



# Women, Work and Wealth in Scotland's changing economy 2022

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# Contents

<b>Executive summary</b>	<b>2</b>
<b>1. The changing nature of Scotland’s economy and labour market</b>	<b>5</b>
<b>2. Labour market participation</b>	<b>7</b>
2.1 Employment and unemployment	8
2.2 Part-time work	10
2.3 Zero hours contracts	12
2.4 Self-employed	14
2.5 Sectors and occupations	16
2.6 Economic inactivity	20
<b>3. Earnings and gender pay gap</b>	<b>23</b>
3.1 Earnings	23
3.2 Gender pay gap	25
<b>4. Women as asset owners</b>	<b>28</b>
<b>5. Mapping future challenges</b>	<b>30</b>
<b>6. Recommendations and conclusions</b>	<b>34</b>

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## Executive summary

Scotland's economy has undergone significant upheaval over the past few years. Covid-19 saw vast swathes of the economy plunged into economic hibernation, generating widespread disruption in patterns of production, distribution and consumption. The recovery has been fragile in nature as well as unequal, both between high- and low-income workers, between marginalised and non-marginalised groups, and between those with assets and those with debts.

Spiralling inflation has led to an intensifying cost of living crisis. While energy companies rake in eye-watering profits, Scottish households are being pushed into fuel poverty as the price of food, fuel and other essentials have spiked, and mortgage payments soar in light of interest rate rises.

Each crisis has shone a spotlight on deep fault lines and inequalities embedded into the current operation of the economy. In the case of the energy costs faced by households, it has also highlighted the volatility and cost of the continued reliance on fossil fuels, which continues to pose the single biggest threat to our collective safety and future. These crises are already impacting living standards and the labour market in Scotland. However, the gendered nature of Scotland's economy and labour market mean that these changes will affect men and women in different ways.

This report analyses women's recent experience in the labour market in Scotland, and explores how current trends may continue to reshape women's role in the labour market in future. We first examine recent trends in labour market participation, and find that headline statistics showing record levels of female employment in Scotland masks significant differences in the nature and quality of employment between men and women, and between different groups of women. We find that:

- While the overall employment gap between men and women narrowed in recent years, there remains a significant gap among women from ethnic minority groups, at 22% below that of white women.
- Women continue to make up the majority (74%) of the part-time workforce in Scotland. Part-time working continues to be associated with women with dependent children. In 2021 39% of women with dependent children in Scotland worked part-time, compared with only 6% of men with dependent children.
- Between 2005 and 2022, the number of self-employed women in Scotland increased by 56%, compared to just 3% for men. Since 2011, the number of women employed on a zero hours contract increased by 320%, and the number of women employed on zero hours contracts increased sharply during the Covid-19 pandemic.

- Women continue to make up the vast majority of the workforce in historically gendered occupations such as care, leisure, retail and administrative and secretarial work. Women are also less likely than men to reach senior positions in organisations, accounting for 40% of ‘managers, directors and senior officials’ in Scotland, compared with 60% for men.
- 80% of all people who are economically inactive due to caring responsibilities are women. There has also been a significant increase in the number of women who are economically active due to long-term sickness since the Covid-19 pandemic began, and long-term sickness is now the most common reason for working age women being economically inactive in Scotland.

We then examine recent trends in earnings, the gender pay gap, and wealth accumulation, and find that:

- Real median earnings for female full-time employees fell by 5% in 2022, and remain £73 lower than for male full-time employees. Women in Scotland are also more likely to be in receipt of social security payments, accounting for 53.5% of those on Universal Credit (UC) in Scotland.
- The gender pay gap for all employees narrowed between 2014 and 2020, but has increased again since – rising to 11.6% in 2021 and 12.2% in 2022. Scotland’s third sector has the highest gender pay gap for full-time employees, standing at 15.1% in 2022, followed by the private sector at 13.3% and the public sector at 5.4%. The gender pay gap is also significantly higher in senior managerial roles and among older age groups.
- The median inflation-adjusted individual wealth of women was £102,000 between 2016 and 2018, compared to £116,000 for men. An estimated 34% of women, compared to 29% of men, are currently not saving for their retirement in any way.
- Overall we find that long entrenched social attitudes, a lack of flexible working opportunities, the absence of affordable childcare services, and the undervaluation of ‘women’s work’ continues to contribute to divergent labour market outcomes and a persistent gender pay gap. These long standing structural barriers have been compounded by recent shifts in the nature of the labour market, particularly in relation to the growth of insecure work, self-employment, austerity and the impact of the Covid-19 pandemic, all of which have reinforced gendered labour market dynamics.

The report then maps potential future challenges facing women in Scotland, including a possible return to a programme of austerity, the long-term impact of the pandemic on women’s economic security, the unequal distributional consequences of the cost of living crisis and accelerated climate and environmental breakdown, and the potential watering down of employment rights. We conclude by setting out a series of recommendations to the Scottish Government to tackle gender inequalities in Scotland’s labour market, which are summarised as follows:

- **Expand childcare and secure decent pay for childcare workers** by increasing the funded childcare entitlement to the equivalent of 50 hours a week and ensuring that no ECL workers are paid below the real Living Wage.
- **Deliver a just approach for care workers and care receivers** by increasing the minimum wage for all care workers to £15 per hour; reducing costs for carers; removing care charging; developing a Carer Poverty Strategy; and scaling up not-for-profit care and sectoral collective bargaining.
- **Embed care in a green industrial strategy** to scale up well paid, secure green jobs throughout Scotland's economy, for example by including it as a central component of the Scottish Government's upcoming Net Zero Industrial Strategy.
- **Upgrade the Scottish Government's Fair Work First principles** to includes criteria such as a ban on the use of zero hour contracts, embedding anti sexual harassment policies into guidelines, tackling the gender pay gap, and accelerating the transition to net zero.
- **Promote fair work in Scotland** by building on the Fair Work Action Plan and raising public sector pay, which will disproportionately benefit women.
- **Address barriers to flexible work in Scotland** by normalising flexible working in the public sector, and encouraging employers to initiate a four-day working week.
- **Address occupational segregation** by tailoring employability programmes to account for the impact of unpaid care work predominantly undertaken by women, the threats facing women's safety both in the workplace and at home, and the gendered experiences of education and skills development.

## 1. The changing nature of Scotland's economy and labour market

Scotland's economy has undergone a series of seismic shockwaves in recent years, triggering widespread economic turbulence that disproportionately impacted structurally marginalised communities.

The devastation of the Covid-19 pandemic and the prolonged periods of economic hibernation it necessitated gave way to the rapid demobilisation of economic activity and significant disruption in patterns of production, distribution and consumption throughout Scotland. In the second quarter of 2020, the Scottish economy contracted by nearly 20%.<sup>1</sup> This marked the deepest and fastest economic contraction on record.

Far from the "V Shaped recovery" initially predicted by some - where a sharp economic decline is followed by a quick and strong rebound - this recovery has been more fragile and volatile in nature. While the furlough scheme and other pandemic-related UK and Scottish Government interventions were essential to protecting jobs and businesses, the impact of the pandemic was nevertheless severe, particularly in areas of the economy like customer-facing sectors.

In November 2021, economic output in hospitality was 8.5% below pre-pandemic levels, and data for January 2022 revealed that 21.4% of hospitality businesses had less than three months of cash reserves.<sup>2</sup> The unequal sectoral impacts of Covid-19 highlighted regional economic divides. Areas in the Highlands and Islands that are more reliant on tourism, hospitality, small businesses and self-employment, for instance, were particularly vulnerable to the type of longer term cash flow shortfalls experienced throughout the pandemic.<sup>3</sup>

While the virus itself does not discriminate, the economy does, and the impacts of the pandemic have been unevenly spread, with hardship disproportionately falling on structurally oppressed groups. Age-standardised death rates for the virus were twice as high for people living in the 20% most-deprived areas when compared to the 20% least deprived areas. Furthermore, deaths amongst people in the South Asian ethnic group were almost twice as likely to involve Covid-19 compared to deaths in the White ethnic group.<sup>4</sup>

Despite overall household savings rising and debt levels remaining relatively consistent, ONS research from December 2020 found that 9 million people in the UK borrowed more than usual as a result of dwindling savings and incomes associated with the pandemic. This group disproportionately comprised renters, people from minority ethnic groups, parents and carers, disabled people and those who were shielding, and young people.<sup>5</sup> In Scotland, research published by the Scottish Trades Union Congress (STUC) in April 2021 demonstrated that the sharp increase in household savings was largely concentrated among middle and high income households as well as retirees. Many of these households also benefited from soaring housing prices, fuelled by tax cuts and a 'race for space'. At the same time however almost

a third of households saw incomes fall during the pandemic and this group was more likely to have seen expenditure increases.<sup>6</sup> Of the communities in Scotland most economically impacted by the pandemic, working class communities, women, minority ethnic households and young and disabled people were hit particularly hard.<sup>7</sup> As a result, the recovery from Covid-19 has been unequal, between high- and low-income workers, between marginalised and non-marginalised groups, and between those with assets and those with debts.

In the labour market, evidence suggests some employers took advantage of the pandemic to cut pay and water down working conditions, creating more precarious jobs and less income security for households at a time of crisis.<sup>8</sup> For instance, a January 2021 poll by the Trades Union Congress (TUC) found that nearly 10% of workers were told to re-apply for their jobs on inferior terms and conditions than they were on prior to the first lockdown in 2020 - a tactic commonly referred to as “fire and rehire.” Within this, working class people were twice as likely to have been put through this, and Black and minority ethnic groups experienced fire and rehire tactics at twice the rate of white workers. Overall, nearly a quarter of workers in Britain faced watering down of their working terms during the crisis.<sup>9</sup>

As Scotland’s economy began to recover – albeit in a fragile way – spiralling inflation has led to an intensifying cost of living crisis, driven by soaring energy costs. In October it was reported that while the typical annual dual-fuel bill in Scotland will amount to over £3,300, homes in rural Scotland could be set for energy bills of £4,400 despite the energy cap announced in the UK Government’s mini budget.<sup>10</sup> While the war in Ukraine and other global factors have caused energy prices to spike across Europe, the current energy crisis has underscored long standing inequities hardwired in the UK’s energy system.<sup>11</sup> In the second quarter of this year, Shell made record profits and BP tripled its profits, while households were pushed into fuel poverty.<sup>12</sup>

Continued inflation hikes are exacerbating an already tumultuous economic landscape. The CPI inflation rate increased to 10.1% in September, marking a 40-year high and soaring to over five times the Bank of England’s 2% inflation target.<sup>13</sup> In addition to spiralling energy costs, the price of food, fuel and other essentials have spiked. In the year to October, the cost of food and non-alcoholic drinks increased to 16.2%, up from 14.5% in September.<sup>14</sup>

Moreover, following the Bank of England’s policy rate rise and the impact of the mini budget, it is predicted that over 5 million households in Britain will see annual mortgage payments rise by £5,100 on average by the end of 2024, amounting to £26 billion in additional mortgage payments.<sup>15</sup> While most of the increased mortgage payments are likely to stem from higher-income households, this is primarily because they are more likely to have a mortgage, the impact of rate increases will disproportionately hit low-income households with a mortgage, taking into account both the greater likelihood of variable rate mortgages and wider inflationary pressures.<sup>16</sup>

Research published in September by Ayr Financial Fairness Trust found the rate of households in serious financial hardship in Scotland - meaning those struggling to cover essentials such as food, having no savings and/or falling behind on bills - is proportionally 40% higher than England.<sup>17</sup> Research by the Joseph Rowntree Foundation shows that low-income households<sup>18</sup> are twice as likely as high-income households to have no savings and almost 70% of single parents - disproportionately made up of women - have either no savings or less than £250.<sup>19</sup> Moreover, research by Poverty Alliance and Scottish Women's Budget Group found that women "are being disproportionately impacted by the cost-of-living crisis" and are "more likely to be living in poverty, have lower levels of savings and wealth and are less able to increase paid work than men due to caring responsibilities."<sup>20</sup>

Each crisis has shone a spotlight on deep fault lines and inequalities embedded into the current operation of the economy. In the case of the energy costs faced by households, it has also highlighted the volatility and cost of the continued reliance on fossil fuels. Despite lurching from one painful crisis to another in recent years, climate and environmental breakdown continues to pose the single biggest threat to our collective safety and future.

The above challenges are already having a significant impact on living standards and the labour market in Scotland. However, the gendered nature of Scotland's economy and labour market mean that these changes will affect men and women in different ways. In this report we assess women's recent experience in the labour market in Scotland, and explore how current trends may continue to reshape women's role in the labour market in future.

The rest of the report is structured as follows. In section 2 we examine how different aspects of women's labour market participation in Scotland have changed in recent years. In section 3 we explore how women's earnings in Scotland have changed over time and assess trends in the gender pay gap. In section 4 we examine the gendered nature of wealth accumulation and asset ownership. In section 5 we explore how current trends may continue to reshape aspects of Scotland's economy in future, and identify potential challenges this presents for women in Scotland going forward. In section 6 we conclude by outlining policy recommendations for the Scottish Government.

## **2. Labour market participation**

This chapter explores how different aspects of women's labour market participation in Scotland have changed in recent years. In the following sections we examine recent trends in employment, unemployment, part-time work, self-employment, zero hours contracts, occupational segregation and economic inactivity. The analysis in this section draws on the latest labour market data from the Office for National Statistics (ONS), primarily the Labour Force Survey, Annual Population Survey, and Annual Survey of Hours and Earnings (ASHE). Further information on the data sources used in the analysis is provided in the Annex.



