



Llywodraeth Cymru  
Welsh Government

STATISTICS

# Wellbeing of Wales: 2020

This report provides an update on wellbeing in Wales, to help us assess whether we are making progress against the 7 national wellbeing goals.

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## Foreword by the Chief Statistician

This report, the fourth annual Wellbeing of Wales report, comes at a time few of us could have predicted last year. Throughout 2020, the coronavirus (COVID-19) pandemic has touched every element of life in Wales. Our statisticians in the Welsh Government have played a considerable role in responding to the analytical demands that the pandemic has created, providing insight on NHS activity, mortality, inequality, the economy and society.

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In order to meet this demand, we have had to change our usual approach to the Wellbeing of Wales report. This year's report comprises two parts: updates to the **national indicators** and this short summary report which looks at the trends over the last year.

Many of our national indicators are based on official data sets which don't yet cover the period of the pandemic, or come from surveys or collections that were paused during this period. This report therefore primarily analyses the progress towards our wellbeing goals during the financial year 2019-20, up to the very start of the pandemic. In places, we have provided additional data which provides a timelier picture or we have looked ahead to how we might expect trends to have changed during the pandemic if new information was available. Next year, we will have the data available to tell a more complete story of the wellbeing of the nation in the 2020-21 wellbeing report.

Although this report is organised by the 7 wellbeing goals, a number of the indicators reflect progress across more than one wellbeing goal. You can see how the goals are related in the **interactive indicator report**.

In 2019, alongside work to develop the national milestones, we took the opportunity to seek views on any changes to the national indicator set. We committed to a small number of changes, including:

- amending the national indicators around the quality of work, taking into account the recommendations of the Fair Work Commission
- investigating a new National Survey for Wales question on “active global citizens” to replace the indicator on Sustainable Development Goal partnerships
- extending the pay difference indicator to other population groups (for example, by ethnicity and for part-time workers)
- taking forward further work on other indicators alongside the ongoing national milestone work, in collaboration with relevant stakeholders

The impact of the pandemic has meant we've had to pause some of this work, but we are still committed to making these important changes. Now is also a good time to reflect on whether the experience of the pandemic has highlighted any other gaps in the way we measure progress towards wellbeing. We'll be

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carrying out work over the coming months to seek views on this.

Stephanie Howarth, Interim Chief Statistician

## A prosperous Wales

The Welsh labour market continued to perform strongly in 2019, with the gap between Wales and the UK narrow in historical terms.

Young people's participation in education and the labour market increased after the recession of 2008 but it has remained fairly stable between 2017 and 2019. There were some small decreases in participation for 16 to 18 year olds.

More recently, the pandemic has had a significant impact on the labour market. Estimates produced by the Office for National Statistics (ONS) and HM Revenue & Customs suggest that the number of paid employees in Wales fell by 2.5% in July compared with February 2020. There has been a slight recovery since, although the number of paid employees remains well below what it was prior to the pandemic.

There has also been a large increase in the proportion of the workforce in Wales claiming unemployment related benefits since the pandemic began. This now stands at around 7.5%. The last time the proportion was that high was in 1996.

Prior to the pandemic, the wider UK economy continued to grow slowly compared to the trend seen prior to the recession of 2008. This has reflected historically weak productivity growth and resulted in very sluggish growth in real wages and in living standards. Wales will have been affected similarly.

The pandemic caused an unprecedented collapse in economic activity in the second quarter of 2020, and over the year as a whole the economy will have suffered a severe contraction. Living standards will also likely fall.

Specific short-term economic harms will take the form of lower incomes and increased unemployment. In turn, these impacts will likely have adverse effects on health and wellbeing.

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The nature of employment in the sectors that have been impacted the most by the pandemic means that effects will tend to worsen inequalities. The most affected tend to be low paid, in insecure employment, and young people.

Latest figures indicate that just under a quarter of all people in Wales were living in relative income poverty after paying their housing costs (23%).

