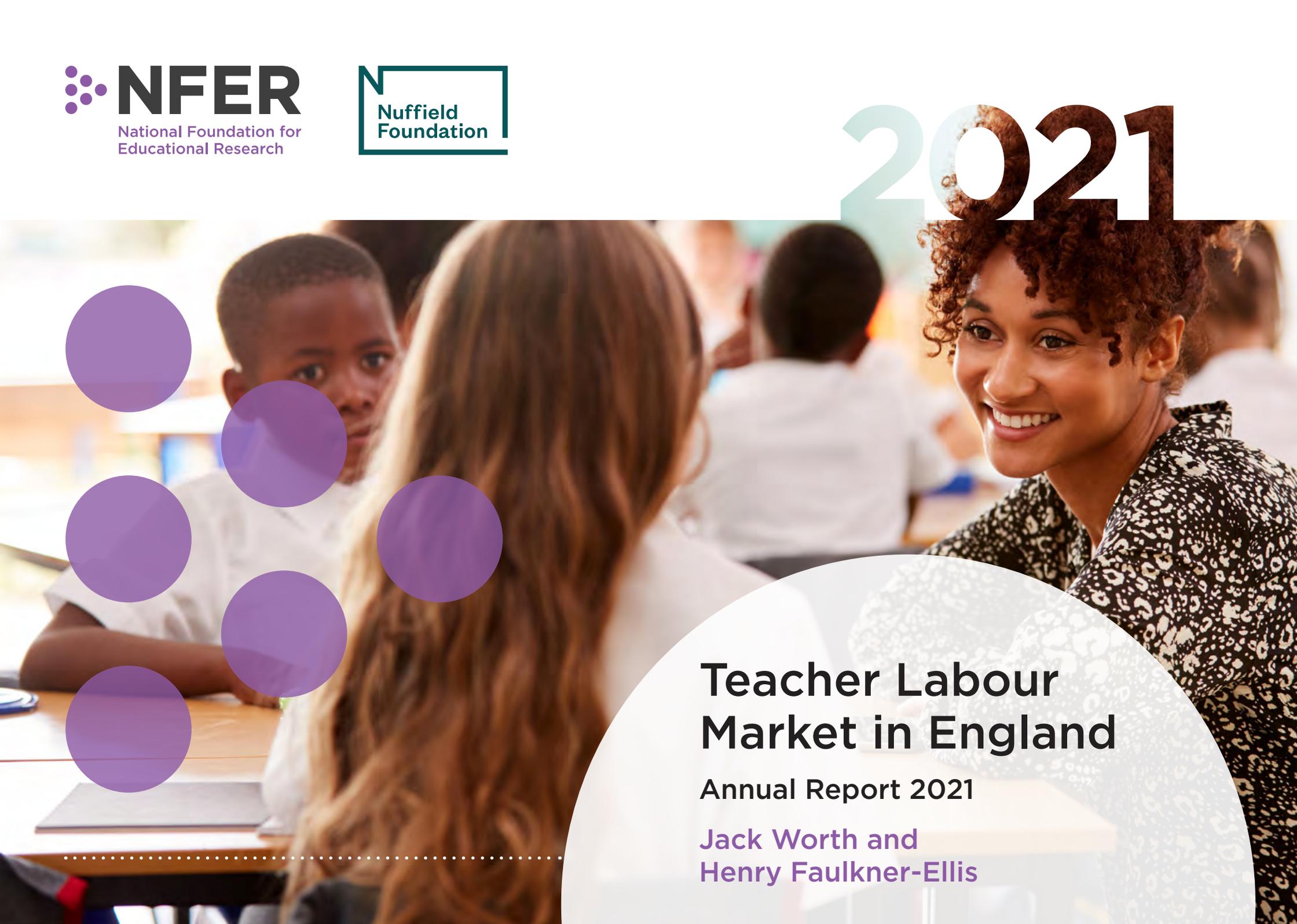


2021



**Teacher Labour  
Market in England**

Annual Report 2021

Jack Worth and  
Henry Faulkner-Ellis

## Contents

Introduction	3
Key findings	4
Subjective well-being	8
Anxiety and life satisfaction	9
Happiness and worthwhileness	10
Job security	11
Working hours and workload	12
Staff absence and capacity	13
Recruitment to initial teacher training	14
Impact of bursary changes on ITT recruitment	15
Teacher turnover and school recruitment	16
School-based ITT placement capacity	17
Teacher pay	18
Recommendations	20
References and data sources	21



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## Introduction

The 2020 Covid-19 pandemic has had profound impacts on society, the economy and on the entire education sector. Teachers' workload, well-being, recruitment and retention have been affected by the national crisis.

The aim of NFER's annual series of Teacher Labour Market reports, funded by the Nuffield Foundation, is to monitor the progress the school system in England is making towards meeting the teacher supply challenge by measuring the key indicators and trends of teacher supply and working conditions. This report remains focussed on these topics, although we have shifted to analysing new and different datasets to focus on the short-term impacts of the pandemic on the teacher workforce rather than on the longer-running trends.

In this report we present new insights on the impact of the pandemic on teachers' well-being, workload, perceived job security and pay. We use the Labour Force Survey (LFS), Annual Population Survey (APS) and the UK Household Longitudinal Study (UKHLS) Covid-19 surveys to measure changes in the working conditions and well-being of teachers throughout 2020. Crucially, using these household surveys means that we can compare the impact of the pandemic on teachers with the impact on similar individuals in other professions.

We present data from the Universities and Colleges Admissions Service (UCAS) on postgraduate initial teacher training (ITT) applications to explore the impact of the Covid-induced recession on interest in entering teaching. We also present new insights from an NFER survey of school leaders, which was conducted in autumn 2020, on their experiences of recruitment and retention during the pandemic.



**Although the impact of the pandemic has eased the teacher supply challenge in the short term, there remains a real need to continue to improve teachers' pay and working conditions to make it a rewarding graduate career choice even when the wider labour market recovers**

Jack Worth, NFER  
School Workforce Lead



## Key findings and recommendation

### **The Covid-19 lockdown in March 2020 led to a lower level of teacher well-being in England**

The onset of the pandemic led to an increase in subjective distress, a rise in anxiety and lower levels of happiness and life satisfaction among teachers, compared to pre-pandemic levels. However, the lower level of well-being among teachers was also experienced by similar individuals in other professions. There is even some evidence of teachers being less negatively affected compared to those in other professions. There appears to be no evidence that being a teacher during the Covid-19 pandemic was specifically associated with lower levels of well-being, over and above the widespread negative effects on the well-being of the population.

### **Teachers' working hours dropped to a more manageable level during 2020, but returned to the pre-2020 level in the autumn term**

Before the pandemic, teachers were working longer hours in term time than similar professionals were in a usual week. However, during the spring 2020 lockdown, when teachers were mostly working at home while schools were only open to keyworker and vulnerable children, full-time teachers' working hours fell to around 40 hours, similar to the hours worked by similar professionals. During the autumn term, in which schools were fully open to pupils, full-time teachers' working hours rose again to around 46 hours per week, significantly more hours than the 41 reported by full-time similar professionals during the same period.

