



Together
we will end
homelessness

The homelessness monitor: Scotland 2021

Beth Watts, Glen Bramley, Suzanne Fitzpatrick, Hal Pawson, and Gillian Young. Institute for Social Policy, Housing and Equalities Research (I-SPHERE), Heriot-Watt University; City Futures Research Centre, University of New South Wales; Newhaven Research Ltd.

September 2021



The homelessness monitor

The homelessness monitor is a longitudinal study providing an independent analysis of the homelessness impacts of recent economic and policy developments across the UK. Separate reports are produced for England, Scotland and Wales.

This year's Scotland Monitor is an account of how homelessness stands in Scotland in 2021, or as close to 2021 as data availability allows. It also highlights emerging trends and forecasts some of the likely future changes, identifying the developments likely to have the most significant impacts on homelessness.

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About Crisis

Crisis is the national charity for homeless people. We help people directly out of homelessness, and campaign for the social changes needed to solve it altogether. We know that together we can end homelessness.

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Disclaimer: All views and any errors contained in this report are the responsibility of the authors. The views expressed should not be assumed to be those of Crisis, or of any of the key informants who assisted with this work.

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Foreword

After being identified as a priority for the Scottish Government, the last few years have seen Scotland make huge progress in its journey towards ending homelessness.

The creation of the Homelessness and Rough Sleeping Action Group, followed by the publication of the Ending Homelessness Together Plan, laid out a blueprint for consigning homelessness to the past.

The work carried out by these groups, based in a shift towards quickly housing everyone experiencing homelessness into settled accommodation, represented massive steps forward for tackling homelessness. Their work was genuinely ground-breaking and set out Scotland as the first nation in Britain to have a plan to end homelessness.

As the monitor shows, this progress alongside homelessness and housing policy decisions in Scotland has led to rates of 'core' homelessness being significantly lower than England.

Overall, the report has recorded 'core' homelessness in England at 0.94% of households, compared with 0.66% in Wales and 0.57% in Scotland.

Of course, the last 18 months or so have represented an extraordinary period in our history – not just in the homelessness sector, but across all of society.

Urgent action by national and local government, as well as homelessness services, saw the numbers of people rough sleeping in Scotland fall significantly since the start of the pandemic. And whilst rates of the worst forms of homelessness are lower in Scotland, there are still many people trapped in temporary accommodation. The numbers of households living in temporary accommodation over the past year grew by 21%.

The research found that the average time spent in temporary accommodation rose from 187 days to 199 days over a year, with one in six households spending more than a year in temporary accommodation.

Meanwhile, on 31 March 2021, 3,645 households with children or a pregnant woman were in temporary accommodation across Scotland, the highest number for a decade, comprising 7,130 children.

Every one of these cases represents an injustice, with people and families left unable to move on and build a better life.

But while the numbers in temporary accommodation rose during the pandemic, the research found that 'core' homelessness was significantly lower in Scotland than in other UK nations.

Scotland continues to lead the way in its commitment to ending homelessness and plans announced by the Scottish Government to strengthen the law around homelessness prevention and consult on new duties on public bodies represent the next step in that journey.

If implemented, these proposals could make Scotland a world-leader in its journey to ending homelessness altogether.

Crisis will continue to play our part to actively support the implementation of the next phase in Scottish homelessness policy and work with others to realise the potential of meaningful reforms to end homelessness, and make sure any lessons learnt can be shared across the UK.



Jon Sparkes
Chief Executive, Crisis

Executive summary

Key points

The Homelessness Monitor series is a longitudinal study providing an independent analysis of the homelessness impacts of recent economic and policy developments in Scotland and elsewhere in the UK.¹ This fourth Scotland-focused report provides an account of how homelessness stands in 2021 (or as close to 2021 as data availability allows), and covers a period dominated by the COVID-19 pandemic, as well as intense policy activity on homelessness in Scotland. It also includes detailed modelling estimates and forward projections of extreme forms of 'core' homelessness.

Key points to emerge from this latest analysis are as follows:

- Statutory homelessness had been on a steadily rising trajectory pre-pandemic, with the number of households assessed as legally homeless having grown by 10% in the period 2016/17-2019/20. The pandemic year 2020/21 saw a year-on-year fall in statutory homeless acceptances of 13% (to 27,571), and 20% in the first quarter of 2020/21 (April-June) compared to the previous quarter. These trends were highly differentiated geographically, with reductions concentrated in East of Scotland authorities classed within the 'Edinburgh and other pressured markets' group (-19%) compared to

the 'Glasgow and Clyde Valley' group (-1%).

- The number of households in temporary accommodation had been at a stable high of 10-11,000 for the decade up until March 2019. At March 2021, the numbers in temporary accommodation stood at over 13,000, well above the previous peak of 11,665 a year previously. Temporary accommodation placements rose by 12% in Q1 2020/21 (April-June) – a trajectory that peaked in Q2 (July-September). The number of families in non-self-contained B&B or hostel accommodation increased very slightly during 2020, though remaining at historically very low levels.

