events through digital channels but these are often provided free of charge or have generated only small amounts of income.

The impact of COVID-19 on the cultural sector has continued to be significant. Between 16-29 November, around 89% of Arts, Entertainment and Recreation businesses were estimated to be trading, up from just over 40% in June. Around 76% reported reduced turnover during November, compared with normal expectations for the time of year. Around 24% also reported having no or less than 3 months of cashflow.<sup>100</sup> Footfall is lower than normal among businesses and cultural sites that are open. The Moffat Centre reported that footfall at a range of visitor attractions in October was substantially below levels seen in 2019 across Scotland.<sup>101</sup>

The workforce in the cultural and creative industries sector has also been substantially impacted by COVID-19. Around 40% of the workforce in the Arts, Entertainment and Recreation sector was estimated to be on furlough between 2 and 29 November, including around 13% of the workforce on full furlough leave.<sup>102</sup> Historically, the cultural sector has been characterised by low income, low wealth and economic uncertainty, with a high rate of freelancing in the creative industries. In



2016, 41 percent of 1,500 arts practitioners surveyed in Scotland were freelance with a median income of £20,000.<sup>103104</sup>

### **Longer term expectations for the culture sector**

The business model of much of the cultural sector is severely impacted by the pandemic, particularly with substantial restrictions on live performances, and capacity restrictions in cultural venues including museums and galleries. The speed of return to pre-pandemic levels of attendance and participation in live events, and associated economic activity will be substantially influenced by measures to control COVID-19, but also by audience confidence about returning. This will also have implications for the outlook for associated sectors, including the tourism sector (including accommodation and hospitality) and events businesses. It may also have implications for equity of attendance at and participation in cultural activities, with the potential to increase inequality.

## 4. Communities, Poverty, Human Rights



### Overview

#### In **Communities, Poverty, Human Rights**:

- There is widespread concern among lower income households across Scotland about their financial situation. This is driven by reduced income as a result of job loss, reduced working hours and furlough, and with unemployment predicted to rise in the medium term, this insecurity may accelerate
- Personal debt has escalated during the crisis, potentially trapping households in unmanageable debt and poverty in the future
- While some groups' rights (for instance access to high quality public services, freedom from discrimination or rights to privacy) may have been negatively affected by the crisis, public perception of the coronavirus response in Scotland has been positive and communities have felt more empowered in some respects

#### **Related outcomes**

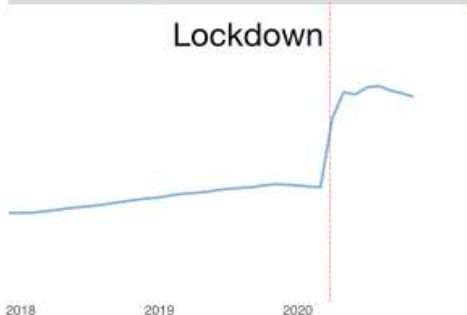
- Given the evidence of financial strain among families, the outcomes for children will be affected by these trends as poverty is a key factor in health and children's outcomes
- Indirectly, households experiencing reduced finances or rising debt may economise by reducing expenditure on engagement with the environment, healthy activities or cultural attendance and participation with consequent impacts on those outcomes
- Any decisions to cut back on, for instance, extracurricular activities for children, may result in long term impacts on educational attainment and the skill profile of the population

# Impact of COVID-19 on Households



There is **rising concern** across **households** on their **financial situation**.

## Money



More people are now claiming benefits.

In **November 2020**, the **claimant count** was **210,750**. This measures the number of people claiming benefit principally for the reason of **being unemployed**.

This has seen a **large rise** since March 2020.



Around **one quarter of adults** were concerned **about providing for their family**.



**One in five** households with dependent children reports being in **serious financial difficulty**.

**Lower income** households are:



- **twice as likely** to have **increased their debts** as higher income households



- **50% more likely to be saving less** compared to higher income households

## Food



Around **one quarter of adults** reported being **very or somewhat worried** about **affording enough food** for themselves or their household in the next month.

## Fuel



**48% of households** are using more fuel since social distancing was introduced.

## Household incomes

The COVID-19 labour market crisis has adversely impacted household incomes, as many workers have been made redundant, furloughed or have had their working hours or wages cut. This has resulted in unprecedented levels of financial distress and hardship particularly for those experiencing socio-economic disadvantage. This fall in earnings follows the 2008 financial crisis and post EU referendum income squeezes, resulting in increased pressure on incomes.

Evidence from April 2020 suggests that households in the lowest fifth of incomes saw a more substantial decline than other groups in their pre-COVID earnings.<sup>105</sup> In May, household incomes had fallen across the UK by 4.5% compared with the previous year.<sup>106</sup>

While increases in welfare payments have partially mitigated falls in income for some lower income households, the effects have been dampened by policies such as the benefit cap and the two child limit,<sup>107</sup> as well as features of Universal Credit such as the need for new claimants to wait at least five weeks before their first payment.<sup>108</sup> Some of the key support measures are also due to be reversed in April 2021, while the labour market impacts may still be being felt at that time.<sup>109 110</sup>

### Living through the pandemic

Feedback from Scotland's Poverty Commissions in Edinburgh, Glasgow, Dundee and North Ayrshire to the Social Renewal Advisory Board highlighted concerns that COVID-19 was increasing the number of people living in poverty and making things worse for those already experiencing poverty. These included concerns such as losing 20% of an already low wage while on furlough or finding social security benefits insufficient or delayed.

*"It's a terrifying time for a lot of people. What's the new normal going to be? The crisis has highlighted how many people live anyway. My hope is that some of the people now having a tough time will think to themselves: is this how much people have to live on normally? When this is over, we need to say: a large proportion of the city's people won't be getting back on their feet because we live in a really unequal city and now it's time to fix it."<sup>111</sup>*

**Voices from Scotland on COVID-19's impact**

## Cost of living, debt and savings

Many households went into the crisis already struggling financially and without savings to cushion them from a fall in income. A third of households in Scotland (34%) were financially vulnerable in 2016-18, meaning that they did not have enough savings to cover basic living costs for three months.<sup>112</sup> This rose to over half (55%)

of households in the lowest 10% income grouping and just 12% of those in the highest income group. While some households with higher levels of income can draw on their savings to cushion shocks to their earnings, those on low incomes or with less wealth may be less resilient.

The evidence so far suggests that the direct and immediate economic effects of this crisis are falling disproportionately on those on low pay with little savings as a buffer.<sup>113</sup> As some households lose income, there will be a knock-on effect in terms of their ability to manage non-discretionary living costs (such as food, heating and housing) leaving some in financial difficulty.<sup>114</sup>

Conversely, household budgets were often strengthened during lockdown for those with higher incomes: 50% of adults in the top income quintile have seen falling outgoings compared to 30% in the bottom quintile.<sup>115</sup> By July, UK households with earnings of £35,000 and above had increased their net bank balances on average, while those households earning less than that had seen them decrease.<sup>116</sup>

In July, 58% of Scottish adults agreed that coronavirus would have a financial impact on themselves and their family, and around a quarter of adults were concerned about being able to pay their bills or provide for their household.<sup>117</sup> One in five households with dependent children reported that they were “in serious financial difficulty”.<sup>118</sup> With unemployment predicted to rise in the medium term,<sup>119</sup> this reduction in household incomes is likely to persist. Planned changes to benefits in April are predicted to increase the numbers of those in relative poverty in the UK in 2021-22 by one million.<sup>120</sup>

Lower income households were also found to be twice as likely as richer ones to have increased their debts during the crisis, to be more likely to be saving less, and to report a higher level of credit card use.<sup>121</sup> Debt associated with housing is also likely to be increased when mortgage holidays and the evictions ban end, as some may be unable to pay back arrears.<sup>122</sup> The crisis has not led to an increase in repossessions at this time<sup>123</sup>, however rent arrears are up in the social rented sector, with £163 million owed in July 2020, up from £150 million in April 2020. In June, 26% of renters surveyed for Citizens Advice Scotland were concerned about making payments, compared with only 19% of mortgage holders concerned about mortgage repayments.<sup>124</sup>

Essentials such as food and fuel account for a greater proportion of the income of households experiencing poverty,<sup>125</sup> and potential price rises in essential foods (e.g. in the wake of a no-deal Brexit<sup>126</sup>) or in fuel usage (e.g. due to greater time spent at home) will impact poorer households disproportionately.

