



STATE OF THE NATION



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INTRODUCTION

Each year we produce our State of the Nation report, charting progress towards gender equality in Wales. Organised around our three strategic priorities of women in the economy, women represented and women at risk, the statistics presented in this report allow us to understand how close we are to achieving the gender equal Wales we need.

Yet again we are publishing the State of the Nation report in the midst of a crisis. The cost of living crisis has swiftly followed the Covid-19 pandemic, and like many previous crises, the effects of this one are already disproportionately impacting women. This is not the result of bad luck, it is the result of the persistent inequality that this report shines a spotlight on. Women's inequality in the economy and the labour market leaves them more vulnerable to economic shocks.

As prices rise, women's lower wages means they feel the squeeze on incomes even more acutely. Women's underrepresentation in decision-making positions makes it less likely that women's experiences and needs will be considered as support packages to deal with the cost of living crisis are developed. Women's already higher risk of poverty leaves them more likely to fall further into financial hardship and to go without in order to cover essential costs. And, already the cost of living crisis is being used as a tool of coercive control and means to trap women in abusive relationships.

Without action to address this underlying inequality, the next crisis will more than likely also hit women hardest. As will the one after that, and the one after that.

This year marks the fifth State of the Nation report, and alongside the annual update presented in this report, we have also produced a report looking at the past five years to determine whether we can identify any trends in the data. The annual data, read in conjunction with the five year report, demonstrate a disappointing lack of change.

Since last year, women's position in the economy has changed marginally. The national gender pay gap has reduced, but continues to vary quite significantly across different parts of Wales. The gender gap in economic activity rates has widened slightly, and we see much larger gaps for women aged 20-24 and 50-54. The economic outcomes for ethnic minority women and disabled women continue to lag behind that of white women

and non-disabled women. Positively, the unemployment rate for women has dropped.

In terms of women's representation, we saw an increased proportion of women elected as local councillors in the elections in May 2022, up to 36%. There is still work to do ensure that this leads to more women in leadership in local government, as just 18% of leaders are women. In business, women are still less likely to be working in sectors such as construction and manufacturing, and the proportion of women in Information and Communication has fallen.

Women's risk of violence, harassment and poverty remains high. Despite data challenges we can see that women remain much more likely to

experience domestic violence, to feel unsafe in public spaces and to live in households at risk of poverty.

Fixing the data issues around violence and harassment must be a priority to ensure we can accurately understand women's experiences and determine whether any progress is being made. It's also clear that specialist services are under immense financial pressure, while demand for support is increasing. Urgent action is needed to ensure that women can access the support they need, when they need it.

The cost of living crisis and the challenging fiscal context we find ourselves in both pose a major risk to progress towards a gender equal Wales. Given the pace of change is already very slow, we must not only push for further progress at a much

accelerated rate, but also be vigilant that we do not stall, or even worse roll backwards.

Each year we find ourselves repeating the same message as we publish State of the Nation; that we need renewed focus, resource and commitment to driving meaningful change, and that we must increase the pace at which gender gaps are being closed. We will continue to produce our State of the Nation report and to repeat this message for as long as it takes to achieve equality for all women in Wales. The past two years, which have so clearly highlighted the cost of inequality, should be the wakeup call we all need to change what we're doing and how we're doing it.

INTERSECTIONALITY

When we talk about achieving gender equality we are unequivocal that this means equality for all women in Wales. To achieve this, we need to focus on the most marginalised first; the women who face the greatest barriers and disadvantage. An intersectional approach is key to being able to do this.

Intersectionality is complex. It means recognising the way in which power structures interact with each other and create inequalities, discrimination and oppression. It means understanding how characteristics such as gender, race, sexuality, disability, class, age and faith can interact and produce often multiple experiences of disadvantage. It's not simply a case of adding together different experiences. A Black woman's experiences will differ from those of a White woman and a Black man, precisely because

of the way that gender and race interact and shape their experiences, opportunities and outcomes.

This complexity should not prevent us from taking an intersectional approach. We know that data can be a challenge, particularly in Wales where sample groups can be small. The work of the Welsh Government's Equality Data Units will be important in helping to address this issue, and encouraging the use of both quantitative and qualitative evidence by policy-makers.

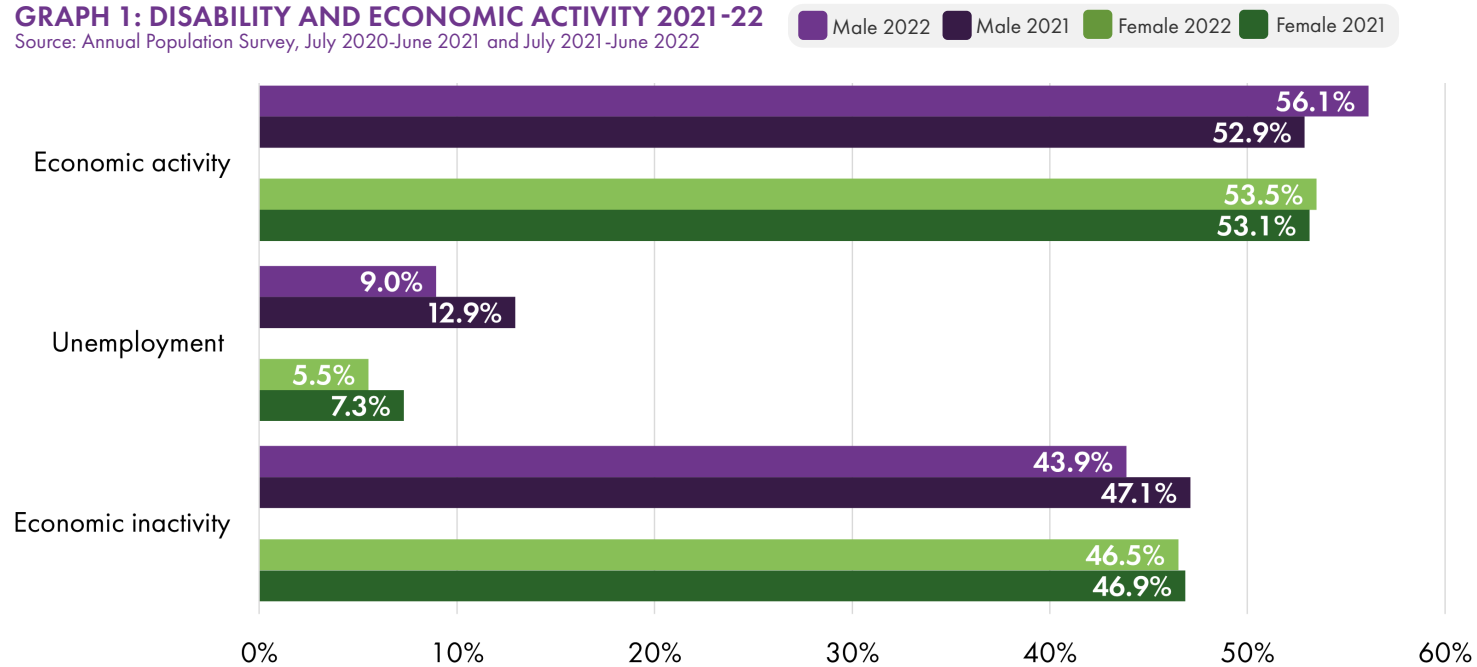
Below we set out some of the key economic indicators, disaggregated by gender and ethnicity and gender and disability. We see that outcomes for ethnic minority women and disabled women are still worse than those of White women and non-disabled women.

Worryingly, the unemployment rate for ethnic minority women has again increased, now reaching 10.4%. This is something that needs to be understood and addressed.

As we round off five years of State of the Nation, we will also be reviewing our use of data, to determine whether further intersectional data can be included in annual reports going forward.

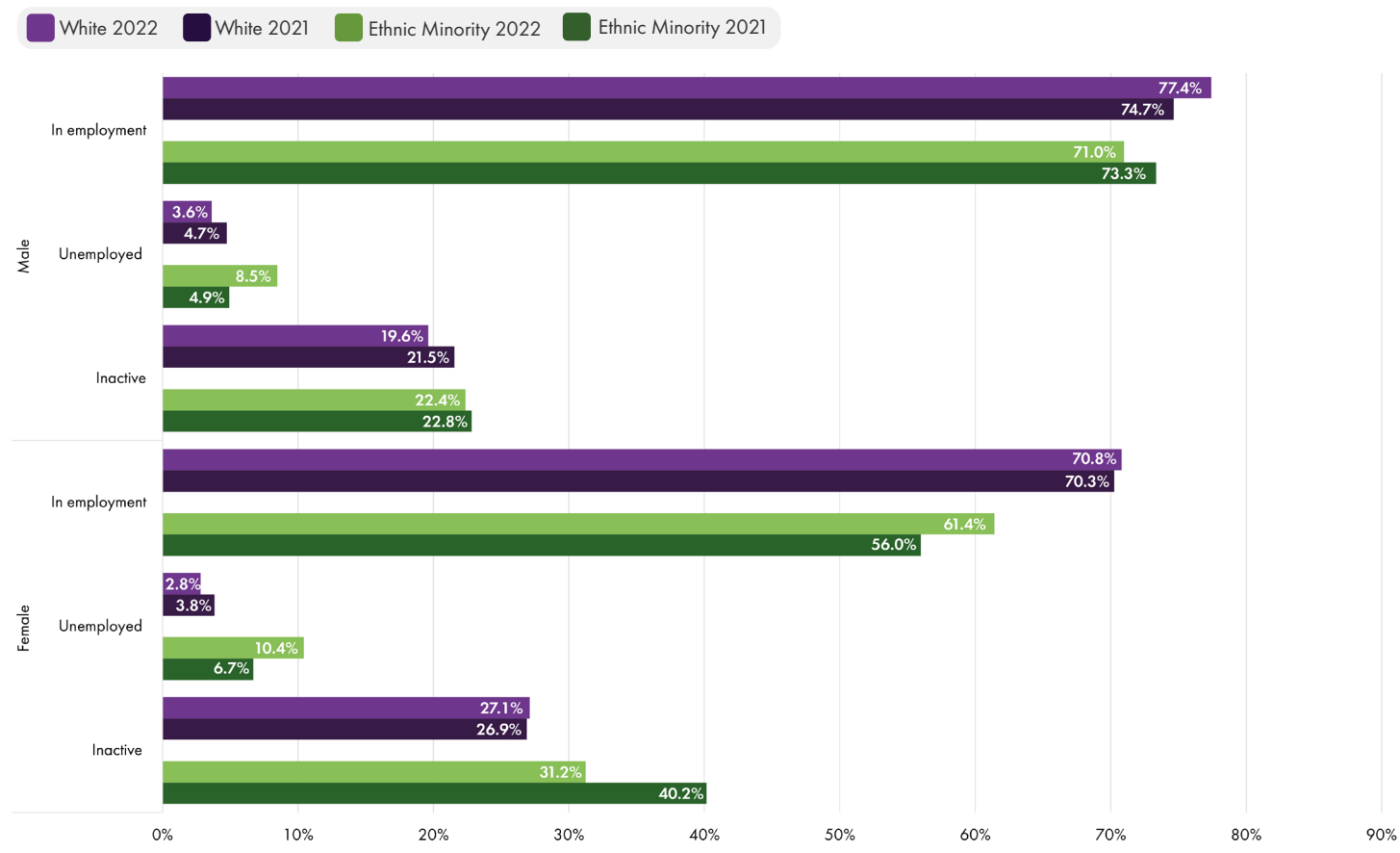
GRAPH 1: DISABILITY AND ECONOMIC ACTIVITY 2021-22

