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A gendered analysis of labour market outcomes in South Africa during Covid-19: Evidence from the Quarterly Labour Force Survey

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A gendered analysis of labour market outcomes in South Africa during Covid-19: Evidence from the Quarterly Labour Force Survey.

A Research Report submitted in partial fulfillment
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by

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1. Introduction

The global financial crisis of 2008-2009 disproportionately affected men's employment. As has been the case in previous economic slumps, industries like manufacturing which predominantly employed men, experienced deeper declines (Mosomi et al 2020). However, soon after the Covid-19 pandemic started spreading globally, early predictions were that women would be hit harder by the Covid-19 crisis than men, because of the kinds of sectors (i.e. industries) and jobs (i.e. less secure, part-time, not UIF registered etc.) in which women dominated (Alon et al 2020; Dingel and Neiman 2020; Joyce and Xu 2020, Mongey and Weinberg 2020; Mosomi et al 2020), and also because of their role in childcare.

Growing empirical research suggested this was indeed the case. In addition, women's employment was slower to recover than men's as economies reopened (Mosomi et al 2020, Casale and Shepherd 2021), and pre-Covid inequalities had worsened (Casale and Shepherd 2021). The gender gap persisted, even once occupation fixed effects and the proportion of work-from-home tasks as well as education had been used to account for individual differences in workforces in the UK and US (Adams-Prassl et al 2020).

Research using the National Income Dynamics Survey – Coronavirus Rapid Mobile response (NIDS-CRAM) dataset produced similar findings. Additionally, women were less likely to benefit from government income support in the form of Covid-19 grants and were more constrained in their labour market activities by inequalities in care work (Casale and Posel 2020, Casale and Shepherd 2020; 2021). Millions of South Africans lost their jobs – the equivalent of wiping out every job created in South Africa in the previous nine-and-a-half years, leaving a society more deeply divided along race and gender lines (Francis 2020).

This study using QLFS data found that women were hit harder by the Covid crisis than men, that employment losses for men and women have yet to recover. Employment losses for women are not fully explained by sectoral, occupational or industry sorting. The data suggests that a preexisting set of labour market structural features continue to inform differential outcomes associated with gender and race groups. These structural features appear deeply enough embedded within labour market sub-categories, that even responses to the Covid-19 crisis do not appear as independent outcomes. Rather, responses appear consistent with pre-crisis structural features, only on a magnified scale for the most vulnerable sub-categories of working age women and men.

1.1. Research objectives

The purpose of this study was to use the QLFS data series to analyse the gendered impacts of Covid-19 in the labour market. Specifically, to track labour force participation at an aggregate and disaggregated level to determine whether the QLFS data also found that women were affected more by the initial job losses and were slower to recover than men. This included an analysis, among the employed to understand which types of jobs were affected most and whether this might help account for gendered differences in job losses. Gendered effects at the intensive margin were also examined.

1.2. Contributions of the study

None of the studies to date using QLFS data, have provided a detailed gendered analysis of the labour market over the entire Covid era up to the end of 2022. This is the gap this study has aimed to address, contributing to literature on gendered impacts of the crisis from the perspective of a country in the Global South. Using the official QLFS datasets from the fourth quarter of 2019 as the base line, to the fourth quarter of 2022 as the end line, the study provides a detailed examination of gendered patterns of unequal labour force participation, including the determinants of gendered differences suggested by other researchers. The QLFS dataset allowed for a look at whether or not, and how conditions of work had changed by the end of the Covid period, which simultaneously offered indications of whether workers agency or benefits had been reversed, and if employers were on average more or less compliant with basic labour regulations. Incorporating a historical approach to contextualising and interpreting the data, provides a wider angle on how gendered outcomes during Covid are situated within a distribution of power and political architecture. The Covid crisis unfolded within, and was shaped by a complex past and present, and invites more analysis set in contextual density. There are very many sites of intersectional inequality at which even just labour market outcomes related to Covid-19 occur. In time, further research and new evidence will contribute to a collection of rich multi-disciplinary literature on Covid and South Africa's labour market.

South Africa is a middle-income country with an economy that bears the features of high levels of unemployment and extreme inequality. Our Apartheid history continues to influence the structure of the economy as well as labour market conditions nearly three decades into the democratic era. An examination of the extent to which the legacy of Apartheid lives on in today's economy was not an explicit aim of this study at the outset. However, it was hard to ignore once data had been disaggregated by gender and then by standard race categorisations. In the time available, it was possible to look at a

small amount of labour market data from 1993, and then in more detail from the beginning of 2008 to the end of 2022 to establish the existence of a pattern of labour force withdrawal that differed consistently between genders and race groups.

Section 1 of the paper lays out the research context of the study, the central questions, and objectives. Section 2 synthesises relevant literature on gendered labour market outcomes in South Africa predominantly, and section 3 sets out a description of the data, methodology, and study limitations. Section 4 details results and is followed by concluding comments and observations, suggestions on further research, and policy implications of the findings.

2. Literature Synthesis

The literature review highlights research on gendered labour market impacts of Covid informed by the QLFS datasets. Research based on additional datasets is then clustered into two categories that broadly frame a historical characterization of post-Apartheid labour market participation for women in South Africa.

Papers that have used the QLFS dataset

Daniels et al (2022), Rogan and Skinner (2022), and Mosomi and Thornton (2022 and 2022b) have used the QLFS datasets to conduct labour market analyses over the Covid period. Daniels et al identified the possibilities and limitations in QLFS data while using both labour market datasets (NIDS-CRAM and QLFS) to investigate labour market uncertainty for the period February 2020 to March 2021. They did not disaggregate labour market outcomes by gender. Rogan and Skinner (2022) focused on subsets of the informal economy and differentiated effects "on specific groups of informal workers" in the first six quarters of Covid. They showed that over the period under study, Covid recovery measures disproportionately affected informal workers, and in both relative and absolute terms, informal worker job losses exceeded formal job losses with formal employment being quicker to recover. Analysis of gendered impacts by sector and status, suggested that women working in the informal economy, retail services, and social and community services, were disproportionately negatively affected and that inequalities that existed prior to Covid, had worsened.

Mosomi and Thornton (2022) used the QLFS dataset over five quarters (Q1 2020 – Q1 2021) to analyse employment changes by gender. They applied three measures comparing patterns of jobs losses in the Global Financial Crisis to the Covid crisis given containment measures, and their impact on the likelihood of job loss. They investigated whether work was classified as an essential service, whether work from home was possible, and physical proximity in work roles. They found that occupational sorting undermined the outcomes women would experience, with women being clustered in fewer types of work and being significantly more likely to engage in physically proximate types of work. Women who were not able to work from home were less likely to be essential workers, and overall, were more vulnerable to social distancing protocols because of their job traits.

Mosomi and Thornton (2022b) also provided a policy brief based on an analysis of the labour market from February 2020 to March 2021, with a focus on the gendered distribution of unpaid childcare. The

study showed that at the start of lockdown, women were more likely than men to permanently opt out of employment. None of the studies that have used QLFS data to date, provide a gendered analysis of the labour market, even where the whole labour market is analysed, over an extended portion of the Covid era. Incorporating research that relied on other datasets describes themes in women's labour market participation in post-Apartheid South Africa.

Employment, Unemployment and Labour Force Participation

The disproportionate burden of unpaid childcare and housework continues to be a binding constraint to women's labour market participation (Budlender and Brathaug 2002). While the work goes unpaid, it is a vital part of enabling the existence of the formal economy and has a direct impact on the amount of time and energy a woman will be able to dedicate to her career.

Because women carry a greater burden of housework and childcare, they are less likely to find work at all, less likely to find skilled work that pays well, and experience higher costs of workplace participation. Naturally, they will weigh up the value of their non-market work versus their potential earnings in market work and make a decision about the kinds of work they will do. Women are more likely than men to opt for the flexibility of part time work, shorter hours, informal work or self-employed work. This will influence how many hours they are in paid work in a week, with women's peak childbearing years affecting participation over the work lifecycle (Blau and Winkler 2018; Budlender 2019; Casale et al 2021).

Chitiga et al. (2021) explored the worsening economic situation of women in South Africa using the Social Accounting Matrix (SAM) data in a computable general equilibrium (CGE) model. This was linked to a microsimulation analysis to investigate the economic and distributional impact of Covid on gender groups. Consistent with Casale and Posel (2020) and Ranchhod and Daniels (2021) who used NIDS-CRAM data, they found that since employment for women predominated in unskilled labour and in sectors that were worst affected by Covid, regardless of the scenario, they suffered greater employment losses than men. They showed that poverty deepened for female-headed households, as did vulnerability, and further found that their results were consistent with those empirically observed for other developing countries.

Using the NIDS-CRAM dataset, Casale and Shepherd (2021) established that in the initial and strictest phase of the lockdown, of the approximately 2.9 million jobs lost, women accounted for almost 2 million of them. In both relative and absolute terms women suffered greater job losses than men

compared to pre-Covid. Over the following months employment levels varied, partially recovering, but with women's employment slower to recover than men. One year into the pandemic, men's employment had recovered, and women's employment was still 8.4% lower than in February 2020. The probability of staying employed (versus losing a job) and the probability of gaining new employment were estimated at the start of the pandemic and then again 9 months later. They found that school closures affected women more than men, with the employment probability lower among women cohabiting with children of school-going age, while for men there was no significant effect. They further found that women were less likely than men to retain their jobs or find work, even when controlling for typical variables, suggesting that the type of work women or men did, played some role in who kept or lost their job. Women were found to be more likely to work in sectors that experienced the greatest fallout from the crisis. Labour market gains for women over the past two decades were partially reversed as labour market gaps widened (Casale and Shepherd 2021b; Mosomi and Thornton 2022b).

Gender Inequality and Occupational Segregation

Occupation is a critical lens in understanding labour market outcomes and gender inequality in South Africa (Casale 2004; Gradin 2018; Budlender 2019; Espi et al 2019; Mosomi 2019; Posel and Casale 2019; Casale et al 2021). Gender and race have played a significant role in determining who does elementary or low-skill work. The labour economics literature provides considerable evidence on how occupational segregation by gender accounts for a significant part of the gender earnings gaps. The fact that Covid-19 manifested as a health crisis meant that expectations of the impact of regulations on job losses would differ from previous economic crises that did not incorporate a health dimension. Mongey et al (2021) and Mosomi and Thompson (2022) identified physical proximity and remote work as key determinants of occupational change by gender during Covid-19. Mongey et al also showed that greater employment vulnerability existed for less educated and lower-earning groups, and that a unique job loss pattern was produced by the Covid pandemic (2021).

3. Research Methodology

3.1. Data

The national labour market data collected in the QLFS by Statistics South Africa (StatsSA) was used in this study, namely QLFS Q4 2019 to QLFS Q4 2022, inclusive. Trends from the QLFS datasets starting from 2008 were also analysed in order to provide some context for Covid labour market impacts. Prior to 2008 the Labour Force Survey (LFS) gleaned similar data to the QLFS, and together with academic articles on South African labour market history, contributed to developing a longer-term perspective of labour market shifts. The QLFS is a household-based survey. It collects data from a sample of 30 000 dwellings covering private households and workers' hostels and is focused on labour market activities of people who live in South Africa, are aged 15 years and older, and who are not institutionalised. The dataset includes some information regarding household characteristics, for example data on members of the household outside the working age population. The QLFS reports only on persons aged 15-64 and covers all industries. It collects data on those employed, unemployed, those in the informal sector, working across sectors (including the agricultural sector), in private households, and in small businesses. Its reference period is the week prior to the survey interview (StatsSA 2022).

When on the 19th of March 2020, Covid-19 measures first restricted movement in South Africa, face-to-face interviews had to be suspended. Because data collection is crucial, StatsSA reverted to computer assisted telephone interviews (CATI) in order to continue to collect data. The survey sample for Q1 2020 was used for the following four quarters. However, contact numbers were not listed for all dwelling units. The sample declined further over time as people's numbers changed, were found to be invalid, they were unreachable, or had moved. This led to dwellings being classified as "out-of-scope" or "non-contacts" and to remaining classified as such across quarters, which meant that data was collected for the part of the sample for which contact details were available. Non-contacts and out-of-scope dwellings were adjusted for in the sample weighting process. The Technical Notes in the QLFS reports provide details of how these adjustments were done.

By Q4 of 2021, the sample had declined alarmingly to 44,6% of the original Q1 2020 sample. Easing of Covid-19 measures prior to QLFS Q2 2021 allowed for sample rotation to take place for the surveys Q2, Q3, and Q4 in 2021 as well as for StatsSA to collect telephone numbers face-to-face for dwelling units in new samples and overlapping samples. Concerns about data quality delayed the release of the Q4 2021 QLFS. Declining response rates from the implementation of the CATI mode necessitated

quality checks and as a result StatsSA chose not to publish the data for metros and non-metros (these estimates had coefficients of variation exceeding 30%), and to rather only release the data on national and provincial estimates (these estimates had coefficients of variations below 30%).

In Q1 2022 face-to-face interviews were reinstated so that data was collected mainly face-to-face using computer assisted personal interviews (CAPI). The survey response rate improved to 64.7% but still fell below pre-Covid levels. The Q2, Q3, and Q4 2022 survey data was again collected mainly face-to-face, with further improvement in response rates. Given the varying modes of data collection and that the data for a number of quarters in this study came from incomplete samples, comparisons between quarters were made with care. By QLFS for Q4 2022, the national response rate had risen to 88.2% making it comparable with the QLFS for Q4 2019 which had an 88.9% response rate. These two quarters form the baseline and end line in this study (StatsSA 2022).

3.2. Methods

The work of this study was largely descriptive involving mapping trends and distributions in the labour market in employment status including labour force withdrawal and employment at the intensive margin, sector, occupation, and industry analysis over the period. Intensive data work was conducted over the thirteen survey waves.

3.3. Limitations

Until 2019, the Post-Apartheid Labour Market Statistics (PALMS) version of the data taken from the DataFirst website was ideal to use as they went to a lot of trouble to make sure QLFS waves are comparable. However, the incorporation of the QLFS from 2020 onwards into PALMS has not taken place yet and there is no clear indication as to whether it will. This made careful data analysis an important part of the process for this research.

The QLFS was designed for in-person data collection with enumerators going door-to-door to ask respondents questions. Lockdown regulations made continuing to conduct the survey in this manner impossible and StatsSA moved to telephonic interviewing in 2020, Q1. Using telephone surveys came with limitations at the outset in that a telephone number was not available for every respondent. StatsSA therefore applied a bias assumption to the survey, but over time people changed their telephone numbers or did not answer a survey call which led to falling response rates. Under normal

circumstances, StatsSA would refresh the sample in order to keep it as representative as possible but being restricted to an existing pool of telephone numbers did not allow for the sample to be refreshed.

Prior to Covid, the budget available to StatsSA was cut when the administration under former President Zuma announced support for fee-free higher education. Budget cuts have meant freezing of posts, no promotions, and work pressure that led to resignations. The capacity to plan that was meant to be made possible by budget allocations in the Medium-Term Budget Expenditure Frameworks since, has not materialised in the actual Budgets so that through the Covid period StatsSA has continued to work under reduced capacity, and funding commitments from the current administration remain insufficient. Notwithstanding the damage to the institution, StatsSAs QLFS data is still regarded as trustworthy and concerns from experts have been well-received. In-person surveys resumed for the QLFS (Q1 2022) as by then all Covid restrictions were lifted. Response rates have risen to within 0.7% of the base and end line quarters under analysis, and all indications point to process and data reliability making the base and end lines comparable.