In June, a quarter of adults in Scotland reported being very or somewhat worried about affording enough food for themselves or their household in the next month. Based on projections of rises in unemployment, the Food Foundation estimates that

between 252,000 and 337,000 more working age adults in the UK will become food insecure in the six months from September 2020.<sup>127</sup> Rising unemployment could also increase rates of fuel poverty,<sup>128</sup> although levels of concern about energy matters as a result of lockdown and social distancing currently remain low.<sup>129</sup>

## Benefit claims

More people are now claiming benefits. In October 2020, 473,500 people in Scotland were receiving Universal Credit, an increase of 94% since January, and an increase of 109% since October 2019.<sup>130</sup> The Alternative Claimant Count, which provides a consistent measure of unemployment over time, was 6.4% in August, double the rate in August 2019 (3.2%).<sup>131</sup> Scottish Welfare Fund crisis grant applications were 46% higher in the first quarter of 2020/21 than in the same quarter last year.<sup>132</sup> While the caseload of Universal Credit has increased for each family type, the distribution between groups has changed during COVID-19 – with young people, men, and single people without children making up a larger proportion of the caseload than previously.<sup>133</sup>

## Discrimination

In the period from April to June 2020, the number of hate crimes reported in Scotland was 5% higher than at the same time the previous year, with the increase showing from mid-May.<sup>134</sup> A significant number of these related to neighbour disputes, which may reflect increased pressures associated with lockdown and the pandemic<sup>135</sup>, although the police have also suggested other possible factors responsible for this rise, such as the protests and counter demonstrations over the Black Lives Matter movement that occurred during the same period.

Online communication has been a vital substitute for in-person social contact during the lockdown and restrictions, but an increased reliance on social media may also have negative impacts for some groups. In a survey of young people in Scotland aged 12-24, almost half (47%) had seen or experienced online bullying during lockdown, with over half saying this took place at an increased level.<sup>136</sup> 59% had seen prejudicial posts, comments and/or attitudes increase online, 45% witnessed more racism, while 36% reported an increase in homophobic material. Higher rates of online bullying and prejudice were perceived by LGBT+ respondents.

There are also indications of increased experience of discrimination and infringements of rights offline too. In a Youth Parliament Focus, participants said they had not faced any direct discrimination as a result of COVID-19 but most were able to give an example of indirect discrimination. Examples included disproportionate consideration seen to be given to Christmas compared to Ramadan or Eid, or an expectation that disseminated information would be translated by some children for their parents or elders.



## Living through the pandemic

*“I personally haven't seen in any way shape or form the like government reaching out to the black community and being like ‘so here's how you should combat this, here's how you should further protect yourself.’<sup>137”</sup>*

### Voices from Scotland on COVID-19's impact

The Ethnic Minority National Resilience Network highlighted an increased chance of prejudice towards Far East Asian communities during the pandemic and towards those identified on social media as not following social distancing measures, such as Roma.<sup>138</sup> A survey by Disability Equality Scotland also found that experience of discrimination and hate crimes increased for disabled workers during lockdown, with fears that public understanding has degraded.<sup>139</sup>

## Safer communities

Since lockdown there has been a reduction in crime recorded by the police. The overall number of crimes recorded between April and October 2020 was 7% lower than the same period in 2019 and for the most recent month, October 2020, recorded crime was 8% lower than in October 2019.<sup>140</sup>

While there has been a reduction in most types of crime during the crisis, there has also been an increase in some types, including fraud. It is difficult to attribute all changes during this period to COVID-19 impact, due to the likely continuation of longer term trends and procedural changes in how some crimes are recorded (including crimes committed using digital technologies).

The first quarter of 2020-21 also saw increases in child sexual abuse crimes recorded (up 21% to 2019-20) and domestic abuse incidents reported (up 8.8% compared to 2019-20) to Police Scotland.<sup>141</sup> Domestic abuse incidents have fallen since then, and in October dipped below 2019 levels for the first time during the pandemic period.

Access to justice has also been impacted during the pandemic by the build-up of backlogs in solemn and summary criminal business in the Scottish Courts.<sup>142</sup> Courts are now returning to normal levels of activity, however, there are other aspects of the justice system under strain, e.g. prisons are near capacity and physical distancing requirements have placed constraints on the work of criminal justice social workers.

## Public services and local democracy

Public services have needed to respond swiftly and flexibly to address the needs of individual and communities that have been most at risk during the pandemic. This has resulted in the emergence of some innovative and person-centred provision based on collaboration between services, which has overcome former barriers and provided effective support to people in need. For example, in an initial response to the pandemic, local authorities and charities supported virtually all people sleeping rough or staying in congregate shelters into self-contained accommodation.<sup>143</sup> Local authorities and community planning partners have also been at the centre of responsive local approaches, working with partners to understand the needs of communities at risk and using community hubs to provide rounded support, focused on the wellbeing of individuals, households and neighbourhoods.<sup>144</sup>

Public satisfaction with the quality of public services has also been high during the pandemic. In the last week of August, for example, 87% of people in Scotland thought the NHS was doing a good job. Satisfaction with Police Scotland among those contacting them in the first quarter of 2020-21 was 71%, where incidents were not related to COVID-19, and 60% where they were.<sup>145</sup>

The Scottish Human Rights Commission, however, have highlighted questions over whether the approach taken to the coronavirus in Scotland's care homes has been sufficient and appropriate to protect the human rights of residents and staff,<sup>146</sup> with 46% of COVID-19 deaths registered by July related to these establishments.<sup>147</sup>

### Living through the pandemic

The listening events which took part in communities in 31 local authority areas as part of the work of the Social Renewal Advisory Board tell a compelling story of empowerment in the face of adversity. The overwhelming sense in reading the records of those conversations is of communities doing what was needed to help each other, without waiting to ask for permission, and of swift, flexible responses from third sector organisations and local authorities to focus on what was needed.

*“Before now, we worked to the council’s structures around our communities and actually we learned during COVID that people want to help and want to be engaged, all of the structures around actually stopped that happening. We don’t need meetings and plans and lists.”*

*“No one person or group is in charge. I now say to my neighbours, that’s a great idea, just go do it, don’t worry if it’s allowed or not. It’s allowed. If others want to be part of it, they’ll join you. If they don’t, they’ll do something else. It’s OK.”<sup>148</sup>*

**Voices from Scotland on COVID-19’s impact**

## Communities and social connectedness

The pandemic has brought unprecedented disruption to citizens' social and community connections through the closure of most of the usual hubs for social interaction between different groups of people. Reflecting this, several measures of "social capital" fell sharply during the lockdown period.<sup>149</sup> In particular, the proportion of people who had met others socially at least once in the previous week fell from 73% at the baseline (in 2018) to 35% in July 2020, and the proportion of people who felt lonely some or all of the time rose from 21% at the baseline to 56% in July. The proportion of people who felt they had someone to turn to for help and advice also dropped steeply from 77% at the baseline to 50% in July.

Alongside the clear disruption to normal connections, there is also evidence of communities taking action to reach out and help each other in response to the pandemic. This has included neighbours providing one another with informal support, communities self-organising and an overwhelming response to requests for volunteers. A public survey for Volunteer Scotland during June found that volunteering participation increased by half during the pandemic (from 48% to 74%), with higher numbers than previously (59%) expected to volunteer post-COVID.<sup>150</sup> This picture will likely vary across different communities in Scotland. Nonetheless, a compelling story has emerged of strong community spirit in the face of adversity.

### Living through the pandemic

The Social Renewal Advisory Board Community Listening Events highlighted examples of people noticing increased care and kindness, with neighbours reaching out to each other and organising to provide help:

*"Before COVID, we didn't know our neighbours anymore, now we do. If we all checked in with our neighbours 3 doors down and 3 doors up regularly, we'd all be happier. Now I'll check on someone if I have noticed their curtains haven't been opened for a few days."*<sup>11</sup>

*"I noticed a lot of people changed their attitude towards helping others in the community, I definitely did as I helped people around me and they also helped me and my dad, people came together to help other people, this has happened in the past but the virus made people work more together and look after each other."*<sup>12</sup>

**Voices from Scotland on COVID-19's impact**

The medium and longer term impacts of the pandemic on community connection and wellbeing are uncertain. Notwithstanding the effort that many individuals and

<sup>11</sup> Social Renewal Advisory Board. Community Listening Events. 2020.

<sup>12</sup> Social Renewal Advisory Board. Community Listening Events. 2020.

organisations have made to reach out and help keep people connected, continuing restrictions mean that those efforts may not be enough to sustain wellbeing for many people. However, if the shifts in the actions of individuals, communities and public services are sustained beyond the crisis, the impact on the communities outcome could be significant.

## 5. Children, Education



### Overview

#### In Children, Education

- Rates of early immunisation and initial health visits have remained high during lockdown. On the wellbeing of children and young people, though there is some suggestion that the experience of lockdown may have held positives for some, most research indicates a generally negative impact, particularly among 12 to 14 year old girls
- Children and young people are now re-entering education with ground to catch up on as well as new procedures to adapt to in this academic year, alongside widespread concerns about lasting negative impacts on educational attainment for more disadvantaged students
- Numbers of students and the proportion of Scottish students securing places at Scottish universities in 2020 are both up from last year. However potential of widespread unemployment and a squeeze on household incomes are likely to close down higher education options for young people from poorer households. The shift to online provision is likely to reconfigure the higher and further education offer in the future, with as yet unclear impacts for equality of access

#### Related outcomes

- Educational attainment is likely to be affected for all age cohorts, though the benefits of new teaching approaches or additional provision may offset this, and the attainment gap is expected to increase given the different experiences of home schooling for children in poorer households. This could affect future labour market chances and in the longer term potentially poverty rates
- Lack of employment choice or availability and financial insecurity are perceived as key issues by young people. Disruption to education may also impact on young people's participation or make it harder to hear children's voices
- Resilience, confidence, wellbeing and happiness of children and young people may also be affected by increased family pressures and uncertainty around education and other aspects of their lives, and access to health services or healthy activities through schools may also have been impacted resulting in poorer health outcomes



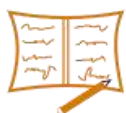
### Early years



Coverage of **health visitor first visit** and **reviews** has **remained high** for children eligible during the pandemic.

