CIPD
Championing better work and working lives

in partnership with

THE ADECCO GROUP

LABOUR MARKET OUTLOOK

VIEWS FROM EMPLOYERS

Spring 2020

The CIPD is the professional body for HR and people development. The registered charity champions better work and working lives and has been setting the benchmark for excellence in people and organisation development for more than 100 years. It has more than 150,000 members across the world, provides thought leadership through independent research on the world of work, and offers professional training and accreditation for those working in HR and learning and development.

Report

Labour Market Outlook

Spring 2020

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1 Foreword from the CIPD

The quarterly CIPD/The Adecco Group *Labour Market Outlook* provides an early indication of likely future changes to the labour market based on employers' recruitment, redundancy and pay intentions. The report is based on a survey of more than 2,000 organisations. The fieldwork for the survey started on Thursday, 26 March 2020, six days after HM Treasury announced it was going to introduce a Job Retention Scheme to help employers avoid making redundancies. Further details relating to the scheme were announced on Friday, 27 March. The fieldwork was completed on 7 April 2020.

The latest report suggests that the jobs market will take a significant turn for the worse in the next three months. The report's central net employment intentions figure has fallen to –4, which is its lowest point since this measure was first introduced in the winter 2012/13 report. The figure, which measures the difference between the proportion of employers who expect to increase staff levels and those who expect to decrease staff levels, is down 25 points compared with the winter 2019/20 quarter. The private sector has seen a particularly marked fall of 30 points compared with the previous quarter. The resulting figure of –9 is the lowest since the winter 2011/12 quarter. The employment outlook is particularly sombre in hospitality, business services, transport and storage, and manufacturing.

The relatively subdued outlook is mainly due to a sharp fall in recruitment activity among employers, which has fallen to its lowest level since the survey began in 2005. More positively, redundancy intentions have increased only modestly compared with the previous quarter. The survey suggests that the Job Retention Scheme is the reason why anticipated redundancies are at a relatively low level. More than half of employers were planning to use the scheme when the survey fieldwork was conducted, with these organisations expecting to furlough on average 60% of their workforce. On average, of those planning to take part in the scheme, employers say that that the scheme has avoided redundancies for more than a third (35%) of their workforce. The CIPD is therefore pleased to see that the scheme has been extended and made more flexible. The next challenge will be for Government to work with employers to design the best way to enable furloughed staff to work part-time for their employer, and gradually reduce reliance on the wage subsidy before the scheme ends in October.

In addition, it seems that employers are using a variety of tactics to reduce workforce costs in order to avoid or minimise redundancies. Popular measures include reducing working hours, freezing recruitment and cutting training budgets. It also seems that many employers are exercising similar wage flexibility as in the previous recession, which should preserve some jobs.

As this report also shows, the current state of the economy will have a big impact on earnings in the next 12 months, with a growing proportion of employers introducing wage freezes, wage cuts and bonus reductions, while others defer their decision until later in the year.

It seems therefore that the intensity and ferocity of the pandemic is being directed towards pay rather than employment – at least in the immediate term. And while there are some grounds to be less pessimistic about the jobs market for those in work, the results suggest that the hiring outlook will be muted in the near to medium term. With this in mind, the prospects for the hundreds of thousands of young people entering the jobs market this summer look bleak.

Gerwyn Davies, CIPD Senior Labour Market Analyst

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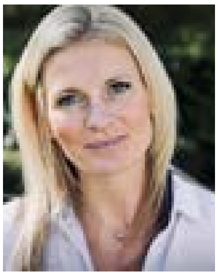
2 Foreword from the Adecco Group UK and Ireland

When data collection for this report was initiated, we were one week into the UK's 'lockdown' period in response to the COVID-19 crisis. As such, the Spring 2020 edition of the LMO Outlook presents an honest and timely view of the labour market. The overall net employment intentions figure of -4 is a significant drop from the positive employment intentions recorded in the winter 2019 quarter of +21.

The underlying uncertainty surrounding the economy is already evident in labour market intentions. Around four in 10 employers are planning to freeze wages in the next quarter, 25% say they don't know whether they will be making any redundancies in the next three months, which is up from 17% in the winter quarter, and 56% of employers say they don't know what their basic pay awards will be. Aside from this turbulence it's encouraging to see that employers are looking at a variety of options to stave off redundancies.

This report shows that 61% of organisations have embraced home working, 44% have frozen hiring, 33% have frozen or delayed pay increases, and 32% have introduced new flexible working arrangements. Other popular responses include cutting bonuses (29%) and cutting training budgets (27%). Although redundancy intentions have increased (22% expect to make some redundancies in the next three months, which is up 6% compared to the last quarter), employers are focusing on alternative measures to maintain their valuable workforce.



Even in January this year we couldn't have foreseen the workplace transformation that we're currently experiencing. At the Adecco Group more than 80% of our 34,000 colleagues globally are working from home and as a business, we're looking at how we can prepare for the inevitable labour market evolution that will take place as lockdown measures continue to ease.

Alex Fleming, Country Head and President of Staffing and Solutions, the Adecco Group UK and Ireland

3 Key points

1 Employment intentions have declined significantly over the past three months. When asked what the overall effect of recruitment and redundancies will be in the three months to July 2020, almost half (49%) of organisations surveyed say they will maintain total staff levels.

Almost a fifth (19%) say that they will increase staff levels and just over a fifth (22%) say the intention is to decrease staff levels – up 11% from the winter 2019/20 survey.

2 The resulting net employment intentions figure of –4 identifies a significant drop from the positive employment intentions recorded in the winter quarter (+21). The net employment intentions for the private sector is –9, which contrasts with +4 for the voluntary sector and +15 for the public sector.

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3 Employment intentions are most positive in healthcare (+37) and public administration (+16%) and most negative in transport and storage (–36), hospitality (–22), business services (–21), and manufacturing (–15).

4 Employers in Wales (+7), Scotland (+6), the north-west of England (+6) and the north-east of England (+6) look set to see staffing levels increase in the three months to July 2020. Conversely, the workforce looks set to shrink in other regions – most notably in the West Midlands (–17) and London (–8).

5 Recruitment intentions among UK employers surveyed have declined significantly over the past quarter. Two in five (40%) employers responding to the spring survey are planning to recruit in the three months to July 2020, down 26 percentage points from the winter 2019/20 quarter and 30 percentage points from the autumn 2019 quarter. The figure has fallen to its lowest level since the survey began in 2005.

6 Redundancy intentions have also increased over the quarter. More than a fifth (22%) of organisations expect to make some redundancies in the three months to July 2020, up 6 percentage points from the winter quarter.

7 Popular employer responses to the current crisis include extending homeworking significantly across the organisation (61%), recruitment freezes (44%), freezing or delaying planned pay increases (33%), introducing new flexible working arrangements (32%), cutting bonuses (29%) and cutting training budgets (27%). Meanwhile, 16% of employers plan to make redundancies.

8 More than two-thirds (67%) of employers surveyed intend to review wages in the next 12 months. One in three (33%) intend to postpone their pay decision this year, up from 14% in the winter quarter.

9 The resulting average pay increase (excluding bonuses) following the reviews is expected to drop significantly over the next 12 months, especially in the private sector. Median basic pay expectations are for a 1% increase, down from 2% in the winter quarter. Basic pay expectations in the private sector are 0%, compared with 2% three months ago. Meanwhile, pay expectations remain unchanged in the public sector (1.5%) and voluntary sector (2%).