Another limitation is that using QLFS data exclusively for a descriptive analysis of labour market trends and patterns in the Covid-era, means that supplementary primary data collection did not contribute to our understanding of the gender impacts of the crisis. Some of the literature references helped to addressing the gap to the extent possible. Qualitative surveys and additional small-sample datasets would add a richer lens to the research. For example, interviews with a sample of women could give us insight into dynamics within the household and how labour market outcomes were and continue to be affected by, and affect, what happens in the home. Unfortunately, conducting additional interviews was beyond the scope of this research report and the time and funding available, but remains a recommendation for future research. Nonetheless, an analysis of gendered patterns in the labour market using the official large-sample QLFS data makes a valuable contribution, as it is still considered to be the most reliable source of labour market data in South Africa. Future work can draw on these national findings to help inform where smaller surveys or more in-depth research should focus.

4. Results

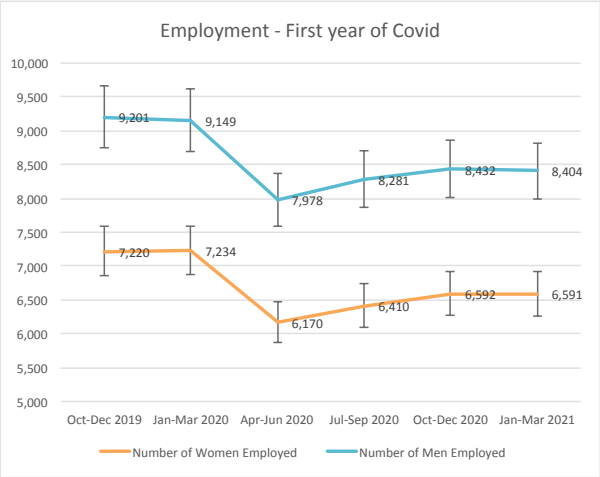
The objective of this study was to use the QLFS data for South Africa over the Covid period, to construct a detailed and gendered analysis of labour market outcomes. The research process lent itself to including some historical perspective on the composition of the South African labour market from the point of the transition to democracy in 1994, and the embedded forms of labour market engagement at the intersections of gender and race, which largely continues to indicate class.

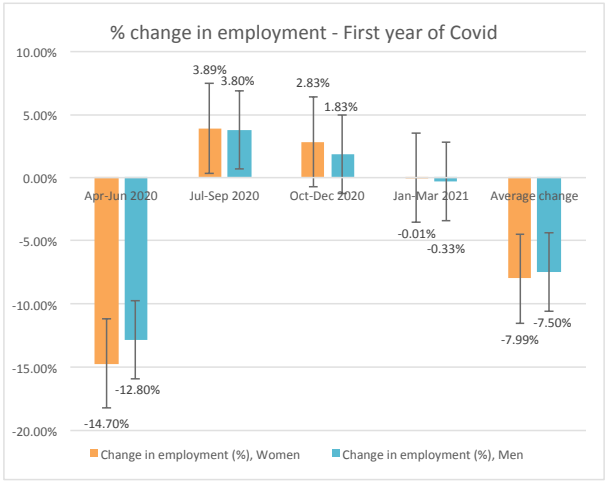
4.1. Labour force participation

Figures 1a-d offer an opening snapshot on employment and how it changed for women compared to men for each of the three Covid years to date. Percentage changes in employment in each case, relate to changes compared to the previous quarter. Women were proportionately hit harder than men in the first and second years of the pandemic. The third Covid year saw recovery rates for women outpace men. Overall, employment has not yet recovered, and women still remain just behind men in the battle towards recovery from the labour market impacts of Covid. It is important to keep in mind that the South African economy is materially affected by events, relations, the political economy and distribution of power at a global level, within the region and domestically, that inform and shape the realisable sovereignty in governing for recovery and growth. An example of some of these influences including the Covid-related lagged effects of global supply chain constraints, concentration risks, and the recent re-opening of the Chinese economy, are ongoing war in the Ukraine, a surge in energy and oil, grain, food basket items and transport prices creating a widespread cost of living crisis, a highly unstable and insufficient supply of electricity in the country, the erosion of credibility in financial regulation and controls both in the state architecture and private sector dealings, and dismal socioeconomic metrics that remain impervious to policy interventions. Despite pronouncements of recovery, the data shows that employment recovery has been slow and limited to a handful of occupational categories and even fewer industries for both women and men.

Figures 1a-d. Covid Era Employment and Changes by Year

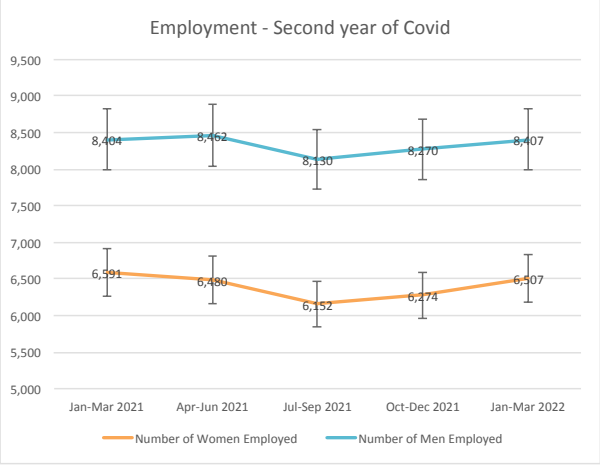
Figure 1a. Year 1

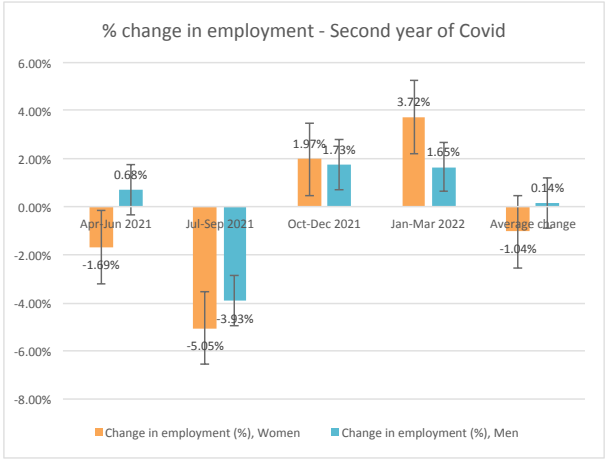




Source: Own calculations from StatsSA QLFS 2019:4 to QLFS 2021:1

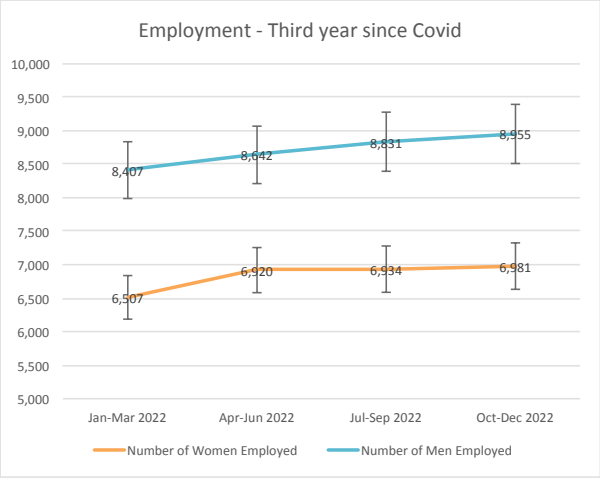
Figure 1b. Year 2

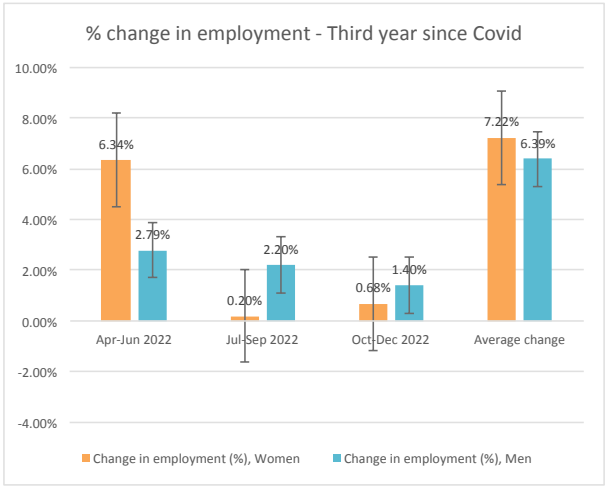




Source: Own calculations from StatsSA QLFS 2021:1 to QLFS 2022:1

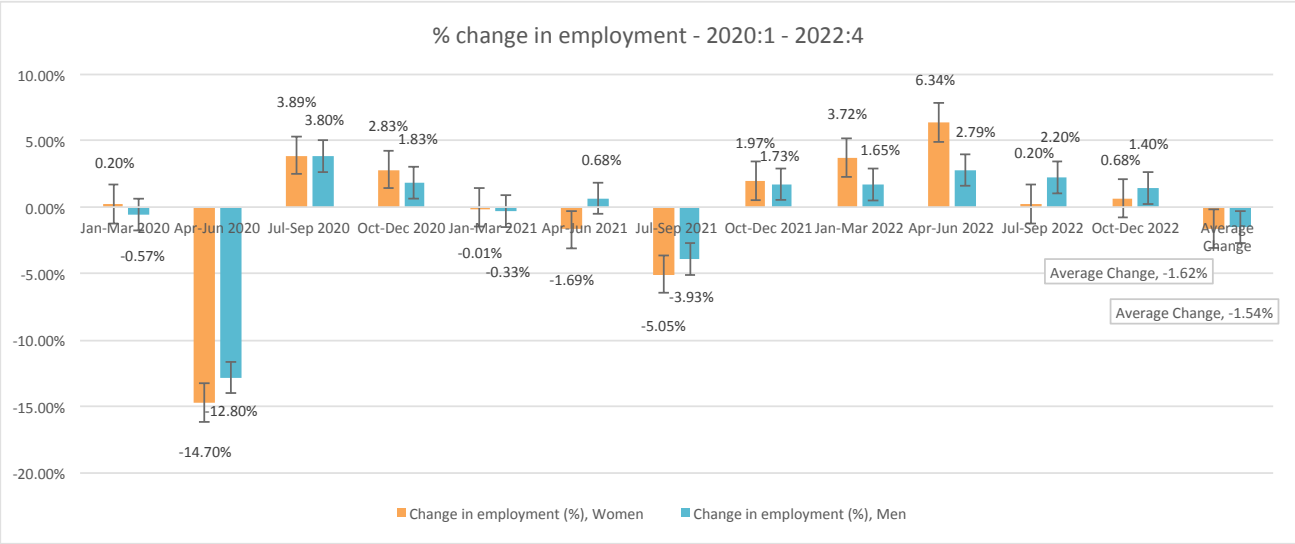
Figure 1c. Year 3





Source: Own calculations from StatsSA QLFS 2022:1 to QLFS 2022:4

Figure 1d. Years 1 – 3



Source: Own calculations from StatsSA QLFS 2019:4 to QLFS 2022:4

The Working Age Population

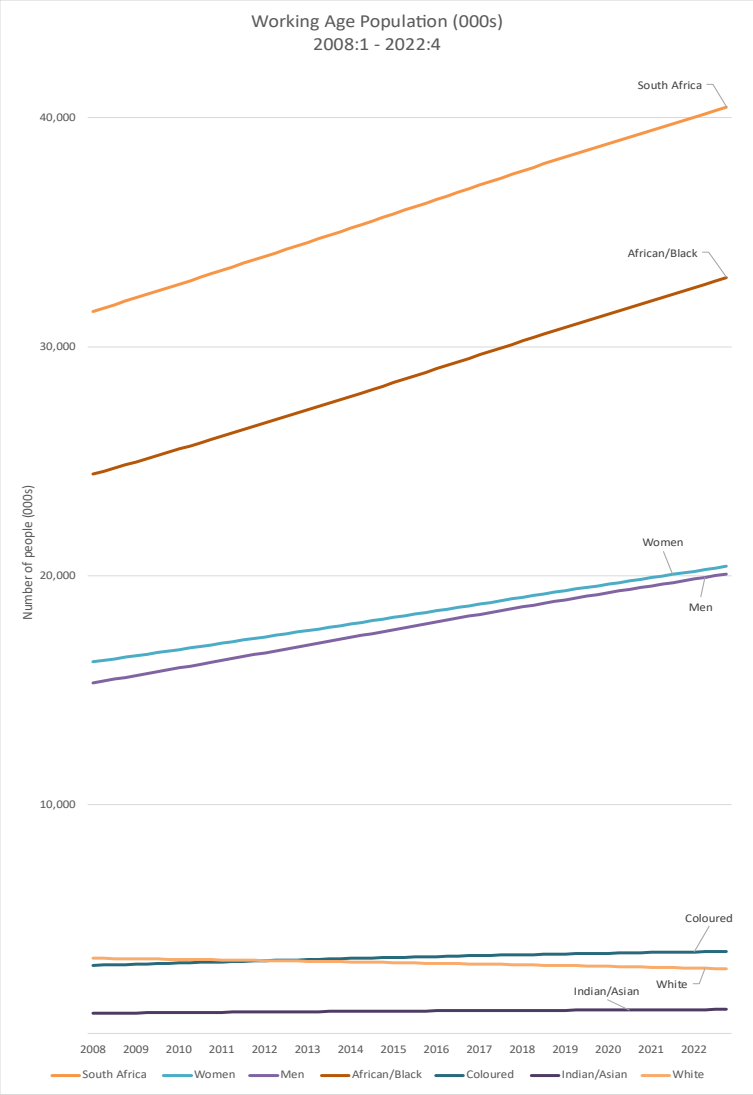
The working age population (WAP) is defined as men and women aged 15 to 64. The WAP for South Africa as a whole and for women and men as population subgroups has risen consistently over the Covid period and presents no material break in trend. When the WAP is disaggregated by race, the picture changes to a clear and steady rise for Black African, Coloured, and Indian/Asian people. The average rates of rise differ for each of these subgroups – the Indian/Asian WAP rises at the slowest rate of the three subgroups, followed by the Coloured WAP, with the Black African WAP rising at the fastest rate. The White WAP on the other hand, reveals a steady decline over the Covid period, which maps as every other race group does, seamlessly onto the same race subgroup trajectory when the data is analysed over the fifteen years from 2008 to 2022, spanning most of the Global Financial Crisis (GFC)[1] fall out period too *(see Figure 2 for WAP by gender and race, 2008 – 2022)*.

It is difficult to directly compare labour market data from Apartheid with the post-Apartheid era given the differences both in who was counted, what was counted, and the methodology employed for data collection. We do know that job reservation policies were at the core of the Apartheid labour market structure. Job reservation hung on the precepts that the hiring of Black people's labour was severely restricted, and simultaneously, that semi-skilled and skilled work was reserved for White people – first White English people, and later for White Afrikaaners once education and training levels within their community had risen to compete (Mariotti, 2012). However, the economic incentives to skills

[1] The Global Financial Crisis (GFC) was the most severe global financial crisis since The Great Depression which began in 1929 and went on into the late 1930s. The GFC was triggered by a combination of predatory loans targeted at low income earners and excessive leveraging in financial markets, that lead to the creation and subsequent burst of a housing bubble in the United States from late 2007.

acquisition and transition into more lucrative categories or work influenced flexibility in the application of job reservation regulations, and its eventual scrapping. A relatively fixed White population shifting into more skilled work, necessitated they be replaced by workers of other races. A transition of that nature in turn necessitated up-skilling of workers of colour so that the broader attainment of skills across race groups facilitated a labour market racial transformation. The development of Black, Coloured and Indian people to occupy semi-skilled positions did not occur because of a shift in moral consciousness on the part of White English or Afrikaans people, but because the economic returns to repealing reservation regulations was perceived to outweigh a universal application of racial segregation (Mariotti, 2012). The features of Apartheid-era labour market policy continue to shape the labour market today, as depicted in Figure 2 below.

