

Population Needs Assessment Executive Summary 2021



Abstract Analysis from the 2021 Aberdeen City Population Needs Assessment

The Population Needs Assessment (PNA) has been prepared at a time of significant global and local challenges. The Covid-19 pandemic has led to unprecedented restrictions being placed on key aspects of our day-to-day lives. The social and economic impact will be long lasting, whilst public spending, which could help mitigate this impact, is likely to be under sustained pressure.

Key points highlighted through the PNA and related analysis are:

- ▶ **the impact of the pandemic has been, and will continue to be, felt unequally. This is likely to contribute to greater levels of poverty, inequality and associated vulnerabilities.**
- ▶ **a significant and potentially rapid decline in the working age population is anticipated.**
- ▶ **the city is projected to be amongst the worst affected areas for economic downturn and potential job losses, however, there are still strong economic foundations which can be supported by investment in key infrastructure and a focus on skills, energy transition & diversification.**
- ▶ **rapid and far reaching change is required to reach the target of net zero by 2045.**





These key points undoubtedly present both challenges and opportunities for the City, its communities and families, its businesses and public services. This is likely to see:

- ▶ a focus on enabling and building strong personal and community resilience, where people have as much control over their lives as possible and are, particularly the most vulnerable, protected from the impacts of future social and economic shocks. Supporting this resilience will emphasise:
 - physical and mental health
 - relationships and social care
 - education and skills
 - employment and income
- ▶ public services increasingly designed with, and to meet the needs, and build on the strengths, of individuals families and communities. There will be a continued focus on preventing problems and making best use of scarce resources through investing in early intervention. However, the need for immediate and direct support for the city's most vulnerable people will be high as the pandemic ends and priority will be given to ensuring they receive the care and protection they need.
- ▶ an ongoing focus on attracting people to the City and, in particular, into the local workforce.
- ▶ rapid adaptation by businesses to new conditions. This will have a specific focus within the City of energy transition, but also includes fundamental behavioural changes to how people work and shop. This will mean maximising the opportunities, where appropriate, of a digital online world.
- ▶ significant change for all of the City's people in the transition to net zero emissions. Businesses and public organisations will embrace new greener technologies and new ways of working. There will be increasing development of homes and local communities which are environmentally sustainable and designed around the connectedness and inclusion of everyone.

The impact of COVID-19 on wellbeing

The **impact of the pandemic has been, and will continue to be, felt unequally**. Those experiencing inequality and vulnerabilities are more likely to suffer the greatest negative social, economic and health impacts.

Some aspects of inequality have been directly impacted by the pandemic as a result of:-

- higher rates of underlying ill-health;
- reduced treatment and diagnosis of chronic conditions;
- higher exposure to infections of key workers;
- higher population density, houses in multiple occupation and less access to open space;
- the effect of social isolation and confinement on physical and mental health.

Previous economic shocks, such as the global financial crisis of 2008, have also led to unequal impacts on physical and mental ill health, suicide and death from alcohol and substance use. Public spending, including entitlement to benefits, can mitigate these inequalities, but will be under severe pressure.



Population Demographics

The city's population is projected to increase, but by a smaller rate than for Scotland as a whole. For the city, however, decreases are projected in the 0-15; 25-44; and 45-64 year age groups.

Combined with reduced migration from Brexit and global movement post-pandemic, this signals a significant and potentially rapid, **decline in the working age population**. The largest projected population increase (16.1%) is for those 75+ years.



Impact of Population Changes	Influences on Population Change
<ul style="list-style-type: none"> customer demand / spending in the local economy 	<ul style="list-style-type: none"> strong economy with well paid, secure jobs
<ul style="list-style-type: none"> employment in, and labour for, the local economy 	<ul style="list-style-type: none"> good housing, including affordable housing
<ul style="list-style-type: none"> infrastructure planning including housing, transportation, schools, energy, etc 	<ul style="list-style-type: none"> quality education (schools, further and higher education)
<ul style="list-style-type: none"> demand for high cost public services 	<ul style="list-style-type: none"> sufficient available and affordable childcare
<ul style="list-style-type: none"> reduced council funding both from grant funding and local revenue 	<ul style="list-style-type: none"> accessibility, mobility and connectedness
	<ul style="list-style-type: none"> attractiveness of the place
	<ul style="list-style-type: none"> good leisure and cultural amenities
	<ul style="list-style-type: none"> good public services



Aberdeen Economy

PreCovid-19, long-term economic performance of the City Region remained significantly above the Scottish and UK averages despite a downturn in, and the challenge of transition from, oil and gas. However, median gross weekly pay in Aberdeen had decreased and was lower than the Scotland average.

Since Covid-19, Aberdeen City is projected to be the **5th worst affected area in Scotland for economic downturn and 3rd worst for potential job losses**.