### Children

The **Children's Parliament** ran a series of surveys looking at **children's experiences of the pandemic**.



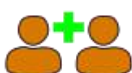
Most children **struggled with home learning**, and there was an **increase in boredom and worry about school work** as time progressed.



Most children reported **enjoying being with their family**, and **identified parents/carers** as their **greatest source of support**.



In **June**, more children reported **being lonely**, and **fewer felt positive or resilient** than in **April**.



However, **post lockdown**, children were more likely to agree that **they generally felt cheerful, and in a good mood**. There were **significant improvements** when it comes to **children reporting that they often feel lonely**.



From the survey results, **12-14 year old girls** were **more likely to feel bored, lonely or to worry about things** in their life, **than younger girls and boys of all ages**.



## Impact of COVID-19 on Education

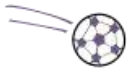


**Schools** in Scotland were **closed** from **20th March** to **11th August** 2020.

Children and young people's experience of education changed dramatically during lockdown, and they have returned to very different academic settings.



Children from **poorer backgrounds** have had **less active engagement** with teachers or school services, and **less space to learn in**. Studies of disadvantaged pupils showed that **two thirds were unable to do work during lockdown**.



Surveys of children report an **increase in levels of boredom** and a **decline in children reporting having fun things to do** in their days.



With children back at school, there is a **decline in some areas related to learner confidence** and a **positive learning environment**; **fewer children report that they enjoy learning new things**, and fewer report knowing **they can be creative** if they want to.



**Higher and further education** has seen massive changes in how they operate. The changes to blended learning **are likely to be transformative**. However, there are **concerns** from lecturers at being able to **deliver all aspects of the curriculum digitally**, as well as **barriers existing for engaging in digital learning**.



The **shift towards digital learning** will **impact different groups in different ways**. Online learning may be a **benefit for students who have fluctuating health conditions**, but **poses a challenge in making learning accessible for disabled students**.

## Early years health

Coverage of the Health Visitor first visit and six-eight week review has remained high for children becoming eligible during the pandemic, with more than 95% of babies receiving their first visit and 88-90% receiving their six-eight week review. Coverage of all other reviews fell for eligible children during the lockdown period in particular. However there is evidence of “catch-up”, with coverage improving with time, but this has still not reached the levels achieved in 2019. For the later child health reviews, which have a much longer timeframe for reviews to be delivered, particularly the four-five year review, it will take some time for final coverage to be known.<sup>151</sup>

Immunisation uptake rates have been higher nationally across the three doses of the six-in-one vaccination as well as both doses of the MMR vaccination. This is seen more markedly among children living in the most deprived areas. However it is too soon to determine whether this early improvement will translate into improved final uptake, and a reduction in health and other inequalities, when measured at later ages.<sup>152</sup>

## Wellbeing of children and young people

Scottish parent survey evidence shows that whilst some children aged between two and seven fared better during lockdown, there was a reported decline in sleep, mood, behaviour, activity levels, eating behaviour and mental wellbeing for between a quarter and nearly half of children.<sup>153</sup> Positive impacts reported include an increase in imaginative and outdoor play.

UK and international research tends to show a general worsening of mental wellbeing during the pandemic (especially anxiety, loneliness and depression), particularly for young people with pre-existing mental health problems, those living in poverty, and other disadvantaged groups such as care experienced children and minority ethnic young people. However this finding is not consistent across all sources and one survey of younger teenagers during lockdown reported improved mental wellbeing compared to the previous year (though this was not the case for LGBTQ+ students and those with a health problem or disability). There is a fairly consistent finding in Scottish surveys that the mental wellbeing of girls, particularly older girls, has fared worse than that of boys during the pandemic.

Boredom, isolation, uncertainty and lack of control continue to have an impact on many young people during lockdown, particularly disadvantaged young people. Remote schooling, an overload of screen time and limited access to outdoor play have also been cited as factors. The things that helped children and young people during lockdown were routine and structure, a sense of control in their lives, having things to do, contact with friends and the wider school community, physical activity and learning new skills.

The Children's Parliament has run surveys for 8-14 year olds in April, May, June and September on the experiences and views of children during the pandemic, it found that<sup>154</sup>:

- **On home learning:** Most children struggled with home learning and were increasingly worried about school work as time went on. Over the first three surveys, there was an increase in levels of boredom and a decline in children reporting having fun things to do in their days, although there was an improvement in these measures in the September survey
- **Relationships:** Whilst most children enjoyed being with their family, and identified parents/carers as their greatest support, these figures declined from April to June, although there was a recovery by the September survey. Most children had someone they can talk to about their worries, but a significant minority indicated that they have no one
- **Mental wellbeing:** In June, more children reported being lonely, and fewer felt in a positive mood and resilient than in April. However, post lockdown children are more likely to agree that they generally feel cheerful and in a good mood. There are significant improvements when it comes to children reporting that they often feel lonely. This is particularly so for the group of children who had reported highest levels of loneliness during lockdown, girls aged 12 to 14
- **Gender differences:** 12-14 year old girls were are more likely to feel bored, lonely, worry about things in their life, including their own health, than younger girls and boys of all ages.

The personal and social development of children and young people may also have been impacted by a period of detachment from the school environment. In particular, children's experience of Early Learning and Childcare cannot be replicated in remote learning in the same way that older children's education might be.<sup>155</sup> The closure of ELC facilities and delays to the rollout of ELC expansion during the pandemic may have longer term consequences for children who were in their early years in 2020, especially for those from poorer backgrounds who benefit more from high quality ELC.<sup>156</sup>

## Vulnerable children and young people

The number of children identified as needing child protection plans has been lower than average throughout the lockdown (and further restrictions phases) compared to an average week last year. Agencies reported that women and children faced barriers to accessing services. The proportion of children with a child protection plan who were seen by a professional in the preceding two weeks was 86-96% throughout April and May, and has been fairly steady around 97% each week since then.

Feedback from organisations working with families experiencing domestic abuse in the UK indicates an increase in referrals since lockdown has eased, with reports of some perpetrators continuing to use the restrictions as a means of controlling victims and their children.<sup>157</sup>

Many care experienced young people in Scotland lived alone during lockdown and have experienced profound isolation. The pressure placed on young carers in Scotland during the pandemic has also impacted negatively on their wellbeing and education, leaving a greater number worried about their future than before the pandemic.<sup>158</sup>

## Family life

The lockdown presented clear challenges for many parents and carers, managing home schooling and work, dealing with health issues without usual supports and experiencing associated pressure on family relationships.

### Living through the pandemic

*“My daughter sees her home as her safe space as somewhere to chill out but having to do school work at home put extra stress on her. Having me telling her what schoolwork to do and trying to get her to do the work – she didn’t want to do it – we tried doing work once a week and then in the end we had to give up as she just didn’t want to do it and was so stressed by it. She is disabled. She has always had a temper and but lockdown has heightened emotions.”*

**Voices from Scotland on COVID-19’s impact**

While some families have faced more challenges than others, particularly those living in poverty or experiencing physical or mental health issues, it does not appear to be the case that the experience of lockdown and continuing restrictions on normal life has been either all good or all bad for most families, and even those experiencing significant challenges may have found some positives, illustrated by the quote below from an asylum seeker in Glasgow.

### Living through the pandemic

*“The lockdown gave me more time to reflect on what is important and not so important in my life. I value more about family relationship and friendship. I treasure all the quality time that I spent with my 3 children and my husband. I prayed more during the lockdown and wish for a peaceful and better world. I read stories book and tell bed time stories to my children which I had never did before.”<sup>159</sup>*

**Voices from Scotland on COVID-19’s impact**

Although surveys across the UK and research by third sector organisations have reported the difficulties experienced by many parents during lockdown, there is UK survey evidence of some families growing closer during lockdown.<sup>160</sup>

## Education

Schools in Scotland were closed from 20 March and reopened on 11 August 2020. Children and young people’s experience of education changed dramatically during lockdown, and they have returned to very different academic settings. Home schooling was experienced by some 8 to 14 year-olds in Scotland as an alternative with potential benefits, while others reported less choice, fun or pride in their work and increased boredom with home schooling.<sup>161</sup>

Students from poorer backgrounds are likely to have had less active engagement with teachers or school services and less space to learn in.<sup>162</sup> Across the UK, children with their own computer whose parents both worked regularly from home with the main parent in a “service class” occupation spent on average 2.9 hours per day on school work for primary level and 3.8 per day at secondary level. Children without these advantages spent 2.3 hours at primary level and 2.6 at secondary.<sup>163</sup> A survey of 1,000 disadvantaged pupils across Scotland showed that two thirds were unable to do school work during lockdown.<sup>164</sup>

There have been additional barriers to home learning where English is an additional language or where children have additional needs. In an online survey, the proportion of parents concerned that their child would be “behind” in their learning when they returned to primary school increased from 16% in Week 1 to 25% in Week 4.<sup>165</sup>

National 5, Higher and Advanced Higher exams were cancelled and coursework could not be collected or marked by the Scottish Qualifications Authority (SQA). Instead grades were based on teacher estimates. This absence of external assessment led to a different pattern of attainment than would be seen in a normal year and means that results for 2020 should not be compared to those in previous years. The table below<sup>166</sup> shows 2020 grade A-C attainment rate.