**Recommendation 1: Reducing teacher workload and supporting well-being should remain a priority for the Government in the post-pandemic recovery phase**

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### **Teachers' well-being is likely to have been insulated to some degree by relatively high job security**

One factor associated with well-being that may partly explain why teachers' well-being was less negatively affected by the pandemic is that teachers have higher job security compared to other professionals. UKHLS data shows that teachers' perceived chance of losing their job in the next three months was five per cent, compared to between seven and ten per cent for other professionals during 2020. Research has shown a significant relationship between job security and higher well-being (Smith *et al.*, 2020).

### **Relatively high job security in teaching compared to an uncertain wider labour market has led to a surge in applications to ITT**

After application numbers increased rapidly over the summer of 2020, enrolments in postgraduate ITT in 2020 were 20 per cent higher than the previous year, meaning the overall targets for primary and secondary teachers were exceeded (although some subjects remained below target). The trend in ITT applications has continued in 2021, with total applications up to mid-February being 26 per cent higher than the same point in 2020. This suggests that the teacher supply challenge has been eased in the short term.

### **Covid-19 is likely to have led to lower teacher turnover and higher retention, as well as a fall in school recruitment as a result**

NFER research found that the proportion of teachers considering leaving in July 2020 had dropped by around half compared to in June 2019 (Worth and McLean, 2020). NFER's autumn 2020 senior leader survey found that more school leaders reported that teacher turnover had decreased than reported that it had increased. In addition, more senior leaders reported lower recruitment activity compared to reporting an increase. The number of teachers leaving the profession is likely to remain lower than previous years in 2021, further bolstering short-term teacher supply.

**Teacher pay freezes are unlikely to be sustainable in the medium term as the wider labour market recovers**

While the immediate threat of a teacher supply crisis appears to have abated due to the Covid-induced recession increasing recruitment and retention, this is likely to be short-lived. Important factors such as pay will return to prominence in the medium term.

The level of teachers' pay remains in line with the pay of similar professionals, but the 2021/22 pay freeze may lead to a less competitive level of teacher pay in the short-term. While labour market uncertainty is likely to bolster teacher supply in spite of slightly less competitive pay for a few more years, a prolonged period of teacher pay restraint beyond 2021/22 would likely lead to teacher pay becoming increasingly uncompetitive compared to other professions. This could work against the positive impact of wider labour market uncertainty on supply and risk prompting another teacher supply challenge once the labour market starts to recover. It would also make it more challenging to meet the 2019 Conservative manifesto pledge to raise teacher starting salaries to £30,000 by the end of the parliament.

**Recommendation 2: The Autumn 2021 Government Spending Review should account for a measured three-year package of teacher pay increases to ensure pay remains competitive**

**Recommendation 3: The School Teachers' Review Body (STRB) is currently not invited to make recommendations on teacher pay if the Government decides to freeze teacher pay. STRB should be given a permanent remit to make independent recommendations on teacher pay, even when the Government considers that pay should be frozen**



### **Covid-19 led to a squeeze on teaching staff capacity throughout 2020, placing additional strain on the teachers who could work**

Covid-19 led to an increase in staff absence during 2020, including because teachers contracted Covid-19, self-isolated because of contact with an infected person and teachers shielding due to an underlying health condition. Data from DfE and NFER surveys from July and the autumn term 2020 show that schools experienced considerably higher absence rates than usual during 2020.

**Recommendation 4: The Government should closely monitor teacher absence data throughout the 2021 spring and summer terms, and publish weekly data**

### **Covid-19 has led to a reduction in capacity for school-based training placements, just as more trainees enter ITT**

There are more trainees in the ITT system in 2020/21 compared to 2019/20, which means that more school-based placements are required for them to complete their training. However, Covid-19 has caused some schools to reduce their provision of ITT placements in 2020/21. NFER's autumn term survey confirms that placement capacity remains below its pre-pandemic level. An important explanatory factor is leaders' concerns about the burden on school staff to provide support for trainees. A lack of mentoring capacity could risk the smooth delivery of ITT in the next few years, as well as other policy delivery, such as the Early Career Framework national roll-out from September 2021.

**Recommendation 5: The Government should take action to ensure schools have sufficient mentoring capacity to support the increasing numbers of new teachers entering the system**

### Covid-19 led to a lower level of teacher well-being, but affected similar individuals in other professions even more negatively

The Covid-19 pandemic has been an anxious time for many people in society, including teachers. We use data from the UKHLS Covid-19 surveys and the APS to measure the trends in teacher well-being throughout 2020. As these surveys are long-standing, we can compare well-being during the pandemic with baseline measures from before 2020. Crucially, these datasets cover the UK population, so we can also compare the experience of teachers in England to that of similar individuals in other professions (i.e. matched on age, sex, region and highest qualification – see methodology appendix for our definition of this group). Because the sample sizes of teachers in these surveys is relatively small, single findings should be treated with some caution. However, taken together the data paints a picture of the impact the pandemic has had on teachers’ well-being.

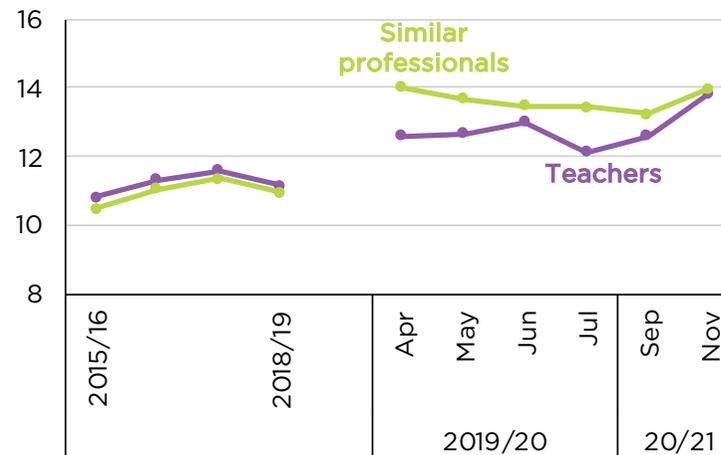
First, we analyse the General Health Questionnaire (GHQ)-12 measure of well-being from the UKHLS. Respondents were asked twelve statements about their subjective distress, including ability to concentrate, make decisions and overcome difficulties and the extent to which they felt unhappy or under strain. More negative statements (e.g. ‘worse than usual’ or ‘much worse than usual’) are scored more highly, so higher scores correspond to lower well-being.

Average GHQ-12 scores among teachers and similar professionals clearly show that the subjective well-being of both groups deteriorated after the first Covid-19 lockdown began. Research has found similar patterns in the UK population, indicating that the pandemic has had a widespread negative impact on many people’s well-being (Banks and Xu, 2020). The trends in well-being for both groups show that well-being improved somewhat during summer 2020, but remained above the pre-pandemic trend. Well-being also deteriorated again in the autumn 2020, coinciding with the second wave of Covid-19 infections.

In spite of these similarities in well-being trends through 2019/20 and 2020/21, there are also significant differences in the experiences of teachers and similar professions. Similar professionals experienced a greater rise in their level of subjective distress than teachers during the pandemic. The average GHQ-12 scores of similar professionals were significantly higher, indicating a higher level of distress compared to teachers, in April and July 2020.

However, teachers’ level of distress rose considerably during the 2020 autumn term, to the same level as similar professionals by November. As cases of Covid-19 in the community rose in autumn 2020, teachers may have perceived working in school as increasingly risky for the health of themselves and their close contacts, whereas they had mostly worked from home during the spring and summer.