- An alternative to focussing exclusively on the official administratively-generated statistics on homelessness is to utilise a variety of existing data sources to assess trends in 'core homelessness'. This relates to people in the most severe and immediate forms of homelessness (e.g., rough sleeping, sofa surfing, staying in hostels, refuges or unsuitable forms of temporary accommodation). At 2019, nightly core homelessness in Scotland is estimated to have stood at 14,250 households, having been relatively stable over the preceding seven years. Rates of core homelessness are substantially lower in Scotland (0.57% of households) than in England (0.94%) and Wales (0.66%).
- Estimates triangulating statutory and survey-based data suggest a nightly estimate of around 900 people sleeping rough in Scotland in 2019. During the pandemic it is clear that rough sleeping reduced significantly. Statutory data recording people's experiences of rough sleeping prior to presentation indicate a year on year national-level reduction in the region of 10 to 16%, but key informant views suggest reductions of greater magnitude. This disjuncture is likely explained by first, the concentration of greater falls in Glasgow and Edinburgh, and second, an increase in the scale and speed of people *exiting* rough sleeping albeit a continuation of new flow *onto* the street.
- By far the largest element of core homelessness in 2019 was its least visible manifestation, sofa surfing, accounting for more than half of core homeless individuals or households (7,920). Next in numerical importance was hostels and similar accommodation (3,320), followed by unsuitable temporary accommodation like B&Bs (1,180). The least numerous groups were those sleeping rough (900) and those staying in unconventional accommodation including in cars or tents (880).
- A range of short-term measures are modelled as being able to alleviate a post-pandemic rise – and in fact reduce – core homelessness, with the biggest potential associated with the use of rapid rehousing to settled accommodation e.g. social rehousing quotas for core homeless households, maximising prevention, implementing the Unsuitable Accommodation Order, and increased welfare benefit levels making the private rented sector more accessible. Specifically in relation to rough sleeping, the most impactful practices would be prioritised access to settled housing and continued use of the special COVID-related provision of hotel-type accommodation.
- In the longer term, large projected core homelessness reductions could be generated by rapid rehousing quotas, prevention and welfare measures, raising the Local Housing Allowance, and sustained expansion of Housing First and accompanying reduction in traditional hostel accommodation. Social housing supply increases, even when carefully targeted at the most under pressure areas, have limited beneficial effects that materialise only in the longer term, though such changes may enable others measures, particularly rapid rehousing.
- Homelessness has been a renewed policy priority in Scotland for the five-years or so preceding the COVID-19 pandemic. In 2018, the Scottish Government published the Ending Homelessness Together Action Plan, taking forward all recommendations of the Homelessness and Rough Sleeping Action Group (2017/18). The Plan received cross-party support and has been followed by two progress updates.

¹ Parallel Homelessness Monitors are published for England and Wales. All of the Homelessness Monitor reports are available from <https://www.crisis.org.uk/ending-homelessness/homelessness-knowledge-hub/homelessness-monitor/>

- Local authority Rapid Rehousing Transition Plans are a key delivery mechanism for the Action Plan and intended to chart a 5-year route away from reliance on temporary accommodation, and towards improved prevention and settled accommodation by default response to homelessness. Around half of local authorities have already made changes to social housing allocations policies as a result of these Plans, primarily increasing priority to homeless households. While the COVID-19 pandemic interrupted implementation, the Plans were seen to have supported responses to the crisis, including via enhanced partnership arrangements. Despite increases in the Scottish Government funding committed to implementation, there are concerns that the Plans remain acutely under-resourced.
- Three years into the Scottish Government and Social Bite-funded Housing First pathfinder programme, over 500 tenancies have been initiated. Although this falls short of the target of 800, this reflects the impacts of the pandemic, as well as a range of locally specific challenges setting up Housing First services. 85% of tenancies initiated have been sustained to date and there have been no evictions from programme tenancies. This year's local authority survey indicates that Housing First services are in operation in two thirds of Scottish local authorities, with their introduction planned in several more.
- The planned extension of the Unsuitable Accommodation Order to all household types has been pushed back several times in response to COVID-19. When implemented, no homeless households can lawfully be accommodated in unsuitable B&B or hotel accommodation for more than 7 days. Only a minority of responding local authorities anticipate the extension of the Order impacting on their temporary accommodation placement practice, but significant impacts are anticipated in pressured areas that rely more heavily on these forms of accommodation.
- In 2019, an independent Prevention Review Group was convened to develop proposals for legal changes to enhance and strengthen homelessness prevention. The Group recommended the introduction of new legal duties on local authorities and a wide range of public bodies, as well as changes to homelessness legislation to incentivise prevention. The proposals go further than earlier reforms introduced in England and Wales.
- The Scottish Government's response to the COVID-19 pandemic focused on accommodating people sleeping rough and decanting night shelter accommodation using hotel or other single-room accommodation. Funds were made available to trusted third sector partners with speed and minimal bureaucratic barriers. These measures were credited by key informants and some local authorities with reducing rough sleeping to unprecedentedly low levels. The inclusion of those with No Recourse to Public Funds brought a group previously hidden from services into view. Intensive multi-agency working prompted by the pandemic enabled positive engagement with those with long histories of rough sleeping and complex needs.
- In combination with enhanced safety measures in congregate accommodation, the homelessness response to COVID-19 was also seen to have kept COVID-19 infection rates to a minimum among homeless and at-risk populations. Other concerns emerged, however, regarding the wellbeing of the large number of individuals accommodated in hotels in response to the pandemic and their exposure to exploitation and other forms of anti-social and criminal behaviour. These issues were especially acute in Glasgow during the early stages of the pandemic, when insufficient on-site support was reported to have been provided to those in hotels.
- Restrictions on evictions were vital in preventing homelessness during the pandemic. The number of households citing eviction as the main reason homelessness presentation fell by 57% in 2020/21 compared to the previous year. Also ranked as highly important by local authorities were additional Scottish Government funding for Discretionary Housing Payments and the Scottish Welfare Fund. The additional £5m Scottish Government funding provided to local authorities to implement Rapid Rehousing Transition Plans in November 2020 was also valued highly.
- UK Government policy responses identified as especially important in preventing or minimising homelessness during the pandemic were the Job Retention ('furlough') Scheme, and a suite of welfare mitigations, including the temporary £20 uplift in the Universal Credit standard allowance, suspension of benefit sanctions and debt-related deductions, and raising of Local Housing Allowance rates.
- The flow of social housing lettings dropped dramatically in the early stages of lockdown. While local authorities were credited with fast adaptation to these challenges, housing associations were widely recognised to having taken a more cautious and risk-averse approach with lettings almost entirely drying up from this source for the first several months of the pandemic. Social housing lets to homeless households picked up substantially in Autumn 2020, reinforced by the rapid rehousing agenda-associated changes in allocation policies noted above.