Qualification	Grade A-C Attainment rate	
	2019	2020
SCQF Level 5: National 5	78.2%	89.0%
SCQF Level 6: Higher	74.8%	89.3%
SCQF Level 7: Advanced Higher	79.4%	93.1%

On 27 October the pupil attendance rate for Scotland as a whole was 92.5%, varying from 88% to 96% across councils. Councils with the highest levels of deprivation report consistently lower attendance on average: on 27 October, the average for the

most deprived councils was 91.5% compared to 94.2% for the least deprived councils. Rural authorities also tend to report higher attendance rates, (e.g. 94.6% average for rural authorities compared to 91.8% for urban authorities).<sup>167</sup>

## Universities and colleges

In 2020 48,820 students gained places at Scottish universities through UCAS, as at 28 days after A-level results day, an increase on the 2019 figure.

Increases in unemployment and household debt will have shaped considerations for domestic students of whether to seek or take up university places, particularly students from working class backgrounds.<sup>168</sup> In July, three in five UK students surveyed by the National Union of Students (NUS) stated that COVID-19 had some degree of impact on their income, with one in five reporting a major impact.<sup>169</sup>

The teaching awaiting this cohort will be shaped by substantial and rapid changes to how universities and colleges operate. Faced with lockdown, higher and further education delivery has been reconfigured to centre on blended online and face to face teaching, and this is seen as a template for future provision. The changes are likely to transform what further education (FE) and higher education (HE) institutions offer, as well as the student experience and staff conditions.<sup>170</sup> A third of lecturers at Scottish colleges surveyed in June by the Educational Institute of Scotland (EIS) were not confident about increased use of online learning in the coming academic year and 71% were concerned about the ability to deliver all aspects of the curriculum.<sup>171</sup>

Nearly all lecturers reported barriers for their students engaging in remote learning, while the NUS survey in July found that among students with online learning provided by their institution, 67% were able to access this sufficiently to complete their studies and 55% agreed the online provision was of good standard or quality.<sup>172</sup> It is likely that these changes will be better for some groups of students and worse for others. The Disabled Students Commission, for example, have highlighted the potential benefit to students with fluctuating health conditions of online learning happening at different times, but also the need for accessibility to be standard across all learning platforms.<sup>173</sup>



## 6. Environment, International



### Overview

#### In Environment, International

- The pandemic and societal response has resulted in short-term impacts on energy use, emissions and some kinds of air pollutants. However evidence from Scotland indicates these changes were driven by factors other than environmental concerns (e.g. having more time during lockdown, changes in routine)
- Whether any of these short-term changes are maintained and feed through into longer term environmental outcomes, are highly uncertain and depend on the evolution of the pandemic, the societal response, and whether any positive behaviour changes are maintained
- In terms of openness of public institutions, COVID-19 has significantly impacted on pre-existing means of data collection that is relied upon for decision making, performance assessment and scrutiny, however it has also underscored the value of responsive evidence
- Trust in the Scottish Government has remained relatively high through the pandemic period, and the UK has seen an increase in reputational ranking perception in 2020, when compared with some other countries
- Reductions in international travel meant prospective migrants for work or study delayed plans

#### Related outcomes

- Scotland's environment and the factors that determine it influence health outcomes through transport mode choice (e.g. active travel versus private car use) and the acute and longer term health effects of poor air quality
- A failure to respond effectively and consistently over the medium and longer term to the challenge of global climate change would have negative impacts across the National Outcomes as the habitability of the planet becomes increasingly affected
- The degree to which decision makers and those who hold them to account have access to timely, accurate and relevant data to inform policy decisions has been highlighted by the crisis, and is also relevant across all outcomes

#### More evidence

As the COVID-19 pandemic continues to progress, data on impact changes regularly. The sources below are regularly updated.

- [Scottish Government 4 Harms dashboard](#)
- [Transport Scotland travel trends and attitudes data](#)

## Impact of COVID-19 on the Environment



### Transport Patterns

During the first six months of the pandemic (March to September):



- **car traffic** dropped to 25% of 2019 levels, but had recovered to 91% of 2019 levels by the end of the period.



- **walking levels** were consistently lower than on equivalent days in 2019.



- **cycling activity** was higher than 2019 for most of the six month period.



- **bus patronage** declined sharply in March to 15% of its pre-pandemic level.



- **rail patronage** dropped in March to 8% of 2019 levels, recovering to 20% of 2019 levels after July.



- **ferry use** fell to less than 4% of 2019 levels.



- **flight numbers** fell at the start of lockdown to 10% of 2019 levels, but recovered to 40% by the end of the six month period.

### Reported Climate Change Behaviours

Interviews with people on climate change behaviours **suggest that changes caused by the pandemic** have had **knock-on effects**.

It is important to note **that factors other than concern for the environment** were **driving behaviour change**. Key factors included:



**More time** as a result of not commuting or working less.



The **influence of family** and friends.

### Outdoor Recreation

During the initial lockdown, both **daily** and **weekend measures of outdoor visits** were **higher** than may have been expected **for that time of year**.



## Energy and material use, emissions and air quality

Following the initial lockdown, electricity use in Scotland declined significantly. Since lockdown till the end of Phase 1<sup>13</sup> the average daily electricity demand in Scotland in 2020 was 16% lower than the equivalent period in 2020. While more people were working from home, this increase in domestic consumption was offset by inactivity from shutdown sectors<sup>174</sup>. The degree to which these demand reductions are sustained as the pandemic evolves, and whether they then translate to positive longer-term environmental impacts is uncertain and contingent on both the evolution of the pandemic and the societal response to it.

The pandemic has seen a surge in the consumption of certain kinds of single use plastics, including personal protective equipment<sup>175 176</sup>, which may offset some of the environmental gains resulting from reduced energy use.

The lead-in time required to provide accurate estimations of emissions for Scotland is substantial, and estimates are not yet available. On a global level, it has been estimated that the world-wide response to the pandemic has led to a reduction of both greenhouse gas (GHG) emissions and air pollutants.<sup>177</sup> However, a World Meteorological Organisation compilation of climate science<sup>178</sup> has concluded that, while overall emission reductions in 2020 will lead to a small reduction in the annual increase of GHG emissions, it will be insufficient to address global warming.

A UK estimation of air pollutants<sup>179</sup> from June 2020 suggested there had been significant changes in the emissions of air pollutants from several sectors, particularly transport, but that data was still limited. It suggested that, once weather effects are accounted for, reductions in urban environment concentrations of nitrogen oxides (NO<sub>x</sub>) were around 30-40%. A study in Scotland<sup>180</sup> also found that nitrogen dioxide concentrations were significantly lower in the 2020 lockdown period than the previous three years. However, despite substantial reduction in traffic volume during that period, concentrations of an air pollutant of particular health concern (small particulates - PM<sub>2.5</sub>) in the 2020 lockdown period were closer to those in previous years. Similar results for Scotland were found in other studies.<sup>181 182 183</sup>

## Transport patterns

Transport mode choice has a large impact on environmental outcomes. Transport (excluding international) was the largest contributor to Scottish greenhouse gas emissions in 2018, showing only a 4.9% decrease since 1990, compared to the overall trend of a 45.4% decrease.<sup>184</sup>

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<sup>13</sup> See <https://www.gov.scot/collections/coronavirus-covid-19-scotlands-route-map/> for details of Scotland's route map

The pandemic has resulted in substantial shifts in travel patterns, driven by the legally enforceable restrictions on certain kinds of travel during phases of the pandemic, advisory guidance recommending against travel, and individual behaviours and choices around avoiding some types of transport.