Figure 2. Working Age Population, 2008 - 2022



Source: Own calculations from StatsSA QLFS 2008:1 to 2022:4

Labour Force Participation Rates

In 1994, the labour force participation (LFP)[2] rates for women and men were approximately 39% and 61% respectively (Leibbrandt et al., 2010). In the years to 2007, collected under the Labour Force Survey mainly, participation rates averaged just under 47% for women and just over 63% for men[3]. Women's labour force participation in the early 2000s had broken through into the early 50% range as Black women's engagement in the labour force rose dramatically. From 2008, commencing in parallel with the unfolding of the GFC, to the end of 2019, the Quarterly Labour Force Survey (QLFS) LFP rates averaged 51.2% for women and 64.7% for men. By the end of 2022 spanning the Covid era to date, LFP rates have averaged 50% for women and 62% for men.

LFP patterns between race subgroups offer an additional lens of structured variance[4]. From 2008 – 2019, and then over the pandemic era 2019 – 2022, LFP rates by race have averaged 55.8% and 55.2% for Black people, 64% and 57.7% for Coloured people, 59.9% and 58.3% for Indian and Asian people, and 68.3% and 66.5% for White people.

Labour Force Participation – the Covid years

A more granular look at initial changes to labour force participation during Covid reveals that 2.4 million men withdrew from the labour force in "strict"[5] metrics. As shown in Table 1, the men's LFP rate fell by 19.6%. This gap narrowed substantially but has not closed. At the end of 2022, 239 000 more men remain outside of the labour force than prior to Covid – and in "broad" metrics – 449 000 more men. The strict LFP rate at the end of 2022 remained 2.64% lower than prior to Covid. 2.3 million women withdrew from the labour force initially in strict metrics. This equates to a 22.51% dive in the LFP rate for women. At the end of 2022, 302 000 more women remained outside the labour force than before Covid in strict metrics (534 000 more women in broad metrics). Labour force participation rates have not recovered for men or women. Women were initially hit harder than men proportionally but have progressed towards recovery a little faster, and at the end of 2022 had a smaller gap to close.

[2] Labour force participation (LFP) is defined as the sum of those aged 18 – 64, classified as either employed or unemployed, and excludes people in the same age range who are classified as either not economically active (NEA) or not in employment, education, or training (NEET).
[3] These LFP rates included the earliest impacts of the Global Financial Crisis which began in mid-2007.
[4] Structured variance is a term I use to describe data dispersion in a time series that bears historical features. Amplitude may increase or decrease and does so in a manner that deepens or embeds pre-existing sub-sample features. In this case, the term refers to how employment responds to the Covid shock based on the variables that account for intersectional inequality in the South African labour market.
[5] The terms "strict" or "broad" used with labour force participation are not official terms. Labour force participation does not include NEA or NEET employment status categories. However, unemployment is now defined in both strict and broad terms, and since unemployment is a constituent category of the labour force, it has been useful to intentionally track changes in labour force participation in both "strict" and "broad" measures, to identify patterns associated with but not limited to the Covid years.

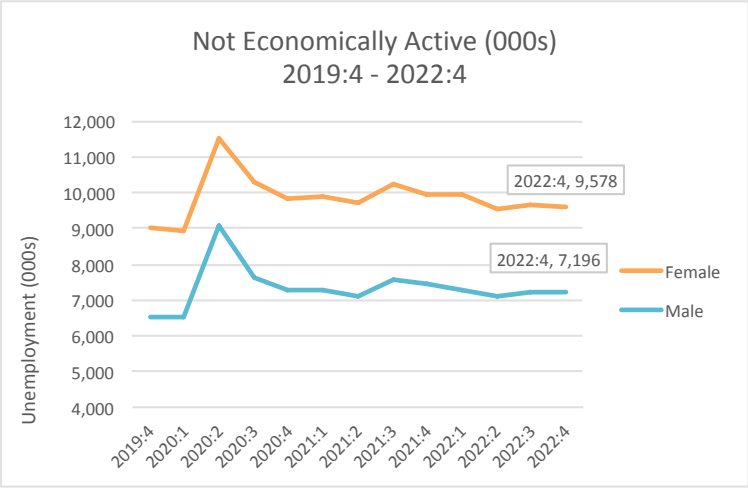
Not Economically Active

Economic inactivity or the classification "not economically active" (NEA) describes a segment of the WAP that is neither employed nor unemployed if the definition of unemployed people describes those without at least an hour's work in the week prior to enumeration, and who can attest to actively seeking work. The distribution of QLFS respondents between classification as NEA or unemployed differs based on whether the strict or broad definitions of unemployment are applied.

Changes in the NEA category convey an important feature in the ways labour as a whole, and then women compared to men in the labour market, were affected by and responded to the Covid crisis. A rise in NEA (labour force withdrawal) concurrent with a fall in unemployment, emerged clearly in the data. The phenomenon was highlighted as a feature of a unique crisis in one of the few studies to date that used QLFS data in Covid labour market analysis (Rogan & Skinner, 2022). The study centered on the initial impacts of the first quarter of 2020 compared to the same quarter the previous year. On tracing the combination of a fall in unemployment coincident with a rise in economic inactivity, it became apparent that Covid magnified a coincidence that occurred in both the women's and men's labour market in the last fifteen years. The occurrence could at times be seen in both subgroups within the same quarter, and at times a little earlier for men or for women. What could also be seen in the data was that for women this phenomenon occurred 50% more often than it did for men, again suggesting a gendered response but this time apparent at a micro level analysis of the disaggregated workforce – a micro level structured variance located within a macro level structured variance.

Table 1 and Figure 3 show that NEA women rose by 2.45 million during the first quarter of Covid (2020:2) and by the end of 2022:4, 539 000 more women were still classified as NEA than before Covid. These levels are lower in both absolute and relative terms when compared with men. Initially, NEA men rose by 2.55 million. At the end of 2022, there were 654 000 more men in the NEA category than prior to Covid. Almost 3 of every 4 people aged 15 - 24 years is economically inactive. The distribution in this age category is more gender balanced with a slight skew towards young women. 76% of young women are classified as economically inactive, with inactivity rates decreasing for women overall, but increasing for women aged 55 and older. More than 2 in every 3 women aged 55 - 64, is economically inactive. Given that households in South Africa are headed predominantly by single women, the erosion of their access to income generating work presents cause for deep concern. Consistent with historical patterns, men's inactivity rates are lower than women's in all working age categories but are substantially lower in the older working age categories. One in every two men aged 55 – 64, is economically inactive.

Figure 3. Key Labour Market Statistics, 2019:4 - 2022:4



Source: Own calculations from StatsSA QLFS 2019:4 to 2022:4

Unemployment

South Africa has some of the highest unemployment rates in the world, and in a global crisis a fall in unemployment is inconsistent with typical theoretical models. However, the nature of the crisis as both a health and economic crisis managed by severely restricting the movement of people, blurred the lines between the categories of those unemployed and those economically inactive. Regardless of definitions of these classifications, movement was so unusually limited that the desire or need to look for work could not be acted on by those who most desperately needed some means to subsist. The blurring of the distinction between the unemployed and economically inactive makes it difficult to restrict analysis to either a strict or a broad definition of unemployment and remain confident that limiting analysis to a subset of the data in such a way does not materially alter findings. For this reason, as far as possible, both metrics were included in the analysis.

Strict unemployment as shown in Table 2 and Figure 3a, fell by 38% or 1.26 million women and 34,2% or 1.17 million men at the hardest level of lockdown (2020:2). This was associated with labour force withdrawal rather than employment. At the end of 2022, women's strict unemployment levels were 16.45% higher than prior to Covid, and higher than men at the same point. Broad unemployment for women was also still higher by 14.58% than prior to Covid, representing 774 000 women. The strict and broad unemployment rates for women were 13.2% and 10% respectively, higher than prior to Covid, and higher than men's unemployment rates at 12% and 10%. Strict unemployment levels for men expressed in absolute terms in Q4 2022 were 14.14% or 485 000 men higher than prior to Covid. Broad unemployment in Q4 2022 sat at 13.7% higher or 695 000 more men than prior to Covid.

Characteristics of the unemployed

The economy's capacity to absorb new entrants in the labour market is shrinking. Like the rise of the NEA concurrent with a fall in unemployment, the drop in numbers of re-entrants to the labour market during Covid may signify increased hopelessness and longer-term labour force withdrawal.
Similarly, the category "other" i.e. those who under the strict definition of unemployment are not economically active and are not described as discouraged work seekers, seemed to grow noticeably perhaps also indicating an environment of radical uncertainty, and permanent shifts in the global and domestic socio-political landscape.

Unemployment is recorded in short- (unemployed for less than a year) and long-term categories (unemployed for one or more years). Long-term unemployment has worsened over Covid, with just that sub-group of the unemployed having grown by 1.14 million people when Q4 2022 is compared with Q4 2019. At the end of 2022, 78.3% of the unemployed have been without work for a year or more i.e. are classified as long-term unemployed compared to 73.3% at the end of 2019. Of the total population of unemployed (both short- and long-term) at the end of 2019, 38.6% had some work in the previous 5 years compared with 31.9% at the end of 2022. Long-term unemployment is growing and reached record highs as a share of the labour force and as a share of the unemployed during the period Q4 2019 to Q4 2022.

At the end of 2022, those who previously worked as Elementary, or Sales and Services workers make up just over half (51.6%) of the unemployed who had work in the previous five years, compared to the same 48% in the same occupations in Q4 2019. The largest industries represented - Community and Social Services, Trade, Construction and Finance, accounted for 68.4% of the unemployed who had work in the previous five years, at the end of 2022. This is compared to 66.5% for the same industries prior to Covid. At the end of 2022, long-term unemployment was higher than prior to Covid. Of those who were remaining unemployed for longer, the same occupations and industries as prior to Covid, carried the largest representation. In this sense, Covid did not seem to change the occupations or industries that were vulnerable to shocks, but rather multiplied the fallout experienced by those occupations and industry classifications already most highly represented among the unemployed.

Economic recession across the globe, driven by Covid and compounded by the Russian invasion of the Ukraine, has made economic and employment recovery even harder for a small open economy like South Africa. Fiscal, Monetary and Industrial Policy measures have had highly contested influence,

particularly monetary tightening through successive rounds of interest rate hikes in response to externally driven, cost-push inflation. Failure to supply sufficient and stable energy has constrained production, and the opportunity to take advantage of export demand for commodities is constricted by malfunctioning rail and ports infrastructure.

Figure 3a. Key Labour Market Statistics, 2019:4 - 2022:4 continued



Source: Own calculations from StatsSA QLFS 2019:4 to 2022:4

Employment

The employment rate (as shown in Figure 3a above and in Table 1 below) for women initially fell by 15% in Q2 2020 and remains 7.31% below its pre-Covid levels. This means 240 000 fewer women

had work at the end of 2022 than they did prior to Covid. For men a similar picture emerged with an employment rate tumble by 14% in the first quarter of Covid. By the end of 2022, 246 000 or 7% fewer men were employed in comparison to the last quarter of 2019. Women's proportionate employment recovery rate fell marginally behind that of men.

Table 1. Key labour market statistics, from Q4 2019 to Q4 2022

WOMEN	2019:4	2020:1	2020:2	2020:3	2020:4	2021:1	2021:2	2021:3	2021:4	2022:1	2022:2	2022:3	2022:4	Change 2019:4 - 2020:2		Change 2019:4 - 2022:4	
														(000s)	%	(000s)	%
Working-age population 15-64 (000s)	**19,554**	**19,625**	**19,696**	**19,767**	**19,837**	**19,907**	**19,977**	**20,047**	**20,117**	**20,187**	**20,257**	**20,327**	**20,395**	**142**	**0.73%**	**841**	**4.30%**
Strict not economically active (000s)	9,039	8,928	11,489	10,304	9,800	9,914	9,717	10,237	9,967	9,955	9,528	9,637	9,578	2,449	27.10%	539	5.96%
Strict labour force (000s)	10,514	10,697	8,207	9,463	10,036	9,992	10,259	9,810	10,150	10,232	10,729	10,690	10,817	-2,307	-21.94%	302	2.87%
Broad labour force (000s)	12,528	12,776	11,355	12,049	12,273	12,382	12,619	12,548	12,750	12,761	13,103	13,054	13,063	-1,173	-9.37%	534	4.26%
Strict LFP rate (%)	53.77%	54.51%	41.67%	47.87%	50.59%	50.20%	51.36%	48.93%	50.45%	50.69%	52.97%	52.59%	53.04%		-22.51%		-1.37%
Broad LFP rate (%)	64.07%	65.10%	57.65%	60.95%	61.87%	62.20%	63.17%	62.59%	63.38%	63.22%	64.68%	64.22%	64.05%		-10.02%		-0.04%
Strict unemployed (000s)	3,295	3,463	2,037	3,053	3,445	3,401	3,779	3,657	3,876	3,725	3,809	3,756	3,837	-1,258	-38.17%	542	16.45%
Broad unemployed (000s)	5,309	5,542	5,185	5,639	5,682	5,791	6,139	6,395	6,476	6,254	6,182	6,120	6,083	-124	-2.33%	774	14.58%
Strict unemployment rate (%)	31.34%	32.37%	24.82%	32.26%	34.32%	34.04%	36.84%	37.28%	38.19%	36.40%	35.50%	35.14%	35.47%		-20.79%		13.20%
Broad unemployment rate (%)	42.37%	43.38%	45.66%	46.80%	46.29%	46.77%	48.65%	50.97%	50.79%	49.01%	47.18%	46.88%	46.57%		7.76%		9.89%
Employment rate (%)	36.92%	36.86%	31.33%	32.43%	33.23%	33.11%	32.44%	30.69%	31.19%	32.24%	34.16%	34.11%	34.22%		-15.15%		-7.31%
Employed (000s)	7,220	7,234	6,170	6,410	6,592	6,591	6,480	6,152	6,274	6,507	6,920	6,934	6,980	-1,049	-14.54%	-240	-3.32%
Paid employed / employees (000s)	7,257	7,271	6,202	6,443	6,625	6,624	6,512	6,183	6,305	6,540	6,954	6,968	7,014	-1,055	-14.54%	-243	-3.34%
Self-employed (000s)	656	683	543	601	588	568	601	601	607	631	639	658	622	-113	-17.29%	-35	-5.29%

