

Summary

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Scotland's National Performance Framework

- The National Performance Framework (NPF) is Scotland's wellbeing framework, showing the kind of country we want to be
- Its 11 National Outcomes are aligned with the 17 [UN Sustainable Development Goals](#)
- Progress towards Scotland's National Outcomes is [reported openly and transparently on the NPF website](#)



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:

- 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

Purpose of the 2020 COVID Impact report

- The National Performance Framework (NPF) [National Indicators](#) track progress towards Scotland's 11 National Outcomes
- The time delay between data collection and publication means COVID-19 impact (e.g. from March 2020 onwards) **will not be seen for some time in the NPF indicators themselves**
- This report draws on a range of evidence, analysis and insight from beyond the NPF Indicators **to describe the impact of COVID-19 on National Outcomes to date, and suggest what it may be in the future**



Key conclusions

- The pandemic has had significant and wide-ranging impact across the **National Outcomes**, and these are largely negative, particularly in terms of health, economy, fair work and business, and culture outcomes. Progress across the NPF has been hindered and in some cases deeply set back
- COVID-19 impacts have been (and are likely to continue to be) borne **unequally**, are expected to widen many existing inequalities and produce disproportionate impacts for some groups that already face particular challenges
- However, it also highlights some positive impacts and potentially positive **future developments** that may result from experiences during the pandemic



- 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 that **some patterns will continue to be seen, including poorer health outcomes for some groups**

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**.



Economy



Fair Work & Business

Culture

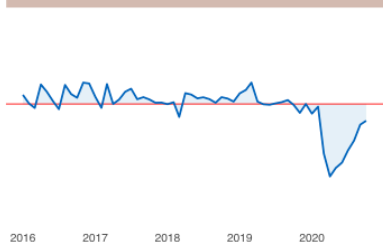


Economic Impacts of COVID-19

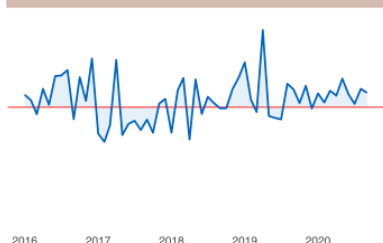


The **impact of COVID-19 on the economy** has varied from sector to sector, highlighted by differences in the Monthly Business Turnover rate.

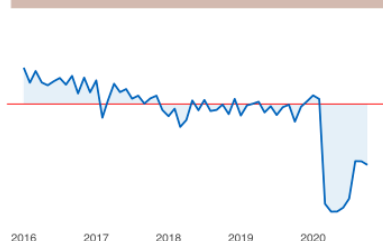
All Industries



Food Retail



Accommodation & Food Services



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.

- 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 remained 7.6% below its pre-COVID level. **The economic recovery is fragile and is expected to be gradual**
- 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, lone parents and those working in particular sectors**
- 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 could entrench inequalities in who participates in cultural, entertainment and recreation activities**



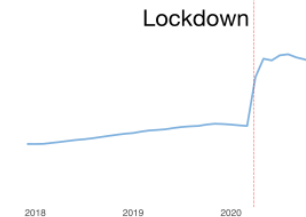
- **There is widespread concern among lower income households across Scotland about their financial situation.** This is driven by reduced income as a result of job loss, reduced working hours and furlough, and with unemployment predicted to rise in the medium term, this insecurity may accelerate
- **Personal 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**

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.



Children

Education



Impacts of COVID-19 on Children and Young People



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**.

- Children and young people missed out on education during lockdown and are re-entering education with ground to catch up. There **concerns about negative impacts on future attainment for more disadvantaged students, who saw less educational input during lockdown**
- The number of applicants securing places at Scottish universities through the Universities and Colleges Admissions Service is up this year. However, **in future years a squeeze on household incomes could close down higher education options for young people from poorer households**
- The personal and social development of children may also have been impacted by a period out of education, and the closure of early learning and childcare facilities could have long term consequences for children who were in their early years in 2020. Though there is some suggestion that the experience of lockdown may have had positives for some, **most research indicates a generally negative impact on child wellbeing, particularly among 12 to 14 year old girls**

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.



- Some positive short-term impacts on energy use, emissions and some kinds of air pollutants. However evidence from Scotland indicates climate change behaviours **were driven by factors other than environmental concerns (e.g. having more time during lockdown, changes in routine)**. Whether these changes are maintained and feed through into longer term environmental outcomes, is uncertain and depends on the evolution of the pandemic and policy response
- **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
- **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

Unequal impacts

COVID-19 impacts 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, in general, 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

What may this mean for Scotland's wellbeing in the future?

How the impacts play out in the future is not inevitable but will depend on the progress of the pandemic and the measures to control its spread, responses from organisations and individuals, and policy choices

- **Potential for a re-shaping of inequalities:** As well as the entrenchment of existing inequalities, new forms of exclusion may emerge e.g. related to the greater reliance on digital and the changing shape of the labour market. Shifts in the public discourse around inequality, low pay and employment rights for essential workers could also shape the political climate for taking action
- **Technology and digital:** Existing trends towards automation and digitisation were accelerated during the pandemic. The future may bring more digital adoption by businesses, greater use of remote working, and enhanced digital public services, opening new opportunities but also risks (e.g. around digital exclusion)
- **International profile and outlook:** International travel has fallen dramatically. Some have suggested the pandemic could increase isolationist tendencies globally, which could impact on a range of National Outcomes
- **Public bodies, communities and empowerment:** There are powerful examples of communities and public sector, private and third sector organisations in Scotland mobilising to provide support during the pandemic, particularly to the vulnerable – highlighting ways of working that could be embedded

Scotland's Wellbeing: The Impact of COVID-19

December 2020

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