Well-being: GHQ subjective distress



Note: A higher score indicates a worse well-being outcome.  
Source: UKHLS Waves 1-9 and Covid-19 surveys.

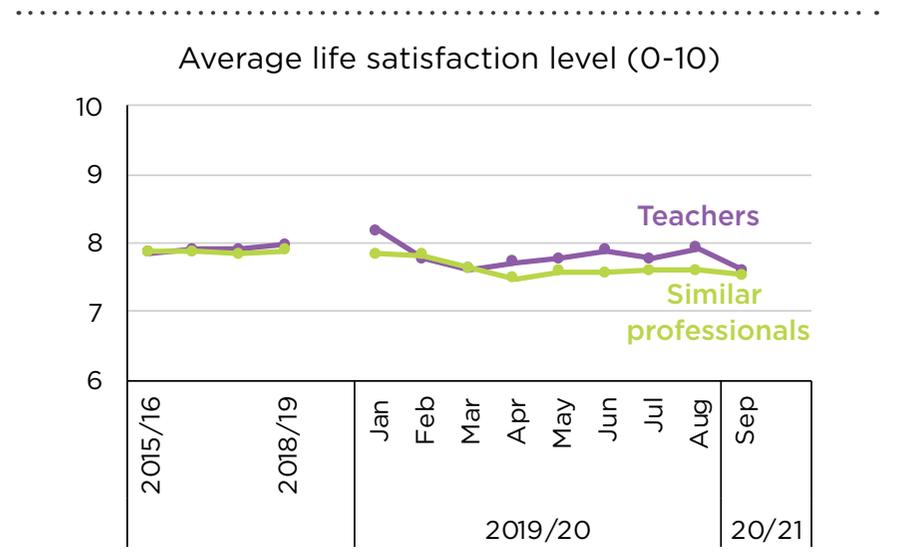
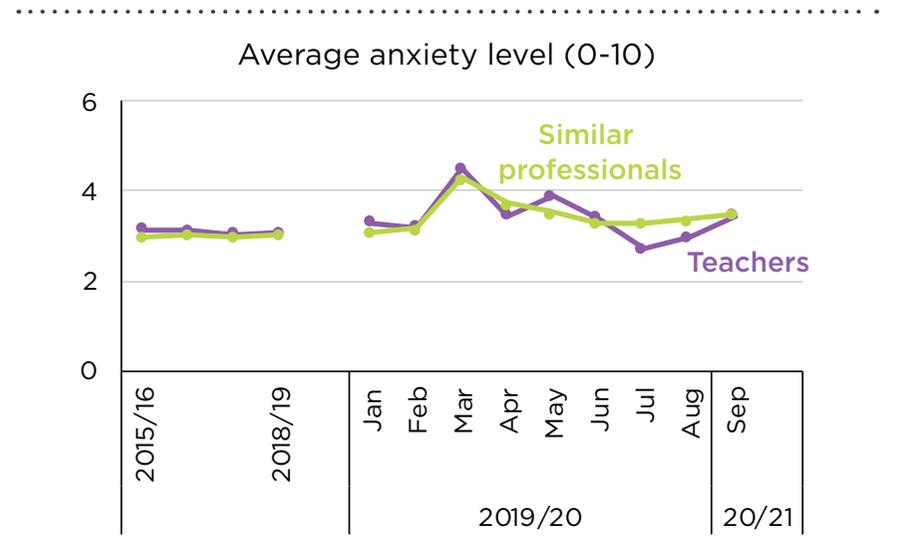
**Teachers' anxiety levels rose during lockdown, but their levels of anxiety have been similar to other professionals during 2019/20**

The pandemic has also led to an increase in anxiety, as measured by one of the Office for National Statistics (ONS) personal well-being measures in the APS. When asked 'overall, how anxious did you feel yesterday?' teachers and similar professionals scored their anxiety level as being, on average, around 3 before the pandemic. In March, this rose to more than 4 in both groups, before falling steadily through the spring. Anxiety among both teachers and similar professionals began to rise again in the late summer and autumn as Covid-19 case numbers began to rise and some restrictions were re-imposed in response.

While it is not a statistically significant change in the APS data due to small sample sizes, the data appears to show a small increase in anxiety among teachers in May compared to similar professionals. This coincides with a period of great uncertainty about when schools would reopen more widely, and under what arrangements. Teacher Tapp measured teacher's work-related anxiety levels throughout 2020 at regular intervals and found a large spike in anxiety in May and around the time of other education policy announcements, particularly where these first appeared in newspapers without accompanying official guidance (Teacher Tapp, 2020). Teacher Tapp also found the spike was more pronounced for senior leaders, but small sample sizes mean we are unable to robustly look at the senior leader sub-group.

**Teachers had similar levels of life satisfaction during 2020 compared to similar professionals**

Using data from the UKHLS (not shown) and APS, we also compare teachers' and similar professionals' life satisfaction. The two groups are fairly consistent in showing lower average life satisfaction during 2020 compared to pre-pandemic levels. The data shows that both groups experienced low points in life satisfaction in spring 2020 and again in the autumn, with slightly higher levels in the summer. However, the differences in life satisfaction between the two groups are not statistically significant in either survey.



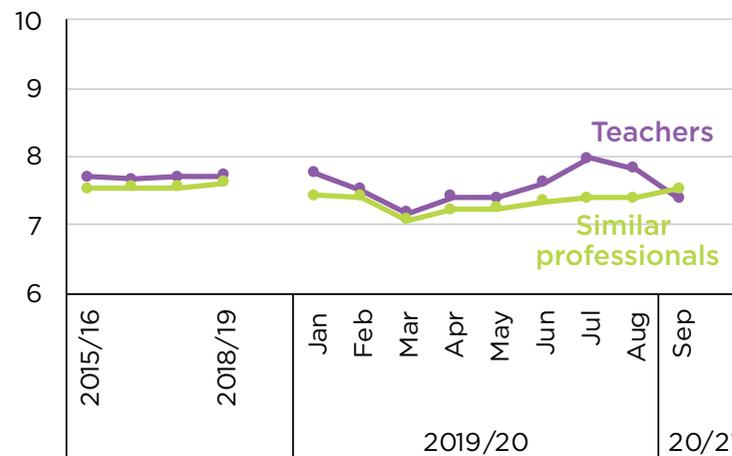
### Teachers had similar happiness levels to similar professionals in 2020, but had greater feelings of doing things that are worthwhile

Two further ONS well-being measures capture general happiness and feeling that the things people do in their lives are worthwhile. Similar to anxiety and life satisfaction, the happiness levels of teachers and similar professionals both fell during the first Covid-19 lockdown relative to their pre-pandemic average. The happiness level of both groups steadily recovered during summer 2020, but fell again for teachers after the school summer holidays. The only significant differences between teachers and similar professionals in terms of happiness in 2020 occurred in the summer holidays – July and August.