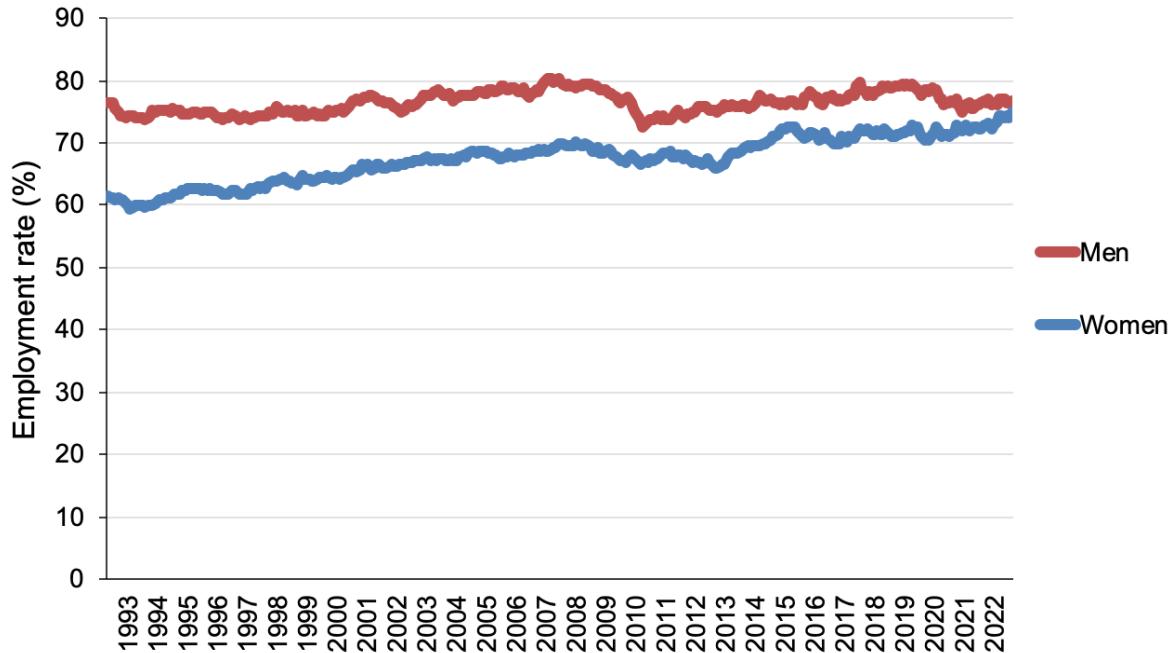
Throughout Chapters 2 and 3, various categorisations are used to describe different groups, resulting in a lack of overall alignment. For example, in places the analysis refers to Black and minority ethnic groups (BME) and elsewhere refers to ethnic minority groups. The reason for these discrepancies is due to how data is collected, in turn shaping how the analysis is presented. Similarly, throughout the analysis we present data for men and women. As the ONS has acknowledged, economic statistics in the UK are gathered in a binary way, and the terms 'sex' and 'gender' are often used interchangeably.<sup>21</sup> Both the authors of this report and the Scottish Women's Budget Group are committed to a more inclusive approach, but acknowledge that due to these data limitations, the analysis in this report does not capture this.

## **2.1 Employment and unemployment**

According to Labour Force Survey statistics, there were an estimated 1,319,000 women aged between 16 and 64 in employment in Scotland in August 2022, representing an employment rate of 74.9%.<sup>22</sup> This represents the highest female employment rate on record, and compares to a male employment rate of 76.7%. The difference between the employment rate for men and women aged 16-64 (known as the 'employment gap') has narrowed significantly over the past few years, and is now 1.8% – the smallest it has been on record.<sup>23</sup> Women now make up 50.5% of the workforce in Scotland, up from 49% in 2019 and 47% in 2000.<sup>24</sup> However, while the employment gap between men and women has narrowed in recent years, there remains a significant gap among female ethnic groups. According to Scottish Government statistics, the employment rate for minority ethnic women remains 22% below that of white women.<sup>25</sup>

### **Figure 1: The gap between male and female employment rates has narrowed in recent years**

Employment rates for men and women aged 16 to 64, Scotland



**Source:** Labour Force Survey<sup>26</sup>

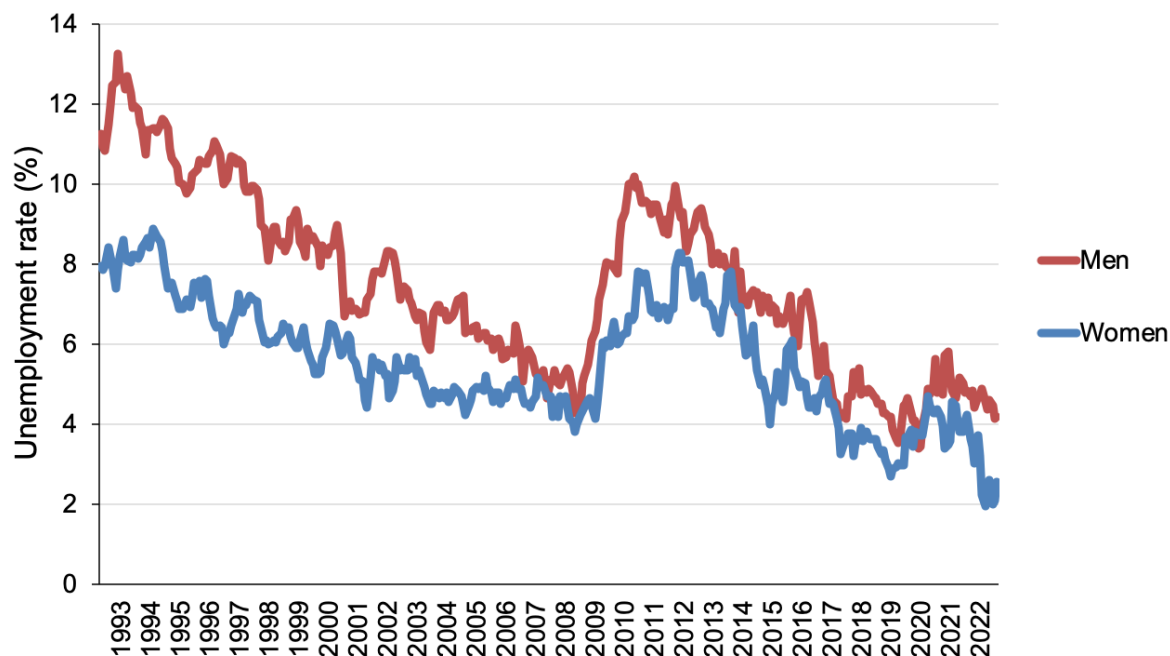
During the Covid-19 pandemic, demobilisation of large parts of the economy triggered a spike in unemployment for both men and women. In February 2020 female unemployment stood at 3.7%, but by March 2021 this had increased to 4.5% – representing 10,000 additional women unemployed. In addition, during the pandemic, many workers were placed on furlough or had their hours reduced. Evidence shows that women were more likely to work in a shutdown sector such as hospitality and retail, and were also more likely to have had their hours cut or be furloughed.<sup>27</sup>

Whereas in July 2020 there were 231,000 women on Universal Credit, compared with 234,000 men, by July 2021 there were 17,500 more women than men on Universal Credit than men.<sup>28</sup> Between July 2020 and July 2021, Universal Credit claimants who could not work as a result of health conditions or caring responsibilities – representing 25% of the total Universal Credit caseload – increased by 38%.<sup>29</sup> In addition, as will be explored further in section 2.6, 80% of all people in Scotland who are economically inactive due to caring responsibilities are women.

Beginning in the second half of 2021 however, the rate of unemployment for women in Scotland began to steadily fall, and reached record lows during 2022. As of August 2022 female unemployment stood at 2.6%, which compares to a male unemployment rate of 4.2%.<sup>30</sup> This growing gap between male and female unemployment can also be partly explained by the growing number of men becoming economically inactive, while female economic inactivity continues to fall. Recent trends in economic inactivity will be explored further in section 2.6.

## Figure 2: Female unemployment has fallen to record lows

Unemployment rates for men and women aged aged 16 to 64, Scotland



Source: Labour Force Survey<sup>31</sup>

However, these headline figures about labour market participation mask important differences in the nature, quality and remuneration of employment pursued by women and men in Scotland. They also do not fully capture recent shifts in the nature of the labour market in Scotland, and across the UK, particularly in relation to the growth of insecure work, self-employment and the impact of the Covid-19 pandemic.

In the following sections we highlight key differences in labour market participation between women and men in Scotland, and identify how the structure of the labour market has changed in recent years. We examine recent trends in women's earnings and wealth accumulation in section 3 and 4.

### 2.2 Part-time work

The Office for National Statistics (ONS) defines part-time employment as someone working less than 30 hours per week.<sup>32</sup> As of August 2022 women made up 74% of the part-time workforce in Scotland, and 38% of employed women are working part-time, compared to 13% of men.<sup>33</sup>

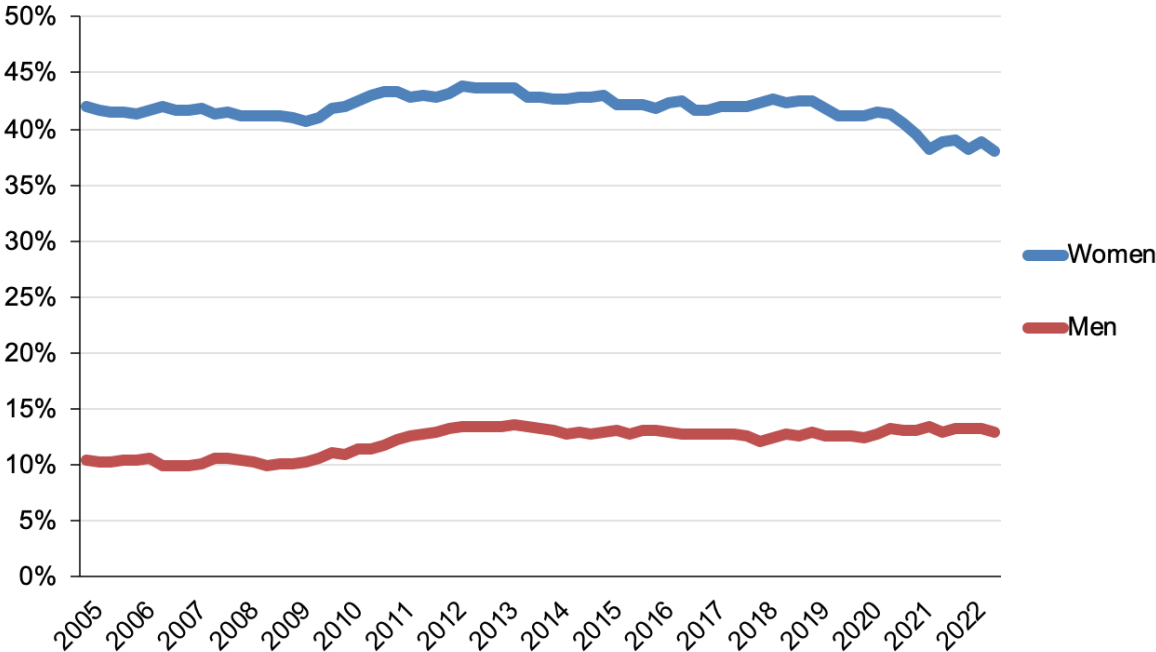
Women's part-time employment levels increased in the years immediately following the global financial crisis in 2008, and full-time employment fell. After peaking in 2011 however, the proportion of women in part-time work has gradually fallen as more women have entered full-time work. There has been a notable decline in women's part-time employment since the

beginning of the Covid-19 pandemic, and an associated increase in full-time employment. One potential reason for this relates to the ‘added worker’ effect, which was also observed following the 2008 financial crisis. This is where second earners – who are more likely to be women – enter the workforce or increase their hours in response to labour market disruption experienced by their partners in order to make up for the lost income. According to the Resolution Foundation, 15% of UK adults in couples whose partners were furloughed on less than full pay entered the workforce or upped their working hours during the pandemic, compared to 9% of those whose partners were furloughed and received all their earnings.<sup>34</sup>

In addition, evidence indicates that women with caring commitments increased their paid employment over the pandemic, because of more flexibility and options to work from home. According to the Resolution Foundation, 10% of mothers aged 25-44 in a couple said remote working meant they could enter work or increase their hours between February 2020 and 2021, compared to 5% of coupled fathers.<sup>35</sup> Whether or not this is a temporary phenomenon remains to be seen, and will likely depend on the extent to which flexibility around home working continues, which we explore further in section 6. Finally, there is also evidence that sectoral shifts may also have contributed to women shifting from part-time to full-time work, and we explore this further in section 2.5.

**Figure 3: Women are much more likely to work part-time than men**

Proportion of people in employment working part-time by sex, Scotland



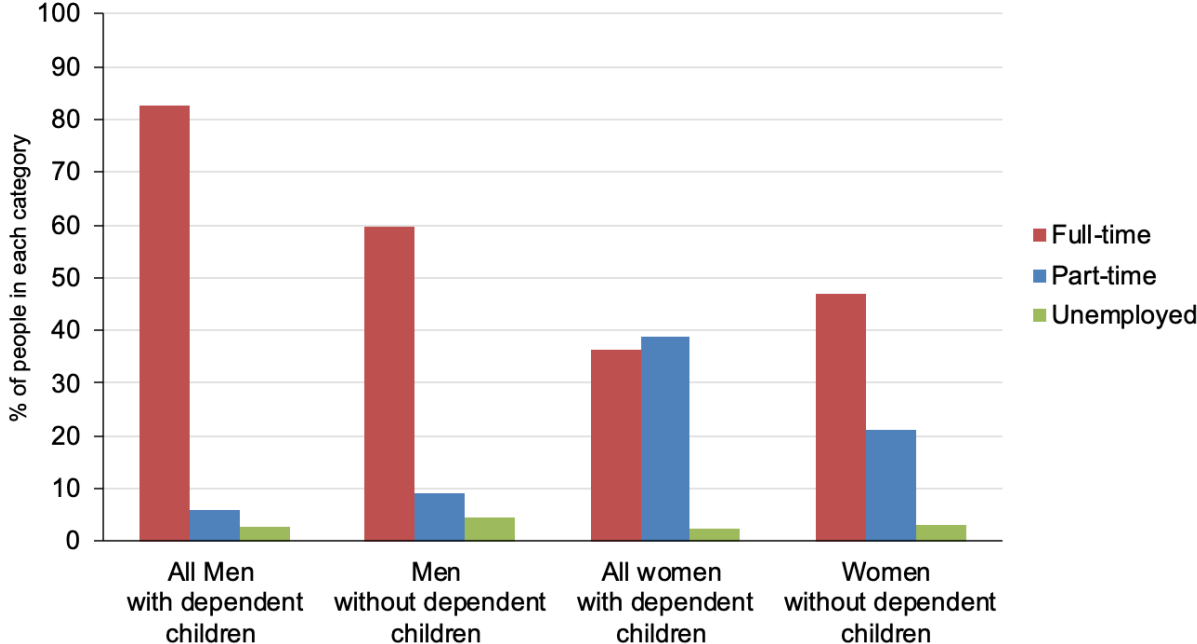
Source: Labour Force Survey<sup>36</sup>

Note: Chart shows the number of men / women working part-time as a proportion of all employed men / women (including employees and self-employed)

Part-time working continues to be associated with women with dependent children.<sup>37</sup> In 2021 39% of women with dependent children in Scotland worked part-time, compared with only 6% of men with dependent children (see Figure 4). This suggests that the higher proportion of women in part-time work is partly due to the lack of flexible working opportunities that can be reconciled with unpaid work, as well as the lack of affordable childcare services.<sup>38</sup> However, women are also more likely to work part-time than men regardless of childcare responsibilities, and it has been suggested that this is partly because women continue to work part-time after their children reach adulthood.<sup>39</sup> The significantly higher proportion of women in part-time work suggests that women’s access to paid work remains heavily constrained by traditional social roles such as care and childcare work, even as they have increasingly entered and remained in the labour market.<sup>40</sup>

As part-time work is predominantly found in the lower-paid jobs and sectors, the higher prevalence of part-time work among women is a key reason why women have lower average earnings, as will be explored further in section 3.