10 Just over half (52%) of employers planned to take part in the Government's new Job Retention Scheme (JRS). The initiative – which is a temporary measure to maintain employment where redundancies would otherwise have taken place – is particularly popular in the hospitality (82%), transport (73%), construction (69%), retail (66%) and manufacturing (66%) sectors.

11 Of those employers participating in the scheme, 60% of workers will be furloughed on average. The proportion of the workforce that will be furloughed, as expected, is highest in the hospitality (80%), retail (76%), construction (66%), administration and other support services (61%) and manufacturing (57%) sectors.

12 Participants in the scheme say that they would have made 35% of their workforce redundant on average if it weren't for the JRS.

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4 Recruitment and redundancy outlook

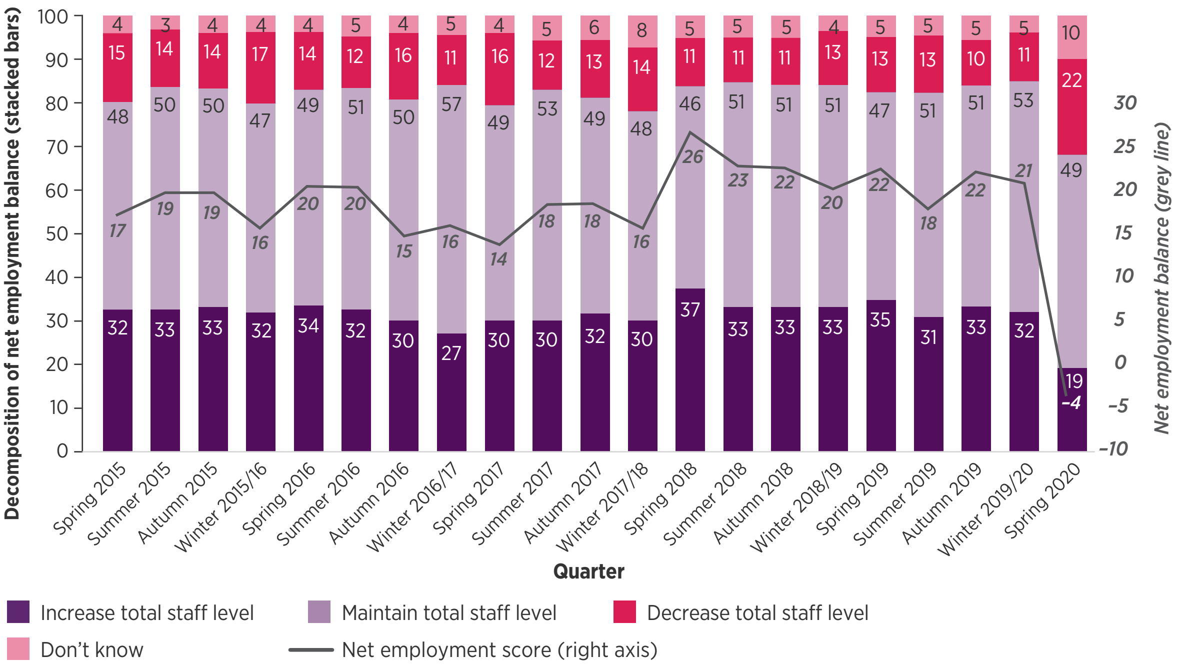
What is the short-term employment outlook?

This section focuses on the recruitment and redundancy intentions of employers in the three months to July 2020. The net employment balance figure measures the difference between employers who expect to increase staff levels and those who expect to decrease total staff levels.

The survey data shows that employment intentions have declined significantly over the past three months. When asked what the overall effect of recruitment and redundancies would be in the three months to July 2020, almost half (49%) of organisations surveyed say it would maintain total staff levels. Almost a fifth (19%) say that they would increase staff levels and just over a fifth (22%) said the intention is to decrease staff levels – up 11% from the winter survey.

The resulting net employment intentions figure of –4 identifies a significant drop from the positive employment intentions recorded in the winter quarter (+21) and previous reports. This is also the lowest net employment balance recorded since this new measure was introduced in winter 2012/13.[1]

Figure 1: Decomposition of net employment balance over time



Base: spring 2020, all employers (n=2,053).

[1] This has been measured using a re-coded variable, with the sample filtered for employers planning to recruit and/or make redundancies in the next three months. Prior to the winter 2012/13 report, the relevant question was asked only to this subset of the LMO sample, therefore re-basing the spring 2020 data to match that routing allows for the most reliable comparison. The re-coded net employment balance for spring 2020 is +5, which is equivalent to the +5 recorded in winter 2012/13.

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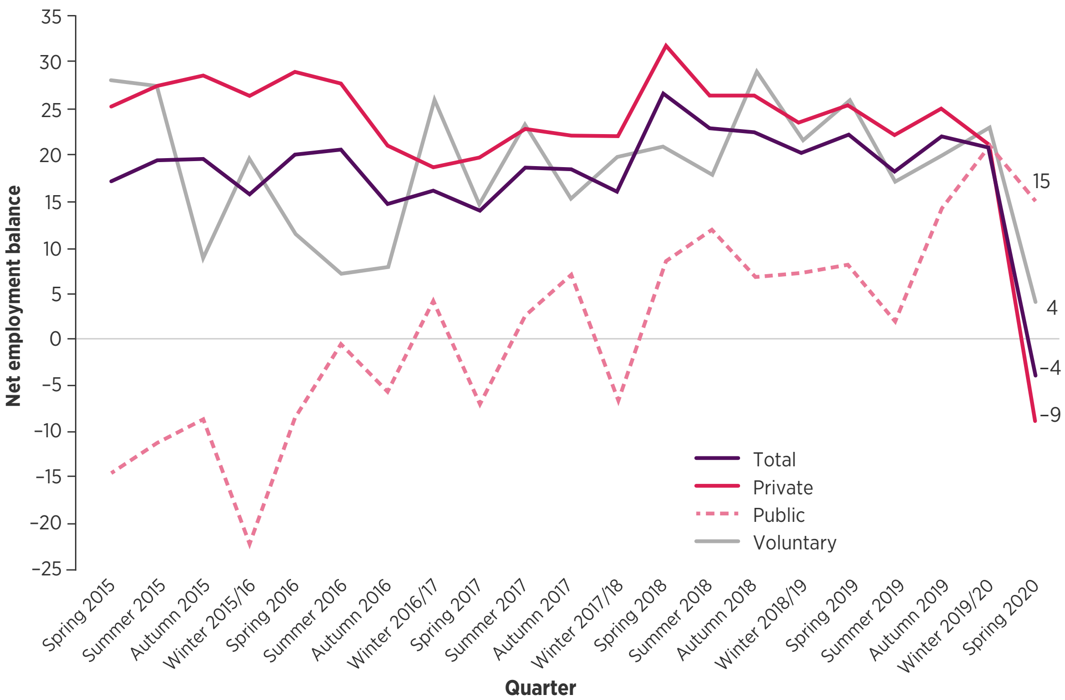
How to interpret Figure 1
The net employment balance is an indicator of employment confidence. It takes the difference between the proportion of employers who expect to increase staff levels and those who expect to decrease staff levels. Figure 1 contains the net employment balance over time to show how employment confidence has changed. It also shows what is responsible for this change, be it more firms increasing, decreasing, or maintaining staff levels.