## **Additional data sources**

**Coronavirus and employment: analysis of protected characteristics**

**Earnings and employment from Pay As You Earn Real Time Information**  
(Office for National Statistics)

**National Survey for Wales: 2020 monthly survey**

**Relative Income Poverty**

**Short-term output indicators: April to June 2020**

**Universal Credit and Job Seekers Allowance claimant count by sex and age** (Nomis Official Labour Market Statistics)

## **A resilient Wales**

Air pollution continues to be a significant health issue, with increases in the levels of two of the main air pollutants between 2017 and 2018.

We have seen continued improvements in carbon emissions and renewable energy capacity. In 2018, carbon emissions reduced by 31% compared to the 1990 base year. This represents a significant improvement from 2017, driven largely by a reduction in coal power generation.

The estimate of installed capacity for renewable energy at the end of December 2018 (3,864 MW) was almost 5% more than the capacity that was estimated in

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2017, and almost 40% more than the estimated capacity in 2014.

It will take some time to understand the full impacts of actions related to the pandemic on climate change, greenhouse gas emissions and air quality.

Whilst data shows that road vehicle activity decreased considerably since the UK lockdown on 23 March 2020, it is less clear how other sectors have been affected and what the changes in the concentrations of air pollutants have been.

Data from the monthly National Survey for Wales relating to May to September 2020 suggest that 40% of workers can do most or all of their work from home. This proportion varies considerably by business activity. 55% of private sector workers were unable to do any work from home, compared 34% of public sector workers.

## **Additional data sources**

### **Provisional Analysis of Welsh Air Quality Monitoring Data: Impacts of COVID**

## **A healthier Wales**

There have been slight increases in the proportion of babies born with a low birth weight in recent years, with 2019 being the highest on record. This follows the lowest figures on record in 2014 and 2015.

Low birthweights are linked with mother's age. The proportion of mothers aged 40 and above was the highest on record in 2019.

Healthy life expectancy is lower for those living in the most deprived areas, and there are no clear signs of the gap reducing.

There is evidence of higher rates of death involving COVID-19 in more deprived areas, but it is too soon to say whether the pandemic will have a long-term

impact on inequalities in life expectancy and healthy life expectancy.

There has been little change in healthy lifestyle behaviours among adults in recent years. Unhealthy behaviours are generally less common among those in the least deprived areas.

There has also been little recent change in healthy lifestyle behaviours among children, although over the longer term there have been reductions in smoking and drinking. Unhealthy lifestyles are more common in older children.

Mental wellbeing is poorer among adults in more deprived areas.

Monthly data from the National Survey for Wales shows that individual wellbeing measures such as feeling happy or anxious have shown little change in the period May to September 2020, although data are not yet available for the autumn and winter periods.

The Public Health Wales public engagement survey reported that only 50% of people rated their current happiness level as high (ratings of 7 to 10 on a scale of 0 to 10) in early November 2020, down from 67% in early May 2020.

## **Additional data sources**

**Deaths involving COVID-19 by local area and socioeconomic deprivation** (Office for National Statistics)

**National Survey for Wales: 2020 monthly survey**

**Public Engagement Survey on Health and Wellbeing during Coronavirus Measures** (Public Health Wales)

**Rapid COVID-19 Surveillance** (Public Health Wales)

# A more equal Wales

The gender pay gap for full-time employees has narrowed in 2020 to 4.3%, the lowest value on record. It remains smaller than the gender pay gap for the UK.

Employment rates remain lower for women than men. However, in 2018-19 more than half of all new public appointments in Wales were women.

At school girls continue to achieve better outcomes than boys, and girls are more likely to stay on in education beyond age 16.

Children from some ethnic groups tend to achieve better on average in school compared to others. In general, Black, Asian and minority ethnic groups are now better represented in higher education and in new public appointments.

Employment rates and average pay remain lower for Black, Asian and minority ethnic groups and people in these groups are more likely to be in relative income poverty.

Employment rates differ for males and females across all ethnic groups

The pay gap between White employees and Black, Asian and minority ethnic employees has narrowed to its smallest level since 2012 in England and Wales. The ethnicity pay gap differs across regions and is largest in London (23.8%) and smallest in Wales (1.4%).