MEN	2019:4	2020:1	2020:2	2020:3	2020:4	2021:1	2021:2	2021:3	2021:4	2022:1	2022:2	2022:3	2022:4	Change 2019:4 - 2020:2		Change 2019:4 - 2022:4	
														(000s)	%	(000s)	%
Working-age population 15-64 (000s)	**19,174**	**19,249**	**19,325**	**19,400**	**19,474**	**19,548**	**19,623**	**19,698**	**19,771**	**19,846**	**19,920**	**19,995**	**20,067**	**151**	**0.79%**	**894**	**4.66%**
Strict not economically active (000s)	6,542	6,494	9,089	7,639	7,253	7,303	7,114	7,582	7,456	7,302	7,093	7,194	7,196	2,547	38.94%	654	10.00%
Strict labour force (000s)	12,632	12,755	10,236	11,761	12,221	12,245	12,508	12,116	12,316	12,544	12,827	12,801	12,871	-2,396	-18.97%	239	1.89%
Broad labour force (000s)	14,273	14,404	13,052	13,787	13,906	14,035	14,246	14,218	14,286	14,598	14,741	14,642	14,721	-1,220	-8.55%	449	3.14%
Strict LFP rate (%)	65.88%	66.26%	52.97%	60.62%	62.75%	62.64%	63.74%	61.51%	62.29%	63.21%	64.39%	64.02%	64.14%		-19.60%		-2.64%
Broad LFP rate (%)	74.44%	74.83%	67.54%	71.06%	71.41%	71.80%	72.60%	72.18%	72.26%	73.56%	74.00%	73.23%	73.36%		-9.27%		-1.45%
Strict unemployed (000s)	3,431	3,607	2,258	3,480	3,789	3,841	4,047	3,986	4,046	4,137	4,185	3,969	3,917	-1,174	-34.20%	485	14.14%
Broad unemployed (000s)	5,072	5,255	5,074	5,506	5,474	5,631	5,784	6,089	6,016	6,191	6,099	5,811	5,767	2	0.05%	695	13.70%
Strict unemployment rate (%)	27.16%	28.28%	22.06%	29.59%	31.00%	31.37%	32.35%	32.90%	32.85%	32.98%	32.63%	31.01%	30.43%		-18.80%		12.02%
Broad unemployment rate (%)	35.54%	36.48%	38.88%	39.94%	39.36%	40.12%	40.60%	42.82%	42.11%	42.41%	41.38%	39.69%	39.17%		9.40%		10.23%
Employment rate (%)	47.99%	47.53%	41.28%	42.68%	43.30%	42.99%	43.12%	41.27%	41.83%	42.36%	43.38%	44.17%	44.62%		-13.97%		-7.01%
Employed (000s)	9,201	9,149	7,978	8,281	8,432	8,404	8,462	8,130	8,270	8,407	8,642	8,831	8,955	-1,223	-13.29%	-246	-2.67%
Paid employed / employees (000s)	9,249	9,196	8,019	8,323	8,475	8,447	8,505	8,171	8,312	8,449	8,685	8,876	8,999	-1,229	-13.29%	-249	-2.70%
Self-employed (000s)	933	963	770	838	897	841	894	894	947	963	989	1,019	973	-163	-17.46%	40	4.34%

Source: Own calculations from StatsSA QLFS 2019:4 to 2022:4

Notes:

a. The working aged population is individuals aged 15-64.

b. The official/strict unemployment rate includes only the searching unemployed.

c. The broad or expanded unemployment rate also includes the non-searching unemployed.

d. Correspondingly, the strict labour force includes the employed and the searching unemployed.

e. The broad labour force includes the employed, the searching unemployed, and the non-searching unemployed.

f. Self-employed refers to individuals operating businesses registered for VAT.

4.2. Employment disaggregated

Locating the dissagregation of employment effects within the economic climate aids an understanding of some outcomes where sectors or industries experienced the economic pressures or constraints differently, and the gendered outcomes then also appear to be affected differentially. This section refers to data depicted in tables 2, 2a, 2b, and in figures 4 and 5 below.

Economic context

Economic recovery from Covid has been thwarted on multiple fronts. Multiple waves or outbreaks of varying strains of Covid and consequent lockdown measures kept the economy closed and uncertainty high. The impact of supply concentration in the East, predominantly in India and China meant that ongoing economic activity was severely constrained by supply shortages which lasted well beyond the re-opening of the economy. The Russian invasion of the Ukraine in February 2022 led to a crisis in the supply of some key commodities. Russia exports oil, and both Russia and the Ukraine are the among the world's most important producers of grains and oil seeds. Russia has imposed a military blockade of Ukrainian exports, severely limiting the number of shipments allowed to leave the Black Sea port. Russia has also been on the receiving end of a set of sanctions including varying sanctions on oil and gas by the EU, individual European countries and the US, severely constraining the amount of oil, gas and coal it can export and therefore the revenue it can earn from these commodities. Additionally, the production of fertilizer is linked to the production of gas. The impacts of these supply constraints have placed cost-push inflation pressure on energy, fuel, and food, causing a cost of living crisis in many parts of the world, including in South Africa (UNCTAD, 2022; TIPS, 2023).

The pace at which producers have elected to restore supply levels across a wide range of primary and manufactured goods has contributed to both legitimate and artificial upward pressure on prices, driving a profit price spiral. However, in almost perfect lockstep, central banks around the world, including the SARB, have responded to inflation with interest rate hikes, further depressing the levels of growth and job creation that can reasonably be anticipated, and deepening the financial pressure experienced by businesses and households (UNCTAD, 2022). The failure of Eskom to deliver stable energy supply has put a stranglehold on the domestic economy and many businesses did not survive as the number of days and level of load shedding rose to reach record highs in 2022. Increased commodities demand and strong commodities prices in export markets continue to provide some much-needed relief for the mining sector. However, the full potential of earnings for the industry and in tax revenues for the government are not being realised both as a consequence of ailing power supply, but also because the

dilapidated rail and ports infrastructure cannot keep pace with transportation and export capacity requirements of the minerals ready to fill offshore orders (National Treasury, 2023; TIPS, 2023). It is within this context, that disaggregated employment effects over the last three years were wrought.

A sectoral perspective

Women's employment on the whole has been slower to recover than men. Women were initially hit harder in proportion to men by employment losses, and the women's formal sector more than twice as hard as the informal sector. However, it is the informal sector for women that has been slower to recover than the formal sector. None of the overarching sectors have fully recovered for women. The most proportionate progress is in the formal sector at -0.92% compared to the end of 2019, but the informal, agricultural and private household sectors were all still 6% - 12% behind their pre-Covid levels. Employment for men was not hit as hard as it was for women initially, when viewed proportionally. Men's recovery tracked at a faster rate than women in the first two Covid years, but overall still remains below pre-pandemic levels. As for women, men's formal sector employment was hit harder than the informal sector in absolute terms. Informal employment took a harder relative knock initially but has recovered to and surpassed pre-Covid levels. The agricultural sector was classified as essential during Covid and experienced very little employment volatility as a result, even growing beyond pre-Covid levels for six of the thirteen quarters analysed, largely due to increased export demand. Private households make up the smallest sectoral share of employment for men and has been the slowest to recover, still lagging more than 10% behind pre-pandemic levels.

Insights into industries

The Community and social services industry is the largest employment industry for women's employment with a 32% share. The industry was initially hit hardest in absolute terms when lockdown restrictions were imposed and has seen steady progress but is yet to recover to pre-Covid levels. Second largest in line for women is Trade with a 20% share of women's employment. The industry seemed to have been sheltered from the worst impacts of the initial Covid lockdown in relative, terms although it shed almost 120 000 jobs initially and has recovered to pre-Covid levels with a marginal 0.8% growth in women's employment. Many of the Trade sub-industrial classifications such as food and pharmaceuticals were classified as essential services, and able to

Table 2. Employment disaggregated, from Q4 2019 to Q4 2022

WOMEN	2019:4	2020:1	2020:2	2020:3	2020:4	2021:1	2021:2	2021:3	2021:4	2022:1	2022:2	2022:3	2022:4	Change 2019:4 - 2020:2 (000s)	Change 2019:4 - 2020:2 %	Change 2019:4 - 2022:4 (000s)	Change 2019:4 - 2022:4 %
Sector	**7,220**	**7,234**	**6,170**	**6,410**	**6,592**	**6,591**	**6,480**	**6,152**	**6,274**	**6,507**	**6,920**	**6,934**	**6,980**	**-1,049**	**-14.54**	**-240**	**-3.32**
Formal non-agricultural (000s)	4,883	4,831	4,337	4,456	4,554	4,609	4,405	4,119	4,196	4,447	4,772	4,795	4,838	-546	-11.19	-45	-0.92
Informal non-agricultural (000s)	1,064	1,132	814	858	901	913	946	932	915	987	1,015	1,052	1,001	-250	-23.50	-63	-5.96
Agriculture (000s)	302	287	271	230	249	228	252	238	232	249	276	280	282	-31	-10.20	-20	-6.57
Private households (000s)	971	984	748	867	888	842	877	863	931	825	857	807	859	-222	-22.89	-112	-11.52
Occupation	**7,220**	**7,234**	**6,170**	**6,410**	**6,592**	**6,591**	**6,480**	**6,152**	**6,274**	**6,507**	**6,920**	**6,934**	**6,980**	**-1,049**	**-14.54**	**-240**	**-3.32**
Manager (000s)	447	453	400	416	428	419	465	432	394	402	403	499	525	-47	-10.43	78	17.57
Professional (000s)	514	510	562	495	472	486	435	430	400	478	573	523	496	48	9.36	-18	-3.49
Technician (000s)	742	729	649	701	745	814	751	713	744	815	773	838	838	-93	-12.50	97	13.02
Clerk (000s)	1,256	1,200	1,069	1,124	1,147	1,152	1,106	1,072	1,060	1,010	1,137	1,116	1,131	-187	-14.87	-124	-9.91
Sales and services (000s)	1,287	1,325	1,025	1,069	1,126	1,109	1,032	920	1,018	1,175	1,283	1,278	1,232	-262	-20.34	-55	-4.25
Skilled agriculture (000s)	23	17	14	16	22	11	16	13	8	13	16	19	18	-9	-38.86	-4	-18.25
Craft and related trade (000s)	230	236	189	172	173	172	190	170	143	188	186	197	211	-42	-18.06	-19	-8.16
Plant and machine operator (000s)	167	172	144	154	161	156	158	137	122	152	186	181	152	-23	-13.58	-15	-8.98
Elementary (000s)	1,600	1,639	1,395	1,428	1,441	1,448	1,467	1,441	1,487	1,491	1,541	1,503	1,554	-205	-12.82	-46	-2.86
Domestic worker (000s)	954	954	713	824	861	815	843	825	898	783	823	780	817	-241	-25.27	-137	-14.38
Industry	**7,220**	**7,234**	**6,170**	**6,410**	**6,592**	**6,591**	**6,480**	**6,152**	**6,274**	**6,507**	**6,920**	**6,934**	**6,980**	**-1,049**	**-14.54**	**-240**	**-3.32**
Agriculture (000s)	**302**	**287**	**271**	**230**	**249**	**228**	**252**	**238**	**232**	**249**	**276**	**280**	**282**	-31	-10.20	-20	-6.57
Mining (000s)	71	63	63	77	64	68	84	45	44	45	85	73	87	-8	-11.24	15	21.41
Manufacturing (000s)	605	599	517	534	528	547	485	478	431	497	505	541	573	-88	-14.53	-33	-5.37
Utilities (000s)	36	36	35	31	32	36	37	28	20	31	22	40	35	-1	-2.93	-1	-2.04
Construction (000s)	145	144	138	113	131	120	164	150	159	128	165	171	174	-7	-4.91	29	19.95
Trade (000s)	1,480	1,551	1,361	1,344	1,392	1,337	1,391	1,239	1,268	1,376	1,462	1,460	1,492	-119	-8.02	12	0.78
Transport (000s)	194	177	174	147	182	150	167	157	163	175	128	177	177	-20	-10.33	-17	-8.75
Finance (000s)	1,068	1,059	894	1,049	944	1,073	887	987	1,018	938	1,016	991	1,003	-175	-16.34	-65	-6.06
Community and social services (000s)	2,341	2,324	1,958	2,008	2,175	2,179	2,122	1,967	2,008	2,242	2,394	2,382	2,289	-383	-16.36	-52	-2.21
Private households (000s)	971	984	748	867	888	842	877	863	931	825	857	807	859	-222	-22.89	-112	-11.52

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MEN	2019:4	2020:1	2020:2	2020:3	2020:4	2021:1	2021:2	2021:3	2021:4	2022:1	2022:2	2022:3	2022:4	Change 2019:4 - 2020:2 (000s)	Change 2019:4 - 2020:2 %	Change 2019:4 - 2022:4 (000s)	Change 2019:4 - 2022:4 %
Sector	**9,201**	**9,149**	**7,978**	**8,281**	**8,432**	**8,404**	**8,462**	**8,130**	**8,270**	**8,407**	**8,642**	**8,831**	**8,955**	**-1,223**	**-13.29**	**-246**	**-2.67**
Formal non-agricultural (000s)	6,448	6,451	5,727	5,850	5,942	5,966	5,795	5,509	5,575	5,732	5,828	6,039	6,139	-721	-11.18	-309	-4.79
Informal non-agricultural (000s)	1,854	1,789	1,466	1,598	1,620	1,589	1,740	1,763	1,732	1,832	1,950	1,919	1,954	-388	-20.91	101	5.43
Agriculture (000s)	583	577	528	578	561	564	610	591	635	595	597	592	578	-55	-9.49	-5	-0.88
Private households (000s)	315	332	257	254	309	285	317	267	328	248	267	280	283	-59	-18.56	-32	-10.29
Occupation	**9,201**	**9,149**	**7,978**	**8,281**	**8,432**	**8,404**	**8,462**	**8,130**	**8,270**	**8,407**	**8,642**	**8,831**	**8,955**	**-1,223**	**-13.29**	**-246**	**-2.67**
Manager (000s)	993	992	888	897	896	923	941	911	862	838	850	980	1,012	-106	-10.63	19	1.90
Professional (000s)	456	439	511	524	480	504	557	516	534	519	593	526	581	54	11.90	125	27.44
Technician (000s)	659	627	564	616	607	585	568	522	521	607	597	702	639	-95	-14.45	-20	-3.09
Clerk (000s)	477	474	401	402	432	443	368	339	311	456	464	467	460	-76	-15.87	-17	-3.65
Sales and services (000s)	1,451	1,428	1,277	1,331	1,351	1,373	1,289	1,229	1,297	1,307	1,298	1,340	1,393	-175	-12.04	-58	-4.01
Skilled agriculture (000s)	56	52	54	45	64	51	29	51	60	55	56	56	70	-3	-4.72	14	24.21
Craft and related trade (000s)	1,677	1,704	1,332	1,404	1,487	1,458	1,408	1,356	1,376	1,424	1,488	1,467	1,453	-345	-20.56	-224	-13.38
Plant and machine operator (000s)	1,208	1,214	1,073	1,061	1,097	1,129	1,084	1,083	1,114	1,172	1,155	1,078	1,129	-135	-11.18	-78	-6.48
Elementary (000s)	2,162	2,167	1,796	1,956	1,952	1,869	2,138	2,093	2,143	2,001	2,107	2,170	2,168	-366	-16.94	6	0.29
Domestic worker (000s)	59	50	32	39	35	33	49	31	51	25	34	45	47	-27	-45.63	-12	-20.67
Industry	**9,201**	**9,149**	**7,978**	**8,281**	**8,432**	**8,404**	**8,462**	**8,130**	**8,270**	**8,407**	**8,642**	**8,831**	**8,955**	**-1,223**	**-13.29**	**-246**	**-2.67**
Agriculture (000s)	583	577	528	578	561	564	610	591	635	595	597	592	578	-55	-9.49	-5	-0.88
Mining (000s)	358	373	310	342	319	328	314	299	326	361	323	333	350	-48	-13.48	-8	-2.35
Manufacturing (000s)	1,115	1,107	939	925	963	951	930	924	886	1,082	1,002	1,089	1,083	-177	-15.84	-32	-2.85
Utilities (000s)	84	79	78	59	67	79	81	67	61	72	82	76	89	-6	-6.82	5	6.08
Construction (000s)	1,206	1,200	928	967	1,035	959	1,058	1,007	974	945	1,012	1,053	1,038	-277	-23.01	-168	-13.90
Trade (000s)	1,769	1,769	1,585	1,665	1,671	1,642	1,696	1,539	1,627	1,618	1,701	1,785	1,806	-184	-10.41	36	2.05
Transport (000s)	818	818	711	730	761	752	802	807	788	785	779	762	806	-107	-13.03	-12	-1.46
Finance (000s)	1,499	1,458	1,341	1,385	1,367	1,454	1,362	1,400	1,386	1,394	1,444	1,389	1,480	-159	-10.60	-19	-1.29
Community and social services (000s)	1,451	1,435	1,286	1,373	1,376	1,388	1,279	1,224	1,256	1,304	1,428	1,467	1,437	-165	-11.38	-13	-0.93
Private households (000s)	315	332	257	254	309	285	317	267	328	248	267	280	283	-59	-18.56	-32	-10.29

Source: Own calculations from StatsSA QLFS 2019:4 to 2022:4

Notes:

a. The sample contains all employed individuals aged 15-64.

b. The category "Other" for both Occupation and Industry disaggregation is included in the sample and excluded from the table.

continue operation even on a limited hours or skeleton-staff basis during Covid. The Financial services industry remains the third largest employer of women and has been slow to recover among the key employment industries for women. Advances in digitalization and access at the level of personal smartphone financial services, made online service delivery in this industry both familiar, and easy to offer, but at the cost of physical service level jobs, some of which are unlikely to recover even as financial services performance flourishes and the switch to digital platforms becomes further embedded in the sector (Mail & Guardian, 2022).