The net employment intentions for the private sector is –9, which compares with +4 for the voluntary sector and +15 for the public sector. By comparison, the net employment intentions for the private sector was +21 in the winter quarter, which compares with +23 for the voluntary sector and +21 for the public sector.

More than a quarter (26%) of private sector employers say the intention is to decrease staff levels – up from 11% from the winter quarter. By contrast, more than a quarter (26%) of public sector employers say the intention is to increase staff levels – up from 21% from the winter report. This is being driven by healthcare employers, for whom more than four in ten (43%) report that they plan to increase staff levels in the coming months.

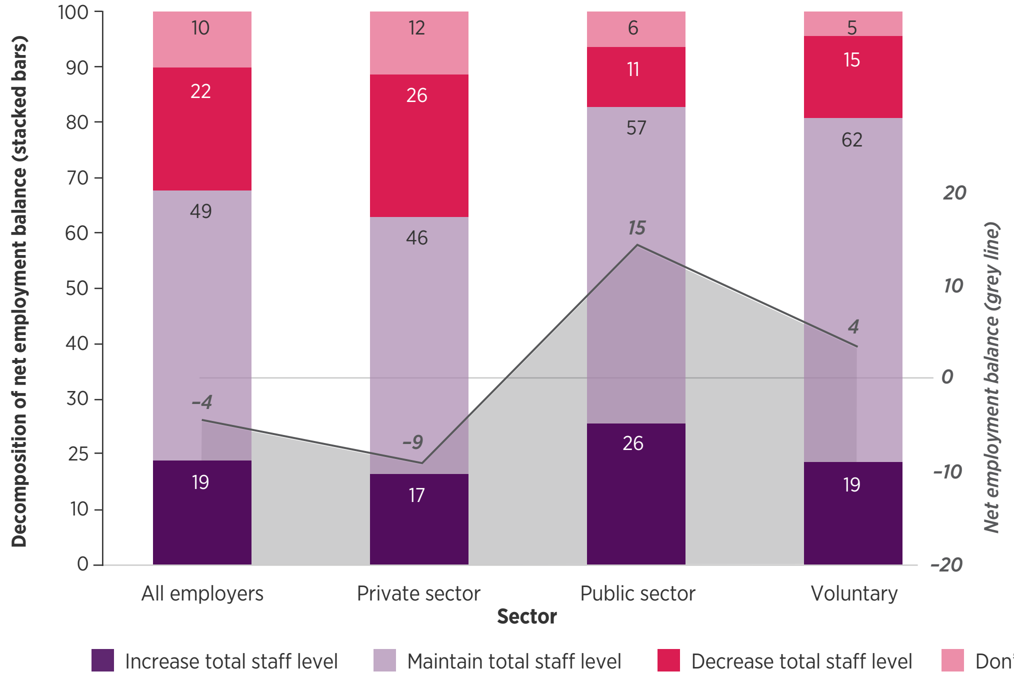
In terms of size of organisation, the net employment figure of –10 for organisations with 250–499 employees represents the most significant drop compared with the previous quarter, down 27 from the winter quarter. Employment intentions are highest for organisations with 500–999 employees (+0).

Figure 2: Overall effect of increasing or decreasing staff over the next three months, by sector



Base: spring 2020, all employers (n=2,053; private n=1,433; public n=427; voluntary n=193).

Figure 3: Overall effect of increasing or decreasing staff over the next three months, by sector – spring 2020

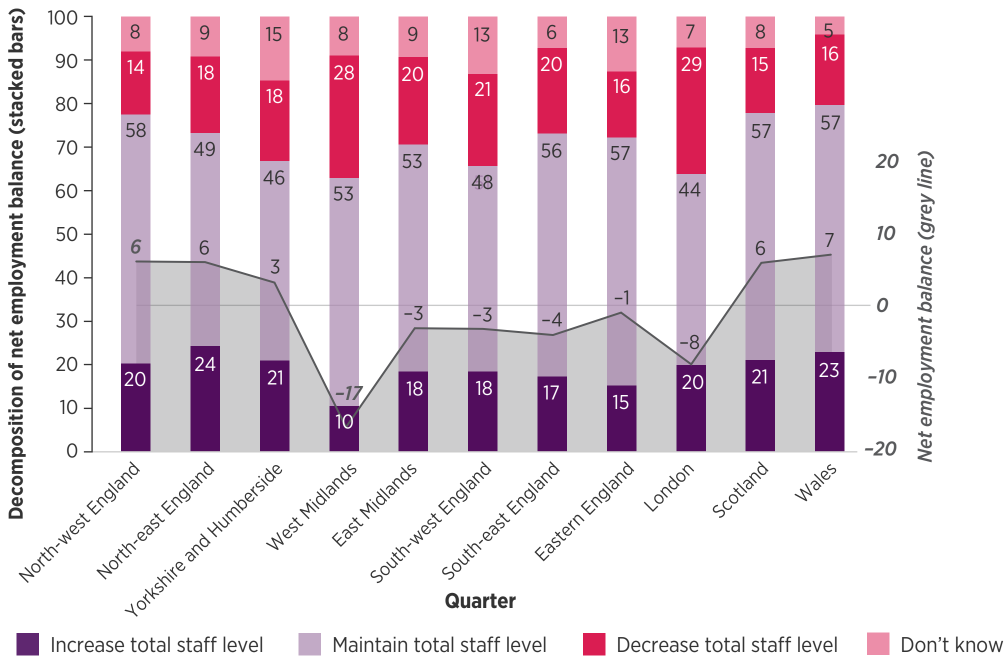


Base: spring 2020, all employers (n=2,053; private n=1,433; public n=427; voluntary n=193).

Regional trends

Employers in Wales (+7), Scotland (+6), the north-west of England (+6) and the north-east of England (+6) look set to see staffing levels increase in the three months to July 2020. In contrast, the workforce looks set to shrink in other regions, most notably in the West Midlands (–17) and London (–8). The variation across the regions may be partly explained by the higher proportion of people employed in the public sector in some of the nations and regions where the net employment intentions balance is positive.

Figure 4: Overal effect of increasing or decreasing staff over the next three months, by region – spring 2020



Base: all bases > 50. For breakdown of base sizes, see Table 4.