In general, educational outcomes for children with special educational needs are improving.

Employment rates for disabled people are rising but a disability pay gap remains and households including someone who is disabled are still more likely to struggle financially.

Children remain the age group most likely to be in relative income poverty and the latest figures show a slight decline in child poverty, whilst the percentage of pensioners in relative income poverty has been rising over the last five years.

The number of people who identify as lesbian, gay or bisexual, or who do not identify as heterosexual or straight is rising, with same-sex marriages now more common than civil partnerships.

Recorded hate crimes increased by 2% in 2019-20, with a small decrease in race hate crimes and crimes related to religion. Hate crimes relating to sexual orientation, trans status or disability rose.

COVID-19 has been reported to have had a disproportionate effect on many different population groups, with older people, men and people in ethnic minority groups more at risk of becoming seriously ill with the disease. It has also highlighted a range of structural inequalities that existed prior to the pandemic

The more indirect impacts of socio-economic harms are more likely to be felt by young people, women, disabled people and ethnic minority groups. We expect this to have an impact on many of the national indicators during 2020-21.

## **Additional data sources**

**[Annual survey of hours and earnings: 2020](#)**

**[Commissioner for Public Appointments annual reports](#)** (The Commissioner for Public Appointments)

**[Coronavirus \(COVID-19\) and the Black, Asian and minority ethnic \(BAME\) population in Wales](#)**

**[Disability pay gaps in the UK: 2018](#)** (Office for National Statistics)

**[Equality and Diversity Statistics](#)**

**[Ethnicity pay gaps: 2019](#)** (Office for National Statistics)

**[Examination results: September 2019 to August 2020 \(provisional\)](#)**

**[Hate crime, England and Wales, 2019 to 2020](#)** (UK Government)

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## Key economic statistics

[Marriages in England and Wales: 2017 \(Office for National Statistics\)](#)

[National Survey for Wales: April 2019 to March 2020](#)

[Relative income poverty: April 2018 to March 2019](#)

[Summary of economic activity in Wales by year and disabled status, from April 2013 \(StatsWales website\)](#)

[Summary of economic activity in Wales by year and ethnicity \(StatsWales website\)](#)

## A Wales of cohesive communities

While most national indicators on community cohesion were last updated for 2018-19, indicators have largely been stable over recent years.

The percentage of people who feel lonely fell in 2019-20 (15%) compared to 2016-17 (17%).

More recent data from the monthly National Survey for Wales from May to September 2020 so far shows that loneliness has fallen further (to 11%) although data are not yet available for the autumn and winter periods.

Data from the monthly National Survey for Wales also shows that people who feel a sense of community has increased significantly, from 52% in 2018-19 to 75% in September 2020.

## A Wales of vibrant culture and thriving Welsh language

The national indicators on the Welsh language are broadly consistent with

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previous years. However there has been a slight decrease in the percentage of people speaking Welsh daily and being able to speak more than just a few words of Welsh.

The 2019-20 National Survey for Wales showed a fall in people regularly attending arts, culture or heritage activities. 71% of people attended these events three times a year, compared to 75% in 2017-18.

The share of people who regularly participate in sporting activities remained stable in 2019-20, at 32%.

Sports, arts and heritage venues were closed for a significant length of time during the pandemic, which has created barriers to participation in these activities this year.

## **A globally responsible Wales**

Carbon emissions continue to decrease with an 8% reduction between 2017 and 2018. Early modelling suggests that global emissions are expected to fall in 2020.

The UK Climate Change Committee (UKCCC) reported that CO2 emissions are expected to drop by a record 5% to 10% as a result of the COVID-19 pandemic, with a potentially larger fall for the UK.

April and May 2020 saw significant decreases in some pollutant levels (for example, nitrogen oxides), consistent with reduced traffic levels. However levels of other pollutants, such as fine particulate matter and ozone increased.