During the first six months of the pandemic (March to September 2020):<sup>185</sup>

- **Car traffic** dropped to around 25% of 2019 levels, but had recovered to 91% of 2019 levels by the end of the six month period. Partly as a result of changing work patterns the morning peak for road traffic has become less pronounced than before the pandemic
- **Walking** levels were consistently lower than on equivalent days in 2019, partly explained by fewer people walking to work and education and the location of counters potentially underestimating recreational walking during the pandemic
- **Cycling** activity was higher than 2019 for most of the six month period
- **Bus patronage** declined sharply in March to 15% of its pre-pandemic level. Concessionary bus travel declined rapidly also, but by the end of the six month period it had recovered to 56% of equivalent 2019 levels
- **Rail patronage** dropped in March with passengers numbers falling to 8% of levels seen in equivalent weekends in 2019. It was only after entering phase 3 of the route map in July that patronage rose above 20% of 2019 levels
- **Ferry use** fell, with CalMac and Northlink passenger numbers falling to less than 4% of equivalent 2019 levels. However as tourism reopened the numbers of cars carried increased rapidly, with CalMac carrying nearly as many cars as in 2019 and Northlink around 80% of 2019 levels
- **Flight numbers** fell at the start of lockdown to around 10% of 2019 levels. By the end of the six month period, they had increased to 40% of 2019 levels

Concerns about using public transport remain high, although appear to be decreasing. In the period 4 to 9 November 75% of people were very or fairly concerned about contracting or spreading COVID-19 while using public transport. In the period 4 to 9 November<sup>186</sup>, 92% of people have left home at least once in the past seven days, with the main trip purposes being to shop for groceries (88%) and outdoor exercise (70%).

While travel patterns clearly have changed as the pandemic has evolved, through a combination of compliance with guidance and risk avoidance behaviour, it is difficult to project to what this may mean for the future and how likely it is that potential benefits (e.g. active travel promotion) will outweigh potential risks (e.g. individuals preferring private car travel over public transport due to safety concerns).

## Reported climate change behaviours in response to the pandemic

Qualitative interviews on climate change behaviours<sup>187</sup> suggest restrictions on movement and an increase in the amount of time participants were spending at home had knock-on effects for almost every climate change behaviour. These shifts

had changed participants' travel modes, how they shopped, ate, and used resources such as water, electricity and packaging materials.

It is important to note that factors other than concern for the environment were driving behaviour change. Key factors included:

- having more time as a result of not commuting or working less (and sustaining behaviours dependent on having time)
- the influence of family and friends, concerns about safety and perceived convenience or inconvenience

Between July-August and September-October there had been an increase in driving and a decrease in walking and cycling. There had also, to a lesser extent, been some changes in public transport use and shopping habits.

These changes were largely attributed to a change in participants' routines as a result of work, school and gradual easing of lockdown restrictions. Increased driving was largely attributed to changes to working patterns, with some participants returning to work after having been furloughed, and others experiencing increased working hours as businesses had become busier with the easing of lockdown restrictions.

A reduction in walking and cycling was partly due to participants having less free time than they did earlier in lockdown; with working hours increasing and children being back at school, participants felt they now had less time on their hands. For example, one participant described having cycled more at the beginning of lockdown because *"life had slowed down"* and she had more time, but that her return to work meant that *"time is now in much shorter supply."* Where changes in behaviours had occurred, these tended to be heavily influenced by old routines being re-established, meaning less free time. Environmental considerations were typically secondary to other motivations, if mentioned at all.

## Outdoor recreation

During the initial lockdown period, a survey<sup>188</sup> found that both daily and weekly measures of outdoor visit participation were higher than might have been expected at the time of year. 34% of people took daily visits for exercise with 19% making no visits at all. Compared to the same period in 2019, 35% of the population spent more time outdoors than usual during lockdown while 43% spent less time outdoors than usual.

Women, younger age groups, families and people in good health were most likely to report spending more time outdoors. People aged 70 and over and those who were not in good health were most likely to report spending less time outdoors than usual. Levels of participation in short walks, cycling and jogging were higher than usual with people spending more time visiting local parks and woods. Visits to coastal locations

and to more remote or rural places decreased as did visits involving off-road cycling, longer walks and hillwalking.

Around half of the population (49%) expected that the amount of time they spend visiting the outdoors for leisure, recreation or exercise will be greater after lockdown than it was before.

## Open and connected

### The National Performance Framework and the UN Sustainable Development Goals (SDGs)

The National Performance Framework and its open and transparent reporting on performance is one aspect of Scotland's contribution to further trust in public organisations, and promotion of Scotland's place in the world in alignment with the UN SDGs.<sup>189</sup> The 17 SDGs and associated targets and indicators are intended to address the biggest challenges facing the planet, including climate change.

The pandemic has impacted the data collection sources relied on by the NPF (for example, through the suspension of face-to-face data collection for major population surveys and the census). However, it has also highlighted the value of different, more responsive, data sources – such as those that feature throughout this report and those that form the basis of the “Four Harms” COVID-19 dashboard.<sup>190</sup> The value of responsive data to inform decisions has been highlighted by the pandemic.

### Trust in public institutions and reputation

Since August, the proportion of people in Scotland who said they trusted the Scottish Government to work in Scotland's best interests has remained consistently high.<sup>191</sup> However there has been a gradual decline from 78% at the end of July to 66% in early December. Women are more likely than men to say they trust the Scottish Government.

The Nation Brands Index for 2020<sup>192</sup>, a measure of public perceptions of a country's reputation across six areas of national competence (culture, exports, governance, investment and immigration, people, and tourism) found that Germany retained its top position while the UK as a whole moved to second place (up from fourth, recording its best performance to date) gaining reputation on the governance, culture, people and tourism measures. In this index, a change in national ranking can be due to a changing score for that nation, or changing scores for other nations, as it is a comparative measure. Ranking changes can occur as a result of small changes in scores and a nation's rank may improve even if its overall score decreases.



## Scotland's population

Prior to the pandemic, Scotland's population was at a record high at 5.46 million (at mid-2019), with all of the growth driven by migration.<sup>193</sup> There was no natural growth with deaths outnumbering births. Population change varied across the country, and while there was a reduction in the number of council areas experiencing population decline over the year to mid-2019,<sup>194</sup> it is projected that by mid-2028 more council areas, concentrated mainly in the west and south-west of Scotland, will experience decline than in previous years.<sup>195</sup>

Whilst the impact of the pandemic on Scotland's overall population is not yet reflected in the official estimates or projections, National Records of Scotland continue to monitor how migration is changing. Early insights from Civil Aviation Authority data<sup>196</sup> show there has been widespread decline in international air travel with a reduction of over 98% in monthly passenger arrivals at Scottish airports between April to June 2020 compared to the same months in 2019.

A short term impact on international travel has been a fall in outward migration, with potential migrants forced to delay plans<sup>197</sup> and flows of seasonal migrant workers dropping sharply.<sup>198</sup> Migration to study is also expected to fall in the short term.<sup>199</sup> Universities Scotland has suggested 50% drop in the Scottish sector's intake of international students in 2020-21 as a "mid-range" estimate.<sup>200</sup> A potential future reduction in migration has the potential to disproportionately affect some areas of Scotland more than others, depending on their demographic and economic profile.

## 7. Unequal impacts across the National Outcomes

### Overview

The impacts of the pandemic have been, and are likely to continue to be, borne unequally. Unequal outcomes between different groups already existed pre-COVID, and the effects of the pandemic have worsened this.

The pandemic has produced disproportionate impacts across a range of outcomes for a number of groups. These include households on low incomes or in poverty, low-paid workers, children and young people, older people, disabled people, minority ethnic groups and women. These groups also overlap, which may compound the impacts for some.

Inequalities in household income and wealth are anticipated to increase, as is the number of households in poverty, and unequal outcomes could potentially be exacerbated across a range of other areas. These include health, employment and education outcomes, children's wellbeing, quality of and access to public services, participation in cultural pursuits and the outdoors, and the quality of local connections and support.

Scotland was already an unequal society before COVID-19 and emerging evidence suggests that COVID-19 has exacerbated many of these pre-existing inequalities. These unequal impacts have been highlighted throughout the report. This section looks at the multiple unequal impacts for particular groups of people in Scotland, including low-income households, low-paid workers, children and young people, older people, disabled people, minority ethnic groups and women.

These groups of people overlap – for example women, disabled people and those of many minority ethnicities are all more likely to be low earners – meaning that the effects will be compounded for some people. These multiple impacts may also store up future risks for some groups and have implications that will play out over the much longer term.

In addition to exacerbating pre-existing inequalities, the crisis has also created new groupings of people who are at risk of disproportionate impact (e.g. the shielding group) and groups facing particular challenges due to the social restrictions imposed in the face of the virus, e.g. people with learning disabilities or mental health conditions.

Conversely, some groups of people have been relatively less impacted by COVID-19 and others have seen some benefits. For example, some higher income households, have maintained their income while reducing their expenditure. Overall, the weight of

evidence suggests that over the medium-term, inequalities in income and wealth are likely to increase.