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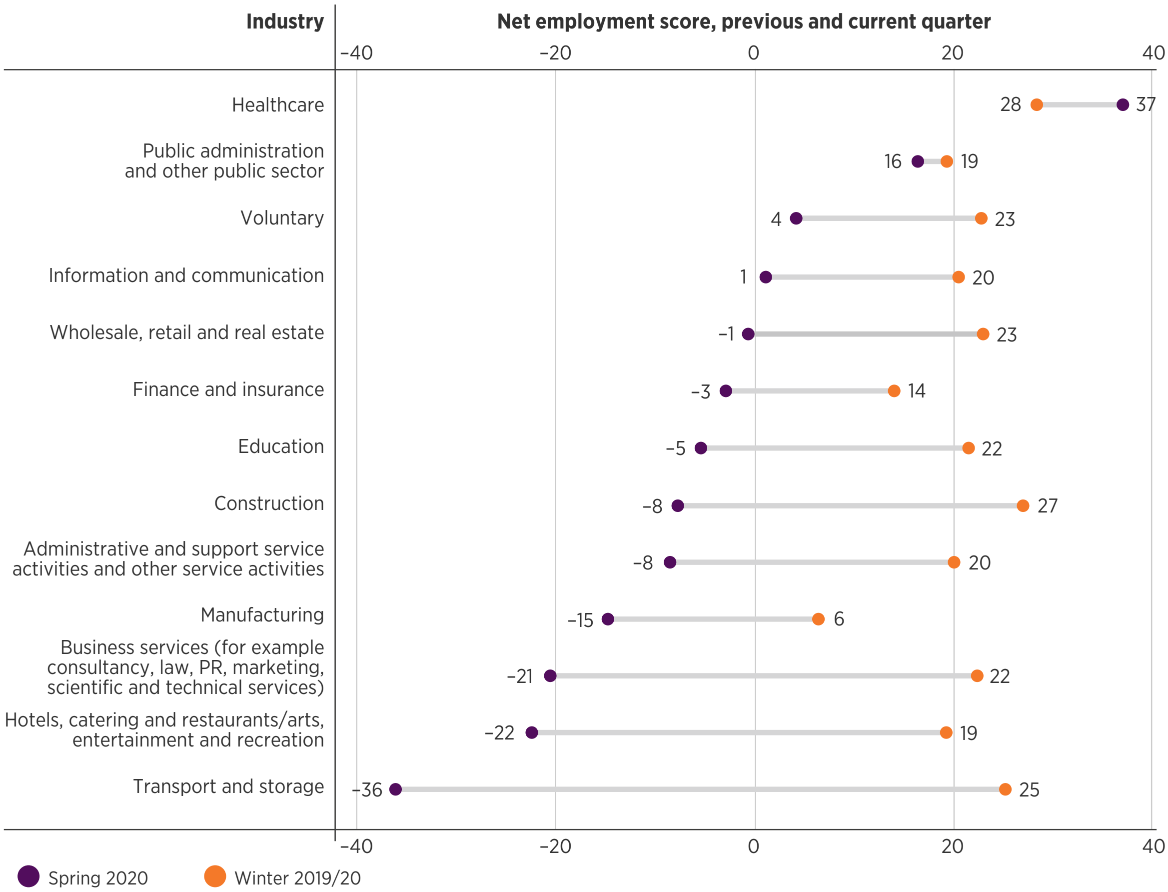
Employment intentions vary across the business sectors. Employment intentions are lowest in the transport and storage sector (–36), down 61 from the winter quarter; hospitality (–22), down 41; business services (–21), down 43; and manufacturing (–15). Meanwhile, employment intentions are highest in the healthcare (37%) and public administration (16%) sectors.

Figure 5: Net employment score, by industry, last and current quarter (%)[2]



Base: all bases > 50. For breakdown of base sizes, see Table 3.

Recruitment trends by sector

Recruitment intentions among UK employers surveyed have declined significantly over the past three months. Just two in five (40%) employers responding to the spring survey are planning to recruit in the three months to July 2020, down 26 percentage points from the winter survey. Recruitment intentions have therefore fallen to their lowest levels since the survey began in 2005.

This sharp slowdown in recruitment activity is consistent with other survey indicators. For instance, a recent survey by the Recruitment and Employment Confederation (REC) said recruitment for permanent positions fell to its lowest level since the survey began.

[2] Note: the sample size is too small for primary and utilities and police and armed forces.

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Recruitment in business sectors

Recruitment intentions vary across the business sectors. Recruitment intentions are lowest in the transport and storage (24%), hospitality (25%), manufacturing (25%) and business services (28%) sectors. Meanwhile, recruitment intentions are highest in healthcare (69%) and public administration (61%). The dramatic fall in employment confidence compared with three months ago is particularly acute in transport and storage, down 46 points from the winter quarter, and manufacturing, down 41 percentage points during the same period. In addition, recruitment intentions are down 35 percentage points in the hospitality sector and have fallen by 33 percentage points in the business services sector.

As expected, the private sector is less likely to recruit over the next three months and more likely to make redundancies on average. Just over a third (34%) of private sector employers intend to recruit, compared with 62% of public sector employers and 44% of voluntary sector employers. In the winter report, almost two-thirds (64%) of private sector employers intended to recruit.

Redundancy intentions

Redundancy intentions have increased over the quarter. More than a fifth (22%) of organisations expect to make some redundancies in the next three months, up 6 percentage points from the winter quarter. The relatively modest increase might surprise some commentators. However, the survey data in this report highlights evidence that suggests that employers are looking at a whole range of options alongside the Job Retention Scheme to stave off redundancies. This is broadly consistent with ONS data, which showed that less than 1% of the workforce had been made redundant across responding businesses that were still trading or had temporarily paused trading during the period 23 March to 5 April 2020.[3]

There is also an increase in LMO employers who cannot give an opinion on whether they will be making redundancies, which is a strong indicator of the underlying uncertainty surrounding the economy currently. A quarter (25%) of employers say they don't know if they will be making any redundancies in the next three months, up from 17% in the winter quarter.

As expected, the private sector is most likely to make redundancies. Just under a quarter (23%) intend to make job cuts in the next three months, compared with 17% of public sector employers and 17% of voluntary sector employers. Redundancy intentions are highest in the information and communication (33%), finance and insurance (29%) and transport and storage (28%) sectors.

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[3] https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/furloughingofworkersacrossukbusinesses/23march2020to5april2020

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5 Pay outlook

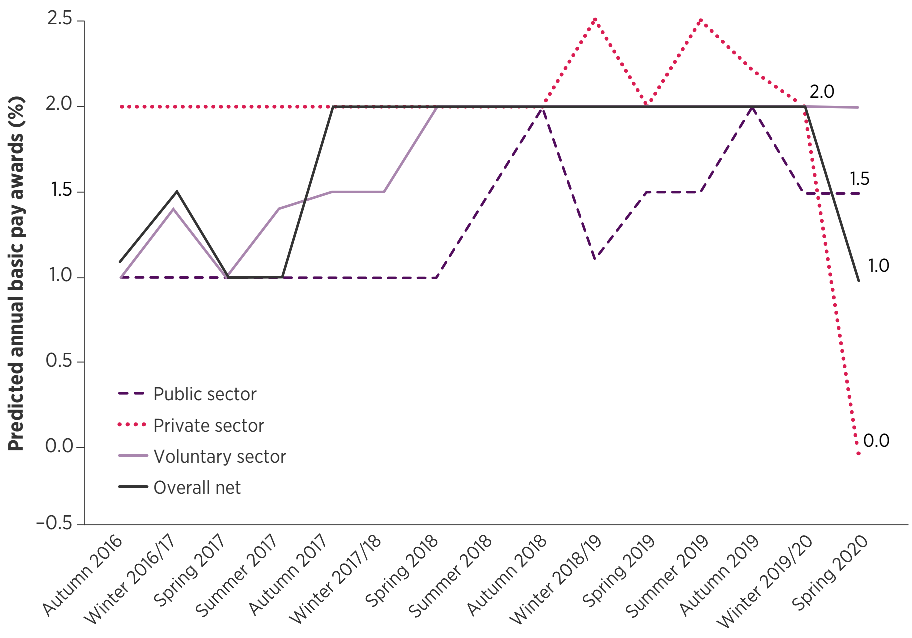
Expected scale of organisational pay reviews

More than a quarter (26%) of employers surveyed intend to review wages between March and May 2020 – the time when many employers make pay decisions. However, there has been a marked increase in employers that plan to defer carrying out their pay review in the next year. One in three (33%) intend to postpone their pay decision this year, up from 14% in the winter quarter. This is another strong indicator of the underlying uncertainty surrounding the economy currently.