Trends in homelessness

Rough sleeping

Estimates triangulating statutory and survey-based data suggest a nightly snapshot estimate of 900 people sleeping rough in Scotland in 2019, and broad stability in these numbers in the preceding four years or so. During the pandemic it is clear that rough sleeping reduced significantly. Statutory data recording people's experiences of rough sleeping prior to presentation indicate a year on year national-level reduction in the region of 10 to 16%. Key informants suggested that reductions had been of greater magnitude, and that rough sleeping had reached historic lows during the pandemic year. This apparent disjuncture between official data and key informant testimony likely reflects two key factors. First, falls in rough sleeping were concentrated in the city centres of Glasgow and Edinburgh, and a small number of other areas. Second, while key informants were clear that the numbers on the street at any one time were as low as ever seen in these areas in particular, largely due to swift accommodation responses in place in response to the pandemic, the 'flow' of new rough sleepers onto the street was acknowledged to have continued throughout the pandemic.

Statutory homelessness and Housing Options cases

Statutory homelessness acceptances had been on a gradually rising trajectory pre-pandemic, with the national total having grown by 10% in the period 2016/17-2019/20. In the pandemic year 2020/21, Scottish local authorities logged 33,398 statutory homelessness assessments, of which 27,571 (82%) were assessed as legally homeless. These figures represent an 11% reduction on 2019/20 levels of overall assessments, and a 13% reduction in homeless acceptances.

Downward trends in new applications and assessments during the pandemic are in contrast with increases in open applications, up 18%, and temporary

accommodation placements, up 12% in Quarter 1 2020/21 (April-June). These trajectories peaked in Quarter 2 (July-September 2020) before falling back, but still remained far above pre-pandemic levels at financial year end (March 2021).

There were substantial geographic differences in statutory homelessness trends during the pandemic, however. Significantly larger reductions in applications were seen in East of Scotland authorities classed within the 'Edinburgh and other pressured markets' group (-19%), as compared to local authorities in the 'Glasgow and Clyde Valley' (-1%).

The pandemic year also saw changes in the profile of, and factors contributing to, statutory homelessness. The number of households presenting as homeless due to the loss of rental tenancies fell by 57% in 2020/21 compared to the previous year (from 4,651 to 1,999). More modest reductions were also seen in applications precipitated by institutional discharge. Those resulting from non-violent disputes within the households or due to fleeing violence or harassment (excluding domestic abuse) increased in the pandemic year. Applications precipitated by violent or abusive dispute within the household remained broadly stable (4,811 compared to 4,845).

In terms of age and household type, reduced homelessness acceptances involving households headed by older people (aged above 50) were substantially greater than the overall norm, whereas the 18-24 aged cohort fell back much more modestly. Single adults continued to account for a large majority of accepted households and their numbers declined only slightly during the initial pandemic lockdown, while the number of households with children plummeted by 30%.

Prior to COVID-19, total temporary accommodation placements had been running at largely stable levels of 10-11,000 for the decade to 2019, following dramatic increases in the 2000s linked to the phasing out of the 'priority need' criterion.² The pandemic year saw overall temporary accommodation numbers grow by 21%, and Bed and Breakfast placements rose by 79% to stand at almost double their number a year earlier. The rise in placements seen during 2020 largely involved adult-only households.

Core homelessness

This report details quantitative analysis of 'core homelessness', which captures some of the most severe and immediate forms of homelessness. The categories captured include people sleeping rough, staying in places not intended as residential accommodation (e.g., cars, tents, boats, sheds, etc.), living in homeless hostels, refuges and shelters, placed in unsuitable temporary accommodation (e.g., Bed and Breakfast hotels, Out of Area Placements, etc.), and sofa surfing (i.e., staying with non-family, on a short-term basis, in overcrowded conditions).

We estimate that 14,250 households experienced core homelessness on a typical day in 2019, with no clear trajectory of change since 2012. Levels of rough sleeping specifically are estimated to have been broadly stable over this same period. Comparing our core homelessness analysis for other Great Britain nations, rates are substantially lower in Scotland (0.57% of households) than in England (0.94%) and Wales (0.66%).

The largest element of core homelessness in 2019 was its least visible manifestation, sofa surfing, accounting for more than half of core homeless individuals or

households (7,920). Next in numerical importance was hostels and similar accommodation (3,320), followed by unsuitable temporary accommodation (1,180). The least numerous groups were those sleeping rough (900) and those staying in unconventional accommodation including in cars or tents (880).

Our predictive models indicate that, without additional policy intervention, core homelessness would be likely to increase in 2021 before stabilising again from 2023 onwards, albeit with reductions in rough sleeping and sofa surfing offset by the higher numbers in substitute COVID hotel etc. provision. Against these projected post-COVID-19 trends, we systematically tested the impact of ten different policy changes on forecast core homeless outcomes over the short (to 2023) and longer-term (to 2031/41).

Rapid rehousing into settled accommodation, for example via social housing quotas, stands out as having the biggest impacts in reducing core homelessness on all time horizons, but notably significant impacts in the short term to 2021. Maximised prevention also performs strongly in the short as well as longer term, as does ending the use of unsuitable temporary accommodation and raising Universal Credit allowances substantially. Policies which achieve a more gradual build up to long term substantial impacts include Housing First, raising Local Housing Allowance rates to make the private rented sector more accessible, and (to a smaller extent) targeted housing supply.