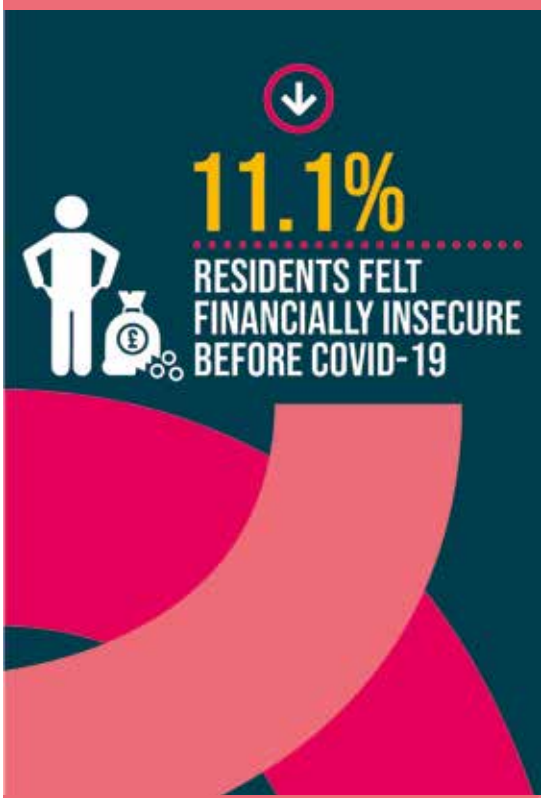
Many key aspects of the local economy, from tourism through to oil and gas, have been badly impacted and the City saw a 128% rise in unemployment claimants between March and November 2020.

The pandemic, combined with Brexit, may also see significant changes in economic behaviours such as online retail and trends towards supply chain onshoring providing both opportunities and risks to local economies.

Whilst, globally, an economic bounce is expected, historically, employment has been a lagging indicator of economic recovery.

The key conclusion of the Economic Policy Panel was that, notwithstanding the shock of the pandemic, the city has strong economic foundations and should maintain its focus on repositioning for the long-term including investment in **key infrastructure** and a focus on **skills, energy transition, and economic diversification**.





Aberdeen People

PreCovid-19, measures of relative poverty had increased, including an increase in children living in poverty. Significant differences exist in life expectancy and healthy life expectancy between the least and most deprived.

Despite significant progress in reducing the number of employees earning less than the living wage, 11.1% of residents reported having financial insecurity, compared to 8.8% in Scotland.

With Covid-19, there are significant risks that the city will experience **greater levels of poverty, inequality and associated vulnerabilities**. Since the beginning of the pandemic the number of people on Universal Credit in Aberdeen City more than doubled. Unemployment is impacting most on those with no qualifications, whilst school leavers and younger workers are likely to feel the lasting impact of the pandemic on the labour market.

PreCovid-19, the proportion of pupils in Aberdeen City achieving the expected educational levels was similar to the equivalent proportion for Scotland as a whole, however, pupils achieving qualifications varied both across geographic and demographic groups. Recent improvement had been seen in pupils achieving a positive and sustained destination.





7000
OVER 7000
NEW VOLUNTEERS
IN 2021

With Covid-19, some children and young people could feel a lasting effect. Data indicates that lockdown restrictions are likely to impact on the developmental milestones of 2 – 4 year olds. There is consensus that pupils leaving school in the coming years will be negatively impacted, and those experiencing existing inequalities are likely to be impacted most.

There is evidence of a significant rise in the number of people experiencing mental health problems, with some of the most impacted groups being children and young people; older people and others with existing vulnerabilities and / or protected characteristics.

PreCovid-19, the City had seen a fall in numbers of homeless applications and an improvement in processes for responding to these. Once the current moratorium on evictions is lifted, a surge in homelessness cases should be anticipated.

With Covid-19, over 7,000 volunteers were recruited in the early stages of the pandemic, in addition to the 80,000 people assisting volunteering in Aberdeen. There is an opportunity to sustain and build on this.





Aberdeen Place

PreCovid-19, the city's CO2 emissions had fallen over the last 15 years. There is a national and local commitment to meet the target of Net Zero Emissions by 2045 and there is a need for **rapid and far reaching change to reach this target**. This impacts industrial and domestic fuel usage; transportation; waste management; as well as challenges to social and environmental resilience such as flooding, protecting biodiversity and fuel poverty.

With Covid-19, city centres, office space and traditional retail, are likely to look different, with more online commerce, homeworking and less travel. In Aberdeen it is believed more than 40% of the workforce are in positions which can be done from home. The projected increase in the proportion of 75+ year old residents has implications not just for housing and supported accommodation, but for open spaces, including enabling mobility and providing dementia friendly environments.

Future communities will require to be efficient and self-sustaining with low energy demands; promoting healthy community lifestyles and active travel; offering housing choice and opportunities for all sectors of the community; be places where people can live, work and play without relying on private transport and designed so that residents can access schools, shops, employment opportunities within walking distance of their home.