Mining, Utilities and Construction are the smallest employers of women. Utilities remain just shy of recovery, but Mining and Construction are two of the three industries that have recovered and expanded employment of women by an average of 20% in the last three years. Large when viewed as a proportion, but small at an absolute level. The gender equity gains regardless, are important and welcome. Employment for women in Private households experienced the worst impacts of the initial Covid lockdown in relative terms. Domestic workers and child minders in absolute terms make up approximately 13% of women's employment yet suffered the highest share of employment losses at 23% in Q2 2020. The industry has been the slowest to recover by a substantial margin, with approximately 112 000 fewer jobs for domestic workers at the end of 2022. As returns to formal or market employment have varied, demand for domestic workers services appears to have grown more elastic at both the extensive and intensive margins. The expansion of the gig work economy introduced Sweep South[6] to the market. Developments in this type of work shift risks away from an employer or the source of domestic work demand onto the domestic worker as individualization and precarity rise in tandem.

The largest proportional recovery and employment gains for men have been in the categories of Professional, Manager, and Skilled agriculture occupation, with 158 000 additional jobs combined, compared to pre-pandemic levels. However, work in Craft and related trades, Plant and machine operation, and Sales and services are the big pain points for men's work, all yet to recover and together accounting for 360 000 fewer jobs than at the end of 2019.

Elementary work is the largest occupation for men, and has recovered fully, but not seen any meaningful employment growth. This increases concern for the attrition of entry-level work

[6] Sweep South is an online platform business that links demand and supply for indoor and outdoor cleaning services for homes and offices. Workers in these kinds of platform businesses are typically classified as self-employed and or casual workers, and often fall outside of the ring of benefits and protections offered by traditional employee-employer contractual agreements.

availability for categories of people with low education and skill levels, and young people – categories for whom unemployment status is unrelenting.

The distribution of work for men across industries remains more balanced. The negative labour market impacts within particular industries then limits the absolute levels of those affected, but the converse is also true in the event of extraordinary positive conditions within an industry. The top three industries for men (as for women but in a different order) remain Trade, Finance, and Community and social services making up a combined 51.3% of men's work at the end of 2019, versus 52.7% at the end of 2022. As a cluster, these three industries combined, have recovered to pre-pandemic job levels even though the contribution of each industry varies. The industries that have struggled to recover men's employment levels both in absolute and relative terms are Construction, Manufacturing, and Private households. Together they represent 232 000 jobs yet to be recovered, with more than 70% of those being Construction industry jobs. Construction job losses have meant that the industry has fallen in rank in the last three years, switching places with Manufacturing employment for men. This is really as a result of the decline in the Construction industry rather than growth across Manufacturing (TIPS, 2023).

Dissecting effects at an occupational level

More female and male managers were employed at the end of 2022 than prior to Covid. Women's share of managerial posts has increased, but male managers still outnumber female managers by almost 2 to 1. Fewer female professionals were employed at the end of 2022 and their share of the occupation has shrunk by almost 7% over the last 3 years. This is a notable reversal of women's advances in upward mobility in the workplace. The largest proportional recovery and employment gains for men were in the categories of Professional, Manager, and Skilled agriculture occupations, with an additional 158 000 jobs combined compared to pre-pandemic levels. This is explained by the fact that remote work was easiest for professionals to take up. Additionally, Covid exacerbated labour market inequalities along race, gender and class lines. Those with higher qualifications replaced those with lower qualifications when the labour market re-opened. Those who generally have high levels of professional qualifications, managerial skills, and experience, coupled with lower burdens of social reproduction and care work, are the middle classes, men rather than women, and White and Indian people over Black and mixed race or Coloured people. The mining sector was buoyed up by strong international commodities demand, as was agriculture, and some manufacturing sub-sectors grew to surpass pre-Covid levels (TIPS, 2023).

Sales and service is the most important occupation for women. Their share of this category is yet to reach pre-Covid levels, with 55 000 more sales and service workers remaining unemployed than did prior to Covid. Clerical work is the third most common occupation for women. Their share of this occupation remains below pre-Covid levels and 124 000 more women clerks remain out of work compared to Q3 2019. Being a technician is the fifth most common occupation for women. This category of work has grown by almost 4% or 97 000 women since Q3 2019.

Most women and men workers by far are occupationally categorised as Elementary workers. This work category has recovered for men, but not for women. There were 46 000 more unemployed women elementary workers at the end of 2022 than there were at the end of 2019. Women make up 94% of the domestic work category. Their share of domestic work has increased slightly, but more than 137 000 additional domestic workers remain out of work at the end of 2022 than did three years prior. This category represents the greatest loss of work for women at more than half of the employment losses for women at the end of 2022, when compared to 3 years prior. Women's share of those employed is still lower at the end of 2022 than it was pre-Covid.

Table 2a. Employment disaggregated by Occupation, Q4 2019 compared to Q4 2022

	Change 2019:4 - 2022:4		Employment Distribution 2019:4		Employment Distribution 2022:4		Share of Occupation 2019:4	Share of Occupation 2022:4
Occupation	**Women (000s)**	**Men (000s)**	**Women %**	**Men %**	**Women %**	**Men %**	**Women (%)**	**Women (%)**
Manager	78	19	6.19	10.80	7.52	11.30	31.02	34.16
Professional	-18	125	7.12	4.96	7.10	6.49	52.96	46.02
Technician	97	-20	10.27	7.17	12.01	7.14	52.94	56.74
Clerk	-124	-17	17.39	5.19	16.21	5.13	72.46	71.10
Sales and services	-55	-58	17.83	15.77	17.66	15.56	47.00	46.94
Skilled agriculture	-4	14	0.31	0.61	0.26	0.78	28.62	20.88
Craft and related trade	-19	-224	3.19	18.23	3.03	16.23	12.06	12.70
Plant and machine operator	-15	-78	2.31	13.13	2.18	12.61	12.14	11.85
Elementary	-46	6	22.16	23.50	22.27	24.21	42.53	41.75
Domestic worker	-137	-12	13.21	0.64	11.70	0.52	94.21	94.61
Other	3	1	0.02	0.01	0.07	0.02	59.06	70.07
Total	**-240**	**-246**	**100.00**	**100.00**	**100.00**	**100.00**	**43.97**	**43.80**

Source: Own calculations from StatsSA QLFS 2019:4 and QLFS 2022:4

Notes:

a. Sample contains all employed individuals aged 15-64.

Table 2b. Employment disaggregated by Industry, Q4 2019 compared to Q4 2022

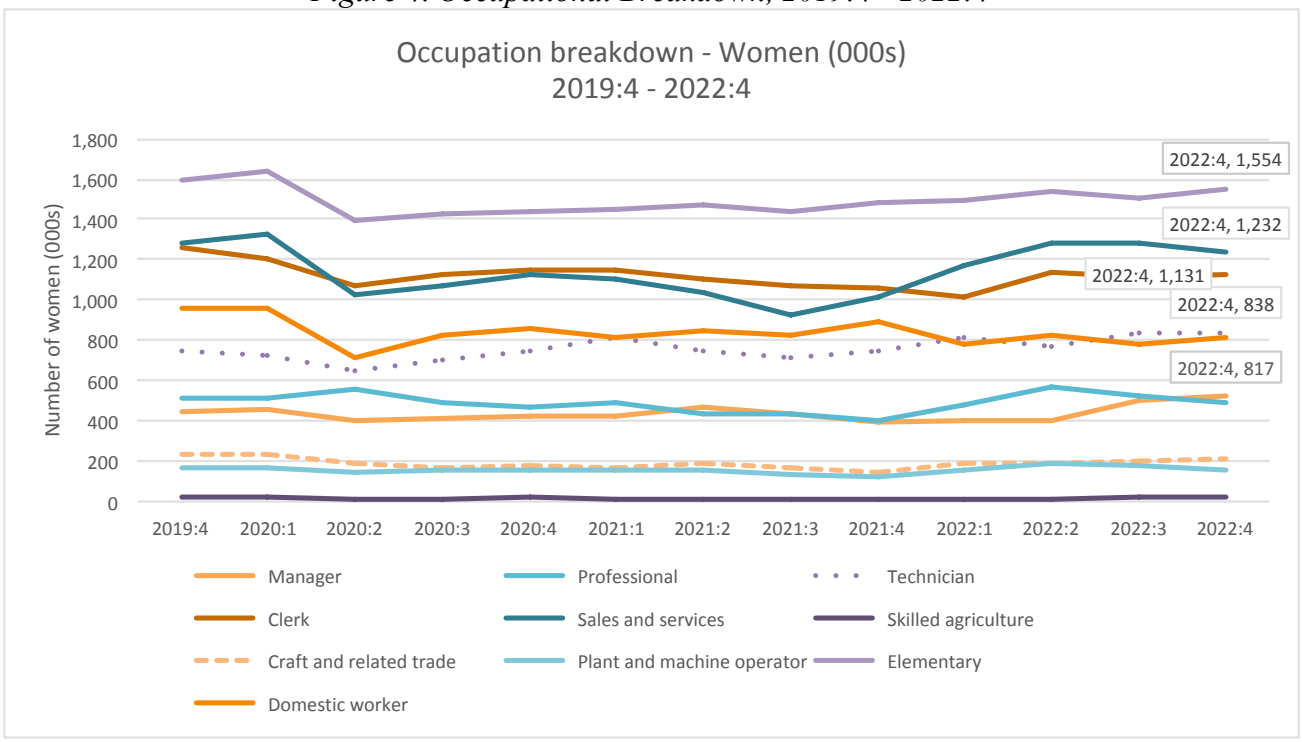
	Change 2019:4 - 2022:4		Employment Distribution 2019:4		Employment Distribution 2022:4		Share of Occupation 2019:4	Share of Occupation 2022:4
Industry	**Women (000s)**	**Men (000s)**	**Women %**	**Men %**	**Women %**	**Men %**	**Women (%)**	**Women (%)**
Agriculture	-20	-5	4.18	6.34	4.04	6.46	34.10	32.27
Mining	15	-8	0.99	3.89	1.24	3.91	16.62	21.28
Manufacturing	-33	-32	8.38	12.12	8.20	12.10	35.17	38.00
Utilities	-1	5	0.49	0.91	0.50	1.00	29.71	33.56
Construction	29	-168	2.00	13.10	2.49	11.59	10.72	14.75
Trade	12	36	20.50	19.23	21.37	20.16	45.55	47.16
Transport	-17	-12	2.68	8.89	2.53	9.00	19.14	19.49
Finance	-65	-19	14.80	16.30	14.38	16.53	41.60	40.79
Community and social services	-52	-13	32.43	15.77	32.80	16.05	61.74	59.91
Private households	-112	-32	13.44	3.43	12.30	3.16	75.48	76.42
Other	3	3	0.10	0.01	0.15	0.05	84.65	55.46
Total	**-240**	**-246**	**100.00**	**100.00**	**100.00**	**100.00**	**43.97**	**43.80**

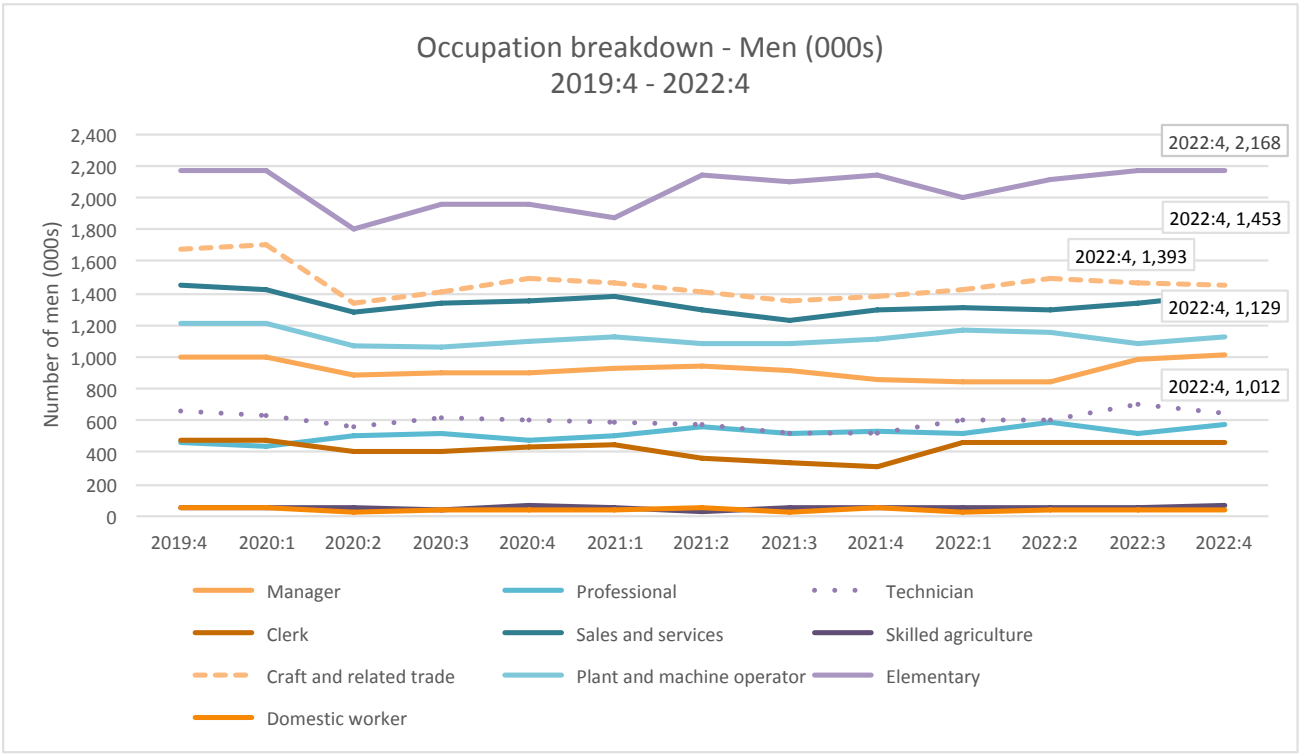
Source: Own calculations from StatsSA QLFS 2019:4 and QLFS 2022:4

Notes:

a. Sample contains all employed individuals aged 15-64.