Wider contextual information on a globally responsible Wales is available from the previous year's Wellbeing of Wales report. This information will be updated as part of next year's report.

## Additional data sources

[Provisional Analysis of Welsh Air Quality Monitoring Data: Impacts of COVID](#)

[Reducing UK emissions: 2020 Progress Report to Parliament](#) (Climate Change Committee)

## Background information

### What is this report?

This report provides an update on progress being made in Wales towards the achievement of the 7 wellbeing goals. It is a statutory report required under the Well-being of Future Generations (Wales) Act 2015. It is a report concerning the collective progress of Wales as a nation. It is not a report on the performance of an individual organisation. The first report was published in September 2017.

### Well-being of Future Generations (Wales) Act 2015

The [Well-being of Future Generations \(Wales\) Act](#) is about improving the social, economic, environmental and cultural wellbeing of Wales. It is intended to make the public bodies listed in the Act think more about the long-term, work better with people and communities and each other, look to prevent problems and take a more joined-up approach. This in turn is intended to create a Wales that we all want to live in, now and in the future.

The Act also puts in place 7 wellbeing goals for a prosperous, healthier, resilient, more equal and globally responsible Wales, with cohesive communities and a vibrant culture and thriving welsh language.

For more background information on the Act please see the [Essentials guide](#).

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## What are the national indicators for Wales?

The Act required Welsh Ministers to set national indicators to assess progress towards achieving the wellbeing goals. From September 2015 to January 2016 Welsh Government undertook a **widespread public consultation** to identify what small set of indicators should be developed to best measure progress against the wellbeing goals. **These national indicators were published in March 2016** and laid before the National Assembly for Wales.

The national indicators are designed to represent the outcomes for Wales, and its people that will help demonstrate progress towards the 7 wellbeing goals. They are not intended to be performance indicators for an individual organisation.

Full description of the national indicators including their technical definition and information about their data sources and frequency can be found in the **technical document**.

## How does this relate to the UN Sustainable Development Goals?

The 2030 Agenda for Sustainable Development is a transformative plan of action based on **17 United Nations Sustainable Development Goals**, to address urgent global challenges over the next 15 years. The United Nations' 17 global goals mean that every country on the planet will have to take action to end poverty, promote prosperity and wellbeing for all, protect the environment, and address climate change. Those goals are meant to be far-reaching, people-centred, universal and transformative. UN member states have committed to working tirelessly towards their implementation by 2030, and Wales will play its part.

Many national indicators will help tell a story of progress in Wales against more than one of the United Nations Sustainable Development Goals. We have **mapped the indicators** against the goals.

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## National milestones

As well as setting national indicators, the Act also requires Welsh Ministers to set national milestones to assist in measuring whether progress is being made at a national level towards the achievement of the wellbeing goals.

## Who produced this report?

The report has been produced by Welsh Government statisticians under the responsibility of the Welsh Government's Chief Statistician. It has been produced in line with the [Code of Practice for Statistics](#) and is therefore produced independently of political influence.

## Timeliness

The report, which typically would have been published in September, has been published in a significantly shortened form in December due to pressures related to the ongoing COVID-19 pandemic.

The data for the national indicators will be kept up to date as new datasets are published for those indicators.

## Coverage

The coverage of the report is Wales. For some indicators, reference is made to the position relative to the UK. The narrative against the goals and for each indicator is based on national progress against the goals, and it does not seek to provide a report on progress at different geographical levels. However, data for many indicators are available on [StatsWales](#), or on request, at lower levels of geographical detail.

## Accessibility

This report has been produced as an online report to improve the accessibility, responsiveness and user experience.

The majority of the data underlying the report, including much more detailed breakdowns, are available on StatsWales and through the StatsWales open data services.

## Are all the data official statistics?

Most of the indicators (32) are based on sources that have been published as official statistics. That is, they have been published by government statisticians, or by other public bodies, under the Code of Practice for Statistics.