## Low income households

While the incomes of the poorest households have been cushioned during the crisis by the uplift in benefit payments, low income working households have suffered disproportionately from the employment effects of the crisis. Across the UK, over half of those in work and in the lowest income households had seen their work negatively affected in some way<sup>14</sup> by May 2020, compared to three-in-ten of workers in the highest income households.<sup>201</sup>

Lower income households were also more likely to be facing financial strain<sup>15</sup>, when measured in July, and were more likely than richer households to have reduced savings and increased their debt, especially higher cost debt. One in four lower income households (UK-wide) had increased their use of consumer credit, compared to just one-in-eight high-income households.<sup>202</sup> Financial strain and problem debt is also likely to increase in the future, as payment holidays end and as benefit levels are cut back (as currently planned) in April 2021. The latter is predicted to increase the number of households in poverty UK-wide next year,<sup>203</sup> affecting a range of wider outcomes linked to poverty – including health and wellbeing and children’s life chances.

Children in schools serving lower income households had less access to educational resources and less active help from schools during lockdown, and children from lower socio-economic groups spent less time on home learning, potentially resulting in a widening of the educational attainment gap in the future.<sup>204</sup> Together with the likely increases in poverty, this will affect the future life chances of children, thus storing up risks for future generations.

In addition to financial strain, lower income households are also disproportionately likely to suffer health consequences from COVID-19. People on lower incomes are more likely to have underlying medical conditions that make them more at risk of serious illness from COVID – those in the bottom three income deciles are 50% more likely to have a health condition that puts them a greater risk than those in the top two deciles.<sup>205</sup> Lower income groups are also at greater risk of suffering from depression, anxiety and loneliness,<sup>206</sup> all of which have been impacted by the pandemic.<sup>207</sup>

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<sup>14</sup> Including either being furloughed, out of work or having their hours reduced.

<sup>15</sup> Based on a composite score including assessment of current financial situation; how much of a struggle to pay for food and other necessities; how much of a struggle to pay bills and other commitments; arrears (including payment holidays) on bills and household commitments.

## Low-paid workers

Low-paid workers have also been more detrimentally impacted by the economic consequences of the pandemic. Employees in the lowest earnings group (the bottom 10% of the weekly earnings distribution) are seven times more likely than those in the top 10% to work in a sector that was shut down during the pandemic.<sup>208</sup> UK-wide survey evidence from September showed that low-paid workers were more likely than others to have either stopped working, to have been furloughed or to have lost hours and pay over the crisis.<sup>209</sup> The self-employed and people with less secure work arrangements have also suffered more from job loss or earnings reductions.<sup>210</sup>

People in low-paid jobs are also less likely to be able to work from home due to the nature of their jobs. Fewer than one in five of those in the lowest earnings group and in non-shutdown sectors are in occupations that are amenable to working from home, compared to three in four of those in the top earnings group.<sup>211</sup> Key workers are also disproportionately concentrated in lower earning groups.

This potentially exposes lower earners to either job loss, because their jobs are untenable, or to a higher risk of infection from using public transport or in the workplace. Higher death rates from COVID-19 have been seen (in England and Wales) among men and women working in social care occupations, such as care workers and home carers, among men working in healthcare professions, such as nurses, and among men in elementary jobs, such as security guards.<sup>212</sup>

## Women

Women have also been relatively more exposed to the negative economic impacts of the crisis because they are over-represented in shutdown sectors, because they earn less than men and because they have been more likely to bear the burden of additional caring responsibilities during the pandemic which can limit their employment options.

Analysis shows that mothers have been more exposed than fathers to job loss during the crisis, either as a result of the shutdown or due to an inability to keep working alongside increases in childcare responsibilities. This is particularly apparent for mothers with the lowest levels of qualification, for whom working from home is much less possible.<sup>213</sup> This risks widening gender disparities in pay and work over the longer term.

### Living through the pandemic

*"In Facebook groups I see mums asking for advice and they are working until midnight after putting kids to bed so that they can fit in their hours etc. I'm really, really worried about burnout for so many women. Because the majority of cases will be women. They have more flexible employers. They*

*work part time so are expected to do it all. They are more involved with school work etc.”*

*“It was personally difficult to be managing a work from home environment alongside personal caring responsibilities. For me, I was also supporting and organising care for my elderly mother who is affected by dementia.”<sup>16</sup>*

### Voices from Scotland on COVID-19's impact

Single mothers with low qualifications are particularly concentrated in shut down sectors<sup>214</sup> and survey data shows that single parents – overwhelmingly women – have experienced particularly large earnings losses during the crisis. The UK-wide Understanding Society survey showed that single parents' earnings had, on average, fallen by more than double the amount experienced by two-parent households by the end of April.<sup>215</sup>

Women not in locked down sectors are twice as likely as men to be key workers and four times as likely to be in health and social care, putting them at greater risk of infection in work settings. Studies have also found that mental health during the pandemic has deteriorated more for women than for men, especially among young women.<sup>216</sup>

A survey exploring people's experience of the pandemic conducted in April and May, found that women were more likely than men to be working more hours than usual, to have cut back on essential items such as food and mortgage or rent payments, to be feeling more anxious and less happy, and to be worried about their or others mental health.<sup>217</sup>

Evidence also suggests that domestic abuse incidents reported to the police went up during lockdown, although referrals to services went down during the early stage of lockdown before increasing, suggesting that access to support may have been reduced.

Qualitative evidence on the impact of the restrictions on people experiencing domestic abuse or other forms of violence against women and girls<sup>218</sup> suggested that referral rates reduced significantly during the initial weeks of lockdown and then gradually increased during later stages and throughout Phases 1 to 3<sup>17</sup>. All services reported victims experiencing significant mental health issues due to the impact of the pandemic and many observed significant increases in crisis work.

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<sup>16</sup> Close the Gap/Engender [Women, Caring and Furloughing during Covid-19](#)

<sup>17</sup> See <https://www.gov.scot/collections/coronavirus-covid-19-scotlands-route-map/> for details of Scotland's route map

## Children and young people

The majority of children of all ages missed out on attending education settings during lockdown, leading to a range of impacts, from a declining sense of fun and enjoyment of education,<sup>219</sup> to increased levels of distress, worry and anxiety.<sup>220</sup> Home schooling served children from poorer backgrounds less well,<sup>221</sup> potentially leading to longer term impacts on inequalities in attainment.

Certain groups of children faced more severe impacts from school closures, including children with special educational needs<sup>222</sup>; disabled students<sup>223</sup>; children who were previously excluded from school, groups with inconsistent attendance (such as Gypsy and Traveller children)<sup>224</sup>; and families for whom English is an additional language.<sup>225</sup> Lockdown restrictions that limited home visits, together with school and early years closures, also made it more difficult to protect at-risk children and to identify and monitor safeguarding concerns, with potentially long term consequences and a potential increase in demand for support as lockdown is eased.<sup>226</sup>

Young people across the UK have also seen a greater deterioration in their mental health during the crisis than older groups, particularly among young women. Women aged 16-24 had 16% worse than average mental health scores before the crisis, which rose to 27% in April 2020<sup>227</sup>.

Young adults in work are also disproportionately impacted by the crisis. Workers under the age of 25 are twice as likely as those over 25 to work in shut down sectors<sup>228</sup> and young people, particularly those with lower qualifications, are less likely to be able to work from home.

Young people have borne the brunt of the unemployment impacts to date – in August 2020, 526,000 people aged 16-24 UK-wide claimed unemployment related benefits, an increase of 124% from March 2020.<sup>229</sup> This year's education leavers, particularly those with lower qualifications, will also likely face long term scarring of their career prospects due to entering the labour market during a recession.<sup>230</sup>

## Older people

Older people and people with certain health conditions are more likely to experience severe symptoms and to die from COVID-19.<sup>231</sup> The greatest risk factor is age, while health conditions, such as dementia and Alzheimer's disease, heart disease, chronic respiratory diseases, cerebrovascular disease (stroke) and diabetes are all associated with increased risk of death.<sup>232</sup> Some of these pre-existing health conditions are more prevalent among people in lower income groups, contributing to the socio-economic gradient seen in the disease.



Limitations in access to healthcare during the pandemic (due to reduced or postponed services or reluctance to attend due to concerns about virus risk) will also disproportionately affect older individuals, and those from less affluent backgrounds, because of the greater use of health services by these groups.<sup>233</sup>

Survey evidence suggests that, alongside younger workers who have borne the brunt of employment impacts, older workers have also seen disproportionate negative impacts and are less likely to be working from home or expecting to do so in the future – one of the key ways in which workers can weather the crisis.<sup>234</sup>

## Disabled people

Research among disabled people in Scotland who were shielding during the lockdown<sup>18</sup> reported a range of concerns including lack of access to the support they needed, difficulties accessing food and medicine, concern about the loss of health care appointments and treatments, mental health impacts due to isolation from friends and family, and worries about coming out of lockdown.<sup>235</sup>

### Living through the pandemic

*“Most offers of help and support were through telephone helplines, excluding the deaf population who were left unable to contact people for help and support – feedback locally and nationally, the same message, that they felt even more cut off from their communities.”<sup>19</sup>*

### Voices from Scotland on COVID-19’s impact

Pre-pandemic, disabled people were more likely to experience isolation and loneliness than others and for some, social contact has reduced even further. Glasgow Disability Alliance research during lockdown found eight in 10 respondents worried about isolation and nine in 10 worried about their physical or mental health.<sup>236</sup> Many also reported barriers to accessing mental health support.