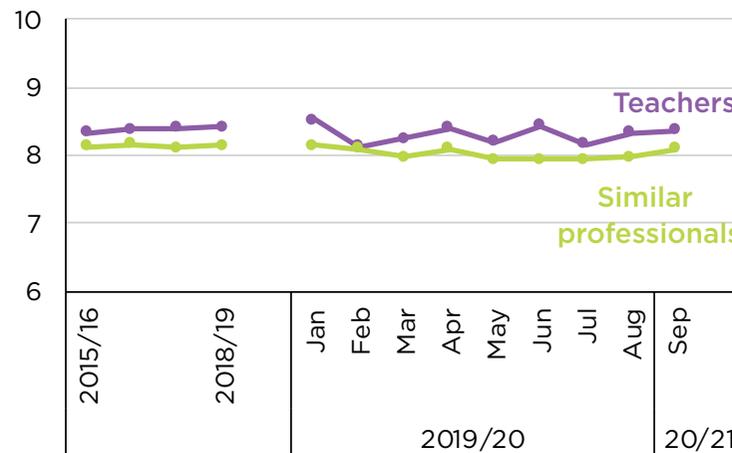
Teachers had a significantly higher level of feeling that the things they do in life are worthwhile, compared to other professionals. This higher level of feeling the things they do are worthwhile pre-dated the pandemic, and while there was a slight drop in feeling worthwhile during the pandemic for both groups, teachers maintained a higher level throughout 2020. The gap between the two groups remained a similar magnitude throughout 2020.

Teachers' higher level of feeling the things they do are worthwhile may reflect the pro-social reasons that teachers go into teaching. The Organisation for Economic Co-operation and Development (OECD) Teaching and Learning International Survey (TALIS) 2018 found that the two most-cited reasons for becoming a teacher in England were 'teaching allowed me to influence the development of children and young people' and 'teaching allowed me to provide a contribution to society' (Jerrim and Sims, 2019). The social contribution of teaching may imbue teachers with a greater sense of feeling the things they do are worthwhile throughout their career, compared to similar individuals in other professions.

Average happiness level (0-10)



Average level of feeling worthwhile (0-10)



Source: Annual Population Survey.

## Higher job security is likely to be one protective factor for teachers' well-being

Taken together, the findings on well-being indicate that teachers experienced lower well-being, life satisfaction and happiness and higher anxiety as a result of the Covid-19 lockdown. While these impacts lessened during the summer of 2020, the data we have indicates a likely rise again in the autumn term and perhaps into 2021. However, there is no indication of teachers having worse well-being outcomes than similar professionals, and some evidence of teachers having comparatively higher well-being in 2020. This accords with the Jerrim et al. (2020) finding of 'no evidence that teachers are any more likely to suffer from low levels of wellbeing and mental health problems than those who work in other professions'.

The higher level of GHQ-12 we identified among similar professionals was not driven by lower well-being among healthcare professionals. Further analysis found that the gap between teachers and the similar professionals group was similar whether healthcare professionals were included or excluded from the group. The impact of the pandemic on healthcare workers is therefore not a likely explanation.

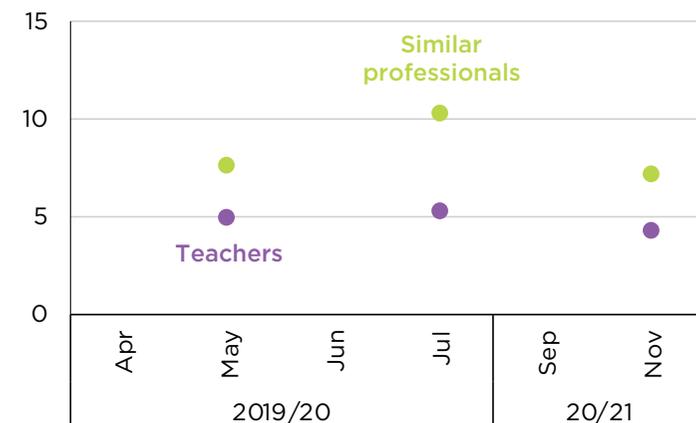
Another potential reason why teachers' well-being has been less negatively affected by the pandemic may be that their job security has remained high. Research has shown a significant relationship between job security and higher well-being (Smith et al., 2020).

Our 2020 Teacher Labour Market report found that, based on UKHLS data, teachers and similar professionals had similar levels of job security in the years preceding the pandemic (Worth, 2020). However, during the 2020 recession some professionals faced the prospect of losing their job, while almost all teachers had a secure job. Data from the UKHLS Covid-19 surveys shows that teachers reported a higher level of job security during 2020, compared to similar professionals.

Only around 20-25 per cent of teachers report feeling any job insecurity at all and teachers reported around a five per cent average probability of losing their job in the next three months. In contrast, around 40-45 per cent of similar professionals reported feeling some job insecurity and similar professionals' perceived likelihood of losing their job rose from seven per cent in May 2020 to ten per cent in July 2020. However, perhaps due to the extension of the furlough scheme in October 2020, this dropped to seven per cent in November 2020.

Greater job security may provide part of the explanation for why teachers' well-being may have been less negatively affected by the pandemic, compared to similar professionals. However, it also means that the deterioration in teachers' well-being during the autumn term of 2020 – in spite of the protection from high job security – underlines how challenging many teachers found working during the autumn term.

Average perceived likelihood of losing job in the next three months (%)



Source: UKHLS Covid-19 surveys.

### Teachers' working hours dropped to a more manageable level during 2020, but returned to the pre-2020 level in the autumn term

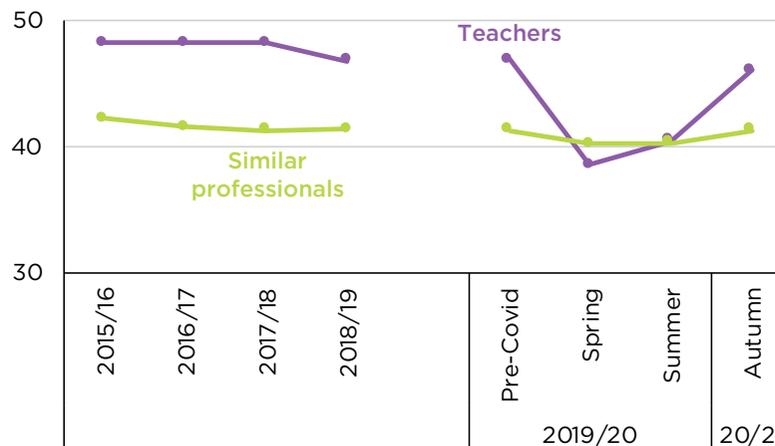
Before the pandemic, teachers were working longer hours in term time than similar professionals were in a usual week. Data from the LFS shows that in 2018/19 full-time teachers were working around 47 hours in a normal working week, compared to 41 hours for similar professionals. More than half of teachers (57 per cent) reported in 2018/19 that they would have preferred to work shorter hours, compared to 42 per cent of similar professionals.

LFS data shows that the working patterns of the two groups were similar during 2019/20 up to March. However, during the spring 2020 lockdown, when teachers were mostly working at home while schools were only open to keyworker and vulnerable children, full-time teachers' working hours were at a similar level to similar professionals, at around 40 hours. There may be a number of reasons why working hours fell during the spring and summer terms, including teachers' childcare and other caring responsibilities, or constraints on teachers' ability to work from home (e.g. access to IT facilities).