**Figure 4: Women with dependent children are most likely to work-part time**  
 Employment type for men and women and dependent children status, Scotland, 2021



Source: Labour Force Survey<sup>41</sup>

**2.3 Zero hours contracts**

A ‘zero-hour contract’ (ZHC) is a type of employment contract between an employer and an employee whereby the employer is not obliged to provide any minimum number of working

hours to the employee.<sup>42</sup> Estimates for the number of people on zero-hours contracts are published in the Labour Force Survey (LFS).

Use of ZHCs across the UK began to attract attention in 2013 after the number of people employed on ZHCs across the UK increased by 132% between 2012 and 2013.<sup>43</sup> While less than 1% of people in employment in the UK had ZHCs between 2000 and 2012, this increased sharply to over 2% in 2013 and has continued to rise to an estimated 3.2% of today.<sup>44</sup> The growth of ZHCs and other forms of atypical contracts is widely acknowledged as a key reason why unemployment has fallen since 2010 despite the UK economy performing poorly on measures such as economic growth and productivity.

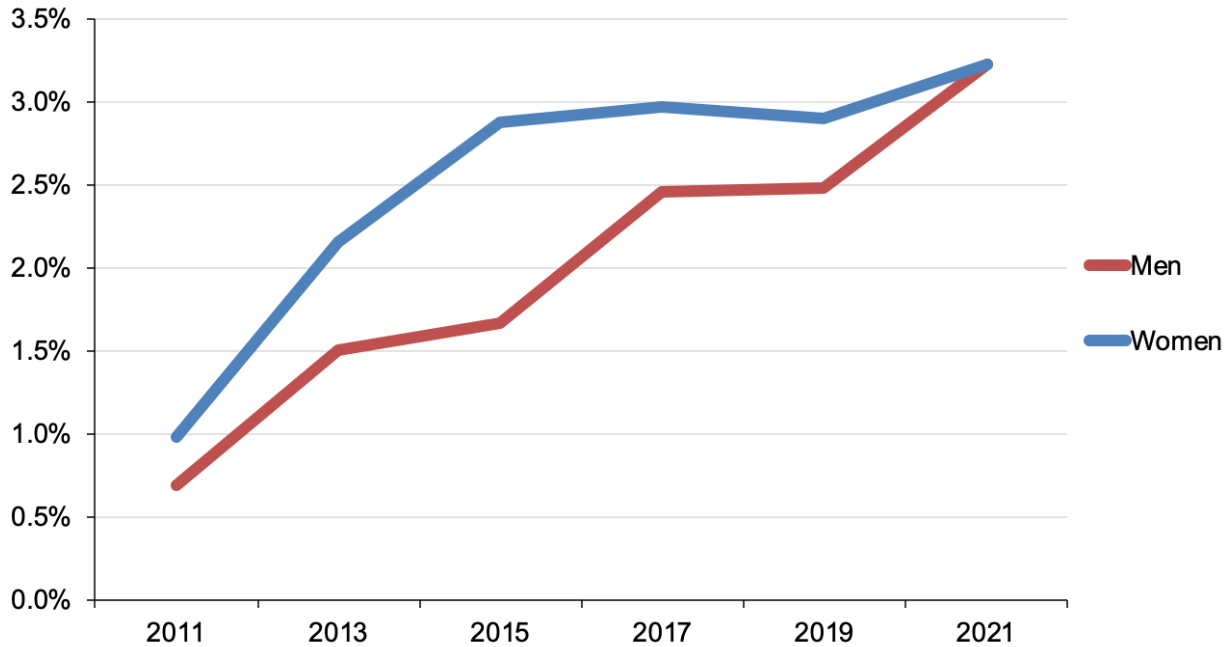
It is also possible to estimate the prevalence of ZHCs in Scotland using Labour Force Survey data, however small sample sizes make the data less robust. The figures show a steady increase in the use of ZHCs over the past decade, rising from 17,542 people in 2011 to 85,248 people in 2021 – representing an increase of 386%.<sup>45</sup> The number of people employed on ZHCs increased sharply during the pandemic, increasing by around 10,000 between 2019 and 2021.

Throughout most of this period women in Scotland have been significantly more likely to be employed on ZHCs than men. In 2011, there were 10,000 women employed on zero hours contracts, but by 2021 this had increased to over 420,000 – representing an increase of 320%. However, the latest data for December 2021 indicates that there is now a broadly similar proportion of men and women on ZHCs in Scotland at around 3.2%.<sup>46</sup> As noted above however, these estimates are based on a small sample size of around 80 people, and should therefore be treated with caution. Across the UK as a whole, where sample sizes are much more robust, women continue to be more likely to be employed on ZHCs than men. At the end of 2021, 3.8% of women in employment across the UK were on ZHCs, compared with 2.6% of men.<sup>47</sup> The higher use of ZHCs among women can be partly explained by the fact that ZHCs are most prevalent in sectors such as hospitality and health and social care, which as will be explored in section 2.5 tend to have majority female workforces.<sup>48</sup>

In addition, a recent study by the TUC and the equality organisation Race on the Agenda (Rota) found that Black and minority ethnic (BME) women across the UK are almost twice as likely to be on zero-hours contracts as white men and almost one and a half times more likely than white women.<sup>49</sup>

**Figure 5: The number of women employed on zero-hours contracts has increased sharply over the past decade**

Proportion people in employment on a zero-hours contract by sex, Scotland



**Source:** Labour Force Survey<sup>50</sup>

**Note:** Data from the Labour Force Survey reflects the number of people in employment who report that their main employment is a “zero-hours contract”. The figures shown are therefore affected by whether people know they are on a zero-hours contract and by how aware they are of the concept.

While some maintain that ZHCs provide workers with greater flexibility and choice, there is evidence that ZHC workers are likely to be less satisfied overall with their employment contracts and pay and conditions compared with other employees. According to UK data from the Labour Force Survey, ZHC workers are more than three times more likely to want more hours in their current role than non-ZHC workers, and nearly seven times more likely to want a replacement job with more hours.<sup>51</sup> ZHC workers also tend to be lower paid than non-ZHC workers: one recent study found that the hourly pay of ZHC employees was 57% of the hourly pay of employees without ZHC, and just 40% of employees with zero-hours contracts had hourly earnings that matched (or were higher than) the 2021 Living Wage.<sup>52</sup> The historically higher prevalence of ZHCs among women in Scotland is therefore likely to contribute to the gender pay gap, which will be explored further in section 3.

## 2.4 Self-employed

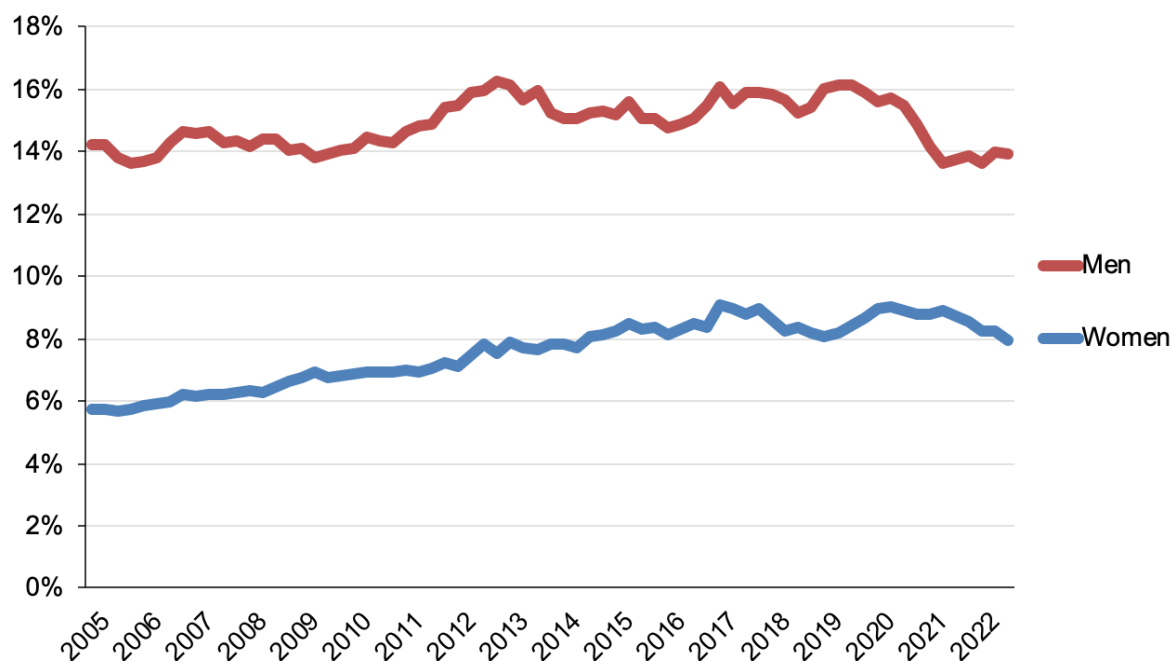
Another significant recent shift in the nature of Scotland’s labour market relates to the growth of self-employment among both men and women. The number of self-employed people in Scotland increased by 34% between 2005 and 2020, compared to an increase of just 6% for employees.<sup>53</sup> The largest increase in self-employment was among women, who experienced a 75% rise compared to 18% for men between 2005 and 2020. However, during the Covid-19 pandemic the number of self-employed men and women declined as an estimated 500,000 workers across the UK switched their status from self-employed to employed.<sup>54</sup> According to

the ONS, this was largely due to people reclassifying their employment status to become eligible for the UK Government’s furlough scheme rather than changing their job.<sup>55</sup> The ONS therefore recommends that “people should be very cautious when interpreting changes in self-employment” since the Covid-19 pandemic.<sup>56</sup> Despite this however, between 2005 and 2022 the number of self-employed women in Scotland still increased by 56% compared to just 3% for men, and women’s share of total self-employed increased from 27% of the total to 35% over the same time period.<sup>57</sup>

Across the UK, 45% self-employed women work part-time, compared to 18% self-employed men.<sup>58</sup> In addition, 61% of self-employed women with children work part-time, compared to only 10% of men. Evidence suggests that a key reason for becoming self-employed is to balance care and other unpaid responsibilities with paid work.<sup>59</sup> A recent review published by the UK Government found that for women with children, flexibility around family care is their number one reason for becoming self-employed.<sup>60</sup> Across the UK it is estimated that the number of solo self-employed mothers has increased by 61% 2008.<sup>61</sup>

**Figure 6: The number of women in self-employment has increased**

Proportion of people in employment that are self-employed by sex, Scotland



**Source:** Labour Force Survey<sup>62</sup>

**Note:** Chart shows the number of self-employed men / women as a proportion of all employed men / women (including employees and self-employed)

While the growth of self-employment is often hailed as a sign of rising entrepreneurialism, it should also be acknowledged that people may enter into self-employment through necessity rather than choice, and that self-employment can often involve precarious work and low pay. The rise in self-employment has coincided with the rise of the ‘gig economy’, and it has been



estimated that across the UK 10.7% of gig economy workers define themselves as self-employed.<sup>63</sup> In addition, much of the female self-employment increase since 2008 across the UK has occurred in services such as 'Professional and scientific' and 'Administrative and support', as well as caring and education roles. This coincides with large numbers of public sector redundancies in those occupational areas. The Bank of England has estimated that around a quarter of the overall increase in self-employment since 2010 may be due to changes in public sector employment. Some have expressed concern that a significant proportion of those who were formerly employed in the public sector could be defined as 'bogusly' self-employed, which occurs when workers are told that they are self-employed when in fact legal tests would likely define them as employed. A report published by Citizens Advice in 2015 found that bogus self-employment has increased in traditionally female dominated sectors, including caring and cleaning, which deliver essential state services that are now outsourced to private companies.<sup>64</sup>

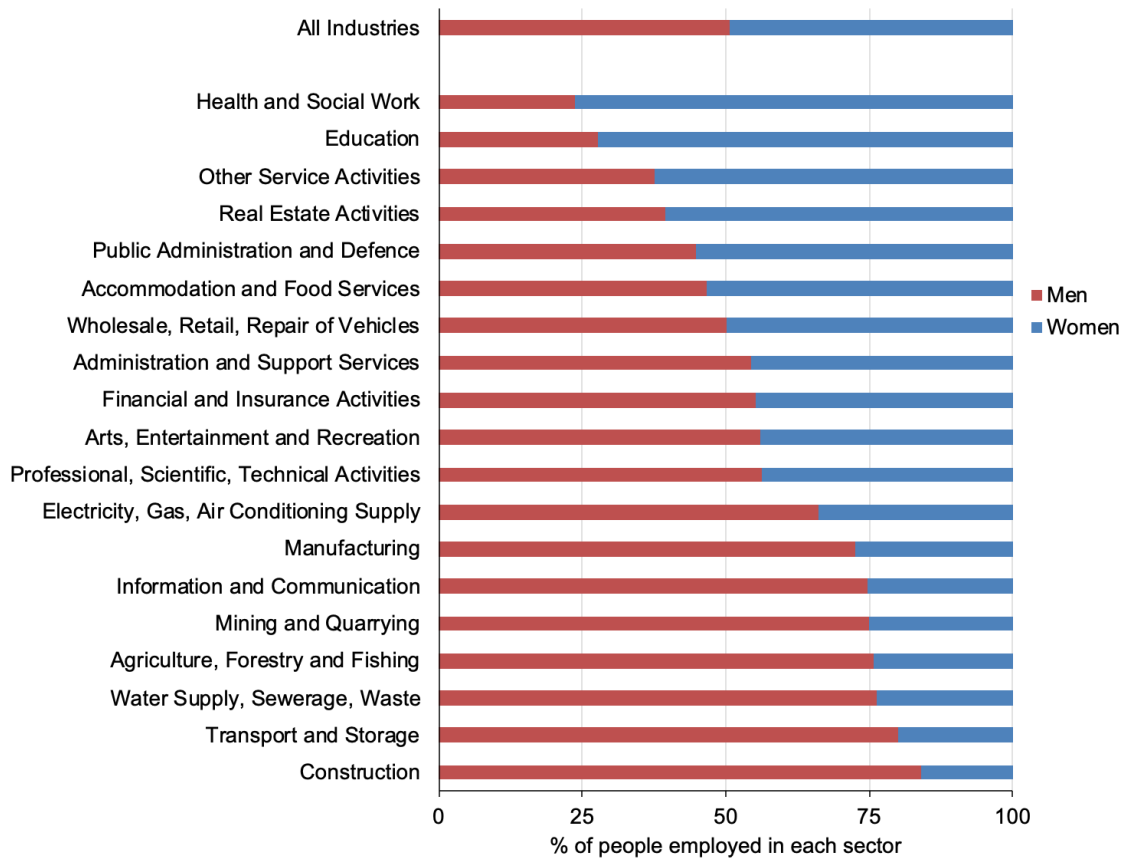
## **2.5 Sectors and occupations**

Although equality legislation has been in place for many years, gender segregation is still apparent in many industry sectors in Scotland. Gender segregation refers to the tendency of women and men to work in different sectors and occupations. It is typically caused by factors including gender stereotyping, inflexible working patterns and undervaluation of roles and occupations usually considered 'women's work'.