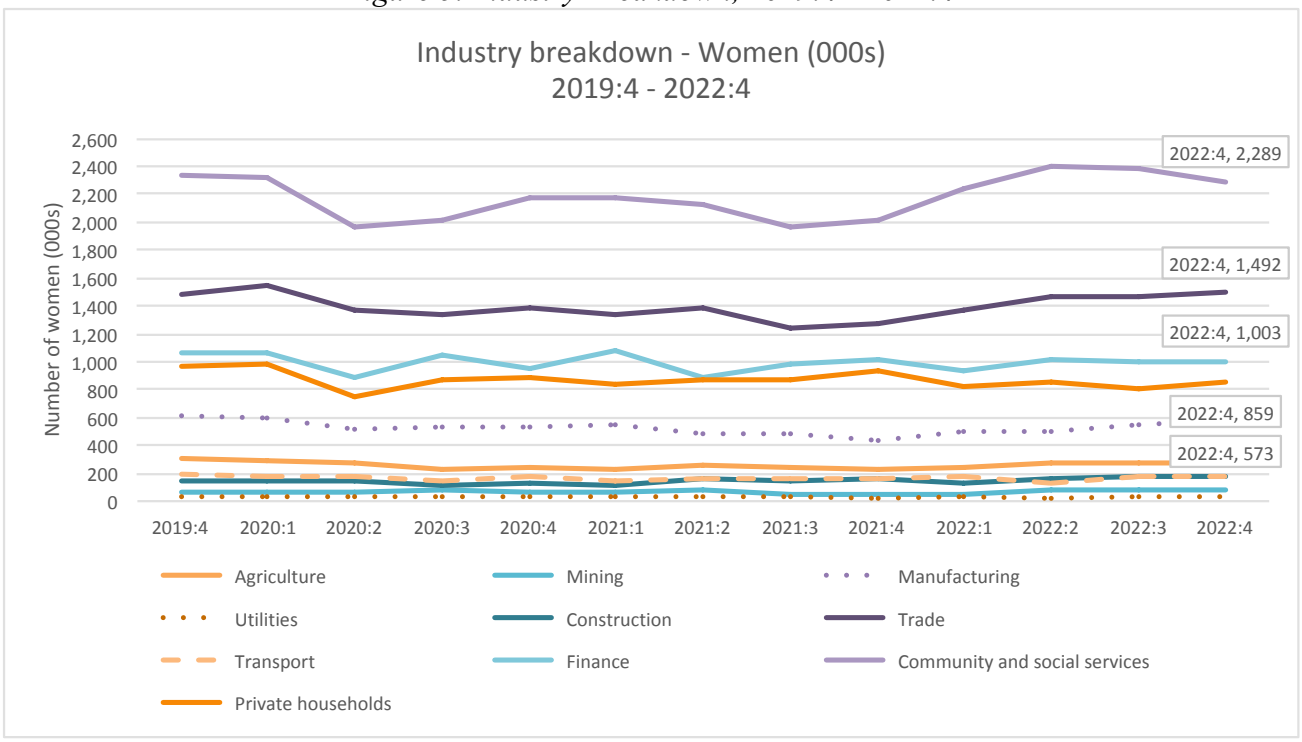
Figure 4. Occupational Breakdown, 2019:4 - 2022:4

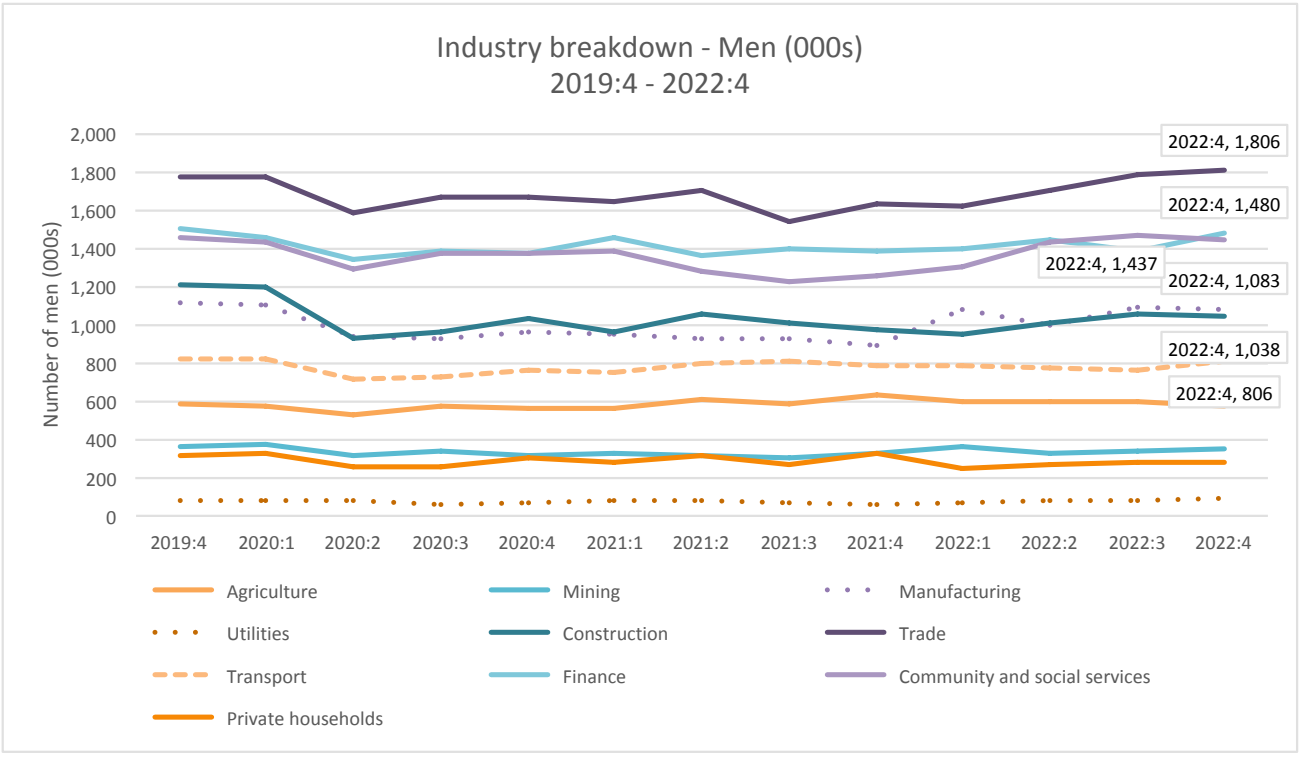




Source: Own calculations from StatsSA QLFS 2019:4 to QLFS 2022:4

Figure 5. Industry Breakdown, 2019:4 - 2022:4





Source: Own calculations from StatsSA QLFS 2019:4 to QLFS 2022:4

4.3. Employment at the intensive margin

At the end of 2019 women worked 90% of the paid hours that men worked. By the end of 2022, the narrowing of this gap was negligible. The proportion of men and women who work part-time sits in single digits. This is likely to be more of a reflection of the lack of availability of any work at all, including part-time work, than a reflection of the preferences for full time versus part-time work. Nearly 50% more women than men worked part-time hours prior to Covid. Three years later, there are both more men and women working part-time than prior to Covid, and women still make up almost 40% more of the part-time workforce than men do. Women are disproportionately represented among the part-time or underemployed. For both the base and end line quarters, more women than men were underemployed. For every quarter in-between, an average or 46% more women than men were underemployed, either voluntarily or involuntarily. An average of 30% more women than men continue to work part-time on an involuntary basis i.e. they would choose to work more hours if they could.

As is to be expected, more men than women work part-time on a voluntary basis, and the gender gap between the base and end line years has not changed. Fewer women work part-time, both involuntarily and voluntarily, than did prior to Covid. The part-time workforce of women has shrunk. This may be attributable to some churning between voluntary and involuntary classifications of part-time and full-time employment. This could be accounted for by both push and pull factors in the economic necessity of both more men and women taking on any (additional) paid work hours they can. For those who cannot work as many hours as they used to, may have had to take a drop in salary or wages, or who are yet to find employment, there is increased financial pressure emanating from having less income. This is only made harder to bear by inflationary pressures which have meant that many households are increasingly unable to afford many of the same goods and services they once could. Care work needs in the household that may have previously been affordable to outsource, may also now have to be insourced at the cost of partial or complete labour force withdrawal, so that an expanded care burden adds a third layer of hinderance to labour force participation in the wake of Covid.

Examining effects in the quantity of work hours classes

When Covid lockdown measures were first imposed, every category of work over 14 hours a week was impacted, with those who worked in the two longest hours categories a week, impacted most in relative and absolute terms. The shortest weekly work hours category actually increased by 58% from Q2 to Q3 2020. This would have included staff who were put onto short hours or skeleton staff rosters

based on their industry's essential services classification. Fewer men and women worked overtime hours by the end of 2022 than did prior to Covid, as evidenced by the number of employees in the 45+ hours a week category. 28% more women and men work very few hours a week in comparison to pre-Covid levels, and employment levels for women and men who work strict full-time hours of 40 - 45hrs on average a week, have recovered to pre-pandemic levels. The share of longer paid work hours was still skewed towards men at the end of 2022. More women than men work 39 hours or less a week at the end line, and fewer women and men are working 40 hours or more a week than pre-Covid. Table 3 indicates a set of gender working hours gaps, most notable of which is in the category of economically active people. Between the start of Covid and the end of 2022, 154% more women expressed wanting to work more paid hours relative to men.

Table 3. Hours worked and underemployment 2019:4 compared to 2022:4

			Change 2019:4 - 2022:4		Gender working hours gap	
WOMEN	**2019:4**	**2022:4**	**(000s)**	**%**	**2019:4**	**2022:4**
Average hours worked (hrs)	40.74 *(40hrs 44min)*	40.01 *(40hrs 0min)*	-0.73	-1.79%	0.90	0.90
% working part-time i.e. < 35 hrs	7.40%	7.42%	0.02%	0.27%	1.48	1.38
Of those working part-time (hrs)	**7,312,491**	**7,058,768**	**-253,722**	**-3.47%**		
Involuntary	439,535	395,302	-44,233	-10.06%	1.32	1.27
Voluntary	6,872,955	6,663,466	-209,489	-3.05%	0.76	0.76
Of those classified as economically active (hrs)	**7,312,491**	**7,058,768**	**-253,722**	**-3.47%**		
Would have liked to work more paid hours	812,363	731,373	-80,990	-9.97%	0.92	2.34
No / Don't know	6,500,128	6,327,395	-172,733	-2.66%	0.77	0.77

			Change 2019:4 - 2022:4	
MEN	**2019:4**	**2022:4**	**(000s)**	**%**
Average hours worked (hrs)	45.21 *(45hrs 13min)*	44.31 *(44hrs 19min)*	-0.89	-1.97%
% working part-time i.e. < 35 hrs	5.01%	5.39%	0.38%	7.59%
Of those working part-time (hrs)	**9,328,304**	**9,065,625**	**-262,679**	**-2.82%**
Involuntary	332,490	312,164	-20,326	-6.11%
Voluntary	8,995,814	8,753,460	-242,353	-2.69%
Of those classified as economically active (hrs)	**9,328,304**	**9,065,625**	**-262,679**	**-2.82%**
Would have liked to work more paid hours	880,452	830,898	-49,554	-5.63%
No / Don't know	8,447,851	8,234,726	-213,125	-2.52%

Source: Own calculations from StatsSA QLFS 2019:4 and QLFS 2022:4

Notes:
a. Those classified as working part-time usually work less than 35 hours per week.
Their working hours are shown here.
b. Those classified as economically active could be employees or employers, self-employed or working unpaid in a household business. Again, hours are shown above.
c. The gender gaps expressed above are ratios of working hours for women to working hours for men in each category.

A very marginal shift (0.2%) more women work 35hrs or less per week. For men, also marginally more (0.4%) have shifted into shorter working hour categories at the end of 2022. Of those working on a part-time basis, some are voluntarily, and others involuntarily underemployed in the context of a formal classification of paid employment. Unpaid care work demands have been shown historically to influence women's labour supply decisions more than men's - whether they work full time or part-time, the extent of part-time hours offered, or their underemployment status. Table 3a indicates the increases in both women and men working less than 15 hours a week, and more so in both absolute and relative terms for men. At the upper range, considerably fewer women and men (469 000 fewer in total) work more than 45 hours a week, with women working disproportionally fewer of these upper range working hours than men, reinforcing and widening the gender gap at the intensive margin.