24 of these indicators are based on sources that have been published as National Statistics. That is the UK Statistics Authority has designated these statistics as National Statistics, signifying compliance with the Code of Practice for Statistics. This means that they meet the highest standards of trustworthiness, quality and public value.

12 indicators are based on other sources such as administrative data held by government departments. 2 indicators currently have no data.

Although not all of the data sources used are from official statistics, the report itself has been developed and published in accordance with the Code of Practice for Statistics. Ahead of this year's publication we had intended to seek to gain National Statistics designation through assessment by the [Office for Statistics Regulation](#). In light of the pandemic, this has been paused but we intend to pursue this again in the future.

## What else should I know about the data?

The [quality report for national indicators reports](#) alongside this release

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provides links to quality information about each of the data sources used to measure the national indicators, or provides that information where it does not exist elsewhere.

Whilst most of the narrative in the Wellbeing of Wales report is drawn from national indicators, some of the contextual data is from other official statistics or other statistics and evidence where we have considered it relevant to the overall narrative. The data not collected through official statistics sources are used in the Wellbeing of Wales report for context, but we cannot always provide assurance about data quality. As the data in the progress report have been sourced from a variety of datasets, the level of quality information available will differ in each case. We have provided links to the original sources and their quality information where they exist.

## **Who are the users of this report?**

It is anticipated this report will be used by: Welsh Government; the Senedd (including Members of the Senedd and its committees); the media; and the general public to (i) help understand the Wellbeing of Wales (ii) progress being made against the 7 wellbeing goals and (iii) where Wales is making progress against the United Nations Sustainable Development Goals.

The national indicators and milestones, once published, can help public bodies who are subject to the future generations law understand further the nature of the change expected in achieving the wellbeing goals. The national indicators should be considered as useful evidence to assist public bodies in understanding the main areas where progress should be made in relation to the wellbeing goals.

The national indicators will also have a specific role as they must be referred to by public services boards in Wales when they are analysing the state of economic, social, environmental and cultural wellbeing in their areas. The report should also be used by public bodies to develop and review wellbeing assessments and to set and review wellbeing objectives required under the Well-being of Future Generations (Wales) Act.

The annual Wellbeing of Wales report must also be taken into account by the Future Generations Commissioner for Wales when they prepare and publish their 'Future Generations Report'.

## UK context

For the UK as a whole, the Office for National Statistics has a **National Well-being Programme**. The **wellbeing dashboard** provides a visual overview of 43 headline national well-being indicators and can be explored by the 10 areas of life (domains) or by the direction of change.

In Scotland, the National Performance Framework (NPF) sets out a vision for national wellbeing and measures achievement in relation to this. A revised NPF was launched in June 2018 following an open review process and is underpinned by statute (the Community Empowerment (Scotland) Act 2015).

The revised NPF maps its eleven National Outcomes to the seventeen UN Sustainable Development Goals (SDGs) and forms an important part of Scotland's localisation of the SDG agenda. Progress towards the vision set out in the NPF is reported on in an open and transparent way on the NPF website through 81 national indicators covering a broad range of social, economic and environmental measures. In addition to showing performance at the national level the data can be explored by a range of demographic and geographic subgroups to see whether outcomes are being realised for different parts of Scottish society.

In Northern Ireland, the principal mechanism for assessing societal wellbeing is the wellbeing framework of 12 outcomes that was developed by the previous Executive, consulted on and refined during 2016-2017. This framework, which contains 49 supporting population indicators, overarches the **Northern Ireland Civil Service Outcomes Delivery Plan** and progress on the outcomes and indicators is currently reported through an **Outcomes Viewer**.

Northern Ireland Statistics and Research Agency continues to participate in the ONS-led Measuring National Well-being programme and publish a **well-being analysis** based on the ONS wellbeing measures, where Northern Ireland data

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availability allows.

## Other related links

[Well-being of Future Generations Act](#)

[Future Trends](#)

[National Survey for Wales](#)

[United Nations Sustainable Development Goals](#)

[UK Voluntary National Review](#)

[UK voluntary national review: Welsh supplementary report 2019](#)

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