Today women working in Scotland are clustered in a relatively small number of jobs and sectors. Women represent over half of workers in only six of the 20 Standard Industry Classifications (SICs), whereas men tend to be more evenly spread across industry groups (see Figure 7). Almost half of all women in employment in Scotland (48%) work in the 'Health and Social Work', 'Public Administration and Defence' and 'Education' sectors, whereas only around 20% of men are employed in these sectors. Many (but not all) of these jobs are located in the public sector. In 2022 women accounted for 66% of jobs in the public sector.<sup>65</sup>

### **Figure 7: Women working in Scotland are clustered in a relatively small number of industries**

Proportion of sector employment aged 16 and over by sex Scotland, Apr 2020-Mar 2021



**Source:** Annual Population Survey<sup>66</sup>

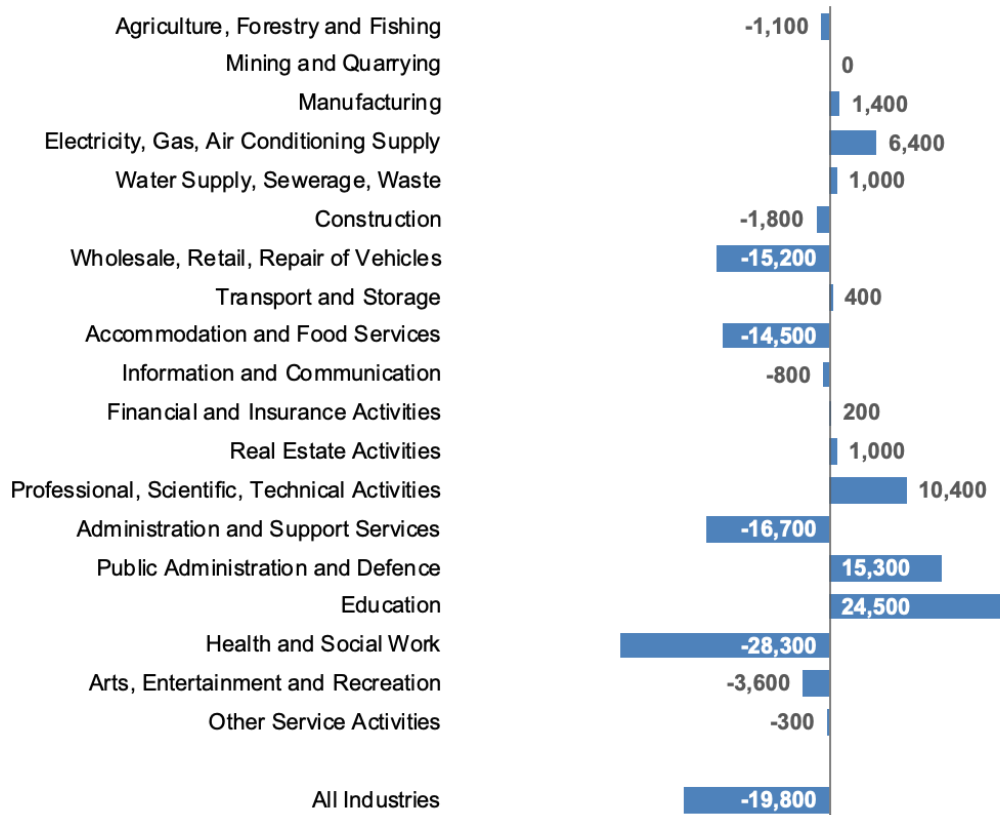
**Note:** Industries are grouped using Standard Industry Classification 2007 (SIC 2007).

In recent years there have been substantial movements in the number of women employed in certain sectors. Between April 2020 and March 2021 50,200 more women became employed in the ‘Education’, ‘Public Administration’ and ‘Professional, Scientific and Technical Activities’ sectors.<sup>67</sup> At the same time however, the number of women employed in the ‘Health and Social Work’, ‘Administration and Support Services’, ‘Wholesale, Retail, Repair of Vehicles’ and ‘Accommodation and Food’ sectors decreased by 74,700.<sup>68</sup> This partly reflects the impact of the Covid-19 pandemic, with sectors such as high street retail and hospitality suffering from the legacy of lockdowns and social distancing requirements.

Given that the sectors experiencing a growth in female employment have higher levels of full-time employment, whereas the sectors experiencing a decline in female employment have higher levels of part-time employment, this may help explain the decline in women’s part-time employment described in section 2.3. These sectoral shifts may also help explain why female employment has risen faster than male employment, as described in section 2.1. The two sectors that have experienced the largest growth in total employment since the Covid-19 pandemic are ‘Education’ and ‘Public Administration’, both of which typically employ significantly more women than men.<sup>69 70</sup>

**Figure 8: The number of women employed in certain sectors has changed significantly in recent years**

Change in the number of women employed aged 16 and over between Apr 2019 - Mar 2020 and Apr 2020 - Mar 2021 by industry and sex, Scotland



**Source:** Annual Population Survey<sup>71</sup>

**Note:** Industries are grouped using Standard Industry Classification 2007 (SIC 2007).

Gender segregation across occupational groups shows a similar picture to that seen across industry sectors, with specific occupational groups showing high levels of segregation. Women account for 81% of those in caring, leisure and other service jobs, 71% of administrative and secretarial workers, and 62% of sales and customer service jobs.<sup>72</sup> As explored further in the below case study, social care workers in Scotland are overwhelmingly women, with many working on low-paid and insecure contracts. As will be explored further in section 3, the undervaluation of roles often referred to as "women's work" such as social care is a key cause of women's low pay and therefore the gender pay gap.

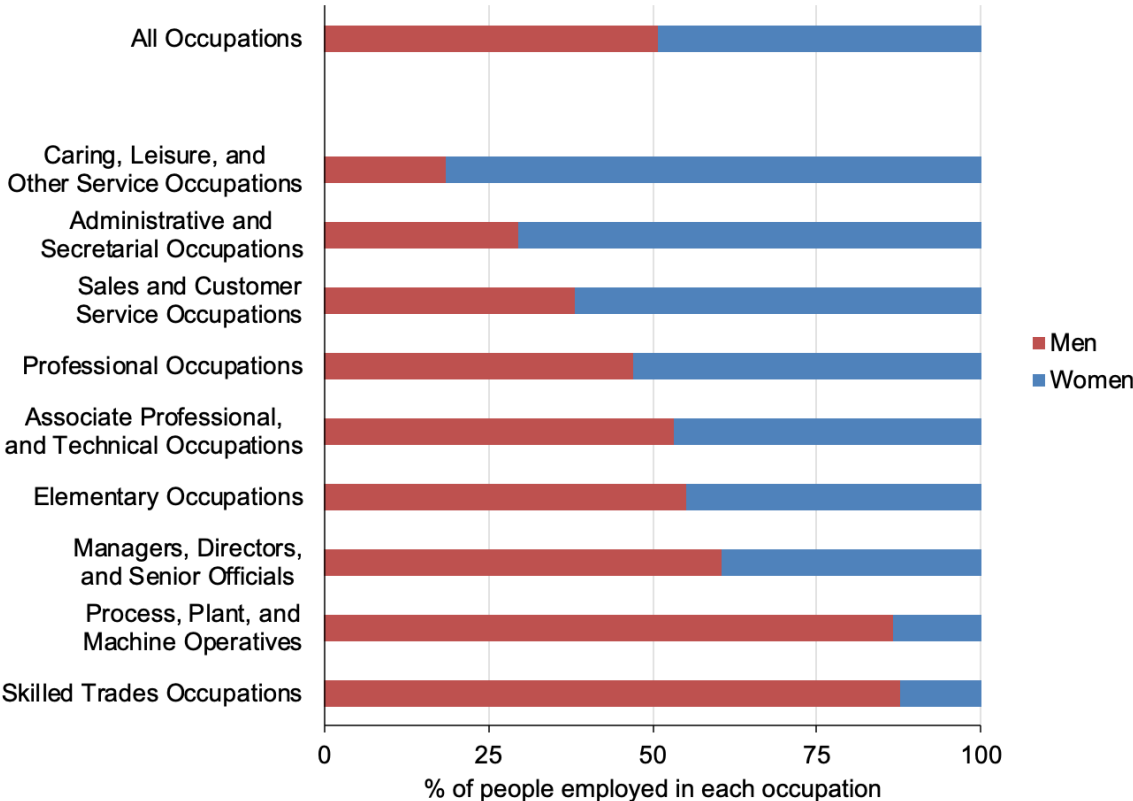
There is also evidence that women in Scotland continue not to reach management and senior positions in organisations to the same extent as men, which again impacts the gender pay gap. Women account for 40% of managers, directors and senior officials in Scotland,

compared with 60% for men. While there are slightly more women employed in professional occupations than men, around half of these are employed in occupations that continue to be undervalued such as nurses, teachers, or other educational professionals.

Factors that are known to affect women’s movement between junior and senior positions include the ‘glass ceiling’ effect and the ‘sticky floor’ effect.<sup>73</sup> The ‘glass ceiling’ effect refers to specific barriers limiting women’s participation in senior positions within organisations, whereas the ‘sticky floor’ effect is that women and other minority groups are ‘stuck’ in low-skilled, low-paid jobs often without access to higher paid jobs due to limited availability of training or promotion prospects. This ‘sticky floor’ effect is thought to be particularly acute within part-time roles, which as described in section 2.3 are significantly more likely to be undertaken by women.

**Figure 9: Women are significantly more likely to work in caring, administrative and customer service occupations**

Proportion of occupation employment aged 16 and over by sex and occupation, Scotland, Apr 2020 - Mar 2021



Source: Annual Population Survey<sup>74</sup>

Note: Occupations are grouped using Standard Occupation Classification 2010 (SOC 2010).

### **Case study: Scotland's social care sector**

There are 209,000 workers in Scotland's social care sector, and eight out of ten (83%) of those are women.<sup>75</sup> Social care is vital to women's lives, as workers and as service users, and to the functioning of Scotland's economy. Investment in the workforce is core to providing both high quality care and good living standards. Despite this, the social care workforce remains underpaid, undervalued and under-protected.

In their 2019 report on 'Fair Work in Scotland's Social Care Sector', the Fair Work Convention highlighted poor terms and conditions and a lack of security for social care staff.<sup>76</sup> It found that 20% of the social care workforce are not on secure contracts, and 11% are on zero hour contracts. It also found that 13% of the workforce work over 50 hours a week, and 15% of social care workers work unpaid overtime. The average hourly pay was £9.79, which lags behind equivalent pay in the public sector and in the health sector. Given that women make up the majority of the workforce in the social care sector, the undervaluation of social care also contributes to the gender pay gap. The continued undervaluing of care work is associated with perceptions of care work as being 'women's work' and is sustained by gender stereotypes and assumptions about women's and men's capabilities.

Rising demand due to demographic shifts, difficulties associated with recruiting and retaining workers, and funding pressures have combined to place huge pressure on the social care system in Scotland. Many care sector employers are already reporting high vacancy rates, a shortage of good quality applicants and high staff turnover.

The 2021 Independent Review of Adult Social Care recommended the establishment of a new National Care Service (NCS) "to achieve the consistency that people deserve, to drive national improvements where they are required, to ensure strategic integration with the National Health Service, to set national standards, terms and conditions, and to bring national oversight and accountability to a vital part of Scotland's social fabric."<sup>77</sup>

Following this, the Scottish Government introduced the National Care Service (Scotland) Bill to Parliament on 20 June 2022, and has committed to establishing a functioning National Care Service by the end of this parliamentary term in 2026. We discuss recommendations relating to the NCS in section 6.

## **2.6 Economic inactivity**

People who are 'economically inactive' refers to those who are neither employed or unemployed, and are therefore not part of the labour supply. There are many reasons why

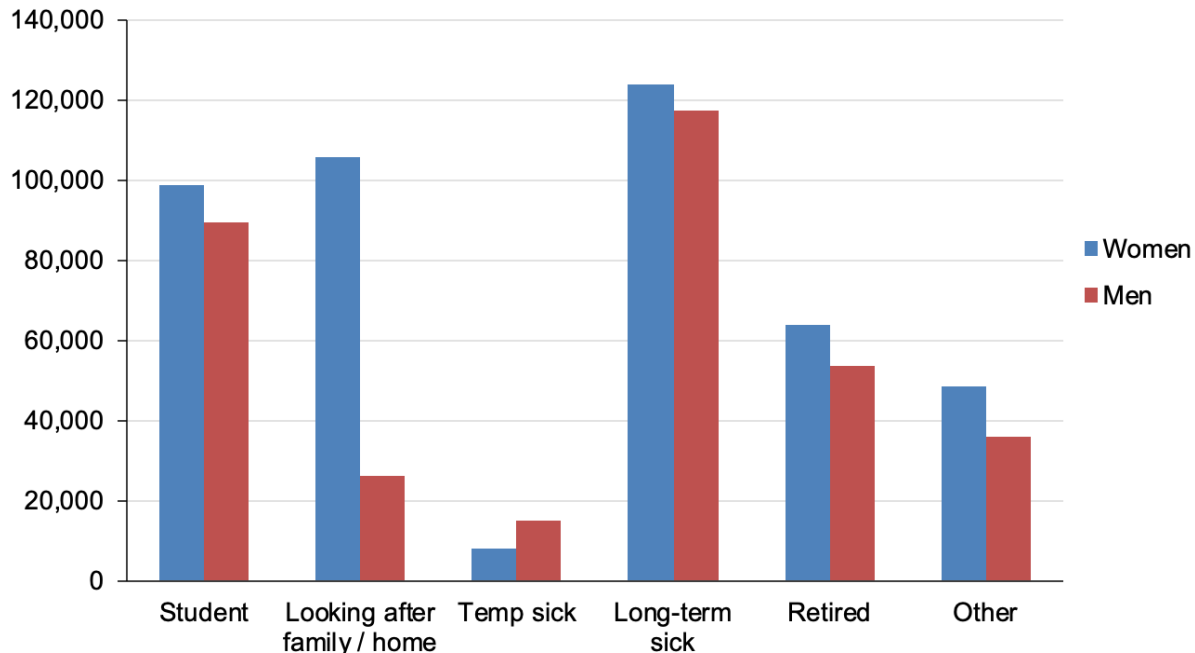
people may be inactive: they may have a long-term illness or disability, be studying for a qualification, staying at home to look after their family, or have retired. It is important to note that under the ONS definitions, those who are not employed or unemployed but undertake unpaid work such as care are not categorised as being 'economically active', even though this work plays a vital role in the economy.