Table 3a. Weekly work hour categories by gender, 2019:4 compared to 2022:4

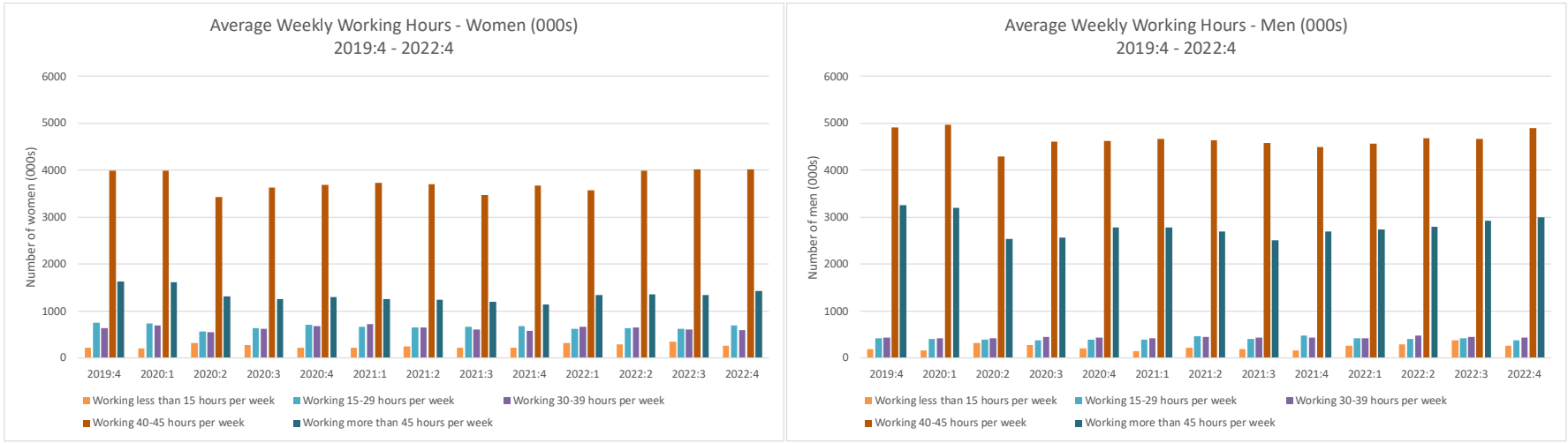
	2019:4 (000s)	2022:4 (000s)	Change 2019:4 - 2022:4 (000s)	Change 2019:4 - 2022:4 %
Women (000s)	**7,220**	**6,980**	**-240**	**-3.32%**
Working less than 15 hours per week	218	264	46	21.15%
Working 15-29 hours per week	746	688	-58	-7.82%
Working 30-39 hours per week	642	587	-55	-8.52%
Working 40-45 hours per week	3,983	4,020	37	0.93%
Working more than 45 hours per week	1,631	1,421	-210	-12.88%
Men (000s)	**9,201**	**8,955**	**-246**	**-2.67%**
Working less than 15 hours per week	191	262	70	36.82%
Working 15-29 hours per week	426	374	-52	-12.16%
Working 30-39 hours per week	427	431	3	0.81%
Working 40-45 hours per week	4,908	4,899	-9	-0.18%
Working more than 45 hours per week	3,248	2,989	-259	-7.98%

Source: Own calculations from StatsSA QLFS 2019:4 and QLFS 2022:4

Figure 6 displays the distribution by gender, of more versus less paid working hours. Clearly visible is the disproportionate distribution of shorter work hours for women overall and longer work hours overall for men over the Covid period. On average women have worked more of the short-hour categories. This is depicted at a glance by comparing the proportion of orange, blue and purple bars between genders. A 'glass ceiling' appears to cap the two longest work hour categories at approximately 1.6 million and just under 4 million women respectively. When compared with the distribution for men, the opposite is true. The majority of men's paid work time is located in the two

longest average work hour categories, biased away from shorter hours. The caps in the two longest work hour categories are 3 million and almost 5 million men on average. Wage share is a term used to describe the proportion of income that goes to labour compared to the profit share that goes to capital. In Figure 6, the historical gendered labour market pattern of a larger proportion paid working hours accruing to men versus women, remains the case over the Covid period. Of the total working hours available, the number of paid working hours assumed by men disproportionately exceeds that of women. Additionally, the distribution of shorter versus longer working hours is allocated in favour of men who are able to capture a disproportionately larger slice of the available wage share in hours. It is important to note that this is measured in numbers of paid working hours in this instance, rather than in the Rand value of those working hours. The disproportionate distribution by gender is likely to hold if Rands earned was the unit of measure, but the data sets used in this study excluded wage data.

Figure 6. Average Weekly Working Hours, 2019:4 - 2022:4



Source: Own calculations from StatsSA QLFS 2019:4 to QLFS 2022:4

4.4. Conditions of employment

The dataset allowed for an analysis of how conditions of work had changed for women and men during Covid. In some cases, changes were very marginal. However, the data offered a set of interesting insights into how women and men seemed to think about what constituted unpaid work in a household setting, and how workplace benefits changed, and worker agency may have shifted.

More women and men reported unpaid household member status since December 2019. However, 11% more men reported unpaid household member status than women. We know that in strict unemployment terms, women experienced higher levels of unemployment than men during Covid initially. Women are also less likely to report being an unpaid member of a household given the gendered stereotype of work in the home being "women's work". The stereotype is so steeped in cultural norms in South Africa that it is invisibalised, often even to women themselves and affects how conceptions of time use and the expectation of payment whether realized or not, affects responses in surveys. At a policy level the same thinking manifests in that still today, not even the historically low-paid domestic work allocated along race, class and gender lines is counted at a national level in metrics such as GDP, even when some grossly under-valued, yet formalised domestic work can very easily be counted and return valuable data to inform policy measures**.**

A window into conditions of employment

Table 4 below offers data on a selection of working conditions indicators. Retirement or Pension fund contributions for the proportion of working women remained essentially stable at their pre-Covid levels, while those of men were 3% lower as a share of working men at the end of 2022 than they were at the end of 2019. Entitlement to paid leave benefits has accrued to slightly more women and to slightly fewer men in the order of 2% and 1% respectively. Maternity benefits accrued to 1% fewer women after 3 years. Paternity benefits however, dropped for 3% of men (so that 7% fewer men versus women as a proportion now receive paternity versus maternity benefits). While it may seem that men have experienced regress in their freedom to participate in care for children, which is attested to by the data, the decrease in the number of men who can take paternity leave will be most keenly felt by the women and mothers in the household who will resultantly carry an even larger share of the care burden than they already do.

UIF contributions were higher for numbers of men in absolute terms but lower as a share of employed men than employed women. This is consistent with gendered employment levels in general. However,

in recent months, while broad unemployment levels in both absolute and relative terms leave more women unemployed than men, contributions have been on average more volatile for men than women, with men's contributions falling marginally, and women's ending at the same level as prior to Covid. Since UIF contributions are typically administered by the employer even though the contribution is equally split between employer and employee, changes in payment of the benefit typically signal compliance levels on the part of the employer. UIF played a significant role in helping relieve the distress of unemployment for qualifying contributors in 2020, and compliance sat at an average of 63% for both genders combined.

More women and conversely fewer men, paid PAYE or SITE tax than did prior to Covid. This is in absolute terms although in relative terms the reverse it the case with 57% of men versus 54% of women on average over the last 3 years, contributing to these tax streams. We know from SARS data that despite intent to level the tax playing field for genders, women remain disproportionately burdened given that most households in South Africa are headed by a single female breadwinner. In these households, unisex tax tables along with the primary tax rebate accruing at the level of the individual earner, mean that tax incidence for a single bread-winner is greater than it would be in a household earning the same total income, but emanating from two earners who would both qualify for the primary tax rebate (The Women's Report, Steenkamp et al., 2022). Adjustments to tax brackets on personal income in the last three years have been very conservative. As an example, the 4.5% adjustment for the financial year 2022/23 left earners poorer with a realised average consumer price index of 6.9% last year. Price levels were even higher on the components, especially food items and transport that made up a substantial proportion of the consumption baskets of low-income households.

Table 4. Selected working conditions indicators Q4 2019 compared to Q4 2022

	2019:4		2022:4		Change 2019:4 - 2022:4	
Conditions of Employment	**Women**	**Men**	**Women**	**Men**	**Women**	**Men**
Pension or retirement fund contribution	46.11%	50.02%	45.78%	47.17%	-0.34%	-2.85%
Any leave entitlement	64.54%	66.65%	66.49%	65.76%	1.94%	-0.89%
Maternity or paternity leave	59.74%	55.07%	58.71%	51.98%	-1.03%	-3.09%
UIF contribution	58.03%	64.48%	58.40%	63.50%	0.37%	-0.98%
Income tax (PAYE/SITE) deduction	51.60%	56.65%	53.78%	56.72%	2.17%	0.07%

Source: Own calculations from StatsSA QLFS 2019:4 and QLFS 2022:4

Notes:

a. Sample contains all employed individuals aged 15-64, who responded "Yes" to the benefit as opposed to "No" or "Don't know".

The burden to make whatever eroding income is available to a household, stretch to meet growing needs sometimes in both price and quantities, still falls to women predominantly. Data from multiple waves of the NIDS-CRAM survey revealed substantial increases in child hunger and household food

insecurity, as well as increased levels of sacrifice borne by adults, and particularly women, to shield children from hunger. In each of the 5 NIDS-CRAM waves, an estimated 400 000 children did not have enough to eat. For some children and the adults in the same household, hunger every day or nearly every day was reported a year into the pandemic, affecting an estimated 1.8 million people (NIDS-CRAM Wave 5 Synthesis Report, 2021). While income, income support, wealth, assets and social support form a very limited part of the available data in the QLFS datasets, the shifts in labour market composition and conditions, and the available data on support mechanisms reported by those surveyed, give us some insight into the impact of Covid at the intersection of gender, race, class, socioeconomic, geo-spatial and age inequality.

Work of limited duration – contract, casual, piece work, has increased for both men and women and makes up a slightly larger share of women's work conditions. Permanent work has increased so very slightly as a share of work conditions for women. There has been even less change in permanent work for men in the last 3 years, although slightly (2%) more men than women have had work of a permanent nature over the period.

Union membership remains at roughly 29% of those employed, spiking in the period immediately following the implementation of lockdown, but the increase was short-lived and has ebbed and flowed, possibly with whether or not income allowed for membership status or the ability of unions to connect with their audience and portray the power to advocate, bargain, and protect workers. Union membership increased at the hardest level of lockdown and remained above pre-Covid levels for the first year into the pandemic. Membership then dropped sharply for both men and women in the third quarter of 2021, remaining below pre-Covid levels as is still the case, but membership begun to pick up again when lockdown measures were officially ended in Q2 2022 and have been on the increase for both men and women in the period to December 2022. The future of labour unions and workplace evolution has made the Covid period more complex to traverse for union leaders and workers alike.

For those who have received salary increments in the last 3 years, adjustments are dominated by the employer taking a unilateral decision, or by negotiation between trade unions and employers. The share of employees who negotiate their salary directly with their employer, has fallen. The difference in this metric for women and men is negligible. Marginally more women than men in relative terms received a regular salary increment at the end line point. In absolute terms, more women than men reported receiving regular salary increments. Further research in a detailed analysis of gendered income differentials over the Covid period would help us understand some of the granular details of

how the income position of men and women in the labor force changed and which categories of men and women were better or worse off at the start of 2023.

4.5. Labour force composition and withdrawal

As indicated in the objectives of this study, analysis of historical patterns in the labour market by gender and race was not an explicit intent initially and became important to recognize in the process of data analysis. It appears that labour force withdrawal – a fall in unemployment and contemporaneous rise in economic inactivity – is not a phenomenon unique to Covid and its labour market impact. In South Africa there is an historical structure within different segments of the labour market that predates the Covid pandemic. To try to get some sense for it, the same dataset allowed analysis going back to 2008 when data entries begin for the current version of the QLFS. Indications were that the labour force is structured in a manner that contained even Covid impacts within a larger historical construct. Where scholars had described a unique pattern of labour force withdrawal defined mostly similarly as a decline in unemployment occurring at the same time that large increases in economic inactivity occur (Rogan & Skinner, 2022; Lam et al., 2006; Higuchi, 1987), it was important to identify these occurrences in the data and to understand their scale. Strict unemployment numbers were used here as they more clearly reveal both current and historic labour subgroup patterns. Given that lockdown regulations prevented job search activity, broad unemployment data could not retain distinction between the sub-categories of those unemployed and NEA, and therefore clear comparison between pre-Covid and Covid-era changes in these sub-categories could not be made. What gets lost is micro-detail that helps to clearly portray sub-group differential impacts.

The picture of the labour force in aggregate for the last fifteen years can be described as having features of structured variance. The data suggests that the labour market's dominant underlying structure plays out in "normal" times and in crisis times to deliver roughly the same outcomes for women versus men, and between race categories. The structure seems to absorb the influence of the domestic political economy environment shaped by our own and external policies, and to determine within a fairly narrow range, how sub-groups of the labour force are jointly and differentially impacted. When viewed over the last decade and a half, unemployment appears to keep with a general trend by sub-group, except for the at the onset of Covid i.e. nothing has disrupted sub-group trends on the scale of Covid in fifteen years. Even Covid labour market impacts appear to amplify pre-existing characteristics of vulnerability within labour market subgroups. Women are characterised by greater labour market precarity than men; and Black and mixed-race people are generally more vulnerable as a subset of the

labour market than Asian/Indian and White people. These more precarious or vulnerable sub-groups experience an amplification of their pre-existing vulnerability. This is contrasted with the proportionately smaller impact for the less vulnerable sub-groups. Covid widens inequality gaps and heightens both the visibility of vulnerability and as well as the visibility of invulnerability. Labour market positions become more deeply entrenched. Certainly, scope for more research in this area exists in tracking further back in the data to see what has changed at a granular level, if there are any recognisable differences between sub-groups, of the labour force response to the crises in the available economic history of capitalism in South Africa.

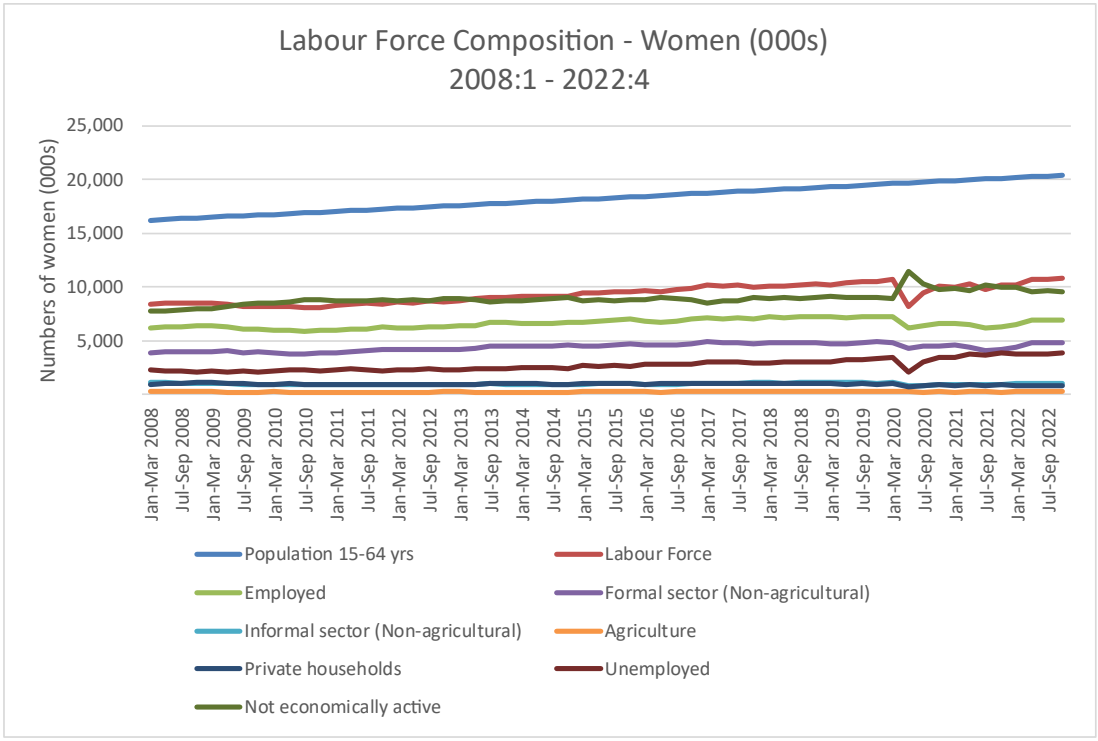
Notwithstanding, it appears from the QLFS data that a segregated labour force structure continues today. Workers of colour are more vulnerable than White people. Women more vulnerable than men. Inequality across socioeconomic lines – in education and skill levels continue to reinforce the walls that make access to higher more lucrative work, more difficult to scale based on demographic classification. The Covid labour market pattern may not so much be unique as it is a pre-existing feature that played out on a far larger scale during Covid, and its differential impact it seems, is not one that can be identified in at a comparable scale in common memory. The QLFS data also seems to suggest that to describe the GFC as a man-cession offers too simplistic an explanation for impacts seen in the South African labour market. In general, the sub-groups of women, and black people predominantly, are the default shock absorbers for economic and labour market pressures, responding by exiting the labour force in the categories of employed or unemployed, shifting into NEA status, and being located in a level of precarity at the front lines of economic shocks. These sub-groups typify the reserve army of labour, with a simultaneous deep reliance and shaky hold on decent work or any work for that matter, and subsistence for many oscillating between waged labour and state grants and subsidies.