More than two-thirds (67%) of employers intend to review pay over the next 12 months. The resulting average pay increase (excluding bonuses) following the reviews is expected to drop significantly over the next 12 months, especially in the private sector. Median basic pay expectations are for a 1% increase, down from 2% in the winter quarter. Basic pay increase expectations in the private sector are 0% compared with 2% three months ago. At the same time, pay expectations remain unchanged in the public sector (1.5% increase) and voluntary sector (2% increase).

There is also a modest increase in the proportion of LMO employers who cannot give an opinion on what their basic pay award is likely to be. More than half (56%) of employers say they don't know what their basic pay awards will be, up from 47% in the winter quarter.

Figure 6: Median expected average basic pay change with pay freeze included



Base: spring 2020, all employers who report an expected increase, decrease or pay freeze in the next 12 months (total n=631; private n=378; public n=168; voluntary n=85).

More than half (51%) of LMO private sector employers surveyed (compared with 14% in the autumn) plan to freeze pay following their next pay review. Overall, the proportion of all employers predicting a pay freeze is 42%, up from 15% in the winter quarter. Nonetheless, almost four in ten (39%) LMO employers surveyed expect their next pay reviews (excluding bonuses) to be 2% or more (Figure 7).

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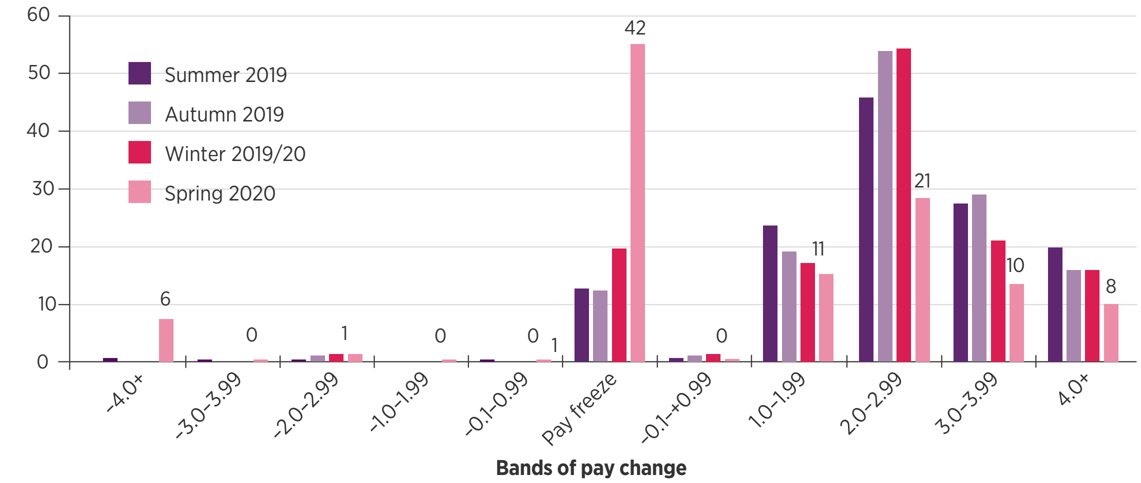
Figure 7: Distribution of forward-looking basic pay settlements, spring 2020 (%)



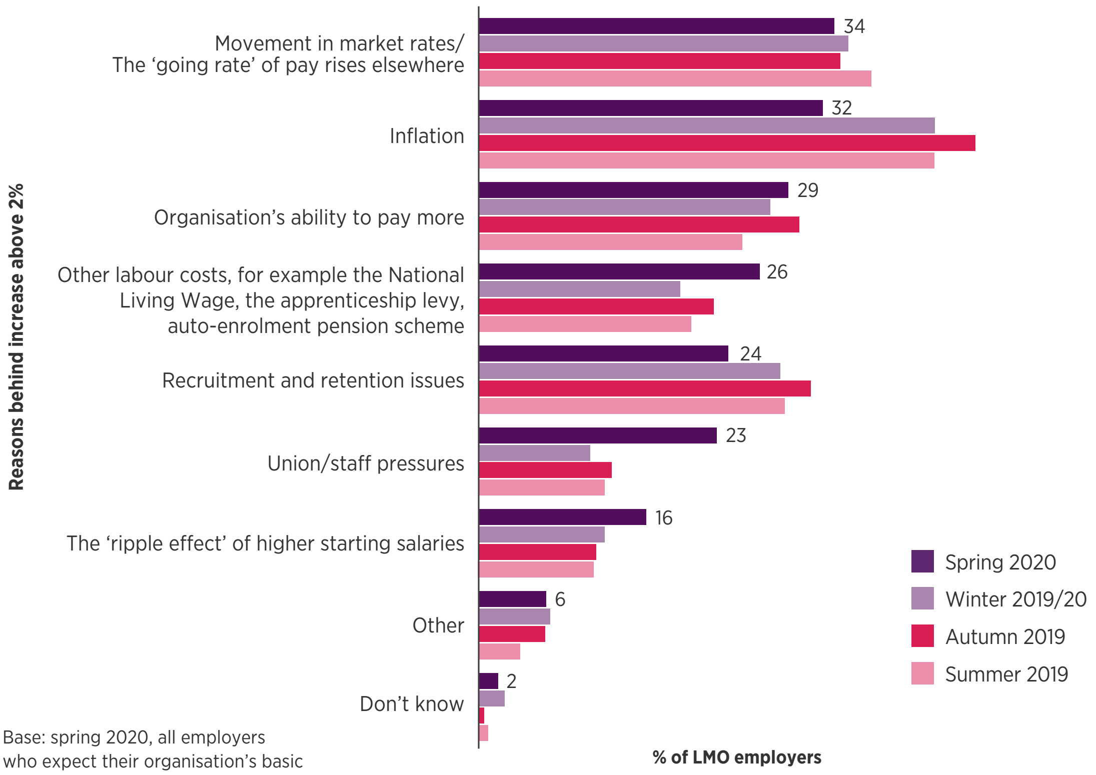
Base: spring 2020, all employers who report an expected increase, decrease or pay freeze in the next 12 months (n=631).

What are the factors behind employers' basic pay decisions?

The market rate and inflation both appear to be equally important drivers of employers' ability to award basic pay increases of 2% or more; around a third (34%) mention movement in market rates and 32% cite inflation. Other key factors include affordability (29%) and other labour costs, such as the National Living Wage.

Differences in determinants of pay reviews emerge when considering the basic pay awards of less than 2%. For organisations in the private sector, the most important driver of pay reviews is movement in market rates, mentioned by four in ten (40%) private sector employers, which compares with a quarter (25%) of public sector employers. For the public sector, inflation is most cited, rated by almost four in ten (38%) of public sector employers.

Figure 8: Top reasons for increase in average basic pay by 2% or more (%)



Base: spring 2020, all employers who expect their organisation's basic pay will increase by 2% or more (n=259).