Source: Annual Population Survey, July 2020-June 2021 and July 2021-June 2022



GRAPH 2: EMPLOYMENT STATUS BY GENDER AND ETHNICITY

Source: Annual Population Survey, July 2020-June 2021 and July 2021-June 2022





WOMEN IN THE ECONOMY

Gender gaps remain common across our economy. These are rooted in the different roles, sectors, occupations and job types that women are more likely to be employed in, which in turn is shaped by the greater pressure women often face due to caring responsibilities. Covid-19 presented significant challenges to women's engagement with paid employment, and while in most areas we have recovered to pre-pandemic levels, these were far from equal.

The persistent inequality in our economy is a key factor that leaves women more vulnerable to the impacts of the current cost of living crisis. On average women are still paid less, are more likely to be economically inactive and more likely to work part-time. This means the squeeze on

incomes is likely to be felt much more acutely by women.

Since last year we have seen some marginal changes. Overall, the gender pay gap for all workers (i.e. full and part time workers) has reduced in Wales to 11.3%. However, the gender pay gap varies significantly across Wales, and we did see an increase in the gender pay gap for full-time workers only over the past twelve months, up from 4.9% to 6.1%.

There has been little change in the economic activity rates of women and men, although the gap has widened slightly since last year. The largest gaps in economic activity are for those aged 20-24 and 50-64. Women remain much more likely to cite looking after family or home as

the reason for being economically inactive, although the gap has reduced.

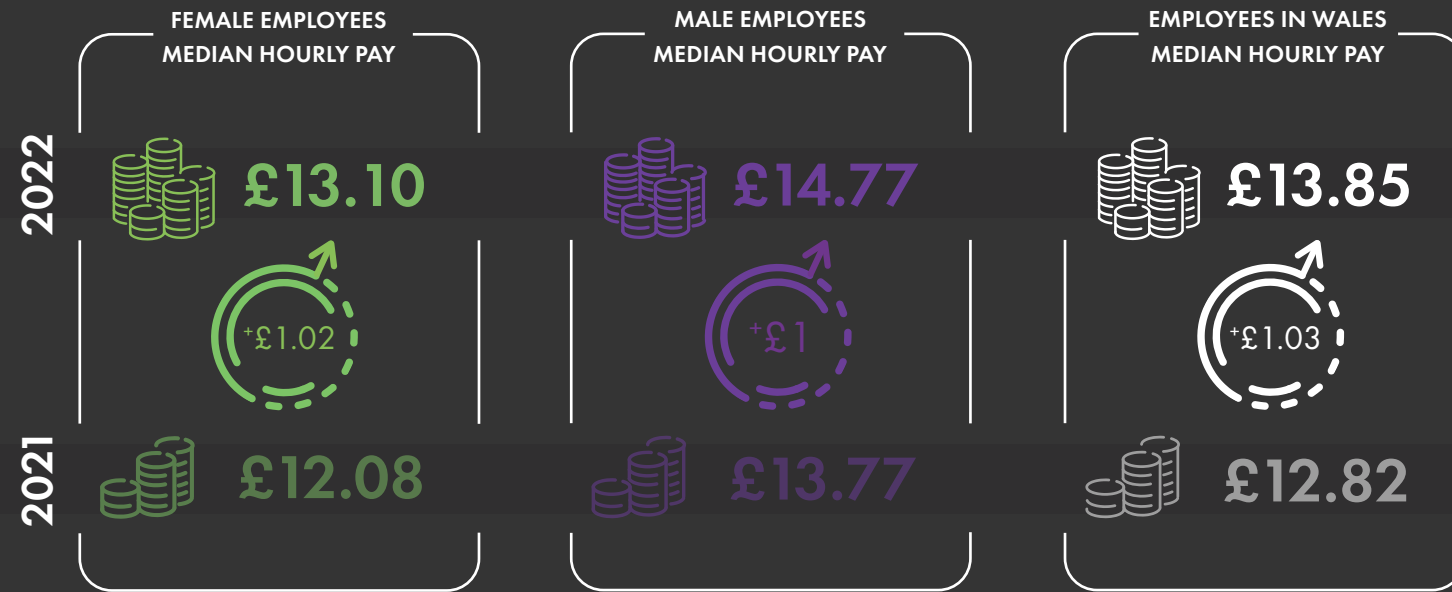
In terms of employment, we see the employment rate for men increasing more quickly than for women, which risks the gender gap widening. Positively the unemployment rate for women has dropped. A gender gap remains in self-employment, although rates of self-employment are down for both women and men.

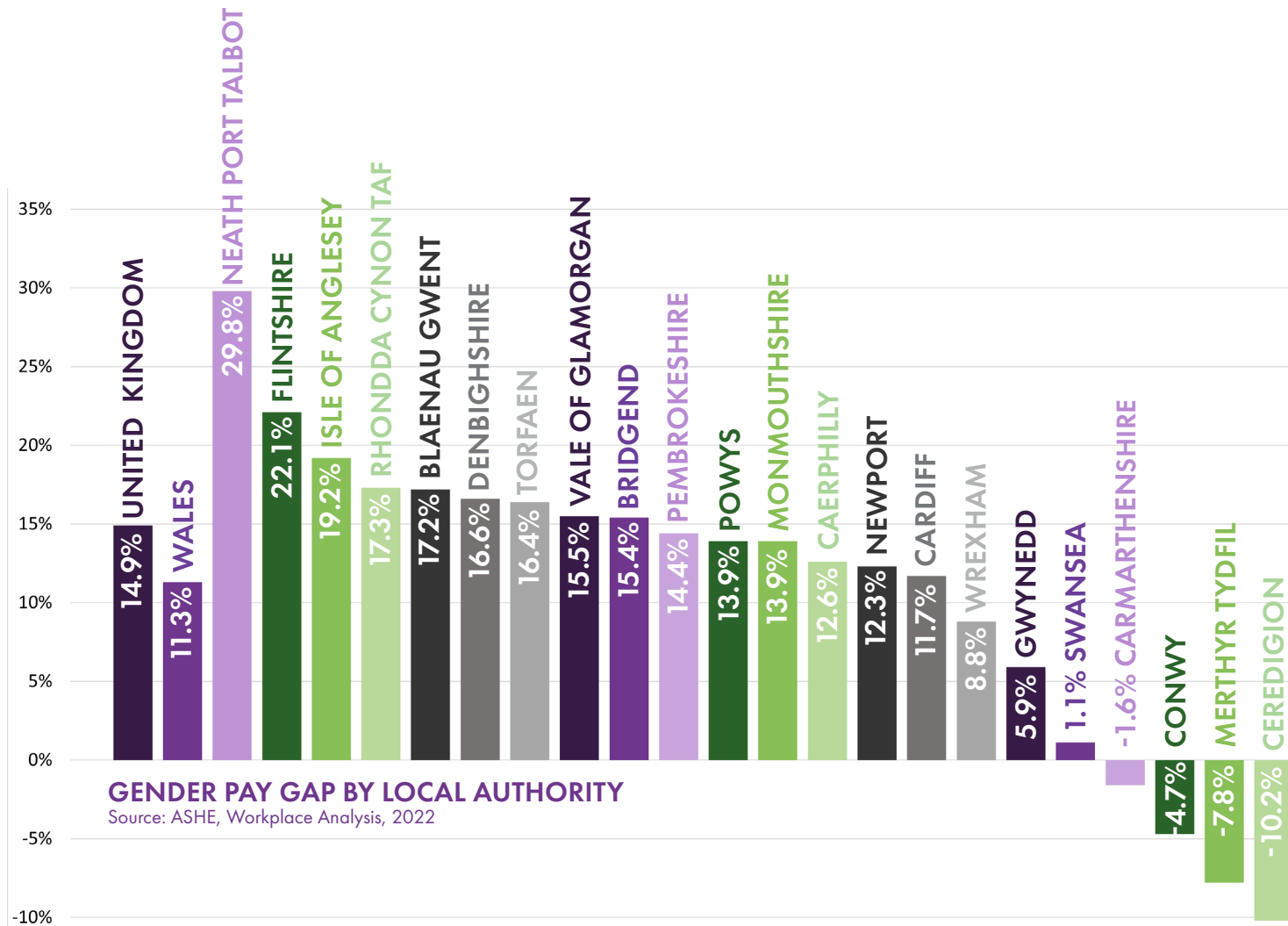
Last year we saw a significant drop in the proportion of women working part-time. Sadly this has not been maintained this year, with a slight increase up to 39% of women working part-time. Just 12% of men work part-time.