The latest data from the Labour Force Survey shows that the inactivity rate is higher for women in Scotland in 2022, at 23.1%, compared with 19.9% for men. Overall women account for 55% of economically inactive people in Scotland.<sup>78</sup> The main difference is accounted for by the significantly larger number of women who are inactive due to 'looking after the family or home'. The latest data from the Annual Population Survey indicates that there are 106,000 women who are economically inactive for this reason (amounting to 26% of all economically inactive women), compared with 26,000 men (or 7.8% of all economically inactive men).<sup>79</sup> This means that 80% of all people in Scotland who are economically inactive due to caring responsibilities are women.<sup>80</sup> This reflects long entrenched gendered patterns and social attitudes, and again highlights how women's access to paid work remains constrained by traditional social roles as carers and mothers, even as they have increasingly entered and remained in the labour market.

The most recently available time-use data for Scotland shows that women in opposite sex couples were undertaking approximately 63% of the housework and 64% of non-developmental childcare.<sup>81 82</sup> In addition, survey data published for Carers Week suggests that there are now 887,815 unpaid carers in Scotland, of which 61% are women.<sup>83</sup> This is an increase of 158,000 since the start of the pandemic, with 78% of carers having to provide more care than they were prior to the Covid-19 outbreak.<sup>84</sup>

### **Figure 10: Main reason why people are economically inactive**

Number of people aged 16-64 economically inactive by main reason and sex, Scotland, Jun 2021 - Jul 2022



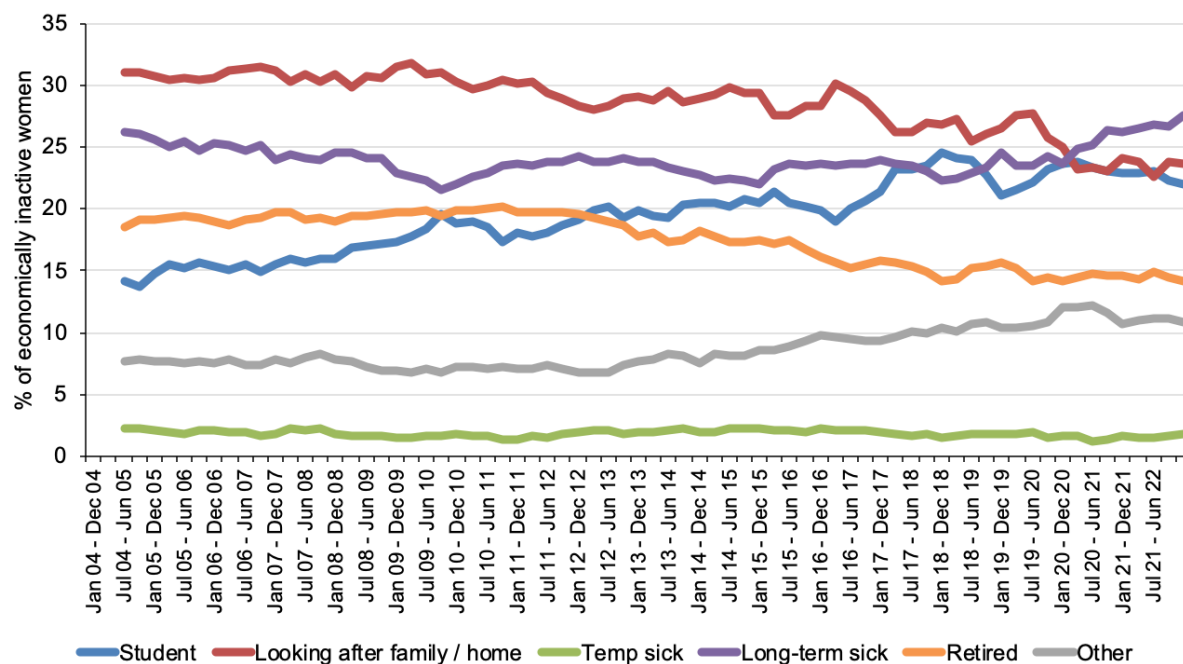
**Source:** Annual Population Survey<sup>85</sup>

Looking at trends over time however, the proportion of women that are economically inactive due to looking after the family and home has been steadily declining. It also experienced a significant decline during the Covid-19 pandemic, falling to record lows in 2021. Evidence indicates that the ‘added worker’ effect and greater flexibility to work from home (which as described in section 2.2 has contributed to women shifting from part-time to full-time work) may have also led women who were previously economically inactive to enter the labour market.<sup>86</sup>

In addition however, there has been a significant increase in the number of women who are economically inactive due to long-term sickness. The number of women in this category has increased by nearly 10,000 since the Covid-19 pandemic began, meaning that long-term sickness is now the most common reason for working age women being economically inactive in Scotland.<sup>87</sup> While not all of this can be attributed to the Covid-19 pandemic, the ONS estimates that there are 204,000 people living with Long Covid in Scotland.<sup>88</sup> Recent analysis published by the Institute for Fiscal Studies (IFS) suggests that long Covid is more prevalent amongst women as well as people living in deprived areas and people with other limiting health conditions and disabilities.<sup>89</sup>

**Figure 10: Long-term sickness is now the main reason for women being economically inactive**

Proportion of women aged 16-64 economically inactive by main reason, Scotland



Source: Annual Population Survey<sup>90</sup>

At the aggregate level however, the total proportion of women that are economically inactive in Scotland has remained broadly unchanged since before the pandemic. The increase in the proportion of women that are inactive due to long-term sickness has been broadly offset by the decline in those that are inactive due to looking after the family and home, as described above. In contrast, the rate of economic inactivity for men has increased since the start of the Covid-19 pandemic, increasing from 19.3% in April 2019 to March 2020 to 19.9% in June to August 2022.<sup>91</sup> This has been driven mainly by an increase in men retiring, which has not been the case with women, as well as long-term and temporary sickness.

### 3. Earnings and gender pay gap

This chapter explores how women’s earnings in Scotland have changed over time and assess trends in the gender pay gap. The analysis in this section draws on the latest data from the ONS’s Annual Survey for Hours and Earnings (ASHE).

#### 3.1 Earnings

According to the ONS’s Annual Survey for Hours and Earnings (ASHE), median gross weekly earnings for female employees working full-time were £605 in 2022, significantly lower than the £678 for male full-time employees.<sup>92</sup> For part time employees, median gross weekly earnings for women were slightly higher than for men, at £242 compared to £225. However, as described in section 2.2, women make up 74% of the part-time workforce in Scotland, and female part-time workers work more hours per week on average than male part-time workers.<sup>93</sup>



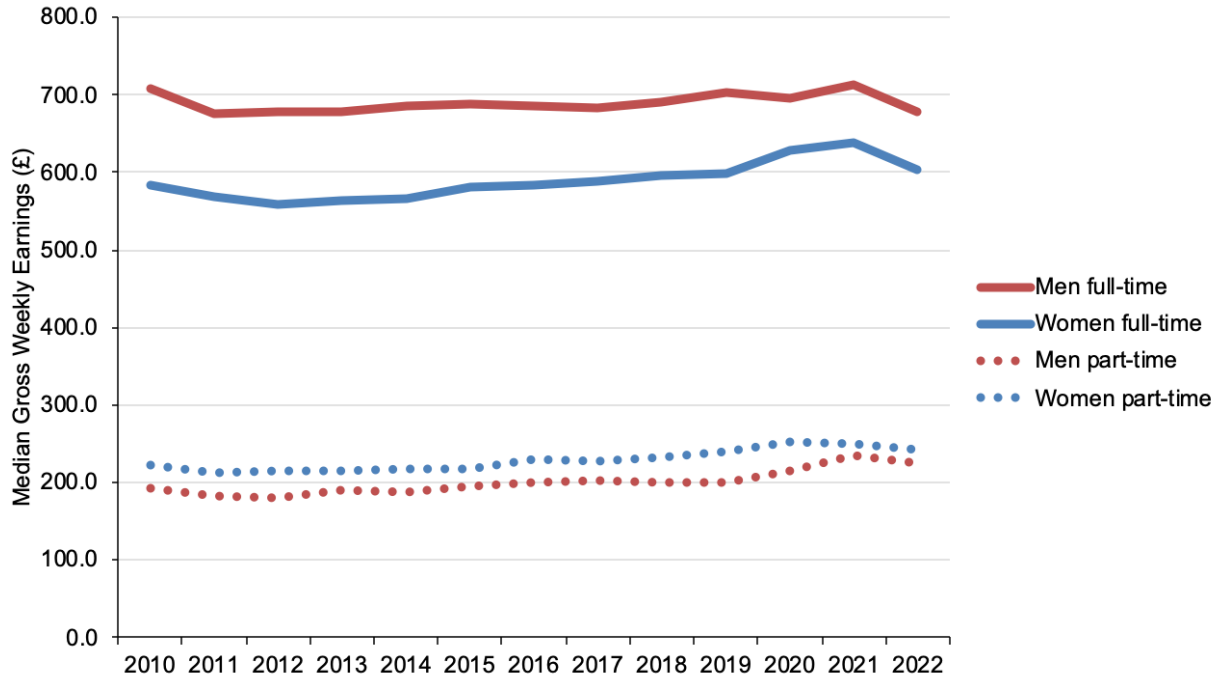
Real weekly earnings (earning after adjusting for inflation) have been relatively stagnant over the past decade for both women and men. Following the global financial crisis in 2008, real weekly earnings fell sharply. Although real weekly earnings started to recover slightly from 2015 to 2021, real earnings for male and female full-time employees fell by 5% in 2022, largely due to inflation soaring to over 10%. This represents the largest decline in real weekly earnings in Scotland since the global financial crisis. As a result, real median weekly earnings for females in full-time employment are now just £20 higher than they were in 2010, and remain £29 lower for men. The current high inflation environment poses a significant challenge for women's living standards in Scotland, which we explore further in Section 5.

Since 2010 real median earnings growth has been higher for part-time workers than full-time workers for both men and women. This may be explained by the fact that part-time work is predominantly found in the lowest-paid jobs and sectors, therefore the rates of pay are more likely to have been impacted by increases in the National Minimum Wage rates and changes to the Living Wage. Since 2012, the proportion of women in Scotland earning less than the real Living Wage has fallen from 22.8% to 16%, and for men has reduced from 14.4% to 12.5%.<sup>94</sup>

However, data on earnings during the Covid-19 pandemic should be treated with caution. During the pandemic many workers were placed on furlough or had their hours reduced, meaning that people saw their earnings fall, pushing down weekly wages. As noted in section 2.1, evidence shows that women were more likely to work in a shutdown sector such as hospitality and retail, and were also more likely to have had their hours cut and be furloughed.<sup>95</sup> In addition, the pandemic also disrupted data collection, with lower response rates to surveys, therefore data during the pandemic is subject to more uncertainty and should be treated with caution. The ONS has therefore encouraged “users to focus on long-term trends rather than year-on-year changes.”<sup>96</sup>

**Figure 10: Earnings have been relatively stagnant over the past decade after accounting for inflation**

Real median gross weekly earnings by sex, Scotland, 2010-2022



**Source:** Annual Survey for Hours and Earnings (ASHE)<sup>97</sup>

**Note:** Real earnings have been adjusted for inflation (2022 prices) using CPIH.

In addition to having lower average earnings, women in Scotland are also more likely to be in receipt of social security payments. This is due to both their lower average incomes and being more likely to receive payments for people they care for, particularly children. As of December 2021, women made up 53.5% of those on Universal Credit (UC) in Scotland.<sup>98</sup> As a result, UK Government cuts to the welfare system over the past decade, such as the benefit freeze, two-child cap and cuts to work allowances, have disproportionately impacted women.<sup>99</sup> The Women’s Budget Group estimates that 59% of the cumulative welfare cuts by 2021-22 will have been borne by women.<sup>100</sup>

### 3.2 Gender pay gap

The gender pay gap is the difference between the average (mean or median) earnings of men and women across a workforce. It is a key indicator of women’s labour market inequality, and the Scottish Government has published a Gender Pay Gap Action Plan to reduce the gender pay gap in Scotland.<sup>101</sup>

There is no definitive way in which to calculate the gender pay gap, and different methodologies will give slightly different results.<sup>102</sup> However, in Scotland the Scottish Government measures the gender pay gap by comparing the median hourly earnings (excluding overtime) of men and women.<sup>103</sup>