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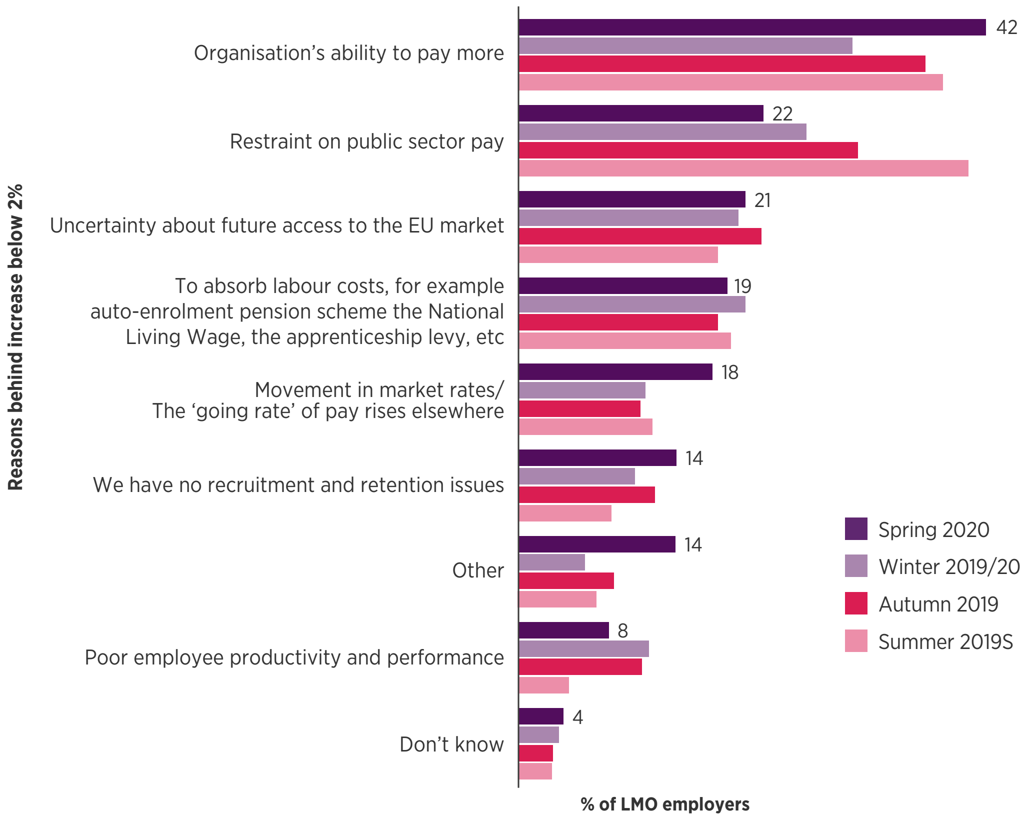
Meanwhile, an organisation's ability to pay is the important factor behind employers' inability to award basic pay increases of 2% or more – this was mentioned by more than four in ten (42%) employers, up from 30% in the winter quarter. Other key factors include restraint on public sector pay (22%), uncertainty about future access to the EU market (21%) and having to absorb other labour costs such as the National Living Wage.

Differences in determinants of pay reviews also emerge when considering the private, public and voluntary sectors. As expected, for organisations in the public sector, the most important driver of pay reviews is restraint on public sector pay, cited by seven in ten (70%) public sector employers.

Figure 9: Top reasons for increase in basic pay below 2% (%)



Base: spring 2020, all employers who expect their organisation's basic pay will increase by less than 2% (n=372).

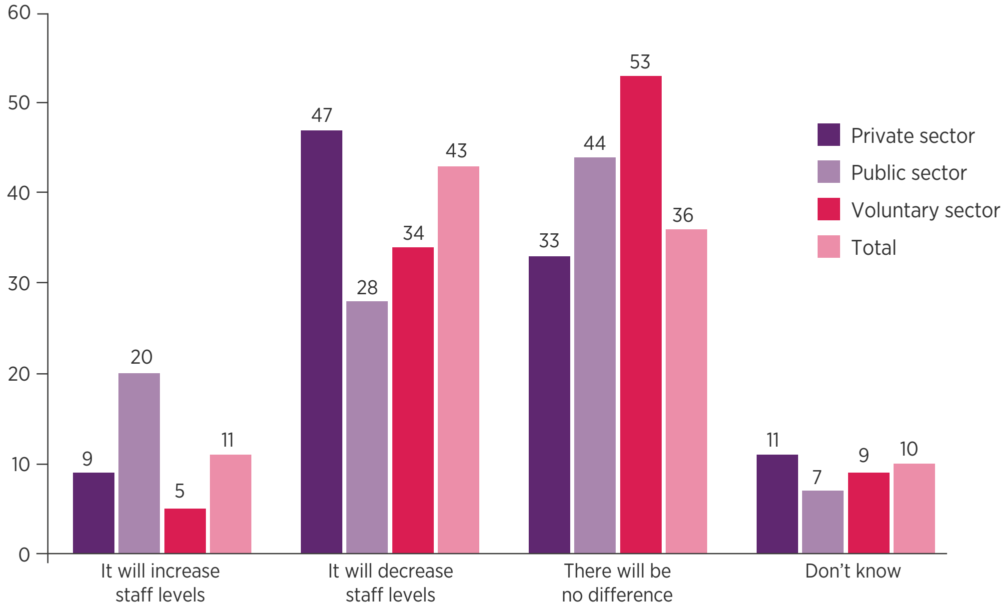
6 Focus: COVID-19

What is COVID-19's impact on staff levels?

Given the scale and rapidity of the current economic fallout, it is no surprise to see that COVID-19 has had a dramatic impact on employers' staff levels. When asked what the overall effect of COVID-19 would be, more than four in ten (43%) employers surveyed said it would decrease staff levels, compared with just over one in ten (11%) who say it would increase staff levels in the next three months. Meanwhile, just over a third (36%) of organisations surveyed report that COVID-19 would have no impact on staff levels.

As expected, the private sector, which continues to suffer the brunt of the current crisis, is more likely to say that COVID-19 will lead to a decrease in staff levels compared with other sectors. Almost half (47%) of private sector employers said that COVID-19 would lead to a cut in staff levels, compared with 34% of public sector employers and 28% of voluntary sector employers. However, a fifth (20%) of public sector employers said that COVID-19 would mean an increase in staff levels in the next three months compared with 9% of private sector employers and 5% of voluntary sector employers.