HOURLY PAY

Source: Annual Survey of Hours and Earnings (ASHE), Workplace Analysis, 2021-22





GENDER PAY GAP, COMPARISON OF 2021-2022

LOCAL AUTHORITY	2021	2022	DIFFERENCE
UNITED KINGDOM	15.4%	14.9%	-0.5%
WALES	12.3%	11.3%	-1.0%
BLAENAU GWENT	12.6%	17.2%	4.6%
BRIDGEND	16.0%	15.4%	-0.6%
CAERPHILLY	18.3%	12.6%	-5.7%
CARDIFF	15.0%	11.7%	-3.3%
CARMARTHENSHERE	4.8%	-1.6%	-6.4%
CEREDIGION	9.3%	-10.2%	-19.5%
CONWY	1.9%	-4.7%	-6.6%
DENBIGHSHIRE	15.9%	16.6%	0.7%
FLINTSHIRE	21.8%	22.1%	0.3%
GWYNEDD	3.5%	5.9%	2.4%
ISLE OF ANGLESEY	2.9%	19.2%	16.3%
MERTHYR TYDFIL	7.6%	-7.8%	-15.4%
MONMOUTHSHIRE	23.4%	13.9%	-9.5%
NEATH PORT TALBOT	20.7%	29.8%	9.1%
NEWPORT	9.0%	12.3%	3.3%
PEMBROKESHIRE	16.1%	14.4%	-1.7%
POWYS	20.9%	13.9%	-7.0%
RHONDDA CYNON TAF	19.6%	17.3%	-2.3%
SWANSEA	9.4%	1.1%	-8.3%
TORFAEN	25.4%	16.4%	-9.0%
VALE OF GLAMORGAN	15.0%	15.5%	0.5%
WREXHAM	3.0%	8.8%	5.8%

80.2%
MALES

AND

72.7%
FEMALES

AGED

16-64
YEARS

ARE



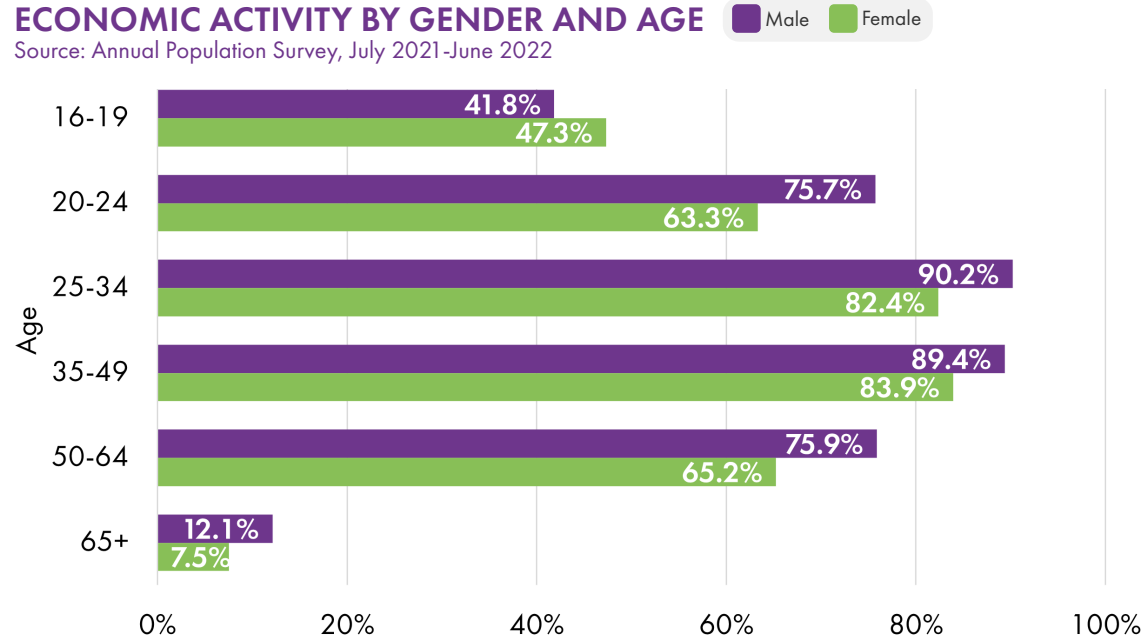
ECONOMICALLY
ACTIVE



ECONOMIC ACTIVITY

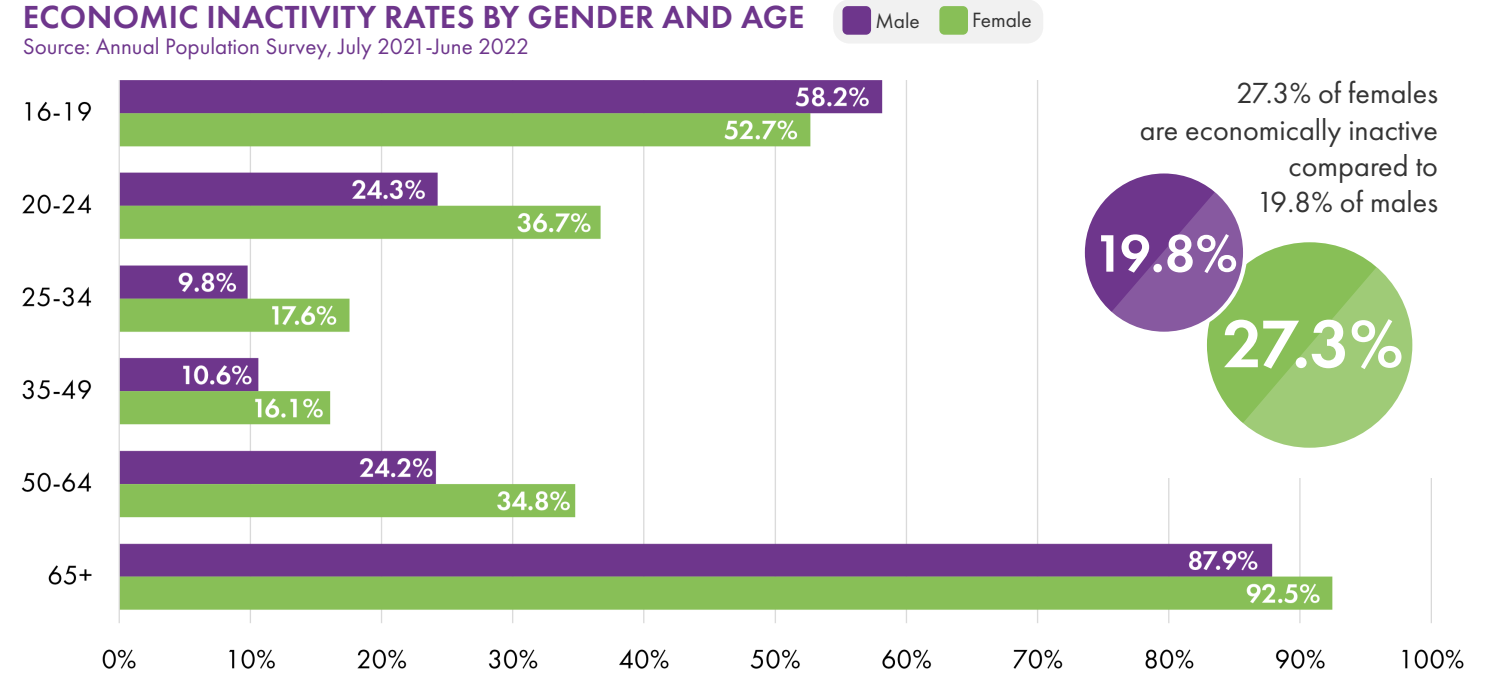
ECONOMIC ACTIVITY BY GENDER AND AGE

Source: Annual Population Survey, July 2021-June 2022



ECONOMIC INACTIVITY RATES BY GENDER AND AGE

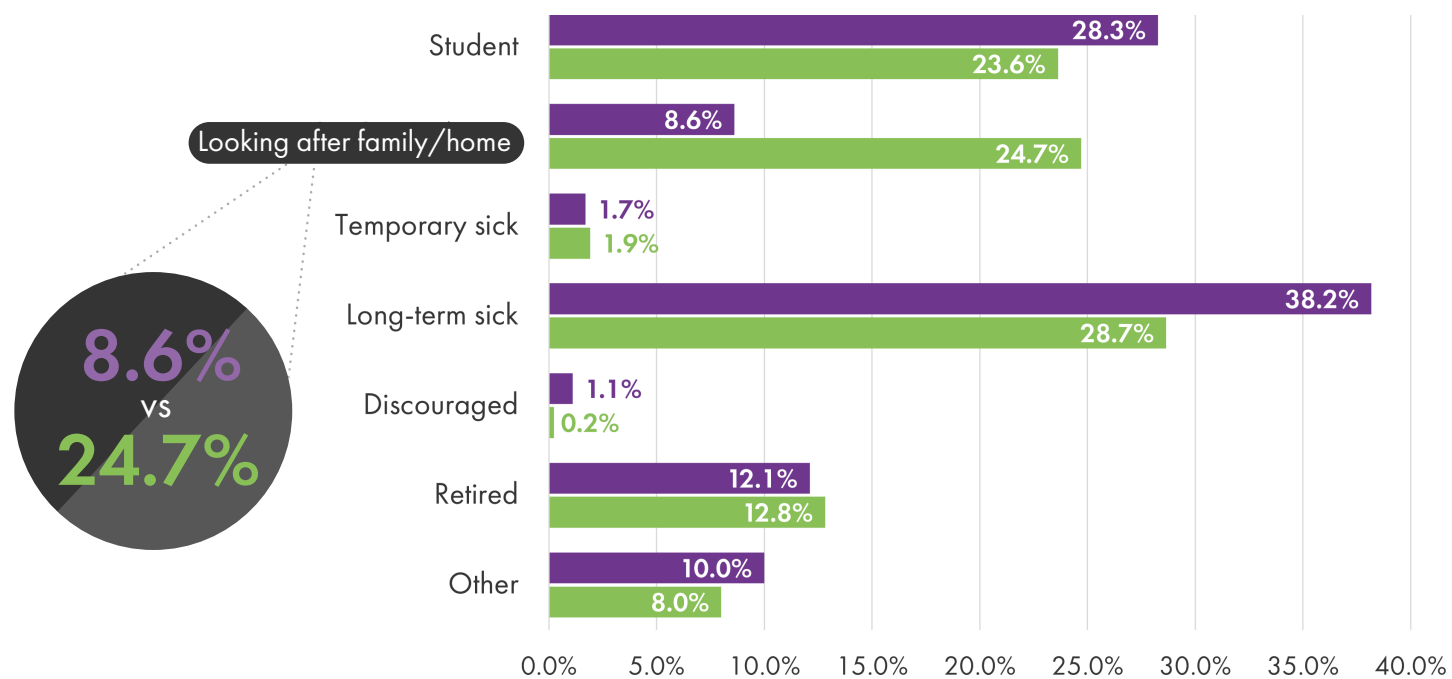
Source: Annual Population Survey, July 2021-June 2022