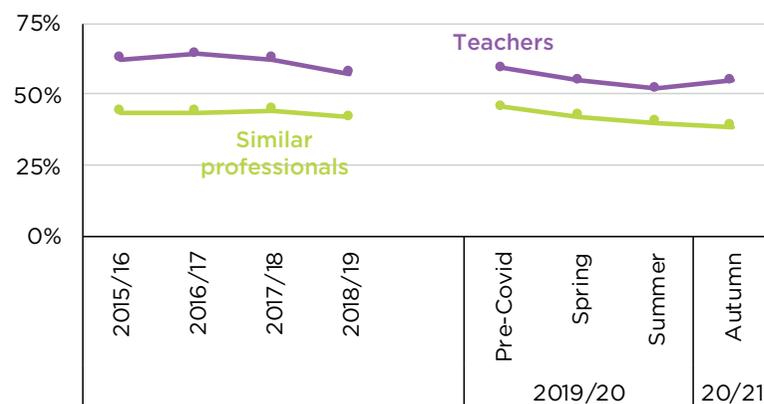
Teachers' working hours remained at the same level in summer 2020, when schools re-opened to some year groups, but most pupils remained at home. During the autumn term, which saw schools fully open to pupils, full-time teachers' working hours rose to their pre-pandemic level, at around 46 hours per week. This was significantly more hours on average than the 41 reported by full-time similar professionals during the same period and back to a similar level as the pre-pandemic average among teachers.

Despite the fall in hours during the spring and summer, teachers remained more likely than similar professionals to report wanting to work fewer hours. In autumn 2020, 55 per cent of full-time teachers would have preferred to work shorter hours compared to 38 per cent of full-time similar professionals. This indicates that teachers' workload remains a significant issue as a majority of full-time teachers perceive that they work too many hours.

Full-time reported weekly working hours



Proportion full-time wanting to work fewer hours



Source: Labour Force Survey.  
 Note: Pre-Covid: 1 Sep 19-20 Mar 20. Spring: 21 Mar-15 Jun 20.  
 Summer: 16 Jun-31 Aug 20. Autumn: 1 Sep-30 Nov 20

**Covid-19 led to a squeeze on teaching staff capacity throughout 2020, placing additional strain on the teachers who could work**

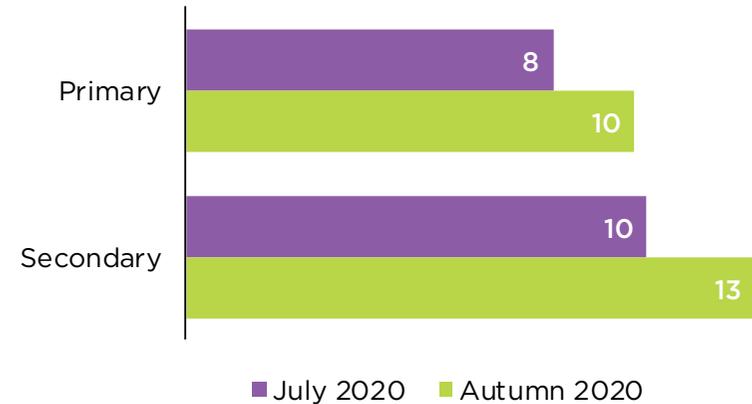
For a range of reasons, Covid-19 led to an increase in staff absence during 2020. This included teaching staff being required to self-isolate due to contracting Covid-19 or being in contact with an infected person and also teachers shielding due to an underlying health condition that could put them at risk of serious complications should they contract Covid-19.

NFER’s July 2020 senior leader survey indicated that in July 2020, on average eight per cent of the primary teacher workforce was unavailable to work either at home or in school (Sharp, et al., 2020). Ten per cent of the secondary teacher workforce was unavailable to work in July 2020. Data from the DfE School Workforce Census indicates that the rate of staff absence in a typical year is around two per cent across the whole year.

In the 2020 autumn term, NFER conducted a senior leader survey with a focus on schools’ experience of recruitment and retention during the coronavirus lockdown period. The same question was repeated, and the data showed that the proportion of staff unavailable to work was higher than in July. In autumn 2020 ten per cent of the primary teacher workforce was unable to work and 13 per cent of the secondary teacher workforce.

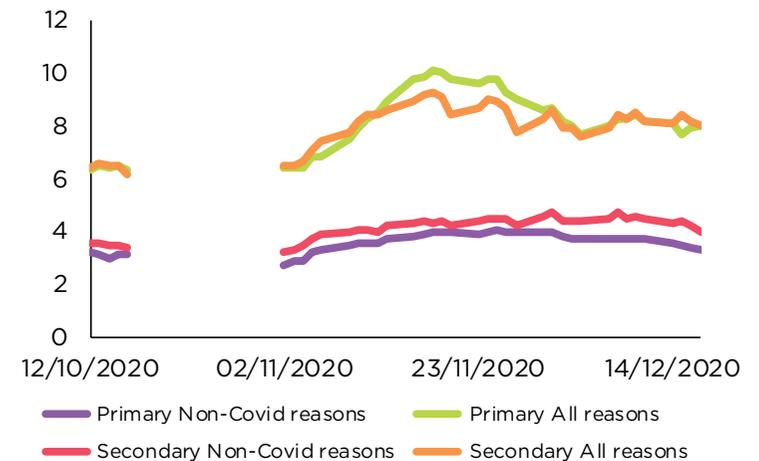
DfE data on teacher absences throughout the autumn term confirms that overall absence rates rose throughout November, from around six per cent in October half term to around ten per cent in late November. This rise was driven by Covid-related reasons (the gap between ‘non-Covid reasons’ and ‘all reasons’ in the chart opposite) and mirrored (with a delay) the rise in Covid-19 cases nationally during October 2020. The delayed impact of the November lockdown in England, during which schools remained fully open, is evident in the falling absence data during December. However, teacher absence remained high in December according to the DfE data, at around eight per cent.

Proportion of FTE teachers unavailable to work (%)



Source: NFER senior leader surveys, July 2020 and Oct-Dec 2020.

Proportion of teachers absent (%)



Source: DfE Attendance in education and early years settings during the coronavirus (COVID-19) outbreak

### The Covid-induced recession has led to a surge in recruitment to ITT, which has continued in 2021

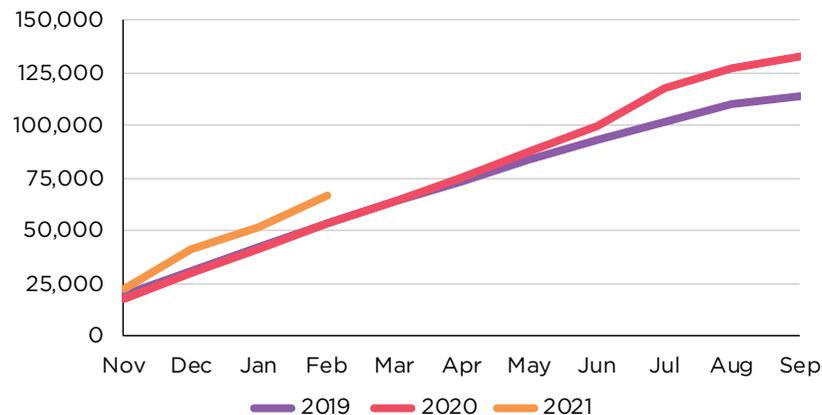
Before the UK-wide lockdown in March 2020, applications to postgraduate ITT had been similar to the levels in previous years. This suggested that the recruitment by the end of the year was likely to be similarly below the target numbers required, as in previous years.