The beneficial effects of extended COVID-19 related special measures and destitution related welfare measures on core homelessness overall are not very significant in the longer term after allowing for the above measures, nor (in contrast

to England) economic 'levelling up' across regions and sub-regions. The impact of boosting overall and social housing supply in areas where the pressure of need relative to supply of lettings is greatest,³ primarily Edinburgh-Lothians, does have beneficial effects although these are more modest than other policies. This is in contrast to the much more substantial positive impacts of boosting housing supply in England. More muted projected impacts in Scotland are likely explained at least in part by the generally less pressured and more affordable housing market context in Scotland, and the generally higher level of social housing stock, relets supply and new provision.

Our analysis indicates that rough sleeping is more sensitive to many of the policy scenarios, in proportional terms, than other elements of core homelessness. The policies with the biggest impacts on rough sleeping are the application of rehousing quotas for core homeless households, a proportion of which would go to rough sleepers; increasing the scale of Housing First programmes, enabling a rundown of hostel capacity; and extending the special hotel provision made in response to COVID-19 over the next four years, and then at a lower level indefinitely beyond that. Other policies with projected positive impacts are increases in Universal Credit personal allowances combined with other measures to reduce destitution including ending the five-week wait and the benefit cap, and maximising prevention.

A comprehensive and appropriately sequenced programme of measures is forecast to reduce core homelessness by 40-45% in the relatively short term (2023) and on a sustained basis, compared with what it would have been without any change in policies. This scenario would see overall core

² Fitzpatrick, S., Pawson, H., Bramley, G., Watts, B., Wood, J., Stephens, M. & Blenkinsopp, J. (2019) *The Homelessness Monitor: Scotland 2019*. London: Crisis. https://www.crisis.org.uk/media/240002/the_homelessness_monitor_scotland_2019.pdf

³ For details on the needs indicator used see Bramley, G. (2021 forthcoming) *Research on Core Homelessness and Homeless Projections: Technical Report on New Baseline Estimates and Scenario Projections for Scotland and Wales*. Edinburgh: Heriot-Watt University.

homeless 40% below the level of 2019-20. Furthermore, unsuitable temporary accommodation would go down by 95%, rough sleeping would be reduced by 63%, sofa surfing down by 38% and hostels down by 31%. There would also be large reductions in statutory homelessness.

Many, though not all, of the changes identified as impactful in reducing core homelessness are within the power of the Scottish Government, and moreover, largely consistent with the Ending Homelessness Together Action Plan. This applies, for example, to the Unsuitable Accommodation Order extension, to the pursuit of the Prevention Review Group's recommendations, to commitments on mainstreaming Housing First, and to more strongly prioritising homeless households in social housing allocations.

Economic, policy and COVID-19 impacts on homelessness

Prior to the COVID-19 crisis, the Scottish economy had experienced over a decade of weak economic growth and austerity,⁴ induced by the economic shock of the Global Financial Crisis of 2008/09 and UK Government cuts to public services and social security benefits. In the 2017-20 period, the after housing costs poverty rate in Scotland stood at 19%. While poverty amongst working age adults had been broadly stable over

the 2010s, child poverty rates have gradually increased, coinciding with social security and tax credit reforms.⁵ Austerity measures and labour market developments have deepened the severity of poverty and material deprivation experienced by people with very low incomes. Between 2010-13 and 2017-19, the proportion of people living in Scotland with an after housing cost income of less than 50% of median income grew from 12% to 14% whilst the proportion of children in severe poverty increased from 13% to 18%. Deepening poverty and inadequate social security provision have contributed to a growing problem of destitution in the UK.⁶

COVID-19 and the introduction of lockdown measures to contain the spread of the virus sent shockwaves through the economy.⁷ The Scottish economy shrank by around 10% in 2020,⁸ far surpassing the damage inflicted by the Global Financial Crisis in 2008-09. The impacts of this contraction were mitigated by unprecedented peacetime levels of fiscal support to sustain jobs, household income, and economic activity including various job 'furlough' schemes. The official unemployment rate for Scotland for the three months to February 2021 was 4.4%, just 0.7 percentage points higher than a year earlier,⁹ though the overall 2020 rate was 13.5%, 5% higher than 2019.¹⁰ The furlough scheme was also, according

to our local authority survey, crucial in mitigating homelessness risks during the COVID-19 crisis: all respondents considered it 'very' or 'somewhat' important in this regard.

Lockdown brought the housing market to a halt, whilst the wider economic dislocation brought fears of mass evictions and mortgage possessions. The UK and Scottish Governments acted to protect tenants and mortgaged owners from eviction during the pandemic by introducing compulsory and blanket forbearance on the part of landlords and mortgage lenders. For renters, forbearance relied on two main mechanisms. First, the notice period that social and private landlords must give tenants of their intention to seek eviction was generally extended to six months. Second, all grounds for eviction in the private sector were made discretionary, permitting the First-tier Tribunal to consider all factors before determining whether to issue an eviction order. Both measures will now remain in place until 31st March 2022, with the exception of notice period for cases involving antisocial and criminal behaviour, which reverted to one month in October 2020 following concerns about the impact of such behaviour on neighbours and local communities.¹¹ All responding Councils considered these measures to have been important in preventing or minimising homelessness in their area, with 90% seeing them as very important.