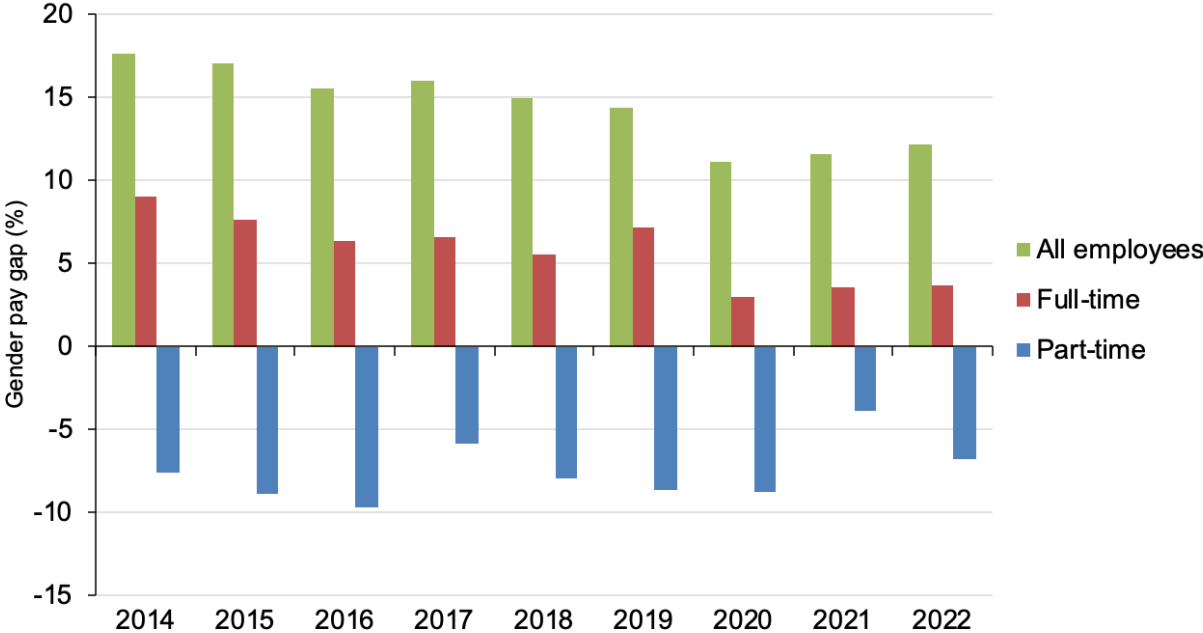
Data from the ONS’s ASHE shows that the gender pay gap for all employees (combined to include full- and part-time earnings) has narrowed over the past nine years. This partly reflects the fact that real median earnings for men have fallen since 2010, as highlighted in the previous section, rather than women’s earnings increasing. However, while the gender pay gap fell from 17.6% in 2014 to 11.1% in 2020, it has increased again since – rising to 11.6% in 2021 and 12.2% in 2022.<sup>104</sup>

For full-time work, the gender pay gap fell from 9.1% in 2014 to 3.0% in 2020, before rising to 3.6% in 2021 and 3.7% in 2022.<sup>105</sup> The gender pay gap for part-time work in 2022 was -6.7% in 2022, meaning women tended to be paid more than men. As above, this likely reflects that women make up a large majority of the part-time workforce, and are employed in a wider range of part-time occupations. The reason that the gender pay gap for all employees is significantly larger than either the full-time or part-time pay gaps is because a much higher share of women than men are employed part-time and part-time workers tend to earn less per hour than those working full-time.

As noted above however, the complexities associated with the Covid-19 pandemic in terms of wages and hours worked in the economy, and also disruption to the collection of data from business, means that recent gender pay gap data – and particularly data for 2020 and 2021 – should be treated with caution.<sup>106</sup> The ONS has encouraged “users to focus on long-term trends rather than year-on-year changes.”<sup>107</sup>

**Figure 11: The headline gender pay gap has risen in recent years after narrowing over the past decade**

Gender Pay Gap - Median Hourly Earnings (excluding Overtime), Scotland, 2014-2022



**Source:** Annual Survey for Hours and Earnings (ASHE)<sup>108</sup>

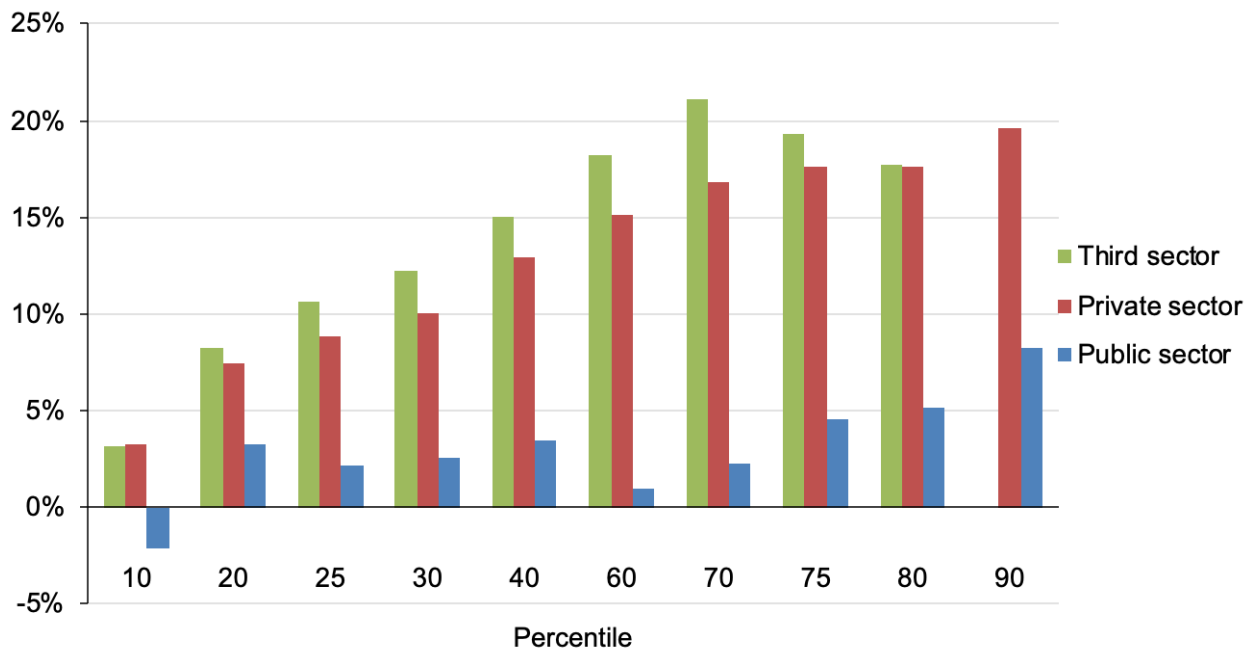
**Note:** Gender pay gap is defined as the difference between men's and women's hourly earnings (excluding overtime) as a percentage of men's earnings.

While the headline figures show a trend towards a narrowing gender pay gap, simply comparing the median hourly earnings of men and women masks significant variations in different parts of the economy. For example, the gender pay gap in Scotland varies significantly in different occupations. The full-time gender pay gap for time 'managers, directors and senior officials' and 'professional occupations' stood at 11.4% and 8% respectively in 2022 – significantly above the overall full-time figure of 3.7%.<sup>109</sup> The gender pay gap also varies widely across the income distribution. The highest female earners continue to earn substantially less than their male counterparts, with a gender pay gap for full-time employees in the 90th percentile (i.e. the highest earning 10%) standing at 13.1% in 2022 – once again significantly above the overall full-time figure of 3.7%.<sup>110</sup>

In terms of sectors, Scotland's third sector has the highest gender pay gap for full-time employees, standing at 15.1% in 2022, followed by the private sector at 13.3%, as measured by median hourly earnings. The gender pay gap in Scotland's public sector is significantly lower at 5.4%. As shown in Figure 12 below, the third and private sectors have significantly larger gender pay gaps across the income distribution.

**Figure 12: The third and private sectors have the largest gender pay gaps across the income distribution**

Full-time gender pay gap in the public, private and third sector by percentile, Scotland, 2022



**Source:** Annual Survey for Hours and Earnings (ASHE)<sup>111</sup>

**Note:** Gender pay gap is defined as the difference between men's and women's hourly earnings (excluding overtime) as a percentage of men's earnings. Data on the hourly earnings at the 90th percentile in the third sector is not available.

Importantly, there remain significant differences in the gender pay gap between different age groups.<sup>112</sup> While the gender pay gap for full-time workers was slightly negative for the 18-21 and 22-29 age groups in 2022 (meaning women tended to be paid more than men), it remained stubbornly high among older age groups – standing at 7.5% for 40-49 year olds, 9.8% for 50-59 year olds and 9% for those over the age of 60.<sup>113</sup> This likely reflects the large and unequal impact of women taking time out of work to care for children, and illustrates women's earnings remain heavily constrained by traditional social roles.

There remains a lack of intersectional data in Scotland pertaining to gender pay gaps among disabled women, Black and minority ethnic (BME) women, lesbian and bisexual women, trans women and refugee women, however collecting this data should be a key priority going forward.<sup>114</sup>

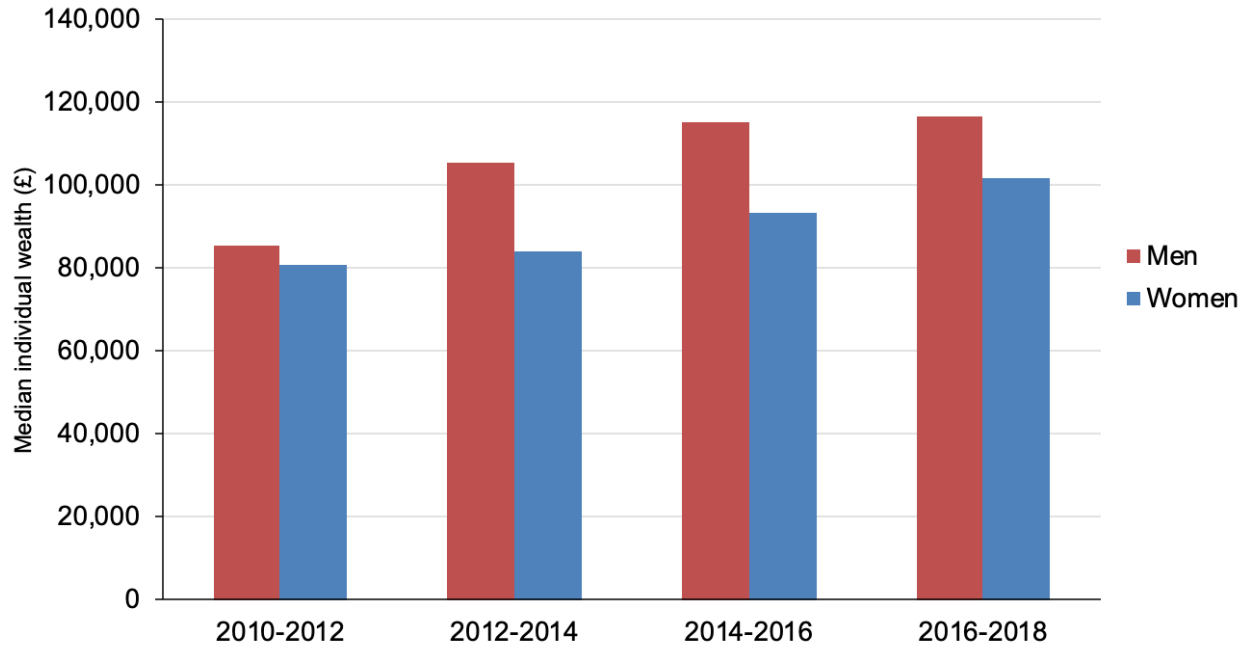
#### **4. Women as asset owners**

Personal wealth is one of the key components of women's and men's standard of living. Wealth can be used as a source of finance to improve current or future living standards, to invest in to generate future returns, and to provide financial resilience, reducing vulnerability to shocks such as unemployment or illness. People's personal wealth is made up of their physical, financial, property and private pension wealth, and is influenced by various factors including asset prices, incomes and savings rates.

There is less detailed data available on patterns of wealth in Scotland than there is on incomes. This is compounded by the fact that measures of wealth are often estimated at the household level, which can make it difficult to disaggregate the individual wealth of men and women, particularly for categories such as property wealth.

According to the ONS's Wealth and Assets Survey, the median inflation-adjusted individual wealth of women was £102,000 between 2016 and 2018, compared to £116,000 for men.<sup>115</sup> This includes all individual wealth (such as pension wealth) plus any wealth held commonly, for example joint property or joint bank accounts. In Scotland and across the UK, private pensions make up the largest component of personal wealth. In 2016-18, the median pension wealth (not yet in payment as well as in payment) of women was £51,700 compared to £100,000 for men.<sup>116</sup> However, these figures exclude the third of adults in Scotland that have no private pension savings, therefore do not represent an accurate picture of the typical individual's pension wealth in Scotland, which would be significantly lower. 34% of women, compared to 29% of men, are currently not saving for their retirement in any way.<sup>117</sup> Women's lower pension wealth can be partly explained by lower average wages and the likelihood of taking time out of the labour market for childcare.<sup>118</sup>

**Figure 12: Individual wealth is significantly lower for women compared to men**  
 Median (inflation-adjusted) individual wealth in £ of adults by sex, Scotland



**Source:** Wealth and Assets Survey<sup>119</sup>

**Note:** Individual wealth splits commonly owned wealth out among household members.<sup>120</sup>

Whereas pension wealth can be clearly allocated to an individual, property wealth is typically measured at the household level, which makes it difficult to disaggregate it between men and women. However, there is evidence that the gender pay gap undermines women’s ability to accumulate property wealth. Research from The Women’s Housing Forum found that a woman on the median income who wants to get a mortgage based on the average (mean) house price will need to borrow 15.4 times their salary, whereas a man on the median income would only need to borrow 10.1 times their wage.<sup>121</sup> In addition, while on average as many women enquire about mortgages as men, far fewer actually qualify for the mortgage due to their lower monthly incomes and on average lower savings.<sup>122</sup>

The analysis so far has shown that despite headline statistics showing record levels of women in employment in Scotland, significant differences in the nature, quality and remuneration of work between women and men remain. While a detailed assessment of the underlying drivers of these differences is beyond the scope of this report, it is clear that long entrenched gendered patterns and social attitudes continue to shape labour market outcomes for women in Scotland. The fact that women are still significantly more likely to work part-time or be economically inactive due to caring roles highlights how women’s access to paid work remains constrained by traditional social roles as carers and mothers, even as they have

increasingly entered and remained in the labour market. In addition, a lack of flexible working opportunities and affordable childcare services, ongoing gender segregation and the undervaluation of roles usually considered ‘women’s work’ continues to contribute to divergent labour market outcomes and a persistent gender pay gap. These long standing structural factors have been compounded by recent shifts in the nature of the labour market, particularly in relation to the growth of insecure work, self-employment, austerity and the impact of the Covid-19 pandemic, all of which have reinforced gendered labour market dynamics. Looking ahead, Scotland’s rapidly changing economic context poses new challenges for the labour market which, absent intervention, could further exacerbate gendered labour market outcomes. We explore a range of potential new and emerging challenges in the next section.