Figure 10: Impact of COVID-19 on staff levels – sector breakdown (%)

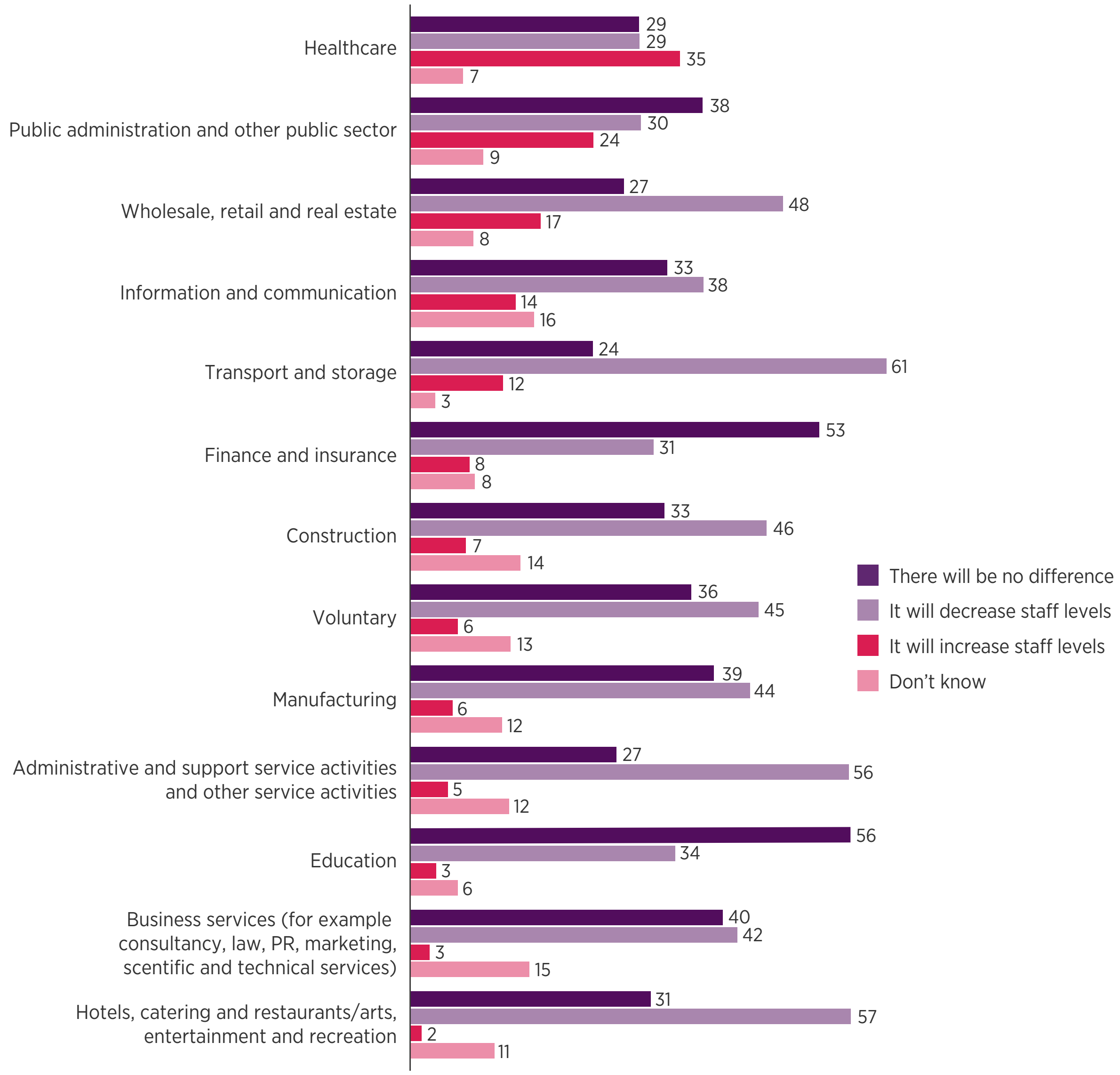


Base: spring 2020, all employers (total=2,053; private sector=1,433; public sector=427; voluntary sector=193).

The abrupt slowdown in sectors such as hospitality and transportation is reflected in the number of employers in those sectors who plan to decrease staff levels in response to the current crisis in the next three months. The intention to cut staff levels is highest in transport and storage (61%), hotels, catering and restaurants/arts, entertainment and recreation (57%), and administrative and other support service activities (56%). In sharp contrast, more than a third (35%) of healthcare employers intend to increase staff levels in response to the current crisis during the same period.

In terms of the regions, almost three in ten (29%) employers in the north-east of England report that COVID-19 will lead to an increase in staff levels in the three months to July 2020. By contrast, almost half (49%) of employers surveyed in the East Midlands say that COVID-19 will lead to a decrease in their staff levels.

Figure 11: Impact of COVID-19 on staff levels – industry breakdown (%)



Base: all bases > 50. For breakdown of base sizes, see Table 3.

Awareness and use of the Government's Job Retention Scheme

On the evidence of this report, the Government's Job Retention Scheme (JRS), which is designed to keep people in work, looks set to have a significant impact.

The vast majority of employers surveyed (96%) say that they are aware of the Government's Job Retention Scheme.

The survey also finds that a small majority (52%) of employers plan to take it up over 'the next three months' (Figure 15). As expected, appeal for the wage subsidy is higher in the private sector than other sectors. Three in five (60%) say they are likely to take advantage of the subsidy, falling to 50% for voluntary sector employers and 19% of public sector employers. Almost a fifth (19%) say they do not know.

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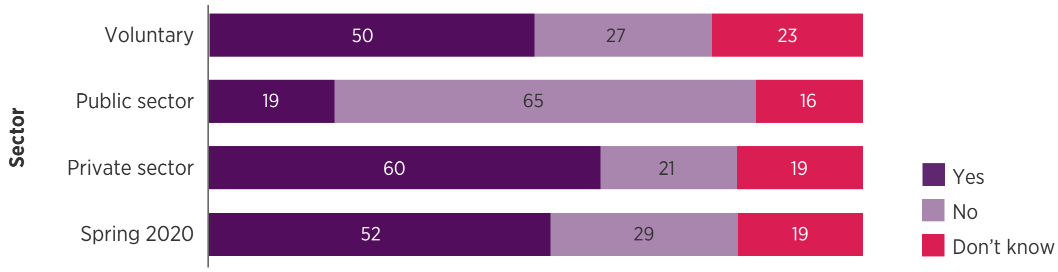
Figure 12: Proportion of employers that expect to seek financial support from Coronavirus Job Retention Scheme (%)



Base: spring 2020, all employers (total=2,053; private sector=1,433; public sector=427; voluntary sector=193).

There is considerable variation across sectors. The vast majority of employers in the hotels, catering and restaurants/arts, entertainment and recreation (82%), transport and storage (73%), construction (69%) and manufacturing (66%) sectors say they will participate in the scheme.

Smaller organisations are also more likely to take up the wage subsidy in the next three months compared with large organisations. Almost six in ten (58%) smaller organisations (2–249 employees), say they will take advantage of this initiative compared with just under half (48%) of larger organisations.

Slight differences emerge in the regions. Employers in the north of England (53%), the Midlands (56%) and the south (including London) (54%) are more likely than those in Wales (43%) or Scotland (46%) to take this up.

Of those planning to use the Government's Job Retention Scheme, employers say that 60% of the workforce will be furloughed on average. However, there is considerable variation across sectors. The proportion of the workforce that look set to be furloughed is much higher in the hospitality (80%), retail (76%), construction (66%), administrative and support services (60%) and manufacturing (57%) sectors than in other sectors.

According to official statistics, more than a quarter (27%) of the workforce had been furloughed in response to COVID-19 in the reference period 23 March to 5 April 2020.[4]

Redundancies avoided

The survey data also suggest that the Job Retention Scheme, which is designed to keep people in work, will have a significant impact on preserving jobs. On average, of those planning to take part in the scheme, employers say that that the scheme has avoided redundancies for more than a third (35%) of their workforce. Employers in the hospitality and retail sectors both say that the scheme has helped stave off redundancies for half (50%) of their workforce. A recent CIPD estimate suggested that up to 4.2 million redundancies have been avoided in the short term due to the Job Retention Scheme.