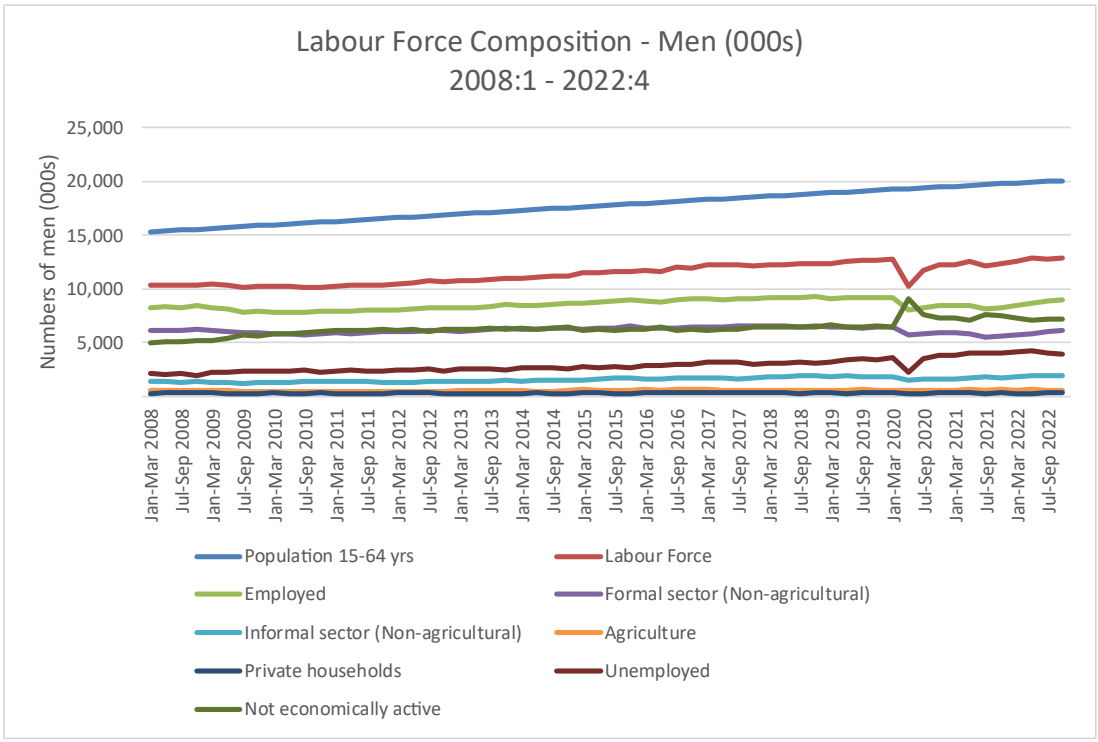
The perpetual precarity of these employment subgroups is reminiscent of pre-1994 policies offering labour market income just too low to remove the need to supplement it with social reproduction with rural reserves (Button et al., 2018), reliant largely on rural women's labour to subsist. Today, a similar relationship to precarious work exists alongside very limited public service infrastructure and a neoclassical social safety net edged in by austerity (Sibeko, 2022). South Africa is no longer governed by a state that orders removal to the reserves. However, the nature of the economy produces mushrooming or urban townships and sprawling squatter camps as waiting rooms for any casual, part-time, precarious, piece jobs.

Women remain in reserve or benched for the formal and informal paid labour market. Women are central to under- or poorly paid and unpaid social reproduction work, thereby subsidising the economy on a fraction of the income of men's labour. To this is added the gap in benefits, skills, and the realization of capabilities.

Labour market effects viewed prior to and during Covid show patterns of volatility within a broader gender-segmented labour force structure. Levels of economic inactivity for women always exceed levels of employment, regardless of economic conditions. When the economy is under pressure, economic inactivity levels for women rise further, exceeding numbers in the labour force, crisscrossing as economic performance vacillates, to suggest an inherent precarity in employment status for women of working age. For men of working age, labour market volatility carries limited similarity. Examining the data trendlines over a relatively long period exposes an essentially different relationship in disaggregated employment status among men. In recessionary or recovery, economic inactivity for men never exceeds the male labour force. In fact, in the decade and a half examined, there are always more men in employment than men classified as not economically active, with the exception of one quarter of the sixty – the second quarter of 2020 which commenced at the most stringent Covid-19 lockdown level 5, followed by levels 4 then 3 before the quarter closed.

Figure 7. Labour Force Composition by gender, 2008 - 2022





Source: Own calculations from StatsSA QLFS 2008:1 to QLFS 2022:4

Particularities of race subgroups

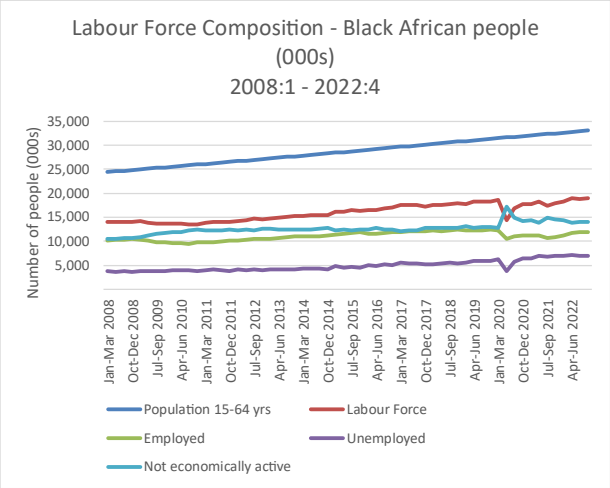
For Black people, the periods post the GFC and Covid, have been prolonged periods where those NEA exceed those employed. This is the least stable or resilient subset of the labour force to crises. The trend lines of employed versus NEA for black people show an extended period in crisis than other groups, and in that condition almost perpetually for the last 15 years – the group could be described as structurally located on the edges of employment. Disaggregated by gender within race groups, what is clear is that the location of black women outside employment pushes the black population into this aggregated status of overall vulnerability.

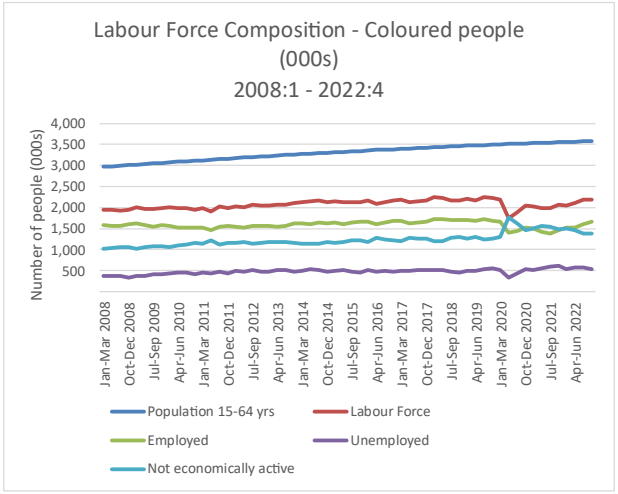
For Coloured people, those classified as NEA exceed the labour force in Q2 2020 and in parts of the ensuing years 2021 and 2022. This category of the labour force features more stable generally or less volatility than the Black and Indian/Asian subgroups. The data does suggest that since Covid, levels of vulnerability for the labour force of Coloured people as increased.

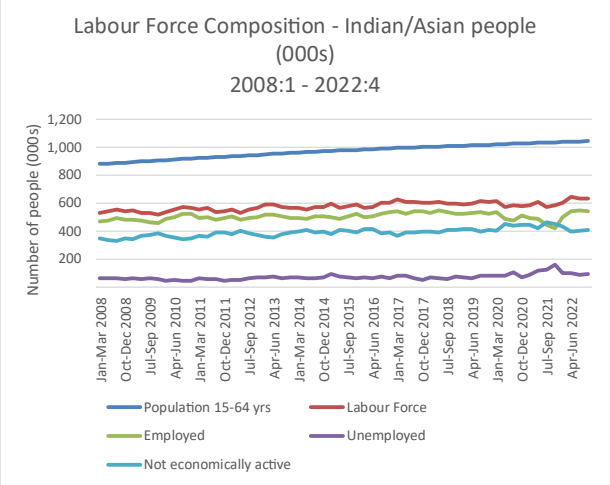
For the Indian and Asian subgroup, the labour force tracks steadily with those classified as employed, but with a wider gap between the two sets of employment status than White people i.e. higher levels of unemployment in comparison, but lower levels than Black and Coloured groups. The largest impact of Covid in this group appeared to be a second round Covid effect seen in Q4 2021 and Q1 and Q2 2022 which are clearly more significant than at the hardest levels of lockdown. This represents the impact of both Covid, and the July 2021 riots pushing unemployment up for Indian people to levels higher than at the peak of Covid for the labour force as a whole. This serves as sobering reminder of the impact of civil unrest driven by perpetual crisis experienced differentially in South Africa. For some, crisis is a permanent state and Covid provided inordinate pressures beyond breaking point

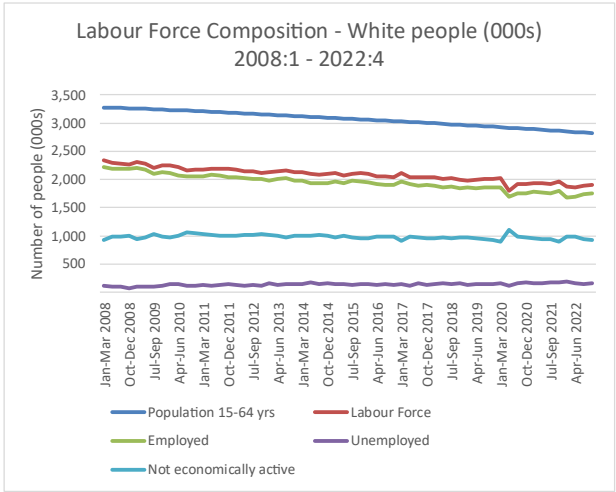
For the White subgroup, the lowest levels of unemployment are clear, and communicate a resilience to crisis as an in-built feature. The series for the labour force and for the employed stay very close together with the largest divergence in Q1 of 2022, suggesting larger second round effects within this group uniquely. The WAP of White people declines unlike other subgroups. The levels of those classified as NEA are low and stable, with NEA at its lowest level in the last 15 years, in the period after Covid.

Figure 8. Labour Force Composition by race, 2008 – 2022









Source: Own calculations from StatsSA QLFS 2008:1 to QLFS 2022:4

5. Conclusion

The labour market in South Africa appears to be shaped in favour of men, and White and Asian/Indian people whether the economy is in crisis or not. For example, disproportionately more men are employed at all and more men than women have more stable working conditions. More men than women regularly get longer paid working hours. Men's smaller share of the burden of unpaid work also means they generally escape the multiplied labour market opportunity costs of carrying the greater share of unpaid work. Favourable labour market status is also afforded to White and Asian/Indian people when compared with other race groups. These biases are situated in an economy that gives expression to a shock like Covid in a way that widens inequality and amplifies both the favourable and unfavourable pre-existing characteristics of labour market sub-groups. The old adage the rich get richer and the poor get poorer largely holds in a gendered labour market analysis of the fifteen years prior to and including Covid. Fluctuations occur inside margins that rest on a structural base built to sort men into paid labour, and women into a reserve army, typecast by gender into concentration in low-paid or unpaid social reproduction, care and care-type work predominantly, which lends itself to being impermanent and transitory – always on stand-by for paid market work when economically expedient, then out of economic activity and back into reserve for slowdowns, downturns, and depressions.

The macro view of the fifteen years under analysis delivers a depiction of the data as not just a structured variance, but a pattern of gendered employment status sorting, which not even a global pandemic on the scale of Covid, can upset. Every subgroup of working age can be described as having a structured variance associated with that group. For working age women, employment is in permanent crisis, is normalized volatility, constantly straddling labour force participation and labour force withdrawal, invisiblising a systemic locating of women outside employment. Structured variance locates men of working age inside employment. This does not mean to say unemployment for men is not in crisis. Economic inactivity and unemployment are themselves structural features of the South African labour market, and both men's and women's inactivity and unemployment levels reached record highs in the last 36 months. Still, profound vulnerability that describes the existence of millions of men and women in South Africa, structural variance in labour force patterns during Covid and on an extended time scale, appear as a visible anomaly or marked blip on the radar for men in comparison to women. In an analysis by race, the expectation that a segregated level of vulnerability to impacts along race lines is baked into the labour force, would be supported by the data.

The impact to the labour force experienced by women when compared to men during Covid, as evidenced by the QLFS datasets, largely concurs with the findings of the NIDS-CRAM studies. Women were hardest hit initially and overall are largely still lagging marginally behind men in employment recovery at the end line of this study.

Further research opportunities reside in a detailed analysis of gendered income differentials during the Covid period, to measure whether and where gender equality advances were eroded by the pandemic. Probit regression analysis to estimate the correlates of employment pre-Covid using the probability of being employed relative to unemployed or inactive on a range of personal and household characteristics would allow for a comparison of employment using the same specification and the latest QLFS dataset to see if these correlates had changed over time. Such an analysis would indicate whether correlates of employment have changed between the base and end lines. Additionally, a detailed analysis of gender sensitivity applied to frameworks for public policy are crucial for realising capacity in the state to intentionally examine gender inequalities and craft policies informed by evidence and measured by distinct indicators designed to produce structural transformation and on aggregate more resilience to crises as well as at a subgroup level so that greater equality becomes a reality in the world's inequality capital. Mixed methods research that marry quantitative analysis with qualitative analysis would offer a richer lens to studies of Covid and other crises, and their impacts across the labour market.

The policy implications of the findings of this study reside at the nexus of widescale, progressive, coordinated public policy. Tinkering with notions of gender sensitivity or intersectional inequality reforms are a mismatch for the depth and breadth of the intersectional impacts of vulnerability legacies in the labour market. Gender gaps were heightened due to the Covid pandemic, but pre-date and will outlive it. Disaggregating the analysis of labour market impacts by sector, industry, and occupation does not fully account for the gendered impacts of Covid. Within the same occupations and industries, women when compared to men fared significantly worse in labour market outcomes. Some research offers the added weight of care and social reproduction work for women as part of the explanation for gendered impacts.

An inclusive and substantial recovery will necessitate addressing the determinants of gendered gaps in labour market opportunities. Equitable access to employment must include decent work. Access and the quality of that access cannot be separated. The working conditions for women and men have on aggregate varied radically, perpetuated by socio economic structures and cultural norms that limit

employment equity for women. Labour laws and regulations, coupled with progressive, affirmative development of women's human capital, and that of people of colour must dominate policy prescriptions and resource allocation. While economic growth and job creation are oxygen to any and every economy, the policy frameworks that are adopted, and policy and regulatory directions taken, determine the quality of life and the capacity to survive a shock like Covid with impacts on deep multidimensional levels. After nearly thirty years of democracy, the Covid crisis has thrown flood light on the struggles of particular types of people in our country who attempt to eke out an existence at the margins. Perhaps gargantuan binding economic, political and social constraints mean that full employment and decent working conditions for every working age adult who wants to work, will not be realisable in South Africa for a long time, if ever. Between the two seeming extremes of an ideal society and the one we now have, perhaps the adoption of a policy framework and the institutions and regulations that support it, can measurably, steadily, decisively push back on gross inequality, dehumanising unemployment and the poverty of hope that democracy could possibly mean, "a better life for all".

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