Some survey data also suggests that disabled people and people clinically at risk from COVID-19 have been more likely to face redundancy<sup>20</sup> during the crisis.<sup>237</sup>

## Minority ethnic groups

Minority ethnic groups are being disproportionately affected by the economic crisis because of their employment and household circumstances. Ethnic minorities are overrepresented among key workers, for example, and some groups, such as

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<sup>18</sup> Including both people who were shielding because they had received a Chief Medical Officer (CMO) letter and those who had not received a letter but had chosen to shield.

<sup>19</sup> Social Renewal Advisory Board. Community Listening Events. 2020.

<sup>20</sup> Including people who have already been made redundant, are in a formal redundancy process or who have had informal discussions with their employer about redundancy.

Pakistanis and Bangladeshis, are concentrated in passenger transport and food and beverage sectors, which are among those hardest hit by the crisis. UK wide analysis showed people from minority ethnic groups are overrepresented in jobs with a higher risk of exposure to COVID-19, accounting for 20% of workers in the most at risk occupations, while only accounting for 11% of the working population.<sup>238</sup>

UK-wide survey data also shows that employees from minority ethnic groups are more likely than others to have found themselves out of work as a result of the crisis<sup>239</sup> - especially Bangladeshis, who are the most likely of all ethnic groups to have lost their jobs, while Black Africans are the most likely to be working fewer hours and earning less and least likely to have been furloughed.<sup>240</sup>

People from minority ethnic groups are also particularly at risk from income shocks because they are more likely to rent than to own their homes – and so will have been less able to take advantage of mortgage holidays. Pre-pandemic, ethnic minority people were more likely to say that they were struggling financially and to be behind on bills or housing payments. Survey data (UK-wide) suggests minority ethnic people feel that they are at greater risk of falling into arrears due to the pandemic and are more concerned about being able to make ends meet.<sup>241</sup>

Minority ethnic people are also at greater risk of severe illness and death from COVID-19. Analysis by the National Records of Scotland showed that deaths amongst people in the South Asian ethnic group were almost twice as likely to involve COVID-19 as deaths in the White ethnic group, after accounting for other factors.<sup>242</sup> A Public Health England review also found that people of Black, Asian and other minority ethnic groups may be more exposed to COVID-19, due to factors associated with ethnicity, such as occupation, population density, use of public transport, household composition and housing conditions, and had a greater risk of severe infection due to more commonly having underlying health conditions that heightened risk.<sup>243</sup> Survey data also shows disproportionate impacts on mental health, for Pakistani and Bangladeshi men in particular.<sup>244</sup>

Evidence on the experiences of refugee, migrant and asylum seeking families during the lockdown also paints a picture of significant hardship, with difficulties evident across a range of areas, including employment, housing, education and health.<sup>245</sup>

## What COVID-19 may mean for Scotland's Wellbeing in the Future

This final section considers what the implications of the impacts described in the report are for the National Outcomes in the medium term – over the next one to five years.

The evidence presented suggests that COVID-19 has had, and is likely to continue to have, significant impacts across all of Scotland's National Outcomes. Progress across the NPF has largely been hindered and in some cases deeply set back. However, the depth and longevity of these impacts varies across the outcomes, and how the impacts play out in the future will depend on a number of factors including the trajectory of the pandemic and the measures put in place to control its spread; the response of businesses, public services, communities and individuals; other changes in the external environment, such as EU exit; and the policy choices that are made by governments in response.

The key medium term impacts are likely to be seen on health, economy, fair work and business, education and poverty outcomes. As described below, these are all closely related impacts, with interacting effects across these outcomes and others.

### Health

The direct and indirect health impacts of the pandemic so far are significant and this is likely to have a negative impact on health outcomes in the medium term. In particular, the impacts of reduced or paused services during the pandemic and delays in seeking health care, as well as longer waiting times in the near term future due to backlogs, is likely to mean poorer outcomes in terms of premature mortality and healthy life expectancy for some people. This will impact disproportionately on older people and people in lower socio-economic groups as they are higher users of healthcare services.

The economic impacts of the crisis in terms of unemployment will also likely impact negatively on future health, as evidence from previous recessions shows an economic downturn to have large and persistent negative effects on health and mortality, especially on mental health outcomes. Groups disproportionately at risk of job loss and in lower income households that may be less financially resilient or with pre-existing health conditions are likely to be disproportionately affected. The overall impact of these trends could be to widen unequal health outcomes.

The quality of the care experience for users of healthcare is also likely to change in the future as a result of the pandemic. The impact on healthcare staff has been enormous and it is likely that additional support will be necessary to help staff with health and wellbeing challenges.

The acceleration of digital delivery of healthcare during the pandemic has been another significant change. The volume of remote consultations using the Near Me service increased hugely during the pandemic and there is likely to be a shift to more of a “digital first” model of healthcare delivery in many areas. Evaluation of the Near Me service suggests a variety of positive effects, e.g. in terms of access, convenience and reduced infection risk, especially for people managing stable long-term conditions. There is also some, more limited, evidence of greater use of online health information during the pandemic, which could signal a greater use of self-care. Both of these trends could potentially free up in-person appointments for people who are less able to use digital services. The impacts of these changes on access to and quality of care for different people and places will be a key area to monitor in the future.

## **Economy and Fair Work and Business**

Measures to restrict the virus spread have also had a huge impact on the economy, with economic activity and output falling sharply as a result of lockdown. How quickly the economy can recover remains uncertain; recent projections suggest that output will only gradually recover back to its pre-COVID level by 2023-24.<sup>246</sup> There are also signs that the recovery will be “K-shaped” – meaning some parts of the economy recovering relatively quickly and others taking much longer. The latter include the sectors that were most exposed to the lockdown and subsequent restrictions, such as hospitality, non-food retail, leisure, tourism, the arts and air travel. Many businesses in these sectors will continue operating at reduced levels of capacity and with reduced staffing for some time to come and it seems likely that some businesses will not survive.

While the impacts in terms of unemployment have not yet shown through in official statistics, there are clear signs of negative impacts to come. Scottish Government projections suggest that unemployment could peak at 8.2% in Q4 of 2020 and remain elevated for several years, only falling back to pre-pandemic levels in 2025. Thus, in the medium term, there is likely to be unemployment and/or underemployment on a larger scale than we have seen in recent years and a depressed volume of vacancies as businesses in some sectors continue to experience subdued demand. Impacts on skills gaps are also likely, with potential skills mismatches resulting from a shift in sectoral growth patterns due to uneven sectoral and regional impacts.

Job losses and earnings reductions will be borne unevenly, with disproportionate impacts for both younger and older workers, women, ethnic minorities and people in low paid or insecure work. Some of these impacts may be long lasting, particularly for the cohort entering the labour market in 2020 and 2021. Previous evidence shows that entering a labour market during a recession has significant impacts on participation and pay for several years, more so for lower qualified young people.

Over the medium term, these impacts could increase earnings inequality and impact negatively on ethnic minority and disability employment gaps and the gender pay gap.

These challenges brought about by COVID-19 will also compound a number of existing structural labour market challenges in Scotland, such as slow productivity growth; poor quality work; inequalities in participation and earnings between regions and groups; and skill shortages and gaps. They will also combine with a number of emergent challenges shaping the future of work, including:

- advances in automation resulting in reduced demand for some types of jobs
- the demographic challenges caused by an ageing population and reduced migration
- additional economic uncertainty caused by EU Exit
- the need for economic restructuring to address the global climate emergency

The acceleration of digital technologies that we have seen as a result of the pandemic will also interplay with these trends. While future trajectories are uncertain, there could be an acceleration of digital adoption across a wider range of businesses in Scotland, including Small and Medium Enterprises (SMEs), and a much greater use of home or remote working in the medium term future. The extent and direction of the impacts on outcomes is currently unclear and much depends on policy responses, but there could be wide ranging impacts across many of the National Outcomes. For example, there could be effects on:

- business growth and productivity
- patterns of participation in the labour market and employment outcomes for different groups and regions
- changes to the relative fortunes of city centre versus small town economies
- shifts in the floorplate of businesses with much greater use of online channels
- changes to commuting and business travel patterns – with implications for transport related emissions
- changes in housing markets

## **Household incomes, poverty and attainment**

Given the disproportionate employment impacts for particular groups of workers, the weight of evidence suggests that income inequality is likely to increase – although this is also dependent upon other sources of income at the household level. Lower income households were to some extent protected from falls in income during the pandemic due to the uplift in benefit rates – but if these are reduced as planned in April 2021, analysis suggests that this will increase relative poverty UK-wide.

Increases in debt and the use of high cost consumer credit among lower income households during the crisis could also trap some households in unmanageable debt.