Official homelessness statistics for 2020/21 capture the dramatic impact of the evictions ban, with the number of homeless households assisted as a result of the ending of private and social tenancies plummeting (see above). The evictions ban may also

explain the changed profile of statutory homelessness in the pandemic year, with greater reductions in statutory homelessness among family households and older age groups likely to reflect their greater likelihood of residing in rental accommodation and protection from eviction during the pandemic. Greater reductions in more pressured areas may similarly reflect the relative importance of the private rented sector as a generator of homelessness in these parts of Scotland. The pandemic altered the statutory homeless households cohort profile in other ways too. Cases associated with disputes within the household or relationship breakdown increased somewhat, something that key informant and local authority survey respondents saw as likely to reflect the strain on informal temporary living situations during the pandemic. This may also explain the small reductions in statutory homelessness among younger age groups more likely to be staying informally with friends and family. Statutory homelessness numbers associated with domestic abuse remained steady during the pandemic, a concern given reports of an increase in domestic abuse itself during lockdown and potentially suggesting that the pandemic and lockdown measures restricted women's capacity to escape perpetrators.¹²

Resulting in part from the construction slowdown due to the pandemic, the Scottish Government failed to achieve its target to deliver 50,000 affordable homes, including 35,000 social rented homes between 2016-17 and 2020-21, delivering just over 41,000 affordable homes and just over 28,000 social homes in the target period. This nevertheless represents a rate per 1000 households far in excess of those

4 The Fraser of Allander Institute (2019) *A Guide to Scottish GDP*. FAI, Glasgow: University of Strathclyde. <https://fraserofallander.org/scottish-gdp-guide/>

5 Fitzpatrick S, Pawson H, Bramley G, Wilcox S, Watts S. (2015) *The Homelessness Monitor Scotland 2015*. London: Crisis. https://www.crisis.org.uk/media/236831/the_homelessness_monitor_scotland_2015.pdf; Fitzpatrick S, Pawson H, Bramley G, Wilcox S, Watts B, Wood J, Stephens M, Blenkinsopp J. (2019) *The Homelessness Monitor Scotland 2019*. London: Crisis. https://www.crisis.org.uk/media/240002/the_homelessness_monitor_scotland_2019.pdf

6 Fitzpatrick, S., Bramley, G., Blenkinsopp, J., Wood, J., Sosenko, F., Littlewood, M., Johnsen, S., Watts, B., Treanor, M. & McIntyre, J. (2020) *Destitution in the UK 2020*. York: JRF. www.jrf.org.uk; Bramley, G., Sosenko, F. & Fitzpatrick, S. (2018) *Destitution in the UK 2018*. York: JRF.

7 Financial Times (2021) *UK suffers biggest drop in economic output in 300 years*. February 12. Online: Financial Times. <https://www.ft.com/content/96e19afd-88b3-4e8d-bc3e-a72bd1f60d3c>

8 Scottish Government (2021) *Monthly Economic Brief: March 2021*. Edinburgh: Scottish Government. <https://www.gov.scot/publications/monthly-economic-brief-march-2021/>

9 Scottish Government (2021) *Labour Market Trends (monthly) April 2021*. Online: Scotland. <https://www.gov.scot/publications/labour-market-trends-april-2021/>

10 Scottish Government (2021) *Labour Market Statistics for Young People (16-24 year olds): Scotland and UK: Statistics from the Annual Population Survey dataset*. Online: Scottish Government. <https://www.gov.scot/publications/labour-market-statistics-for-young-people-16-24-years-scotland-and-uk---january-2020-to-december-2020/>

11 Scottish Government (2021) *Coronavirus Acts: Sixth Report to Scottish Parliament*. Edinburgh: Scottish Government. <https://www.gov.scot/publications/coronavirus-acts-sixth-report-scottish-parliament/>

12 Scottish Government (2020) *Improving Housing Outcomes for Women and Children Experiencing Domestic Abuse: Scottish Government Working Group Report*. Online: Scottish Government. <https://womensaid.scot/wp-content/uploads/2020/12/Improving-Housing-Outcomes-for-Women-and-Children-Experiencing-Domestic-Abuse-Report.pdf>

for the other UK countries.¹³

The COVID-19 crisis also restricted access to existing social rented housing, with 20% fewer permanent social lettings (36,000) made in 2020/21 as compared to the previous year. The proportion of (all) new social lettings to homeless households was, however, creeping up pre-pandemic, from 38% in 2015-16 to 44% in 2019/20,¹⁴ though lettings data for 2020/21 is not yet available to track the impacts of the pandemic on this figure. It is clear from interviews with key informants, however, that pandemic impacts on homeless households' access to social housing varied both over the course of the crisis and between local authority landlords and housing associations. While the pandemic generated immense challenges to all housing providers in re-letting empty properties and rehousing new tenants, local authorities were seen to have adapted swiftly. The response of housing associations by contrast was described as slow and cautious, and to have contributed to the backlog of individuals accommodated in emergency COVID-19 hotel placements. By autumn 2020 the position was seen to have improved significantly, with accommodation increasingly being made available to homeless households on a temporary and permanent basis.

A key recommendation from the Homelessness and Rough Sleeping Action Group reconvened in

June 2020 to review the Scottish Government's pandemic response¹⁵ was that the allocation of social housing voids to homeless households be "maximise[d]... for a limited emergency period to enable people to move on from hotels and other emergency accommodation". The report continued: "While recognising local variation, we expect this being in the region of 80-90% or more during Phases 2 and 3 of the Scottish Government's route map through and out of the coronavirus response".¹⁶ The Scottish Government did not ultimately endorse this specific numerical target in its latest Action Plan Update, following strong resistance from local authorities and Registered Social Landlords.¹⁷ Key informants had mixed views on the proposed numerical target and the Scottish Government's failure to pursue it. However, it was perceived that due to both pre-pandemic policy and specific pandemic-related drivers, the trajectory is towards increasing social housing allocations to homeless households.