However, the Covid-induced recession led to a surge in applications to teacher training during the summer of 2020, as shown by the UCAS data. As the negative impact of the lockdown measures on the wider labour market became increasingly apparent to new graduates and career switchers during June and July 2020, the number of applications to ITT increased rapidly compared to previous years.

DfE data on ITT enrolments confirms that the number of entrants to ITT in September 2020 was higher than in 2019. The overall recruitment numbers represented 130 per cent of the target for primary teachers and 106 per cent for secondary teachers. While the numbers of enrolments increased for almost all subjects, not all met their recruitment targets. These subjects included perennial shortage subjects, such as physics, maths, chemistry and modern foreign languages.

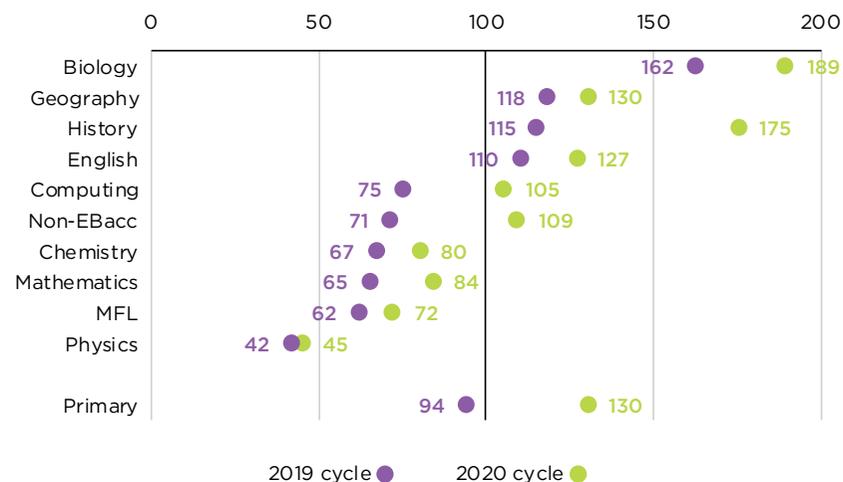
The surge in applications has continued above pre-pandemic levels into the 2021 cycle. Up to mid-February 2021, the number of applications to postgraduate ITT in England is 26 per cent above the same (pre-pandemic) point in the 2020 cycle. If the current application trends continue, then the overall number of entrants to ITT in September 2021 looks likely to be as high by the end of the cycle as it was in 2020.

Number of postgraduate ITT applications, England



Source: UCAS teacher training applications.

Postgraduate ITT recruitment vs target (%)



Source: DfE ITT Census 2020 to 2021.  
 Note: Non-EBacc includes art & design, business, design & technology, drama, music, physical education and religious education, media studies, social studies and psychology.

## Reductions in bursaries have led to a dampening of demand for teacher training in non-shortage subjects

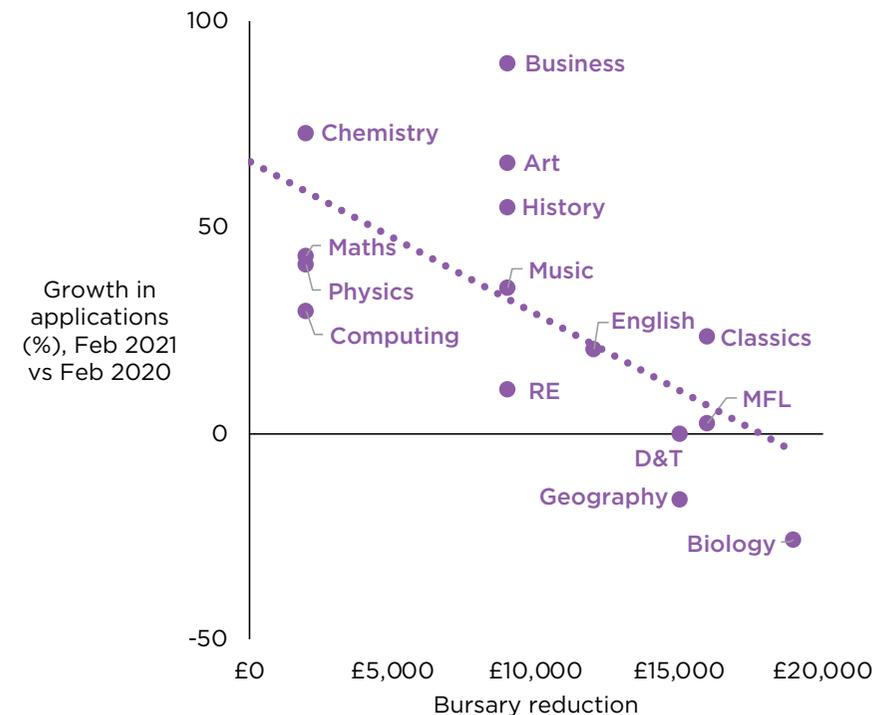
Recruitment to different subjects was not uniform before Covid, and nor was the increase in applications throughout 2020. While the number of enrolments to some shortage subjects, such as maths and chemistry, saw strong growth compared to the previous year, the number of physics enrolments in 2020 was barely higher than in 2019.

Non-shortage subjects that tended to meet or exceed recruitment targets even before Covid-19, also saw strong growth in enrolments in 2020. This created a dilemma for policymakers, as continued over-recruitment in subjects such as history could lead to trainees finding it challenging to find a teaching job after they complete ITT. As a result of the application surge, DfE have therefore reduced the generosity of training bursaries for non-shortage subjects in 2021. The aim of these changes is to dampen demand back towards the numbers needed to meet supply needs and avoid training more new teachers than the system needs in those subjects.

Data from UCAS shows that the growth in the number of applications from (pre-pandemic) mid-February 2020 to mid-February 2021 is considerably lower in subjects with bursaries that have been reduced the most. This was the intended impact from the bursary cuts, to ensure supply did not exceed the demand for those new teachers.

Bursaries for modern foreign languages (MFL), geography, biology, design and technology and English have been reduced by more than £10,000, dampening the numbers applying to these subjects compared to what they might otherwise have been. In contrast, there has been strong growth in 2021 for shortage subjects such as maths, chemistry, computing and physics. Broadly, the bursary changes appear to have been successful in maintaining the strong demand for shortage subjects, while reducing the over-supply of new teachers in non-shortage subjects. The large reduction in the biology bursary is also likely to have led to some applicants switching to chemistry or physics instead.

The large bursary reduction for MFL, which has led to considerably fewer applying than otherwise would have, is somewhat of an outlier. MFL recruitment targets had not been met for seven consecutive years prior to the pandemic. The targets were set high to try and ensure sufficient supply of teachers to deliver the government's EBacc ambition of at least 75 per cent of pupils studying MFL by 2022 and 90 per cent by 2025. This bursary change may therefore indicate a shift in policy focus away from increasing MFL teacher numbers, and even signal a change to the EBacc measure or the timescale for meeting the EBacc target.



Source: UCAS teacher training applications; DfE ITT bursaries funding manual 2020 to 2021.