## 5. Mapping future challenges

In a rapidly changing landscape, pinpointing future challenges is difficult. However, drawing on the analysis outlined above and generating assumptions from recent developments, this chapter offers insights into potential complications, setbacks and hurdles in Scotland’s economic future, and the risks they present to women. Under each scenario, achieving gender equality becomes more challenging and so should be established as a policy priority. While an extensive mapping of future challenges falls outwith the scope of this report, this chapter provides a snapshot of potential barriers to women’s economic security.

### Another programme of austerity and its implications for women

In a matter of weeks, the UK Government pivoted from the September mini budget policies of seismic tax cuts disproportionately benefitting households with high incomes and wealth, to potentially ushering in a new era of austerity.<sup>123</sup> Even prior to her resignation, then-Prime Minister Liz Truss warned “spending will grow less rapidly than previously planned” as part of the rollback of some policies in the mini budget, generating concerns about possible departmental budget cuts, capital expenditure reductions and lower social security payments.<sup>124</sup>

The appointment of the new Chancellor Jeremy Hunt generated fresh speculation about a return to austerity. Excluding health and defence, government departments in Westminster are reportedly being told to make cutbacks of up to 15%, with Conservative manifesto commitments like the “triple lock” pension possibly in jeopardy.<sup>125</sup>

A 2019 report by the UN special rapporteur for extreme poverty and human rights into the last austerity programme, which began in 2010, accused the UK Government of “systematic immiseration of a significant part of the British population”, creating “solitary, poor, nasty, brutish, and short” lives, and labelling the austerity outcomes “a social calamity and an economic disaster.”<sup>126</sup> The unequal gendered impacts of austerity are evident.<sup>127</sup>

Women receive a much higher proportion of benefits and tax credits, are more likely to undertake unpaid care work, experience in-work poverty and spend a higher proportion of income on rent, and 92% of single parents are women.<sup>128</sup> Analysis published in 2016 found that 86% of the net 'savings' from austerity come from women's incomes, including pensions, and services.<sup>129</sup> Modelling by the Equality and Human Rights Commission also found that between 2010 and 2017, women lost more than men from reforms at every income level.<sup>130</sup> Single mothers - the social group with the highest poverty risk - are particularly vulnerable to austerity.<sup>131</sup>

The implications for women of a return to a programme of austerity are harrowing, and would be ushered in the near-immediate aftermath of the last programme of cutbacks, following a deadly pandemic, and in the midst of a prolonged crisis of real wage losses, an energy crisis causing fuel poverty to sky-rocket, and a cost of living crisis unleashing a wrecking ball on the financial security of households.

### Implications of the pandemic on women's economic security

While men had a higher share of Covid-related hospitalisations, intensive care admissions and deaths, the economic impacts of the pandemic often disproportionately harmed women. Overall, women - particularly those that are lone parents and single women - as well as minority ethnic households and disabled people were all more likely to live in poverty prior to the pandemic, and have thus been more at risk of financial distress during Covid-19.<sup>132</sup>

For instance, women made up the majority of employees in sectors with some of the highest pandemic-related job losses such as retail and food services. Further, women increased the number of hours devoted to care (often unpaid) by more than men during the pandemic. 46% of mothers made redundant during the pandemic cited lack of adequate childcare as the cause.<sup>133</sup> Moreover, between the third quarter of 2019 and that of 2020, the number of Black, Asian and minority ethnic women workers had fallen by 17%, compared to 1% for white women.<sup>134</sup> Insecure work with lower quality conditions, such as zero-hours contracts, contributed to the gendered economic outcomes of the pandemic.<sup>135</sup> In Scotland, research by Close the Gap and Engender found young women were seven percentage points more likely than their male counterparts to say their financial situation had worsened since the start of the pandemic.<sup>136</sup>

The pandemic widened gaps between the household balance sheets of the rich and the poor at the same time as asset prices increased. The long-term implications of this for women and other structurally marginalised groups acutely vulnerable to pandemic-related economic stress are severe, from the increased flexibilisation of work to the sustained gendered outcomes embedded in the current approach to care work (paid and unpaid).



As highlighted in section 2.2, there is some evidence that women increased their economic activity over the pandemic, because of more flexibility and options to work from home. While greater flexibility around home working has improved opportunities for some women, it also presents challenges – particularly for women who juggle caring and childcare responsibilities. Given the dependence of many powerful economic interests on city-centre development models built around office working, there remains a risk that tolerance of home working in the public and private sectors fades as the Covid-19 pandemic recedes. The aim should therefore be to build and expand on the flexible working patterns introduced during the pandemic, and resist pressure from vested interests to revert to pre-pandemic norms.

### Unequal distributional consequences of the cost-of-living crisis

The implications of the energy crisis are severe, from households forced to live in cold and damp homes and a surge in insecure housing, to rising consumer debt levels and spikes in respiratory conditions and hospital admissions throughout a winter engulfed in hardship for many. Soaring fuel bills are disproportionately harming low-income households and communities in rural Scotland. For instance, around 129,000 people in Scotland - mainly in rural areas - use heating oil as the primary source of heating fuel, which has seen a price rise of over 230% over the last two years.<sup>137</sup>

Alongside energy, food, transport and housing costs have rapidly risen. These developments sit on the backdrop of long-term stagnant incomes, drastic social security cuts, and reductions in public service provision - all of which have had a particularly negative effect on women's economic security. Important measures have been taken to protect households against financial hardship and insecurity; notably the Scottish Government's introduction of a rent freeze, which represented a meaningful if overdue step to delivering more security for tenants.<sup>138</sup>

The escalating cost of living crisis adds fuel to the fire amid an already challenging time, further corroding the purchasing power of households. As highlighted in section 2.5, women are more likely to be in low paid sectors such as care, hospitality and retail, and are much more likely to work part-time, thus leaving them more exposed to the financial pressure of inflation. In social care, for example, 71% of private sector workers in the UK earn below the real Living Wage.<sup>139</sup> Further, Living Wage Foundation revealed that 42% of women on low wages have fallen behind on household bills compared to 35% of men on low wages, and 35% of low paid women have skipped meals regularly for financial reasons.<sup>140</sup>

Importantly, while the Office for National Statistics (ONS) found the headline unemployment rate has fallen in the past year to the joint lowest figure on record, estimated wage growth in Scotland is 5.3%, compared with 6.6% for the UK.<sup>141</sup> To put this into context, the Trades Union Congress (TUC) revealed in July that UK workers are set for the “worst real wage squeeze” among G7 nations. This rests on a backdrop of poor real wage growth. Between

2008 and 2021, people in paid work lost almost £20,000 in real earnings as a result of wages failing to keep up with inflation.<sup>142</sup>

While the Bank of England predicts inflation will start to fall, it is not due to do so until next year with the expectation that we will be close to 2% in roughly two years.<sup>143</sup> This would represent a prolonged period of suffering for women, low-income and minority groups, and the wider economic landscape remains volatile.

### Labour market implications of accelerated climate and environmental breakdown

Intrinsically linked to inequality, the causes and distributional consequences of climate and environmental collapse are unevenly felt, both within and between countries, with those that have contributed the least facing the sharp end of the crises.

In the UK, the wealthiest 1% each produce 11 times the amount of carbon emissions of someone in the poorest half of the population, making their carbon footprint 6 times that of the national average.<sup>144</sup> And, as Carbon Brief research analyst Marina Andrijevic notes: “There’s a solid base of evidence showing that women are disproportionately vulnerable to climate change” due to “socio-cultural structures that deprive women of access to resources, decision-making, information, agency, etc.”<sup>145</sup>

Even if Scotland aligns emission reductions with the Paris Agreement, the Climate Change Committee estimates that over the coming decades, sea levels will rise further and temperatures will continue to increase, with drier summers and wetter winters on average. This, the committee states, will have a wide-ranging impact, from a projected 26% increase in fluvial flooding by the 2050s and weather-related failures of the electricity system, to an increase in heat waves and coastal communities forced to relocate due to coastal flooding and erosion.<sup>146</sup>

The inequities of climate injustice are highlighted by the current cost of living crisis in many areas, like access to public transport and fuel poverty. A key illustration of such is housing. Homes account for around 13% of Scotland’s greenhouse gas emissions.<sup>147</sup> As Living Rent, Scotland’s tenant union, notes, many people in Scotland reside in “poorly maintained housing with mould, damp and drafts, as well as inadequate ventilation, heating and insulation.”<sup>148</sup> In the current cost of living crisis, tackling the problems of inefficient and poor quality housing is especially urgent.

### Potential watering down of employment rights

The controversial review of UK workers’ rights in the wake of Brexit, which was rumoured to include measures such as ending the 48-hour maximum week and removing elements of overtime pay, was scrapped in January last year after being met with fierce criticism.<sup>149</sup>

Despite claiming the UK Government seeks to “protect and enhance workers” rights”, in June it published the first reading of the Bill of Rights, which is set to replace the Human Rights Act 1998.<sup>150, 151, 152</sup> The TUC warned that the Human Rights Act supported the advancement of rights of workers throughout Europe, “including limiting workplace surveillance and restricting dismissal of workers where it interferes with their freedom of expression outside work or has a severe impact on their private and family life.”<sup>153</sup> Under the Bill of Rights, the TUC claims, “victims of racism, xenophobia, LGBT+ hate, ableism, misogyny and gender-based violence may not be able to hold their public services employer to account for failing to put protections in place for vulnerable workers or individuals.”<sup>154</sup>

In September, it was announced that European Union (EU) laws retained in the statute book will be “sunset” by the end of next year.<sup>155</sup> While the Westminster government avows this transition will allow for tailor-made regulations and “high standards in areas such as workers’ rights and the environment”, many have voiced concerns about the implications for vast swaths of regulations, like environmental standards and workplace protections, noting the potential erosion of rights such as holiday pay, safe limits on working time and parental leave.<sup>156, 157</sup> The Scottish Government has voiced “deep concern and fundamental opposition” to the Retained EU Law (Reform and Revocation) Bill, accusing the UK Government of appearing to want to water down protections “in a rush to impose a deregulated, race to the bottom, society and economy.”<sup>158</sup> Given that women are more likely to be in low paid and insecure work, any further dilution of workers’ rights in the UK can be expected to impact women disproportionately.

In addition, the development of future trade deals poses a potential threat to women’s economic security. Far from simply the exchange of goods and services as it is so often portrayed, trade and investment today impacts policy and regulatory space in everything from public services to labour rights, and climate and environmental protections.<sup>159</sup> As Close the Gap notes, “Evidence shows that trade agreements can have considerably different impacts on women and men because of gendered differences in caring roles, economic equality, and power.”<sup>160</sup>

## **6. Recommendations and conclusions**

In this chapter, we set out a series of recommendations for policy changes the Scottish Government should make to tackle gender inequalities in Scotland’s labour market and improve the material conditions for women in paid work in Scotland, before providing a conclusion.

It should be noted that while structural changes are required at a UK Government level to implement a gender-just approach to employment law, this report is confined to actions for the Scottish Government. In addition, particularly in light of financial pressures amid the

ongoing cost of living crisis and the uneven impacts of climate and environmental breakdown, a series of policy initiatives are required to support households on low incomes, like the introduction of rent controls and an upgraded home retrofitting programme. While such measures are vital, the focus of this report is on actions to ensure Scotland's labour market is grounded in gender justice.

## **6.1. Improve childcare and social care provision**

### *Expand childcare and secure decent pay for childcare workers*

The Scottish Government recently expanded funded early learning and childcare (ELC) to cover three and four years olds as well as eligible two year olds, for example, two years olds that are care experienced, and live in households receiving certain social security support like incapacity benefit and the state pension credit.<sup>161</sup> The inaccessibility and unaffordability of childcare is a central barrier to women being able to work, and this expansion marks significant progress to widening affordable childcare access.

Moving forward, as Close the Gap notes, “entitlement must be viewed as the starting point, rather than the end point, of reform”, supporting the need for wraparound childcare as an immediate priority for the government, and measures such as a further increase of the funded childcare entitlement to the equivalent of 50 hours a week, ensuring women can have the choice to increase working hours.<sup>162</sup>

Women make up 97% of the ELC workforce, and it is estimated that around 80% of ELC practitioners and 50% of supervisors in private and third sector partner settings are not paid the real Living Wage.<sup>163</sup> Immediately closing this real Living Wage gap is integral to safeguarding financial security for workers and an opportunity to tackle occupational segregation. In addition however, there is a strong case for ensuring that all care workers earn more than the Living Wage, for example by introducing a £15 per hour minimum wage in the sector, as will be discussed further below. Complimenting this strategy should be the government's commitment to “promote collective bargaining through the inclusion of an employee voice indicator, measured by collective bargaining coverage” in childcare work.<sup>164</sup>

### *Deliver a just approach for care workers and care receivers*

Following an Independent Review into Adult Social Care recommendation to establish a National Care Service (NCS) and a consultation, the Scottish Government introduced the NCS Bill to Parliament in June.<sup>165</sup>

The government's vision is that the NCS will help make Scotland “the best place in the world to thrive” by ensuring “people of all ages can access the support they need to live a full life by improving consistency and quality of provision.”<sup>166</sup> The NCS relates to areas such as social

care support and related services, community-based support, community health and social care partnerships, participation in care design, and prevention, early intervention and end of life care.

A key priority for the NCS should be to increase carers' incomes. According to a recent survey by Unite the union, more than half of those working in care and support in Scotland (52%) run out of money before their next pay day; one in five do not use energy when at home because they can't afford to; and nearly one in ten are skipping meals to save on cash.<sup>167</sup> Unite, alongside the trade unions Unison and the GMB, have called on the Scottish Government to increase the minimum wage for care workers from the current £10.50 per hour to £15 per hour. Forthcoming research from the Scottish Women's Budget Group will provide further details behind these wage rates and investment needed to cover them. Other priorities for the Scottish Government should include reducing costs for carers (like health, travel and parking costs), work with the Convention of Scottish Local Authorities to make progress on removing care charging, and develop a Carer Poverty Strategy to sit alongside a new Disability Poverty Strategy.<sup>168</sup>

In adult social care, stark differences in the quality of care and staffing costs exist between for profit and not-for-profit care. Staffing resources are 20% worse in the private sector compared to the not-for-profit sector, and privately owned care homes only spend 58% of their revenue on staffing, compared to 75% in not-for-profit care homes. Over the last six years, the public sector has paid on average £1.60 more per hour to care workers.<sup>169</sup> As a June report by STUC argues, the "ownership neutral" approach to the NCS is untenable, and a genuinely transformed NCS should be rooted in not-for-profit care, strengthened by sectoral collective bargaining to drive up pay and conditions for care workers, and a decentralised approach to care delivery, ensuring that local needs are met.<sup>170</sup>

### *Centre care in a green industrial strategy*

Paid and unpaid care work is a vital service grounded in reciprocity and reparative action, delivering human needs essential for survival. By its nature, it also tends to be low-carbon work.<sup>171</sup>

In Scotland, the impacts of climate and environmental crises are already being felt, from an increased rainfall and heavy rainfall events over the past few decades, to warmer annual temperatures and rising sea levels around the Scottish coast.