It is known that poverty has a range of negative consequences over the short and longer term, including on social and cultural participation, on health, on housing, on crime victimisation, on drug or alcohol use, on homelessness, on children's wellbeing and development, on educational achievement, and on future employment outcomes and hence future poverty.

The closure of educational institutions during the first lockdown in April and May affected children and young people of all ages. While some of the impacts of this on young people's mental health and wellbeing are already apparent, the potential longer term impacts on educational attainment are not yet evident. There is concern that, due to the differential experience of education during the lockdown among young people from different socio-economic backgrounds, this could increase the educational attainment gap, reducing the progress that has been made in recent years. The negative impact on household incomes in the medium term could also potentially close down higher education options for some young people. These trends could flow through into more limited employment opportunities and other life chances for the young people concerned.

## **Cross-cutting impacts**

In addition to these interacting effects of the pandemic on health, the economy, work, education and poverty, it is also possible to identify a number of cross-cutting impacts that do not relate to a specific National Outcome but have wide-ranging effects across the NPF. In some cases, the impacts are more uncertain and it is not yet clear how they will unfold in the future. These include:

- An entrenchment of inequalities
- Digital acceleration
- Changes to Scotland's international profile and outlook
- Enhanced community organising capacity and greater trust in local public bodies
- Increased uncertainty and the need for greater resilience

## **Inequality**

A key impact of the pandemic has been to exacerbate or entrench existing inequalities. Those groups that were already experiencing disadvantage have been disproportionately impacted, often in multiple ways, compounding the effects. This suggests that unequal outcomes for different groups could increase across a number of the National Indicators in the future – in particular inequalities relating to income or socio-economic status, gender, age, ethnicity and disability.



There is also the potential for inequalities to be re-shaped or for new inequalities to come to the fore, as a result of the wider changes wrought by the pandemic in the future. For example:

- There is likely to be a greater reliance on digital technologies in the future, across a range of societal areas, which will shine a greater spotlight on digital exclusion – whether from limited confidence in using technologies or from limited access to devices, connectivity or data for some groups of people or geographical areas in Scotland – and the ways that this can shape inequalities in access to employment, services and other aspects of social and cultural participation
- The impact on young people’s labour market prospects as a result of the pandemic may reinforce concerns about inequality across the generations and re-signal the importance of using a generational lens to understand some aspects of inequality
- The pandemic has seen greater prominence in public discourse of concerns about the low pay of some essential workers (such as social care workers) and limitations in access to employment rights, such as sick pay. This could potentially alter public attitudes towards these issues in the future and re-shape the opportunities for action

## Technology

Technologies have played a key role during the pandemic in helping to reduce the spread of COVID-19 and in keeping businesses and services operational during the lockdown and ongoing restrictions. As such, it is suggested that the pandemic has accelerated existing trends towards automation and the digitisation of services, systems and solutions. This can be seen across a range of different areas – from greater use of 3D printing technology in manufacturing, to new mobile and biometric applications to aid virus surveillance and control, to everyday use of digital technologies during lockdown to facilitate contact with family and friends, to work, study and learn and access services.<sup>247</sup>

The extent to which these changes are maintained and further accelerated in the future is not yet clear. This is likely to vary across different domains and will be shaped by Scotland’s policy choices. However, the effects and implications across the National Outcomes in the medium and longer term are potentially wide-ranging and multi-directional. For example:

- Accelerated digital adoption by businesses is likely to have positive impacts on business growth, productivity and resilience. This could either exacerbate or ameliorate the current divide between high and low tech businesses, depending upon how trends in take-up are supported and spread across the business base

- The shift to digital could result in higher relative growth among online businesses and those providing digital services, and could further expand the prevalence of platform business models. This may open up new employment opportunities and could also raise new issues to consider and monitor in terms of fair work
- A greater adoption of remote working across businesses and the public sector could open up more job opportunities to people who are less able to travel for work (either due to cost or time limitations). This trend could also alter the structure of regional employment opportunities in the longer run. Increased remote working could also alter commuting patterns, with potentially positive impacts on emissions from less travel
- Greater use of digital delivery of services in health and care could increase access and convenience and reduce travel time and cost for individuals. It could also reduce the amount of time needed away from work or education to attend appointments, so reducing loss of earnings for individuals and impacting positively on efficiency. A greater use of remote monitoring for people with stable long term conditions could also potentially free up in-person appointments for people less able to use digital services, and longer term could help effect a shift towards more preventative and self-care approaches, which could enhance health outcomes
- Overall, the digital shift is likely to intensify the importance placed on addressing digital connectivity and digital inclusion in policy. It will be important to understand how digital exclusion interacts with other existing inequalities. The digital shift may also spur development and innovation in digital service delivery across a range of public services and in online and blended learning, and may give rise to greater public debate about data use and ethics

### International profile and outlook

As a small, outward-facing nation, Scotland's international profile is important for its economic resilience and its policy ambitions. It is possible that the pandemic will have an impact on Scotland's international outlook and connections over the medium term, although the nature of this is as yet very unclear. At the outset of the pandemic, international travel fell dramatically due to widespread restrictions, including a sharp fall in seasonal migrants, international students, business travellers and overseas visitors. It is not possible to know at the moment how long this will last and whether there will be any significant medium to long term impacts. Much will depend on the control of the pandemic, both in Scotland and globally, as well as its economic effects.

Some external commentators have suggested that one potential future scenario as a result of the pandemic could be increased isolationism globally, resulting in more restricted international trade, stricter border controls and more limited global co-operation.<sup>248</sup> There is evidence that previous recessions have seen some countries

subsequently developing protectionist policies and discouraging inward migration. If such a scenario were to play out, this could have implications for progress against a range of Scotland's National Outcomes. For example:

- More restricted international trade could slow Scotland's economic growth, stifle innovation, and hamper economic resilience through reduced diversity in business supply chains
- Reduced international travel could impact on Scotland's cultural sector and creative industries, which rely on international collaboration and exchange, and which in turn drive international visitor flows to Scotland
- Reduced numbers of international students would impact on Scottish higher education institutions – particularly in Edinburgh and Glasgow where overseas students are predominantly located
- Reduced global co-operation could also impact detrimentally on progress towards Scotland's net zero ambitions, which rely strongly on using international influence to drive greater global ambition in tackling climate change

### **Public trust, communities and empowerment**

During the pandemic, there have been many examples of communities taking action to help people in need, including neighbours reaching out to one another to provide informal support, communities self-organising and an overwhelming response to requests for volunteers. This picture will likely vary across different communities in Scotland. Nonetheless, in community listening events across the country, a compelling story has emerged of strong community spirit and community empowerment in the face of adversity.

This has been matched by different ways of working – with Scotland's public sector, businesses, the third sector and communities, working together at pace and across boundaries, resulting in swift, flexible responses to support people at risk. Examples include the NHS Supply Chain Programme, which coordinated activity across public agencies and businesses to support the demand for personal protective equipment in the health and care sectors, and the emergence of innovative and person-centred support for rough sleepers, Gypsy/Traveller communities and for the shielding and at risk populations. Local authorities and community planning partners have been at the centre of responsive local approaches, working with partners to understand the needs of communities at risk and using community hubs to provide rounded support, focused on the wellbeing of individuals, households and neighbourhoods.

These changes have been characterised by:

- More concern over outcomes and less concern with organisational boundaries or policy silos

- Public, private and third sectors and citizens coming together to work collaboratively to provide a person-centred response to need
- Building trusting relationships with communities and empowering the people on the ground who are in closest touch with local needs
- Rapidly implementing and transforming services

The pandemic has thrown a spotlight on different ways of working and shown what has been possible in the face of overwhelming need. It is possible that, going forward, some of these changes will become embedded, as government and public services seek to apply the lessons that have been learnt in the wake of the pandemic. This could be part of a wider reshaping of the relationship between government and public services, with potentially far-reaching implications for the National Outcomes.

National Indicators relating to human rights, such as people's experiences of public services and citizens' perception of their influence over local decisions, could be impacted. More widely, if there is increased trust in public sector bodies, greater responsiveness to local needs, more holistic person-centred approaches to service delivery, and greater collaborative working across organisational or policy silos, this could also herald a greater ability to make progress across all of the National Outcomes.

### **Uncertainty and building resilience**

The COVID-19 crisis is leading to profound changes across Scotland and elsewhere but the impacts on the National Outcomes are not yet settled, and it will be important to monitor these changes to understand which will be temporary and which will become permanent structural shifts and what this means for our ability to achieve the National Outcomes. This understanding will only become possible over time.

The COVID-19 pandemic has layered additional uncertainty, on top of a range of existing uncertainties about the future. In the medium term, this may place a greater emphasis, when making policy choices, on the need to future-proof actions against a range of possible futures and to build enhanced resilience across all of the National Outcomes. This ranges from building resilience in business supply chains to withstand future global shocks to supply, to building community resilience to a range of possible future shocks by investing in civic capital and third sector capability. Over all of the National Outcomes, enhanced resilience is likely to become increasingly important.

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