The pandemic prompted rapid shifts in responses to homelessness in Scotland. The immediate focus was on supporting rough sleepers and those occupying 'shared air' night shelter accommodation. In March 2020, the Scottish Government made £1.5m available to third sector organisations, and Rapid Rehousing Welcome Centres were established in Edinburgh and Glasgow to replace previous shelter provision. The crisis response was inclusive of those facing

homelessness with No Recourse to Public Funds, and newly drafted guidance, emergency legislation and top-up funding to relevant third sector organisations ensured that this group had access to accommodation, support and healthcare during the pandemic. The crisis context also occasioned a step-change in multi-agency working that enhanced services capacity to engage and assist those with long histories of homelessness and complex needs.

The overall speed and efficiency of the Scottish Government's response, and their focus on empowering trusted organisations and frontline workers, drew praise from key informants. These measures were also seen by key informants to have dramatically reduced rough sleeping, though reductions reported in statutory data were more modest. This disparity may reflect the geographical scope and 'inflow' focus of the statutory data, whereas key informants' comments largely focused on the 'stock' of rough sleeping in the city centres of Glasgow and Edinburgh. The move away from dormitory style night-time only shelters during the pandemic was universally welcomed by key informants, and has prompted the development of a route-map charting an end to the need for night-shelter and hotel provision as a response to homelessness,¹⁸ an ambition now officially adopted. Pandemic responses also prompted an abrupt end to Glasgow City Council's longstanding

failure to meet its statutory duty to offer temporary accommodation to all those entitled to it.¹⁹ Serious concerns were raised, however, regarding the wellbeing of the large numbers of people²⁰ accommodated in hotels in response to the pandemic, issues that were identified as especially acute in Glasgow in the early stages of the pandemic due to insufficient support provision. Concerns were also voiced by several key informants regarding the pace of move on from emergency hotel accommodation, especially in the early stages of the crisis.

Supportive wider changes to welfare policy were also vital in protecting homeless people and other low-income groups during the public health emergency. The Scottish Government's boost to the 2020/21 Discretionary Housing Payment and Social Welfare Budgets were highly valued by local authorities, with almost all survey respondents (28 and 27 out of 29, respectively) describing these as important in minimising or preventing homelessness. Key informants were scathing about the inadequacy and poor design of the Scottish Government's Tenants Hardship Loan Fund intended to assist those ineligible for other forms of support to pay rent, with Fund data revealing very low award levels.²¹ In response to low take-up, the Scottish Government announced grant fund to support households struggling to pay their rent as a direct result of the pandemic in June 2021.²²

13 Scottish Government (2021) *Housing statistics quarterly update: June 2021*. Edinburgh: Scottish Government. <https://www.gov.scot/publications/housing-statistics-scotland-quarterly-update-2/pages/8/>

14 Calculated from Annual Return on the Charter data from the Scottish Housing Regulator.

15 Scottish Government (2020) *Ending homelessness together: Updated Action Plan - October 2020*. Online: Scottish Government. <https://www.gov.scot/publications/ending-homelessness-together-updated-action-plan-october-2020/>

16 Homelessness and Rough Sleeping Action Group (2020) *Tackling Homelessness in Scotland following the Coronavirus Pandemic - Recommendations from Homelessness and Rough Sleeping Action Group*. Online: Scottish Government. <https://www.gov.scot/binaries/content/documents/govscot/publications/corporate-report/2020/07/homelessness-and-rough-sleeping-action-group-final-report-tackling-coronavirus/documents/harsag-final-report-on-homelessness-after-coronavirus/harsag-final-report-on-homelessness-after-coronavirus/govscot%3Adocument/HARSAG%2BCovid%2Bfinal%2Breport.pdf>. p.11

17 Scottish Government (2020) *Ending homelessness together: Updated Action Plan - October 2020*. Online: Scottish Government. <https://www.gov.scot/publications/ending-homelessness-together-updated-action-plan-october-2020/>

18 Ibid.

19 Scottish Government (2018) *Homelessness in Scotland 2017-2018*. Online: Scottish Government. <https://www.gov.scot/publications/homelessness-scotland-2017-18/>; Scottish Housing Regulator (2018) *Housing people who are homeless in Glasgow*. Online: Scottish Housing Regulator. <https://www.housingregulator.gov.scot/landlord-performance/national-reports/thematic-work/housing-people-who-are-homeless-in-glasgow>; Shelter Scotland (2017) *Evidence of Gatekeeping in Glasgow City Council*. Online: Shelter Scotland. https://scotland.shelter.org.uk/professional_resources/policy_library/evidence_of_gatekeeping_in_glasgow_city_council

20 Although Scottish Government did not collect separate data on the numbers accommodated on this basis, key stakeholders reported that around 600 people were accommodated in emergency hotels in Glasgow alone at the peak.

21 Scottish Parliament (2021) *Official Report of Meeting of the Parliament: Thursday 20 May 2021- Covid-19 (Protection from Eviction)*. Online: Scottish Parliament. <https://www.parliament.scot/api/sitecore/CustomMedia/OfficialReport?meetingId=13228>

22 Scottish Housing News (2021) *Scottish Government announces £10m grant fund for tenants in arrears due to COVID-19*. 23 June. Online: Scottish Housing News. <https://www.scottishhousingnews.com/article/scottish-government-announces-10-million-grant-fund-for-tenants-in-arrears-due-to-covid-19>

The UK Government's £20 per week uplift in the Universal Credit standard allowance (which ends in September 2021) was identified as important by 25 of 29 local authority respondents, with very high proportions also ranking as important the suspension of benefit sanctions in the early stages of the pandemic (23), the increase of Local Housing Allowance caps to the 30th percentile (23) and the suspension of debt-related benefit deductions (22).