WHY ARE WOMEN AND MEN ECONOMICALLY INACTIVE?

Source: Annual Population Survey, July 2021-June 2022

Male Female

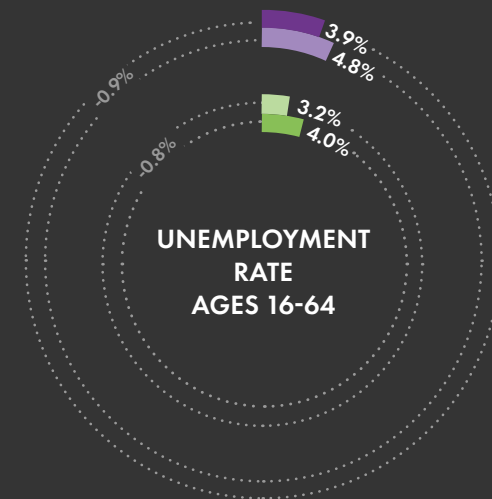
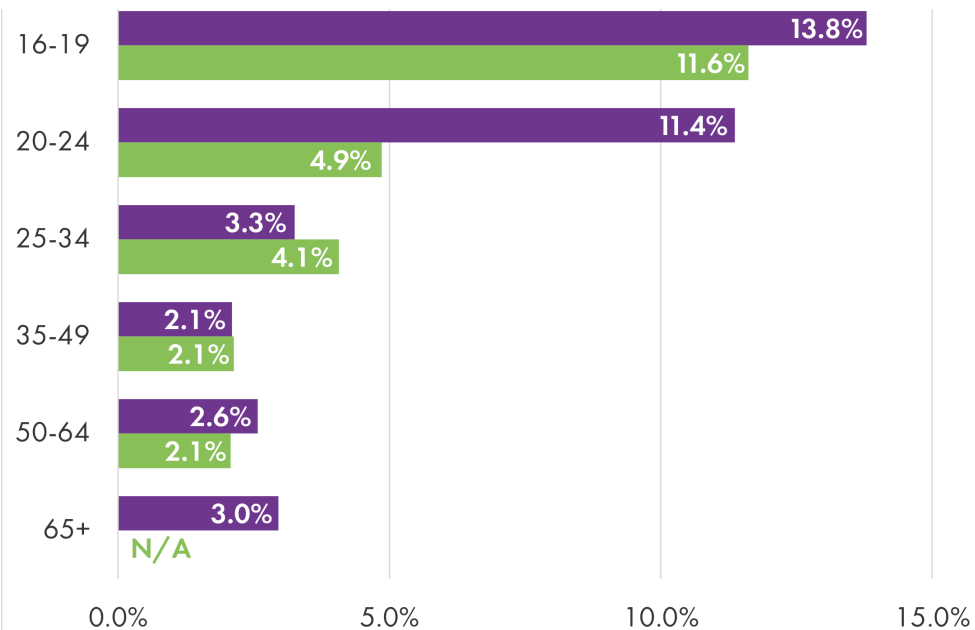


EMPLOYMENT AND UNEMPLOYMENT RATES

UNEMPLOYMENT RATES BY GENDER AND AGE

Source: Annual Population Survey, July 2021-June 2022

Male Female



Male 2022 Female 2022
Male 2021 Female 2021

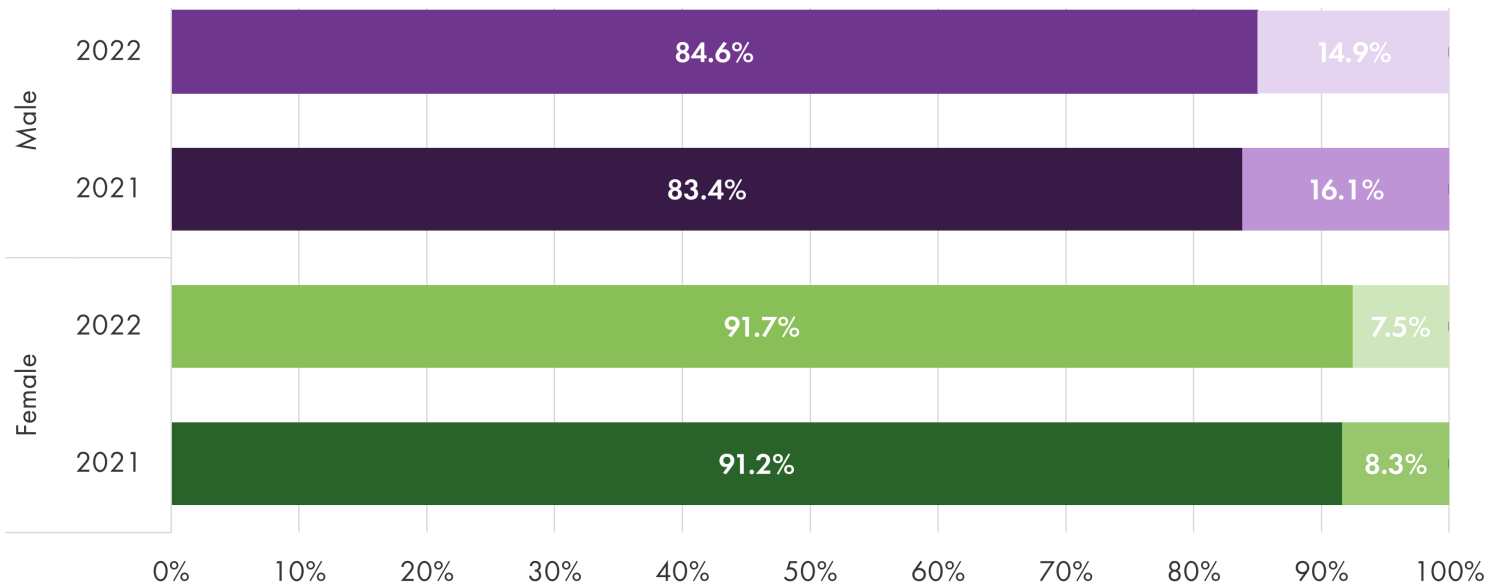


SELF-EMPLOYMENT

WHAT PROPORTION OF WOMEN AND MEN AGED 16-64 ARE SELF-EMPLOYED?

Employees Self-employed

Source: Annual Population Survey, July 2020-June 2021 and July 2021-June 2022

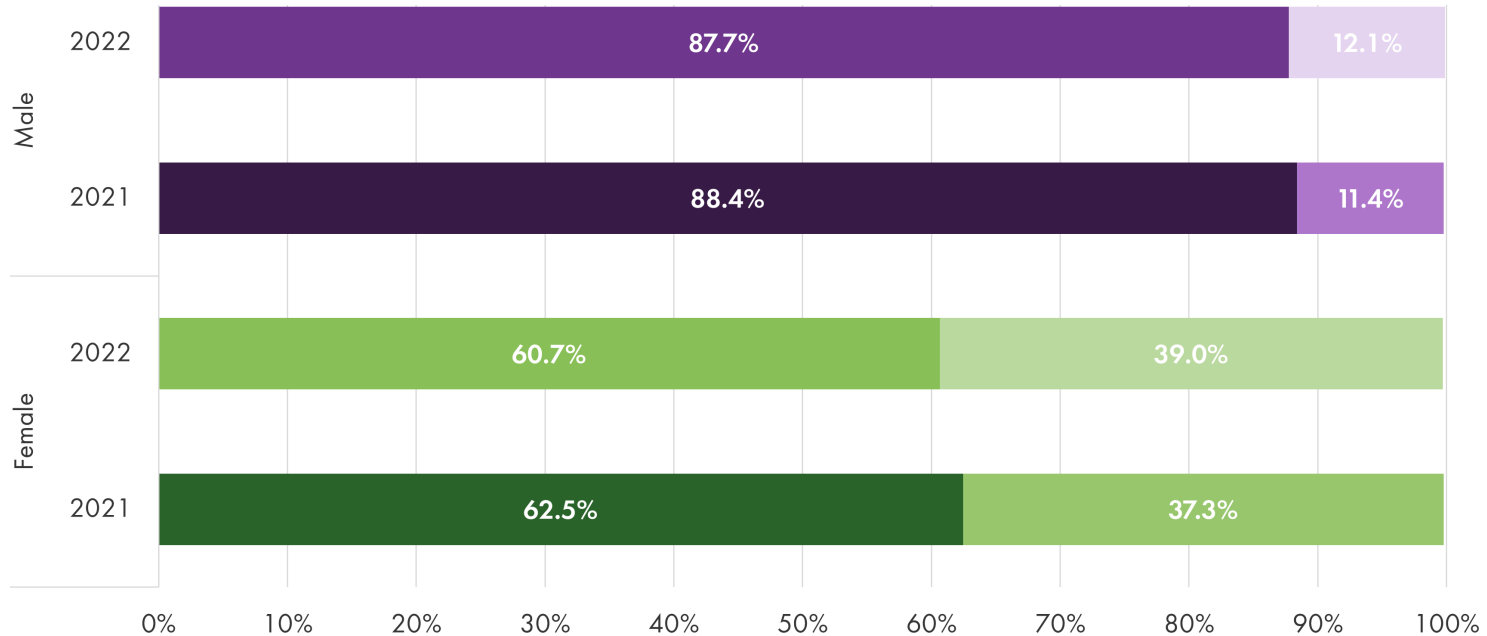


WORKING PATTERNS

HOW MANY WOMEN AND MEN AGED 16-64 ARE WORKING PART-TIME?