### Covid-19 is likely to have led to lower teacher turnover and higher retention, as well as a fall in school recruitment as a result

NFER research found that the proportion of teachers considering leaving in July 2020 had dropped by around half compared to in June 2019 (Worth and McLean, 2020). This is likely due to a combination of factors including practical reasons (e.g. not wanting to leave their school understaffed during a lockdown) and economic reasons (i.e. fewer teachers leaving due to poor job prospects outside of teaching). Due to the spring term school closures and the continued labour market uncertainty, the number of teachers leaving the profession is likely to remain lower in 2021 compared to recent years.

NFER’s autumn 2020 senior leader survey found that more school leaders reported that teacher turnover had reduced than reported it had increased, compared to what might otherwise have been expected. Secondary school leaders were more likely to report lower turnover, with half reporting a reduction compared to only four per cent reporting an increase. Nearly twice as many primary senior leaders reported lower turnover (19 per cent), compared an increase (10 per cent).

Around half of secondary senior leaders and a third of primary senior leaders also reported a reduction in recruitment activity, compared to few reporting an increase. This is likely to be at least in part as a result of lower teacher turnover meaning fewer vacant posts. Other key reasons reported by schools as to why their recruitment was lower than in a normal year were concerns about their ability to assess the quality of candidates via a remote interview process and anticipating a diminished field of applicants for posts.

Even if school leaders expected to be able to attract a good field of applicants for a post, their school’s tight financial position also constrained their ability to recruit. Almost three quarters of secondary senior leaders (73 per cent) and 87 per cent of primary senior leaders reported that their school could not have afforded to recruit one or more additional teachers, regardless of whether they wanted to do so.



Note: survey questions: Recruitment = ‘Thinking about the amount of recruitment activity in your school during the school year 2019-20 compared to ‘normal’ levels of recruitment in a typical year, how was this affected, if at all, by the Coronavirus lockdown period?’; Turnover: ‘During the Covid-19 lockdown period, did your school experience any change in teacher turnover compared to what might otherwise have been expected?’.

Source: NFER senior leader survey Oct-Dec 2020. Primary N = 514, Secondary N = 349.

**Covid-19 has led to a reduction in capacity for school-based training placements, just as more trainees enter ITT**

There are more trainees in the ITT system in 2020/21 compared to 2019/20, which means that more school-based placements are required for them to complete their training. However, Covid-19 has caused some schools to reduce their provision of ITT placements in 2020/21.

In NFER’s July senior leader survey, we asked senior leaders how many placements they were planning to offer in 2020/21 before Covid-19, and how many they planned to offer in July 2020. Our analysis found that primary schools were planning to reduce placement capacity by 20 per cent as a result of Covid-19, and by seven per cent in secondaries (Worth and McLean, 2020). A key factor associated with schools reducing placements was senior leaders reporting that, when surveyed in July, opening in September under the DfE guidance would be ‘not at all manageable’ or ‘somewhat manageable’.

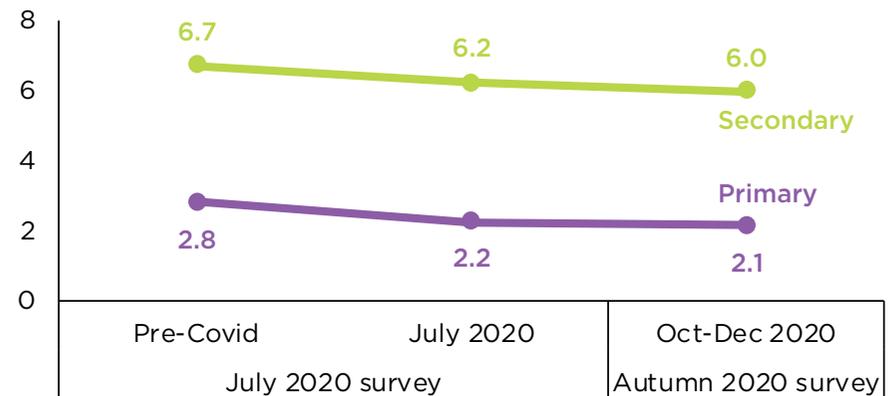
We asked senior leaders about placement capacity again in autumn 2020 to see whether the experience of fully opening the school and conversations with ITT providers had led to any changes. The data from the autumn 2020 survey indicates that schools’ plans had not changed and 2020/21 placement capacity was similar to levels reported in the summer.

In the survey, senior leaders reported a range of considerations that had influenced their school’s placement capacity plans. The most significant factors for primary senior leaders were ‘concerns about the burden on school staff to provide support for trainees’ (41 per cent) and ‘concerns about having too many different people in school’ in light of Covid-19 guidance (39 per cent). The issue of the burden on staff to support trainees was also a salient factor for secondary senior leaders (30 per cent). However, secondary leaders also recognised the benefit of ITT placements for supporting recruitment (36 per cent), as did 25 per cent of primary leaders.

DfE introduced flexibilities to the ITT requirements for 2020/21, such as relaxing the need for trainees to spend 120 days in a school and be placed in more than one setting, as a short-term measure to manage the capacity squeeze. Our survey also asked about other measures that might encourage or support school leaders to increase placement capacity. The most cited measures were ‘increased financial support from Government’ (64 per cent for primary and 56 per cent for secondary) and ‘incentives/ recognition for providing placements’ (45 per cent for primary and 36 per cent for secondary).

This indicates that changes to the incentive arrangements between ITT providers for schools may be necessary to unlock the placement capacity squeeze over the medium term. More broadly, a lack of mentoring capacity could also threaten other policy delivery, such as the Early Career Framework national roll-out from September 2021.

Average number of ITT placements per school in the 2020/21 academic year



Source: NFER senior leader survey Oct-Dec 2020. Primary N = 514, Secondary N = 349.

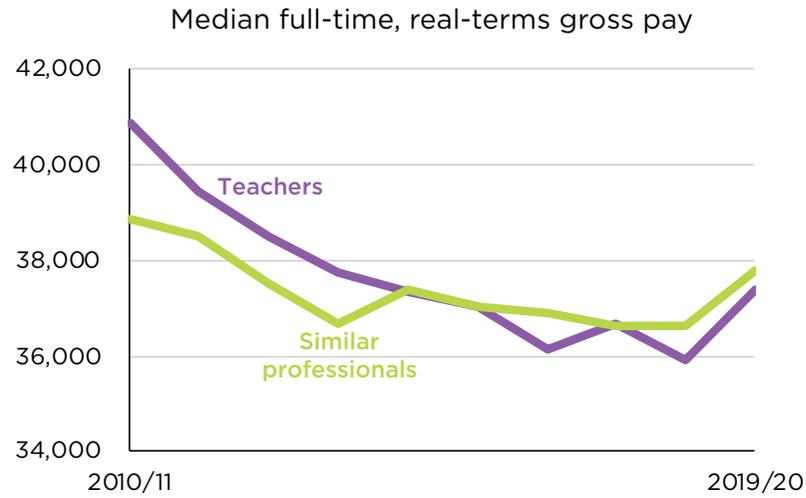
### The level of teachers' pay remains in line with the pay of similar professionals in 2019/20

The immediate threat of a crisis of teacher supply appears to have abated due to the recession increasing both teacher recruitment and retention. However, over the medium term other factors important for recruitment and retention, such as pay, will return to prominence.