The Scottish Government has committed to Scotland becoming net zero by 2045 - five years ahead of the UK - and to creating a new Net Zero Industrial Strategy.<sup>172,173</sup> In light of the deepening climate and environmental emergency, and the need for an economy rooted in care for society and the planet, care can and should be regarded as an integral infrastructure. To do so, care should be embedded as a central component in the upcoming Net Zero

Industrial Strategy to scale well paid, secure green jobs throughout Scotland's economy, and rapidly and justly stewards the economy towards sustainability to ensure it is fit for the future.

## **6.2 Use fair work to tackle insecure employment and the gender pay gap**

### *Upgrade Fair Work First: Banning the use of zero hour contracts*

Employment law is currently reserved to Westminster, covering matters such as employment and industrial relations, health and safety, and areas of non-devolved job search and support. While systemic inequalities are built into the current approach to employment law, which has been successively watered down over the course of decades and which require a broader overhaul to tackle insecure pay and conditions and discriminatory practises, such measures reside at a UK Government level and thus fall outside the scope of this report. There remains a need to do everything possible within the Scottish Government's remit amid the compounding crises workers face to deliver well paid, contractually secured, unionised work.

An area where the Scottish Government does have power is the conditions attached to grants, funding and contracts awarded to organisations by the government. The Scottish Government has already made progress in this area through the creation of the Fair Work First, the flagship policy "for driving high quality and fair work across the labour market in Scotland."<sup>174</sup>

Under this strategy, the Scottish Government required employers who receive public grants, funding and contracts to adopt a set of working practices. This includes: appropriate channels for effective voice, such as trade union recognition; investment in workforce development; no inappropriate use of zero hours contracts; action to tackle the gender pay gap and create a more diverse and inclusive workplace; payment of the real Living Wage. The strategy was recently updated to seek to promote flexible and family friendly working practices, and opposition to the use of fire and rehire practices.<sup>175</sup>

While the criteria is welcome and marks progress towards a fairer labour market in Scotland, more action is required. Recent years have seen a surge in forms of atypical contracts, such as ZHCs, that are contributing to poor productivity levels and creating more insecurity in the labour market amid a cost of living crisis.

As shown in the analysis, women have historically been more likely to be employed on ZHCs than men. Workers on ZHCs are more likely to be on a lower wage compared to non-ZHC workers, and their prevalence is contributing to the gender pay gap. Given the profound insecurities created by the use of ZHCs, we recommend amending the Fair Work First criteria from "no inappropriate use of zero hours contracts" to state that there should be "no use of zero hour contracts".

### *Upgrade Fair Work First: Embedding anti sexual harassment policies into best practise guidelines*

A March 2022 survey by STUC revealed the scale of sexual harassment in Scotland's workplaces and the risks it poses to women's safety and happiness at work. The findings show that almost half of women have experienced sexual harassment at work, with a third of those having been subjected to it within the last year. Not only is sexual harassment at work prolific, but the way reports were handled speaks a culture of underreporting. The overwhelming majority (85%) said their report and experience was not taken seriously and dealt with appropriately.<sup>176</sup>

While a series of measures are needed to tackle this, like extending time limits for workers to bring claims to an employment tribunal, the Scottish Government should require organisations bidding for public sector grants, funding and contracts to record and report incidents of sexual harassment and have a proactive anti sexual harassment policy in operation. This measure can be supported by wider action to make work safer for women, like supporting Unite the Union's 'Get Me Home Safe' campaign, which includes extending employers' duty of care to embed safe transport home policies for all workers.<sup>177</sup>

### *Upgrade Fair Work First: Tackling the gender pay gap*

As it stands, the Fair Work First criteria notes action should be taken to "tackle the gender pay gap and create a more diverse and inclusive workplace."<sup>178</sup> This can and should be strengthened to gear public funding and procurement approaches to actively tackle gender inequality by working to eliminate the gender pay gap.

As the analysis in section 3 shows, the gender pay gap for all employees has narrowed over the past nine years, but has increased again in recent years.<sup>179</sup> Close the Gap notes: "Fair Work First does hold potential to create fair work for women, but the criterion on the pay gap should be refocused to be directing action to tackle the causes of the pay gap, rather than diluted to a more general, non-specific ask on equality."<sup>180</sup> Further, to promote fair work for all women - understanding the compounding impacts on marginalised women - the design of this guidance should be grounded in an understanding of intersectional barriers facing equal pay for women.

This advancement can support the Scottish Government's March 2019 Gender Pay Gap Action Plan which seeks to reduce the gender pay gap for employees in Scotland by the end of this parliamentary term and "tackle the labour market inequalities faced by women, particularly disabled women, older women, minority ethnic women, women from poorer socio economic backgrounds and women with caring responsibilities."<sup>181</sup>

### *Upgrade Fair Work First: Working towards net zero*

In addition, the Scottish Government should ensure organisations bidding for public grants, funding and contracts have a sustainability strategy. This will need to be tailored to the types of organisations applying but should include, for example, ensuring that third sector organisations have an internal policy on sustainability and a low-carbon approach to operations, and certifying that consultancy firms have criteria for who they work for with regards to alignment with the aims and objectives of the Paris Agreement. This will have the dual benefit of better aligning the Scottish Government’s Fair Work First agenda with its own stated climate and environmental objectives and encouraging organisational change in Scotland to meet the criteria, supporting a more sustainable economy.

### **6.3 Enhance the fair work agenda**

#### *Build on the Fair Work Action Plan*

While employment law is reserved, the Scottish Government has set out an approach to Fair Work which includes “the establishment and continued support of the independent Fair Work Convention, our approach to Fair Work in public procurement and the inclusion of Fair Work indicators in the National Performance Framework.”<sup>182</sup>

In February 2021, the government launched its Fair Work Action Plan. The plan aims to support employers to adopt Fair Work practices, deliver Fair Work to a diverse and inclusive workforce, and embed Fair Work across the Scottish Government.<sup>183</sup> The Action Plan is extensive but among its key objectives are: increasing the number of people employed who are paid the real Living Wage and in secure work; promoting awareness of and flexibility for unpaid carers; and promoting collective bargaining and strong trade unions.<sup>184</sup>

Going forward, the government in collaboration with the trade union movement should seek to enhance sectoral collective bargaining with a particularly strong focus on low paid sectors. For example, 80% of Scotland’s workforce in adult social care are women, and care work is a vital yet often a chronically underpaid and undervalued sector.<sup>185</sup> Supporting sectoral collective bargaining in care is essential to increasing wages and elevating the power of care workers to collectively improve working conditions.

More broadly, the pandemic shone a spotlight on the deep injustices and inequalities facing women at work. As Scotland’s economy rebuilds from sustained periods of mass economic hibernation, mainstreaming a gender-just approach to wider economic development, like the National Strategy for Economic Transformation and the National Care Service, can better prioritise women’s long term economic security.<sup>186</sup>

#### *Raise public sector pay*



The Scottish Government has decision-making powers over pay for the majority of public sector staff in Scotland by, for example, setting the framework for pay for staff in public sector staff bodies and disclosing salaries of senior public sector staff.<sup>187</sup> Taking into account the majority of public sector workers are women and that women are disproportionately impacted by the deepening cost of living crisis, committing to an equal pay audit (including at a local government level) as well as decent pay rises across the public sector is vital to meet the ambitions of the Fair Work agenda. While research into tax raising measures to fund a public sector pay rise falls outside the scope of this report, taking into account the limited fiscal borrowing powers under the current devolution framework, maximising the use of devolved tax powers - ensuring they are redistributive and sustainable by design - is essential to ensuring public sector workers receive a fair wage.

#### **6.4 Address barriers to flexible working in Scotland**

Two necessary caveats are required before addressing this recommendation. First, the term “flexible working” should not be conflated with insecure work, like the types of financially precarious work experienced by many in the so-called gig economy. Instead, flexible working refers to agreement between employers and workers for measures such as, for instance, predictable compressed hours to accommodate unpaid care work, and remote and home working. Moreover, given that many jobs - such as retail and hospitality - cannot often include working from home, our understanding of flexible working arrangements should go beyond options for home working to include measures like the availability of compressed hours. Further, while rates of working from home surged throughout Covid-19, this brought with it a series of challenges; not least the challenge of managing paid work alongside increased childcare responsibilities for working parents and guardians - the majority of which was carried out by women.

Nevertheless, the pandemic dramatically changed the nature of work, and reinvigorated an overdue conversation about how to ensure work is more accessible in future. Despite this, in 2021, only 27% of jobs in Scotland’s labour market were advertised with flexible options.<sup>188, 189</sup>

The lack of quality jobs offering flexible work is a driver of the gender pay gap and, while some women may prefer part-time work, others may choose full-time work should it accommodate decent, flexible conditions.<sup>190</sup> Normalising flexible working for all workers can help equalise caring responsibilities, and enable businesses to boost worker retention, boost productivity, tackle the gender pay gap and address the under-representation of women in senior roles within organisations.

While regulatory change is required at a UK Government level, including, as Close the Gap suggests, making “flexible working the default, introducing a day-one right to request flexible working”, the Scottish Government should champion this within the Fair Work agenda, striving to normalise flexible working.<sup>191</sup> Further, action can be taken to encourage employers to

initiate a four-day week, which research by Autonomy think tank found could save parents thousands of pounds a year in childcare and commuting costs.<sup>192</sup>

Conveying the scale of the challenge to normalise flexible working, a TUC survey found 42% of mums in paid work in the UK would not feel comfortable asking about flexible working in a job interview, largely due to concerns about being discriminated against and rejected.<sup>193</sup>

## **6.5 Address occupational segregation**

As the analysis in section 2.5 demonstrates, occupational segregation remains prevalent in Scotland's labour market, with women disproportionately working in low paid sectors like care, leisure, sales and administrative and secretarial work. Moreover, where women represent the majority professional occupations, around half of these are employed in occupations that continue to be undervalued.

Sustained occupational segregation is a key driver of the gender pay gap, squeezing women's earnings, creating gendered inequalities in the labour market, and holding back sectoral development in areas where women are underrepresented. There remains a need to better tailor a gendered approach to employability programmes, for instance, by embedding a more comprehensive understanding of the impact of unpaid care work predominantly undertaken by women, incorporating considerations of the threats facing women's safety both in the workplace and at home, and taking account of the gendered experiences of education and skills development.<sup>194</sup> This should take into account the varied experiences and barriers faced by different groups of women, for example, understanding the specific needs of disabled women and migrant women at work.

Importantly, while tackling occupational segregation is vital, it should not be seen as a replacement for or distraction from tackling the continued undervaluation of work in low paid, precarious sectors where women currently represent the majority of the workforce.

From the economic turmoil triggered by Covid-19 to soaring inflation, the energy crisis and the impacts of climate and environmental crises, Scotland's economy has faced a challenging few years. The cumulative impact of these crises has underscored injustices and inequalities, including highlighting and at times exacerbating the gendered nature of Scotland's labour market. Despite areas of progress, deep-rooted gendered imbalances in earnings, the pay, and wealth persist. Tackling engrained, long standing gender inequalities in the labour market will necessitate a series of policy shifts, from the expansion of childcare and a retrofit of the Fair Work First agenda, to policy measures to normalise flexible work and action to address occupational segregation.

## **Annex: Data sources**

### **Labour Force Survey**

The Labour Force Survey (LFS) is a study of the employment circumstances of the UK population. It is the largest household study in the UK and provides the official measures of employment and unemployment. The survey is managed by the Office for National Statistics (ONS) and since 1992 has run quarterly. The LFS is intended to be representative of the whole population of the UK, and the sample design currently consists of around 40,000 households and 100,000 people across the UK. It provides the most up to date information on the performance of the labour market, and is recommended by the ONS as the most robust source of employment-related statistics.<sup>195</sup>

One of the strengths of the LFS is that it has the largest sample size of any household survey and can thus generate robust statistics at regional level. In addition, the sampling errors are small, because the LFS has a single-stage, random sample of addresses. The survey covers a large range of employment-related variables and non-employment-related variables, allowing cross-linking analyses to be undertaken (for example, earnings against educational attainment).<sup>196</sup> One of the limitations of the LFS is that the sample design provides no guarantee of adequate coverage of any industry, as the survey is not stratified by type of industry. The LFS coverage also omits communal establishments, excepting NHS housing and students in boarding schools and halls of residence. Members of the armed forces are only included if they live in private accommodation. Also, workers under 16 years of age are not covered.

In response to the coronavirus pandemic, the Office for National Statistics (ONS) made some changes to the LFS data collection and various refinements to the weighting methodology. From March 2020 (with the onset of the coronavirus pandemic), face-to-face interviews for respondents newly joining the survey were moved to telephone interviews. With a corresponding fall in response rates, the wave 1 sample was doubled in July 2020 to increase the achieved sample size.<sup>197</sup>

### **Annual Population Survey**

The Annual Population Survey (APS) is the primary source for information on local labour markets. It combines results from the Labour Force Survey (LFS) with 'boosts' for England, Scotland and Wales. In Scotland, the Scottish Government funds the boost to the LFS sample, taking the sample size from approximately 4,000 households to 13,000 households for the latest time periods.<sup>198</sup> This means the APS can provide more robust labour market estimates for local areas compared to the main LFS.

### **Annual Survey of Hours and Earnings (ASHE)**

The ASHE is a UK wide survey that provides data on hourly, weekly and annual earnings by gender, work patterns, industry and occupation, including public versus private sector pay comparisons. It is based on employer responses for a 1% sample of employee jobs, using HM Revenue and Customs Pay As You Earn (PAYE) records to identify individuals' current employer. Throughout this bulletin, the terms "jobs" and "employees" are used interchangeably.<sup>199</sup>

Over the Covid-19 pandemic period, earnings estimates were affected by changes in composition of the workforce and the impact of the Coronavirus Job Retention Scheme (furlough) making interpretation difficult; also data collection disruption and lower response rates mean that, for 2020 and 2021, data were subject to more uncertainty and should be treated with caution; we would encourage users to focus on long-term trends rather than year-on-year changes.<sup>200</sup>

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