Full-time Part-time

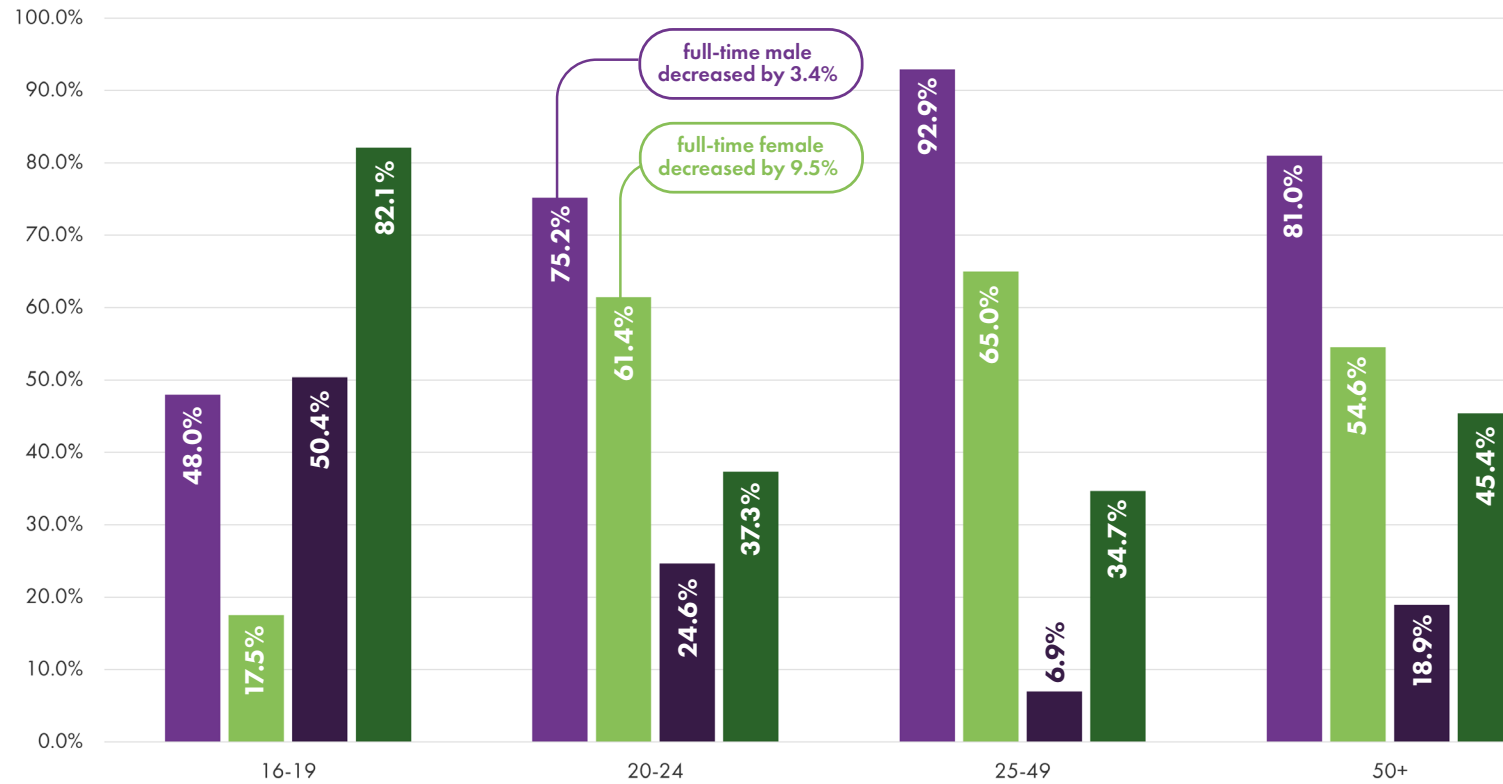
Source: Annual Population Survey, July 2020-June 2021 and July 2021-June 2022



WORKING PATTERNS BY AGE

Source: Annual Population Survey, July 2021-June 2022

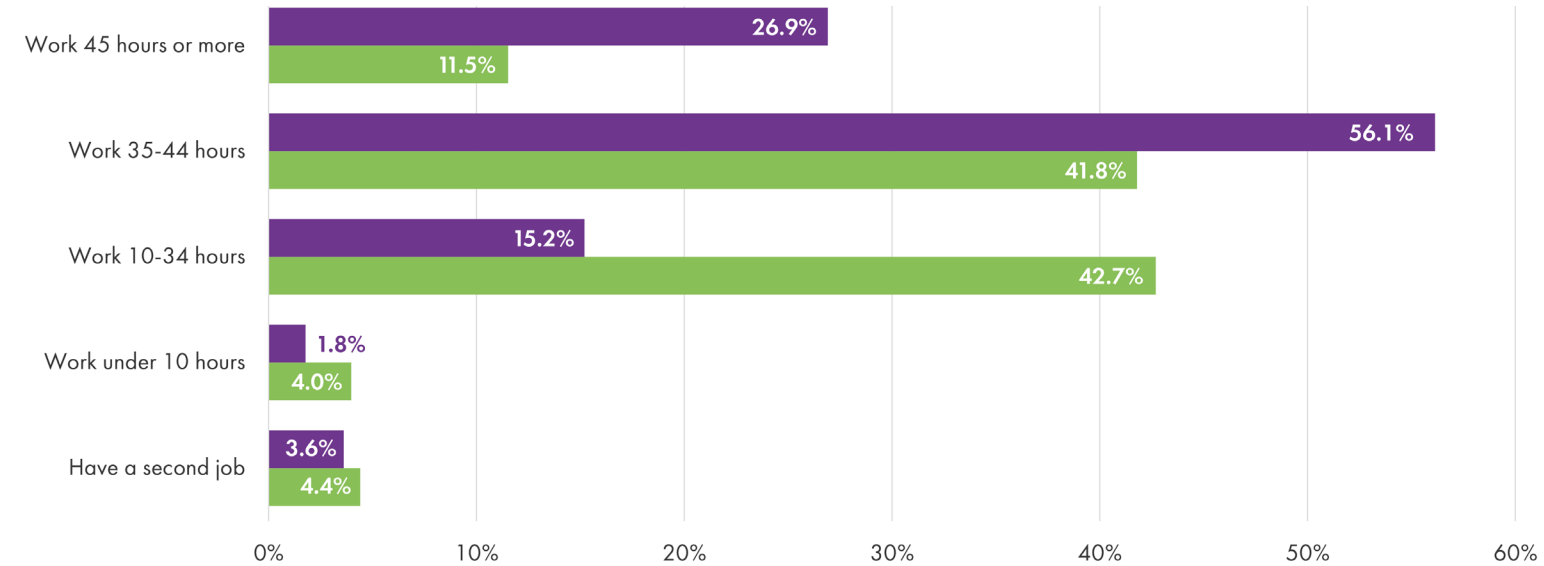
■ Full-time Male
 ■ Full-time Female
 ■ Part-time Male
 ■ Part-time Female