Addressing homelessness has been a renewed policy priority in Scotland for a number of years pre-pandemic. In 2017, "a clear national objective to eradicate rough sleeping in Scotland and transform the use of TA"²³ was announced, alongside associated funding (the £50 million EHT Fund) and the appointment of a short-life Homelessness and Rough Sleeping Action Group to advise on how to achieve these aims.²⁴ In 2018, the Scottish Government published the Ending Homelessness Together High Level Action Plan,²⁵ taking forward all of the Group's recommendations, including on 'rapid rehousing', Housing First, a new prevention duty on public authorities, and several changes to existing homelessness legislation including to the Unsuitable Accommodation Order.²⁶

A key mechanism for the delivery of the Action Plan has been the development and implementation of

5-year Rapid Rehousing Transition Plans by all local authorities. Key stakeholders were generally positive about the implementation of plans to date and prospects for further progress. More than half of local authority survey respondents (15 of 29) reported that Plans in their area had led to alteration of social housing allocations policies, with changes anticipated in the near future in seven more. In most cases, these adjustments involved increasing quotas or targets for the proportion (or number) of social housing lettings for allocation to homeless households. The key concern to emerge from this study in relation to the implementation of Rapid Rehousing Transition Plans relates to resourcing. Recognising the shortfall between requested funds and allocated budget in the first tranche of Plans, and again in response to the pandemic, the Scottish Government has increased allocated funding. The associated £5 million 2021/22 funding uplift was acknowledged as an important element of the COVID-19 response by most local authority survey respondents (24 of 29). Nevertheless, there was a common view that Plans remain significantly under-resourced.²⁷

More than a third of local authority survey respondents (11 of 29) reported that the COVID-19 pandemic had negatively impacted local implementation of Rapid Rehousing

Transition Plans.²⁸ The most frequently cited challenges were the need to cope with increased demand for temporary accommodation during 2020/21; additional pressure on staff members due to pandemic-induced workload stress; and reduced ability to rehouse households out of temporary accommodation due to diminished social housing letting activity. On the other hand, having Rapid Rehousing Transition Plans in place supported homelessness responses to the pandemic according to most local authority survey respondents (20 of 29), not least as a result of improved partnership arrangements in place their development.

Over half (17 of 29) of local authority survey respondents reported Health and Social Care Partnerships making a positive contribution to the prevention and/or alleviation of homelessness, almost double the number in our 2018 survey (8 of 28). This progress is likely to reflect the dual drivers of Rapid Rehousing Transition Plans development and the impacts of the COVID-19 pandemic. However, a third of local authorities nevertheless reported that Health and Social Care Partnerships have had little impact on their ability to prevent and/or alleviate homelessness, and some noted this as a barrier to progressing the rapid rehousing agenda.

Three years into the Housing First pathfinder programme, over 500 tenancies have been initiated. This falls short of the original target of 800, in part as a result of the pandemic but also because of a range of local challenges setting up Housing First services. Of the tenancies started, 85% have been sustained to date and there have been no evictions

from the programme so far.²⁹ Key informants were generally positive about the Pathfinder programme, noting that all areas involved have all voiced intentions to continue provision despite the tapering down of the Scottish Government funding. This year's local authority survey indicates that Housing First services are in operation in two thirds of Scottish local authorities, with their introduction also planned in several more. Positive impacts include tenancy sustainment, wider benefits to tenant choice and control of tenants, and gains on partnership working. At the same time, there are ongoing challenges in relation to resourcing, access to housing, levels of buy-in from non-housing partners, and maintaining programme fidelity, concerns also raised in relation to the Pathfinder programme. In March 2021, the Scottish Government's 20-year housing strategy articulated an aim for "Housing First to be the default option for people with multiple and complex needs".³⁰ In the same month, Homeless Network Scotland published a ten-year national framework to start up and scale up Housing First in Scotland. Notably, the Housing First approach was endorsed by all political parties in the 2021 Holyrood election.

Following recommendations from the Homelessness and Rough Sleeping Action Group, in 2017 the Unsuitable Accommodation Order was amended to extend restrictions on the use of hotels and Bed and Breakfasts for pregnant women or families with children to a maximum of 7 days to all household types. The new Order, however, had not yet come into force at the onset of the pandemic, and its implementation was subsequently delayed. At the time of writing

23 Scottish Government (2018) *A Nation with Ambition: the Government's Programme for Scotland 2017-2018*. Online: Scottish Government. <https://www.gov.scot/publications/nation-ambition-governments-programme-scotland-2017-18/>

24 HARSAG published four reports over the course of 9 months, containing 70 recommendations, all of which were accepted in principle by the Scottish Government. HARSAG's first set of recommendations, published in November 2017, aimed to "reduce rough sleeping during winter 2017/18", and were designed for immediate implementation. Its two subsequent reports focussed on "how to eradicate rough sleeping", and on "ways to transform TA", published in March and May 2018 respectively. See <https://www.gov.scot/publications/homelessness-and-rough-sleeping-action-group-final-report/>

25 Scottish Government (2018) *Ending Homelessness Together: Action Plan*. Online: Scottish Government. <https://www.gov.scot/publications/ending-homelessness-together-high-level-action-plan>

26 Scottish Government (2020) *Ending Homelessness Together: Annual Report*. Online: Scottish Government. <https://www.gov.scot/publications/ending-homelessness-together-action-plan-annual-report-parliament/>; Scottish Government (2020) *Ending homelessness together: Updated Action Plan - October 2020*. Online: Scottish Government. <https://www.gov.scot/publications/ending-homelessness-together-updated-action-plan-october-2020/>

27 The Salvation Army (2021) *Homelessness in Scotland: Research for The Salvation Army*. Online: The Salvation Army. <https://www.salvationarmy.org.uk/sites/default/files/resources/2021-03/TSA%20Report%20Homelessness%20in%20Scotland%20FINAL%20%28Full%29.pdf>