[4] https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/furloughingofworkersacrossukbusinesses/23march2020to5april2020

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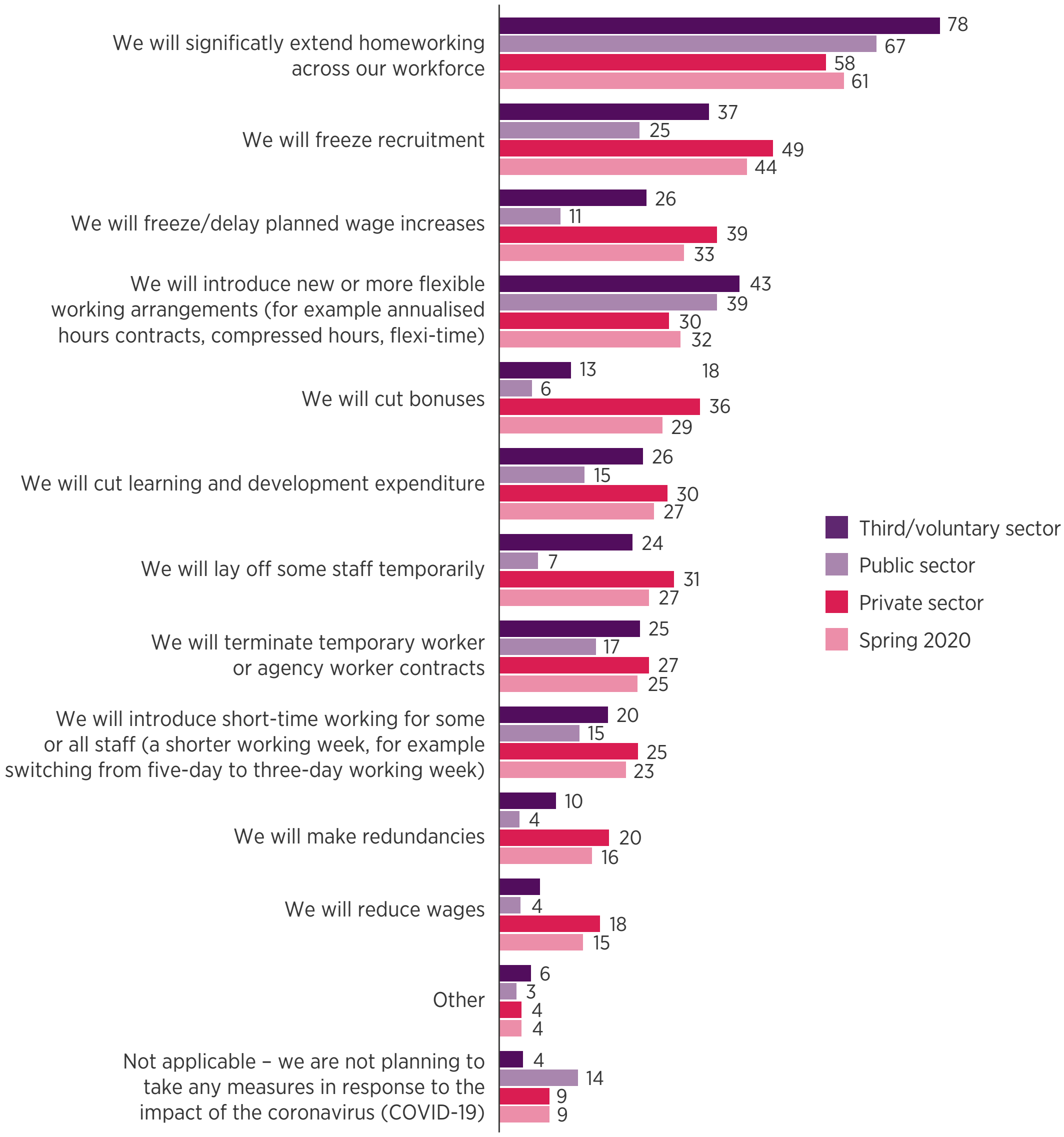
Figure 13: Measures organisations plan to take in response to COVID-19 (%)



Base: spring 2020, all employers (n=2,053; private sector=1,433; public sector=427; voluntary sector=193)

Employer response to COVID-19

The survey also amply highlights evidence that suggests employers are looking at other options to stave off redundancies in response to the current pandemic.

Most employers plan to extend homeworking significantly across their workforce (61%), especially in the education (70%), business services (69%), information and communication (68%) and public administration (68%) sectors. As expected, many employers in the hospitality (43%) and healthcare (47%) sectors do not intend to extend homeworking across their workforce.

More than four in ten (44%) employers say they plan to resort to recruitment freezes compared with just 16% of organisations who say they plan to make redundancies. The proportion of organisations adopting a recruitment freeze is significantly higher for the private sector (49%) than the public sector (25%), especially in hospitality (64%), construction (60%) and business services (55%). Meanwhile, redundancy activity is higher in transport and storage (27%), hospitality (26%) and business services (24%) than in other sectors.

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It also seems that many employers are exercising similar wage flexibility as the previous recession of 2008/09, which should help preserve some jobs. Pay cuts (15%), bonus cuts (29%) and freezing or delaying pay increases are all tactics that employers intend to use in response to the current pandemic. Pay cuts are more prevalent in the construction (31%), hospitality (25%), business services (24%) and administrative support and support services (21%) sectors.

Other responses employers intend to use include introducing new or more flexible working arrangements (32%), cuts to training budgets (27%), temporary lay-offs (27%) and terminating agency or temporary worker contracts (25%).

In addition, almost a quarter (23%) of employers plan to use short-time working – a temporary measure to maintain employment where redundancies would otherwise have taken place – to avoid making redundancies. This initiative appeals more to private sector employers (25%) than those in the public sector (15%).

7 Survey method

All figures, unless otherwise stated, are from YouGov Plc. The total sample was 2,053 senior HR professionals and decision-makers in the UK. Fieldwork was undertaken between 25 March and 7 April 2020. The survey was carried out online. The figures have been weighted and are representative of UK organisations by size, sector and industry.

Weighting

Rim weighting is applied using targets on size and sector drawn from the *Business Population Estimates for the UK and Regions 2018* (see Tables 2 and 4). The following tables contain unweighted counts.

Table 1: Breakdown of the sample, by number of employees in the organisation

Employer size band	Count
2–9	312
10–49	398
50–99	150
100–249	196
250–499	175
500–999	171
1,000 or more	651
Total	**2,053**

Table 2: Breakdown of sample, by sector

Sector	Count
Private sector	1,433
Public sector	427
Third/voluntary sector	193
Total	**2,053**

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Table 3: Breakdown of sample, by industry

Industry	Count
Voluntary	193
Manufacturing and production	292
Manufacturing	201
Construction	91
Primary and utilities	45
Education	229
Healthcare	132
Private sector services	989
Wholesale, retail and real estate	150
Transport and storage	51
Information and communication	114
Finance and insurance	170
Business services (for example consultancy, law, PR, marketing, scientific and technical services)	188
Hotels, catering and restaurants/Arts, entertainment and recreation	125
Administrative and support service activities and other service activities	191
Public administration and defence	142
Police and armed forces	22
Total	**2,053**

Table 4: Breakdown of sample, by region

Region	Count
North-east of England	64
East Midlands	121
West Midlands	111
Scotland	132
London	379
South-west of England	153
East of England	94
Wales	56
South-east of England	265
North-west of England	164
Yorkshire and Humberside	106
Northern Ireland	25

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