WORKING PATTERNS BY HOURS

Source: Annual Population Survey, July 2021-June 2022

■ Male
 ■ Female



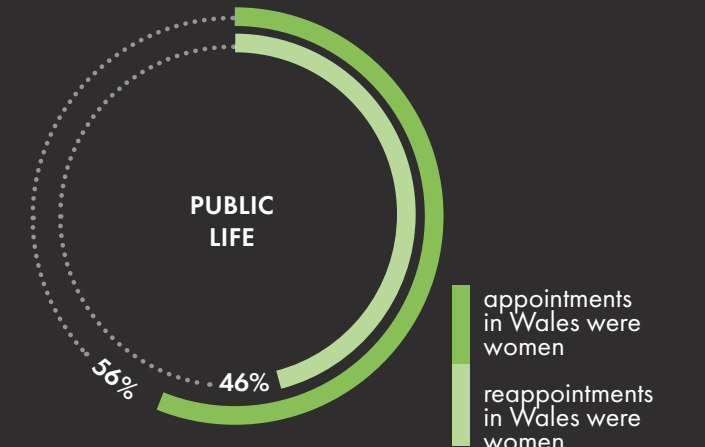
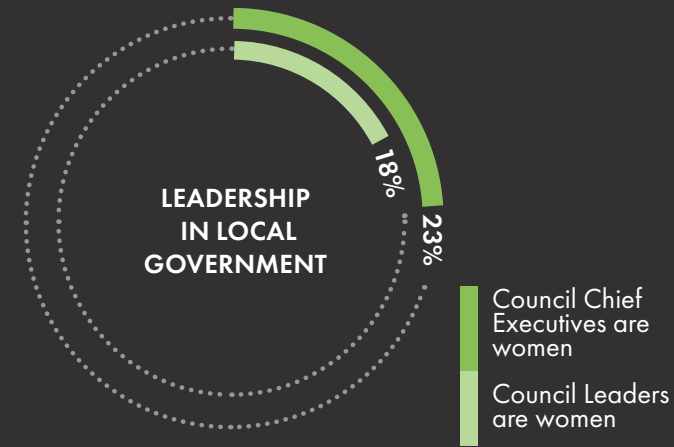
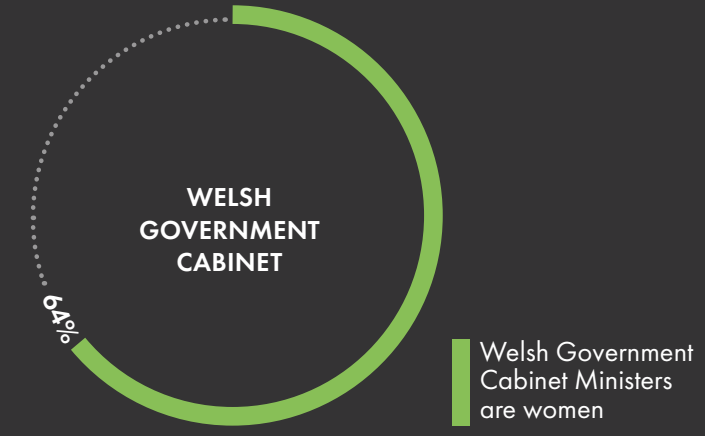
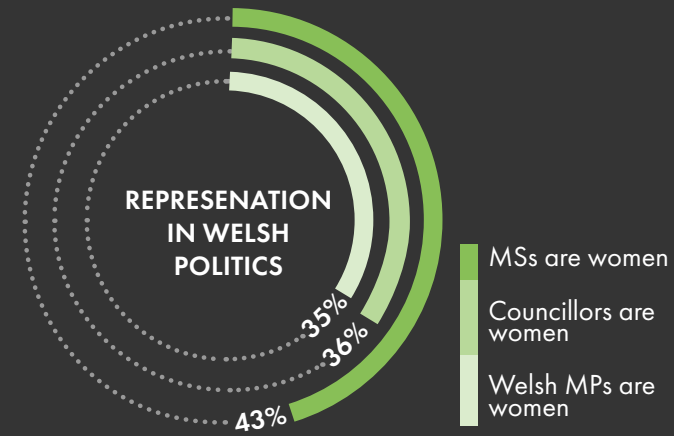


WOMEN REPRESENTED

Having diverse voices in the room means that different issues and different perspectives are more likely to be discussed. Nowhere is this more important than in public life, where decisions that affect every aspect of our lives are taken. Historically, we've seen quite a mixed picture in terms of political representation in Wales, with the Senedd performing better than other political institutions.

Over the past year we've had local council elections, where the proportion of women elected increased to 36%. This represents progress, but work must continue to get this figure even higher at the next council elections, and to ensure that increased diversity carries through to council leadership, where figures remain disappointingly low.

On public appointments, data challenges have left us unable to provide updated figures. We have presented the figures for 2021/22 below, but action is needed to provide properly disaggregated data on public appointments in Wales, that is publicly available, and enables an intersectional lens to be applied.





BUSINESS AND THE WORKPLACE

Gender segregation across sectors and occupations in Wales is a significant factor that contributes to the gender pay gap, as different sectors are characterised by high and low pay.

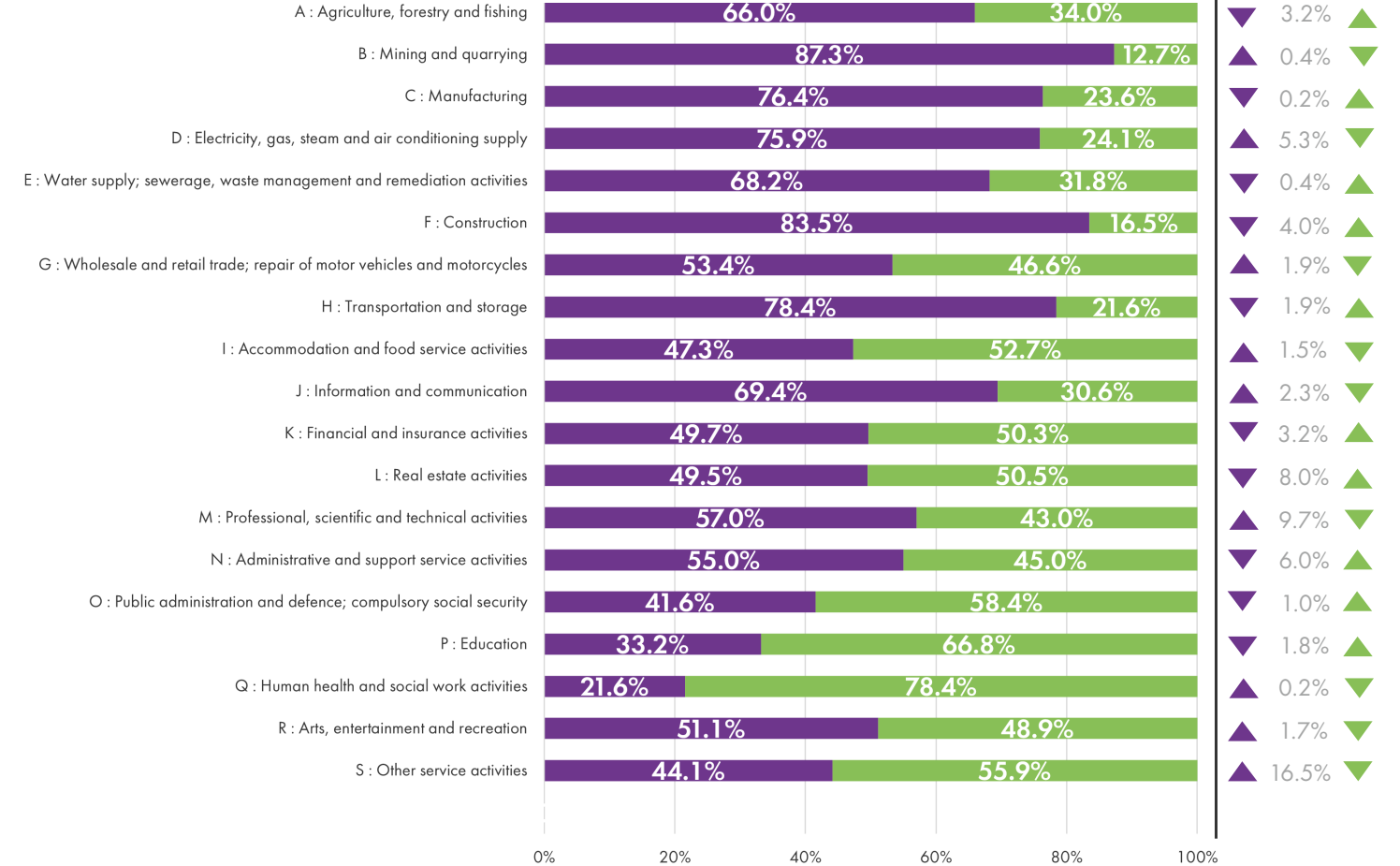
Unfortunately, we do not seem to be making much progress improving the proportion of women working in traditionally male-dominated sectors. There has been some improvement in construction (increase of 4%) but worryingly the proportion of women working in Information and Communication is down by 2.3%. There is a very real danger that this same segregation will be transposed into emerging and high growth sectors as we transition to a green economy and see increased digitalisation.

Since our last State of the Nation report, the standard occupational codes have changed. As such we cannot directly compare occupational data to previous years. However, what we see is that women are under-represented in senior roles making up 39% of managers, directors and senior officials, and are less likely to be business leaders, with just 14% of SMEs in Wales led by women.

WHAT IS THE GENDER BALANCE IN WELSH SECTORS?

Source: Workforce jobs by industry (SIC 2007) and sex, June 2022

Male Female



WHICH OCCUPATIONS (SOC 2020) ARE MEN AND WOMEN WORKING IN?

Source: Annual Population Survey, July 2021-June 2022



WHO OCCUPIES SENIOR AND PROFESSIONAL ROLES?

Source: Annual Population Survey, July 2021-June 2022



BUSINESS LEADERS

Source: Longitudinal Small Business Survey 2020



Across the UK

16%
of SMEs are led by women



In Wales

14%
of SMEs are led by women

<https://www.gov.uk/government/statistics/small-business-survey-2020-businesses-with-employees> Table 26



WOMEN AT RISK

Women continue to face greater risk of poverty, social exclusion and financial hardship due to the different positions women and men occupy in work and society.

They also remain at far greater risk of abuse, harassment and violence. Data is a continued challenge in this space, with few regularly produced data sets that can tell the full picture. Using crime data alone is not sufficient, and too often we then have to rely on data collected and published by specialist services that are under immense pressure trying to meet the needs of the women they support.

As such, in this section of State of the Nation, we present the most up to date data we can to try and demonstrate the scale of the challenge we face. Women are less likely to feel safe in

public spaces and continue to face harassment in public spaces to a greater extent than men. The proportion of women who feel very safe after dark has dropped by 5% since last year. Women are also far more likely to experience domestic violence and sexual assault, and are being routinely failed by the criminal justice system.

Against this backdrop, specialist services are under pressure as funding levels fall behind the rate of inflation, leaving services overstretched and understaffed.

Until all women can live their lives free from the threat of violence and abuse, we simply cannot achieve equality.