28 Ibid.

29 Housing First Scotland (2021) *Housing First Tracker: Progress to May 2021*. Online: Homeless Network Scotland. <https://homelessnetwork.scot/wp-content/uploads/2021/06/HF-Scotland-Monthly-Tracker-MAY-2021.pdf>

30 Scottish Government (2021) *Housing to 2040*. Online: Scottish Government. <https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2021/03/housing-2040-2/documents/housing-2040/housing-2040/govscot%3Adocument/housing-2040.pdf>. p. 53

provisions are intended to come into force in September 2021. There was a consensus among key informants that the extension of the Order to all households was a positive and highly significant shift, but opinions were divided on the justifiability of delays to its implementation. These delays have been heavily criticised by Shelter Scotland and a group of Members of the Scottish Parliament,³¹ as well as a small minority of key informants in this study. The delays were strongly defended by statutory sector key informants, with most voluntary sector participants sympathetic to the need for the delays given challenges associated with the pandemic response. Only nine local authority survey respondents anticipated that the extension would pose funding and resourcing challenges, with a key concern being local authority capacity to sufficiently scale back Bed and Breakfast placements that had expanded due to pandemic period demand pressures.

Further changes to homelessness policy and practice look set to reshape the landscape in the coming months and years. Key among them is a planned long-term move away from night shelter provision³² and related and highly significant plans to continue improved responses to

those experiencing homelessness who have No Recourse to Public Funds.³³ Most significant are plans to introduce new homelessness prevention duties on local authorities and a range of wider public bodies.³⁴ The proposals thus represent a radical reshaping of the legal duties owed to homeless or at risk households that go further than preceding reforms in England and Wales, in particular with regard to requiring co-operation from other public bodies. Key informants and local authority survey respondents were in general positive about the Group's recommendations and almost all local authority survey respondents identified aspects of the proposals that would work well in their locality, albeit with half identifying aspects that would be challenging. The emphasis on improved joint working and obligations on wider public bodies was especially welcome, though concerns were voiced about the practicalities of implementing both a six month prevention duty and new duties on wider public sector bodies.

Conclusion

Two core themes dominate this edition of the Homelessness Monitor Scotland. First, the catastrophe of the COVID-19 pandemic forced renewed reflection on the shape of homelessness services in Scotland. The legal protection owed to homeless households in Scotland is world- and UK-leading in its generosity and inclusiveness, and this is reflected in the relatively modest scale and geographic concentration of required crisis response to the most acute forms of homelessness. The pandemic nevertheless shone a light on the continuing reliance on night shelters in Edinburgh and Glasgow, the inadequacy of support (driven by UK policy) available to those with No Recourse to Public Funds, and the ample room for improvement in collaboration and joint working between local authorities and wider stakeholders. The pandemic also reinforced a key message running through the Homelessness Monitor reports, namely the central importance of policy as a driver of both the scale and profile of homelessness.

Second, this edition of the Monitor has offered an opportunity to assess initial progress against the Scottish Government's radical transformation agenda on homelessness. The verdict is primarily positive, not least in relation to early progress implementing the rapid rehousing agenda, scaling up Housing First, and the prospect of progressing legal reforms to improve statutory protections for households at risk of homelessness. The scale of, and resources required to effectively implement, the rapid rehousing agenda have been starkly underlined. Our projections analysis

reveals the enormous potential in Scotland to reduce statutory and core homelessness, including rough sleeping, by historically significant degrees if the right policy levers are effectively pursued, sequenced and resourced, even within the constraints of the current devolution settlement. The next Scotland Monitor will provide an opportunity to assess the Scottish Government and wider homelessness stakeholders' record in fulfilling this potential.

31 Shelter Scotland (2021) *Scottish Government Back-tracks on Homeless Protections*. 14 Jan. Online: Shelter Scotland. https://scotland.shelter.org.uk/media/press_releases/scottish_government_back-tracks_on_homeless_protections; Scottish Parliament (2021) *Unsuitable Accommodation Order*. Motion ref. S5M-23862. 15 Jan. Online: Scottish Parliament. <https://www.parliament.scot/chamber-and-committees/votes-and-motions/votes-and-motions-search/S5M-23862>

32 Everyone Home Collective (2020) *Route-Map 1: Ending the Need for Night Shelter & Hotel Room Provision*. Online: EHC. <https://www.everyonehome.scot/pdf/route-map.pdf>; Scottish Government (2020) *Ending homelessness together: Updated Action Plan - October 2020*. Online: Scottish Government. <https://www.gov.scot/publications/ending-homelessness-together-updated-action-plan-october-2020/>

33 Everyone Home Collective (2020) *Route-Map 1: Ending the Need for Night Shelter & Hotel Room Provision*. Online: EHC. <https://www.everyonehome.scot/pdf/route-map.pdf>; Scottish Government (2021) *Ending Destitution Together A Strategy to Improve Support for People with No Recourse to Public Funds Living in Scotland: 2021-2024*. Online: Scottish Government. <https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2021/03/ending-destitution-together/documents/ending-destitution-together-strategy-improve-support-people-no-recourse-public-funds-living-scotland-2021-2024/ending-destitution-together-strategy-improve-support-people-no-recourse-public-funds-living-scotland-2021-2024/govscot%3Adocument/ending-destitution-together-strategy-improve-support-people-no-recourse-public-funds-living-scotland-2021-2024.pdf>

34 Scottish Government (2020) *Ending homelessness together: Updated Action Plan - October 2020*. Online: Scottish Government. <https://www.gov.scot/publications/ending-homelessness-together-updated-action-plan-october-2020/>

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