HARASSMENT AND SAFETY



of women aged 16-34 experienced at least one form of harassment *in the past year*¹



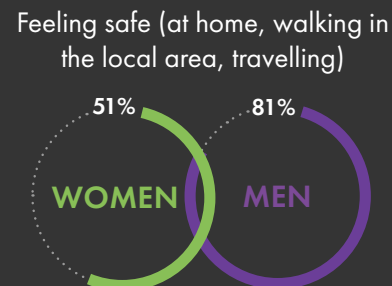
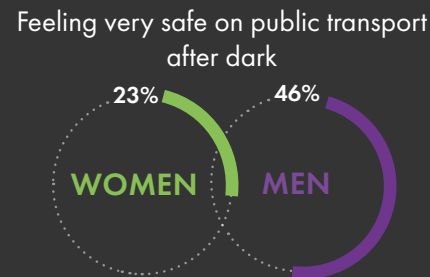
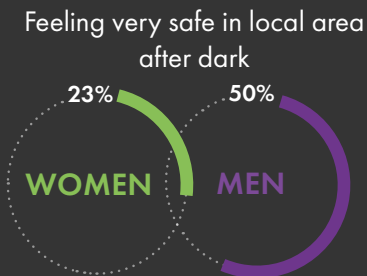
of women aged 16-34 experienced catcalls, whistles and unwanted sexual comments or jokes from a stranger²



of women aged 16-34 felt they had been followed³

SAFETY IN PUBLIC PLACES

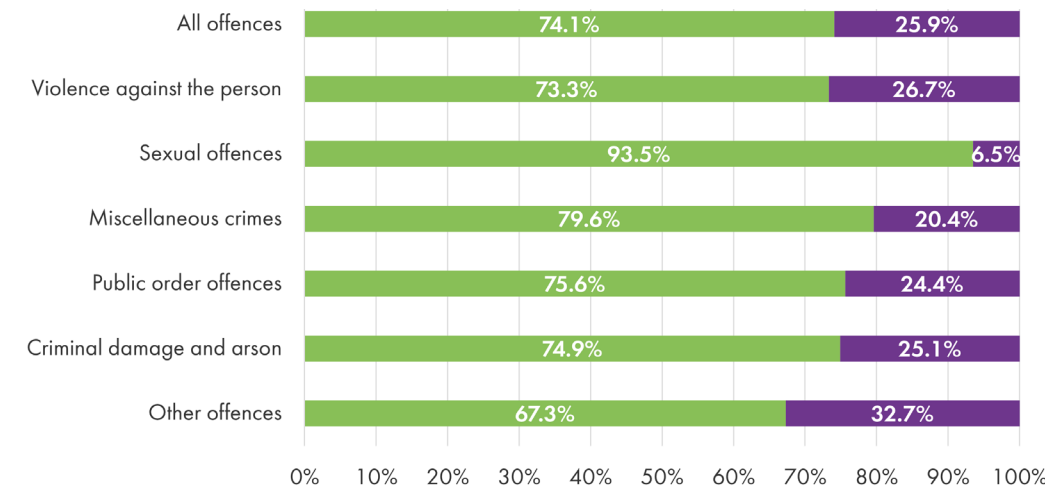
Source: National Survey for Wales, 2022



PROPORTION OF DOMESTIC ABUSE- RELATED CRIMES RECORDED BY THE POLICE, ENGLAND AND WALES, 2022

Female Male

Source: ONS, Domestic Abuse Prevalence and Victim Characteristics, Appendix Tables, March 2022, Table 15.



PREVALENCE OF DOMESTIC ABUSE

Source: ONS, Domestic Abuse Prevalence and Victim Characteristics, Appendix Tables, March 2022, Table 8, 11 and 15.

17.6%

of all crimes recorded in Wales are domestic abuse-related

50.5%

of all violence against women offences recorded were domestic abuse related

74%

of all domestic abuse victims in England and Wales are women



We continue to see a disturbingly high level of violence against women and girls enacted across Wales. We recognise that those reaching out for help and accessing support are, heartbreakingly, only the tip of the iceberg of this epidemic.

Front-line specialist services continue to provide lifesaving, life changing support to survivors and their families, but amongst a culture of misogyny and sexism, after years of austerity and the current cost of living crisis, short-term, insecure funding will continue to result in limitations to achieving the systemic and social changes needed to truly prioritise eliminating violence against women, domestic abuse and sexual violence.



Welsh Women's Aid



Live Fear Free Helpline 0808 80 10 800 (call/text)

SEXUAL VIOLENCE

85%

of recorded sexual assault cases are committed against women⁴



93.5%

of recorded domestic abuse-related sexual offences are committed against women⁵



The latest data available from Rape Crisis England and Wales show that:⁶



1 in 4 women have been raped or sexually assaulted as an adult

The highest ever number of rapes was recorded by police in the year ending March 2022:

70,330



5 in 6 women who are raped don't report it to the police



Only 1 in 100 rapes recorded by police resulted in a charge that same year



POVERTY

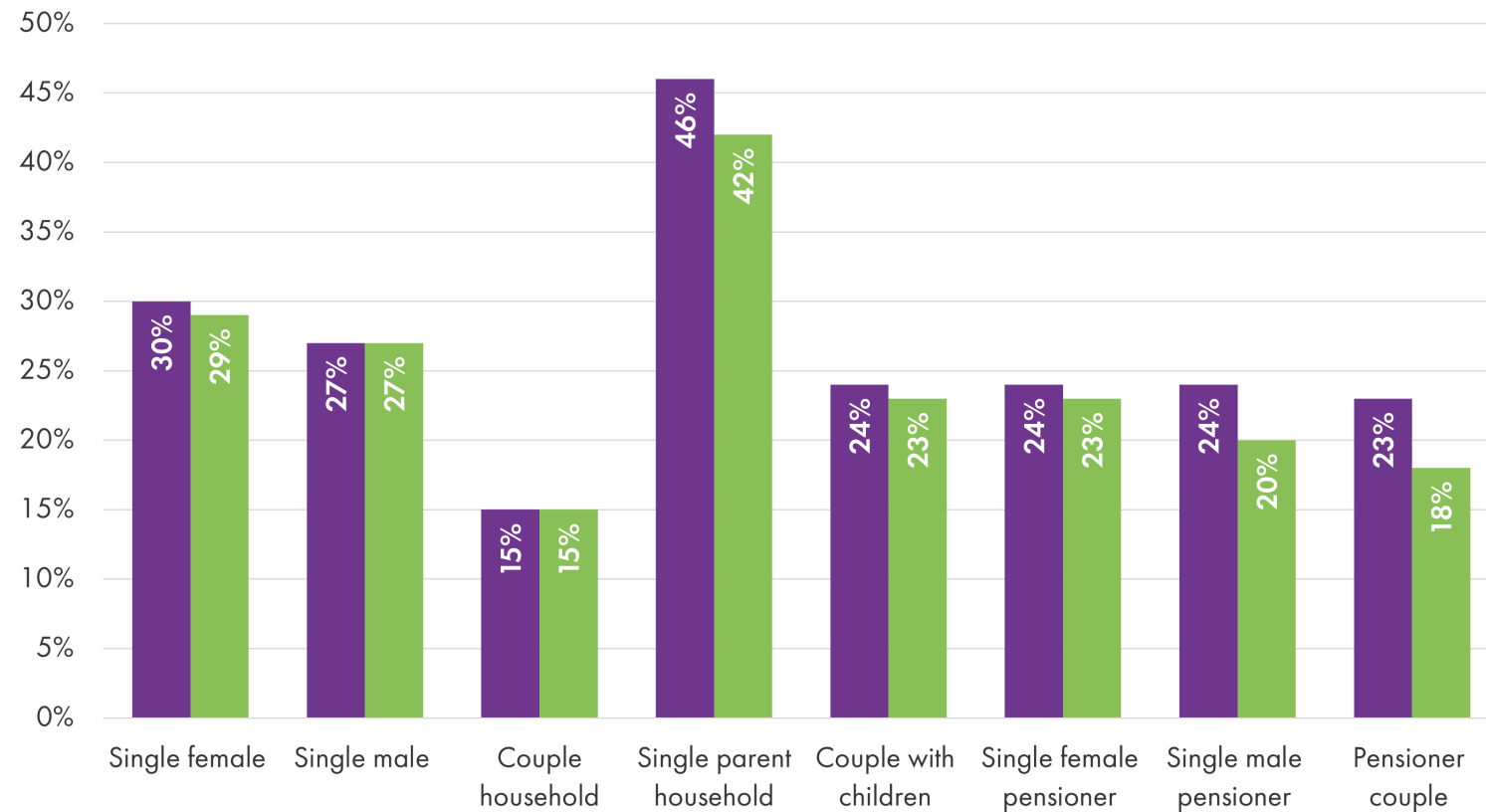
Poverty rates in Wales have been persistently high for over a decade; a situation that is only likely to worsen in the face of the cost of living crisis. Women's risk of poverty is closely linked to their position in the labour market and within households. As second earners or primary carers, many women have limited independent income, leaving them especially vulnerable to falling into poverty in the event of relationship breakdown.

Data is a challenge in this space. Measured at a household level, assumptions are made about how resources are shared within households. As such, the full extent of women's poverty is likely to be hidden. These data challenges have been made more acute this year, due to the impact of the pandemic on the data collection process. Updated figures for 2020-21 have not been produced and therefore we've included the data from last year's State of the Nation.

WHO IS AT GREATEST RISK OF POVERTY?

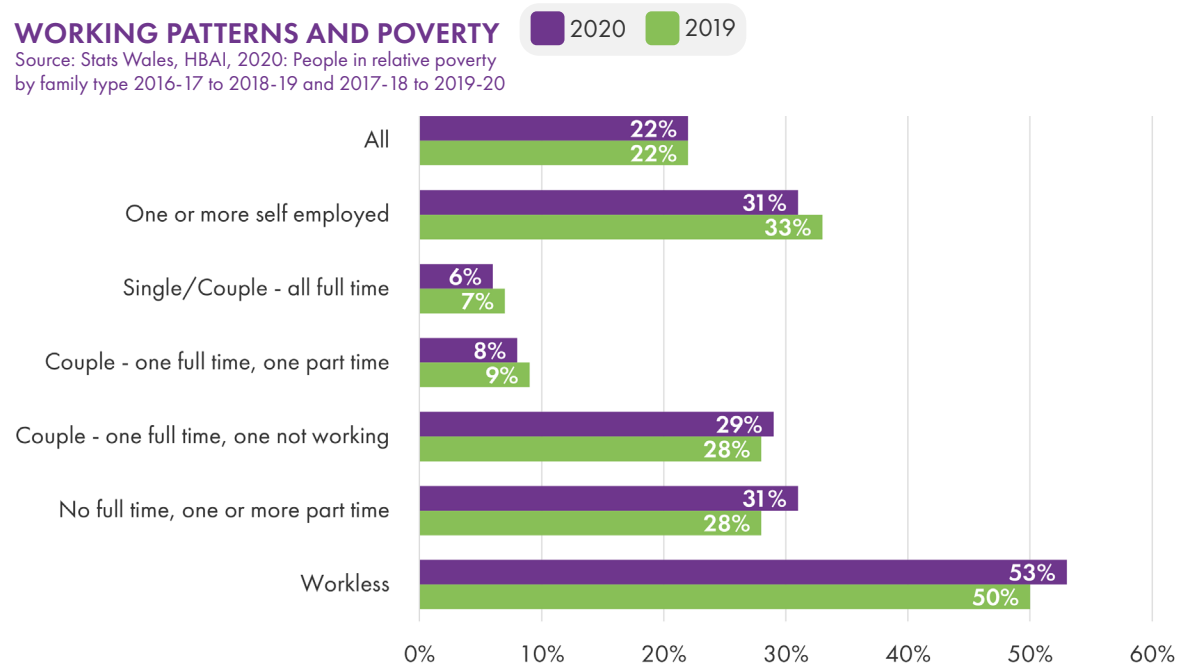
Source: Stats Wales, HBAI, 2020: People in relative poverty by family type 2016-17 to 2018-19 and 2017-18 to 2019-20

2020 2019



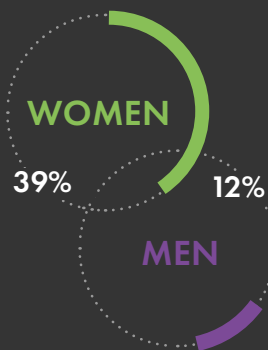
WORKING PATTERNS AND POVERTY

Source: Stats Wales, HBAI, 2020: People in relative poverty by family type 2016-17 to 2018-19 and 2017-18 to 2019-20



23%

of households in Wales are living in relative income poverty



are part-time workers in wales



SOCIAL SECURITY AND WELFARE REFORM

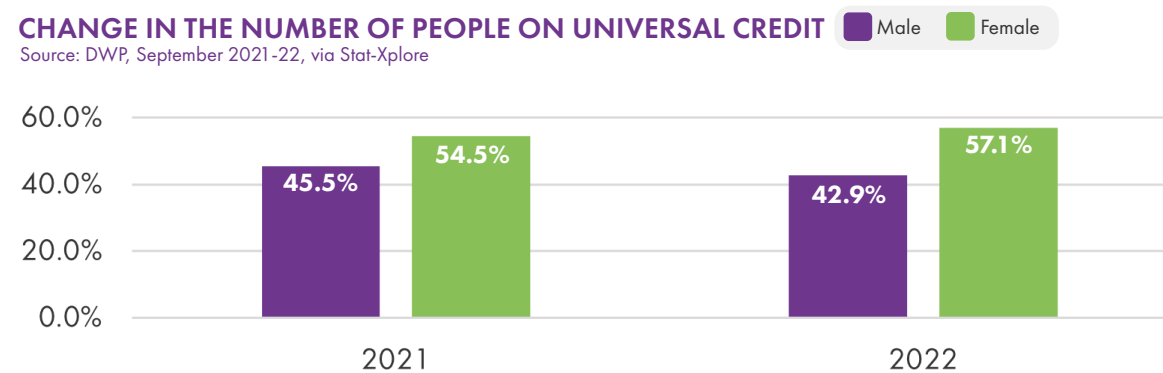
The social security system should offer a vital safety net for those unable to work, those whose income does not meet their basic needs and those with long-term health conditions. However, in practice, the UK's social security system is often found to be lacking. Universal Credit is the main source of support, and has long been criticised for its failure to meet women's needs. It's important to note that Universal Credit is not just an out-of-work benefit, and women are more likely than men to be in employment and claiming Universal Credit. Suggestions from the UK Chancellor that we may see

increased conditionality applied to those in receipt of Universal Credit, including those in employment, are a real concern, given the complex factors that often result in women working fewer hours and therefore earning less.

In the face of rising costs and stagnant wages, many more may turn to the social security system and any temporary support measures put in place. If these prove insufficient we risk many more households falling into financial hardship and poverty.

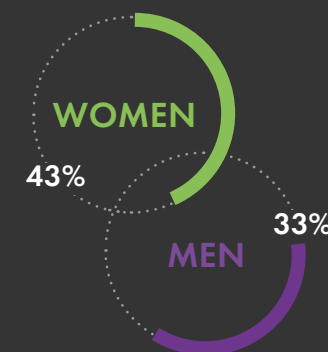
CHANGE IN THE NUMBER OF PEOPLE ON UNIVERSAL CREDIT

Source: DWP, September 2021-22, via Stat-Xplore



57%

of Universal Credit claimants in Wales are women



Universal Credit claimants in Wales that are in work

Source: DWP September 2022, via Stat-Xplore

2022 presented new challenges. Almost immediately after the worst of the pandemic passed, we found ourselves heading into a cost of living crisis. This has only worsened as inflation has spiralled and wages have fallen further behind the costs of essentials such as food and energy. We also find ourselves in a challenging fiscal environment, with a UK Government focused on limiting public spending, a real terms cut to Welsh Government budgets, and the end of EU-funded projects with no adequate replacement fund in place to support programmes that focus on tackling inequality.

In this context women are left vulnerable. As outlined in our **Cost of Living briefing** women, particularly ethnic minority and racialised women,

disabled women and lone parents are more likely to be working in precarious, low paid jobs, are often juggling paid work with unpaid caring responsibilities and have lower levels of wealth and savings. These factors all leave them more vulnerable to the cost of living crisis. The simple fact is that on average, women in Wales do not earn enough to meet the minimum income standard - in 2022, the Minimum Income Standard for a single person was calculated to be £25,000.⁷ In Wales average female annual earnings are £22,041.⁸

In the short-term we will need action to support those most affected by the cost of living crisis and ensure that support schemes are designed with women's needs in mind. Longer-term we cannot ignore the fact that

persistent inequality is the reason women continue to be left more vulnerable to crises such as the 2008 financial crash, the pandemic and now the cost of living crisis.

We see again in the State of the Nation data this year only marginal progress at best. On the biggest issues – poverty, abuse, harassment – we see no progress. Tackling gender inequality is not easy. It requires action in many areas, and from many different actors. It will require changes in what we do and how we do it, ensuring that the needs of diverse and marginalised women in Wales are centred in decision-making.

We have made some initial steps in this space. With the acceptance of all fifty recommendations set

out in the Gender Equality Review report **Deeds not Words**, Welsh Government signalled that there was an understanding of the scale of change needed and a commitment to making it. Ongoing work around gender budgeting and equalities mainstreaming, the creation of the Equality Data Unit, and the focus on intersectionality are all important steps forward.

But, we must go further. We need to see this high level commitment translate into meaningful change felt by women across Wales and ultimately reflected in the data presented in State of the Nation. Government, national and local, will need to consider how and where it invests money, particularly in the challenging fiscal space we find

ourselves in. Investment in public services is essential, but we need to expand this to include the provision of childcare, which continues to influence women's working lives and is a significant pressure on women's incomes.

Businesses must consider how we can further change how we organise and structure work, centring inclusion, supporting those with caring responsibilities and eradicating workplace harassment and discrimination.

And civil society will need to navigate an incredibly challenging funding environment, to ensure that support is available for those groups who face additional barriers and are too often failed by mainstream provision.

We will need to continue our work to ensure we walk the walk on diversity and inclusion and look at how we can work together to campaign for change.

When facing a crisis, it can be all too easy to see equality as a nice to have, when in reality a focus on equality and inclusion is never more important. As we've said previously, there is a strong commitment to equality and social justice in Wales, from government, civil society and business. The challenge for all of us remains changing warm words into action.

ENDNOTES

1 ONS (2022) Perceptions of personal safety and experiences of harassment, Great Britain: 16 February to 13th March 2022 <https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/bulletins/perceptionsofpersonalsafetyandexperiencesofharassmentgreatbritain/16februaryto13march2022#experiences-of-harassment>

2 ONS (2022) Perceptions of personal safety and experiences of harassment, Great Britain: 16 February to 13th March 2022 <https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/bulletins/perceptionsofpersonalsafetyandexperiencesofharassmentgreatbritain/16februaryto13march2022#experiences-of-harassment>

3 ONS (2022) Perceptions of personal safety and experiences of harassment, Great Britain: 16 February to 13th March 2022 <https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/bulletins/perceptionsofpersonalsafetyandexperiencesofharassmentgreatbritain/16februaryto13march2022#experiences-of-harassment>

4 ONS, Crime in England and Wales: Appendix Tables, Table A4 <https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/datasets/crimeinenglandandwalesappendixtables>

5 ONS, Crime in England and Wales: Appendix Tables, Table A4 <https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/datasets/crimeinenglandandwalesappendixtables>

6 <https://rapecrisis.org.uk/get-informed/statistics-sexual-violence/>

7 Joseph Rowntree Foundation (2022) Minimum Income Standard 2022

8 ONS Annual Survey of Hours and Earnings 2022 Provisional results Table 7.7a