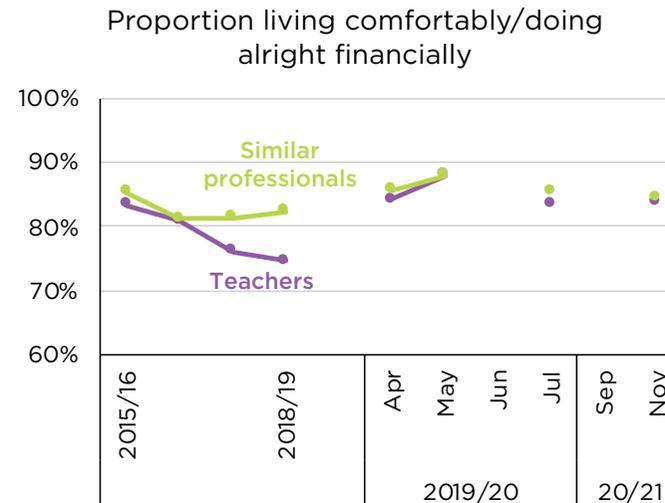
Data from the LFS suggests that full-time teachers' pay was higher than full-time similar professionals' pay in real terms in 2010/11. The gap between teachers and similar professions closed during the period 2010/11 and 2014/15, due to public sector pay freezes and caps. While teacher pay has been broadly similar to that of other professionals since 2014/15, this does not necessarily mean that it was sufficient for maintaining long-term supply. The deterioration in real-terms teacher pay relative to professional earnings in the wider economy is likely to have been one factor that contributed to the teacher recruitment and retention challenges in the latter part of the decade.

In 2020/21, the teachers' pay scale points rose by 3.5 per cent on average, although pay awards varied by points on the pay scale, from 5.5 per cent for newly qualified teachers to 2.75 per cent for the upper and leadership pay scales. This was part of a planned three-year rise in teacher pay, tilted towards early career teachers to raise the teacher starting salary to £30,000 by 2022/23 and improve recruitment.

UKHLS data indicates that teachers' perceptions of their current financial security was lower than similar professionals in 2017/18 and 2018/19. However, teachers' level of financial security rose in 2019/20 and 2020/21 to the same level as similar individuals in other professions. This is perhaps in part due to the above-inflation pay increases in these years, but may also reflect increased subjective financial security derived from relatively high job security compared to those in other professions.



Source: Labour Force Survey.



Source: UKHLS waves 1-10 and Covid-19 surveys.

## Teacher pay freezes are unlikely to be sustainable in the medium term as the wider labour market recovers

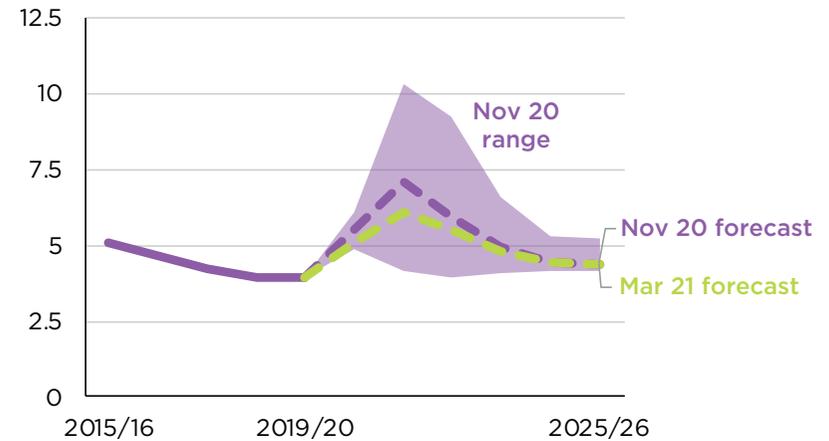
In the autumn 2020 Spending Review, the Chancellor announced that teachers' pay in 2021/22 would be frozen, alongside all public sector workers outside of the NHS. The economic case for a pay freeze, in terms of teacher supply, is supported by the increase in applications to ITT and the likely increase in retention. Both are due to wider labour market uncertainty increasing the relative attractiveness of the profession compared to alternatives. However, looking ahead to the anticipated three-year Spending Review in autumn 2021, the economic case for a continued pay freeze to 2024 is less convincing.

The Office for Budget Responsibility (OBR) forecasts that unemployment is likely to rise through 2020/21, peaking in 2021/22 and returning to below five per cent by 2023/24. This suggests that, all else equal, labour market uncertainty is likely to bolster teacher supply for a few more years. However, the OBR also expects average earnings growth of around two per cent per year from 2021 and three per cent per year from 2024.

The second chart shows our forecast for similar professionals' real-terms pay over the next five years, based on the OBR forecast of average earnings and inflation (green dotted line). The red line shows the projected path of teachers' real-terms pay with a continued pay freeze, while the orange line shows the projected path of teachers' real-terms pay if pay awards from 2022/23 are 2.5 per cent.

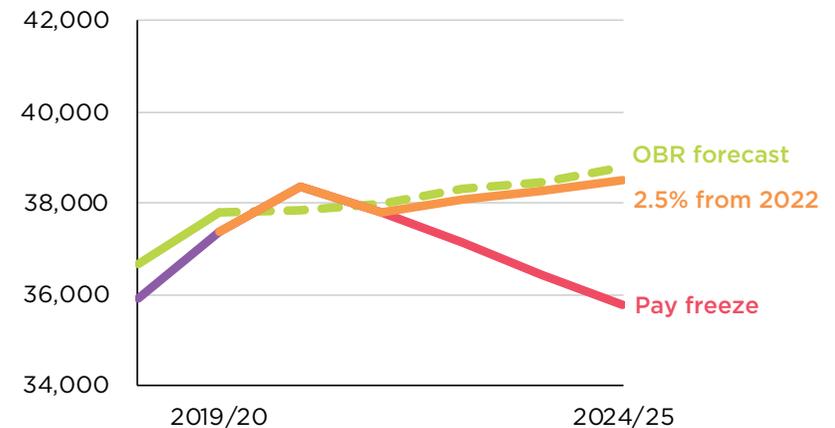
This analysis makes clear that a prolonged teacher pay freeze would likely lead to teacher pay becoming increasingly uncompetitive compared to other professions. This could work against the positive impact of wider labour market uncertainty on supply and risk prompting another teacher supply challenge once the labour market recovers. The autumn 2021 Spending Review should therefore accommodate a rise in teachers' pay over the next three years to keep pay competitive and support teacher supply in the medium term.

Unemployment rate (with OBR forecasts, %)



Source: OBR Economic and fiscal outlook – March 2021.

Median full-time, real-terms gross pay



Sources: Labour Force Survey, OBR Economic and fiscal outlook – March 2021.



# Recommendations

## 1. Reducing workload and supporting well-being should remain a priority for the Government in the post-pandemic recovery phase

There is a risk that noble ambitions to support pupils that have missed out on considerable amounts of their education due to Covid-19 to catch-up are delivered by adding to teachers' already high workloads. This would not be sustainable or desirable, so the capacity of the teaching workforce should be considered in the Government's catch-up plans. Additional workload could lead to falling teacher retention rates once the economic recovery takes hold.

Rapid change and uncertainty are important contributors to heightened anxiety. While an increase in teacher anxiety during March 2020 was understandable and shared by many people across the country, anxiety created by leaked plans and constantly-changing guidance was to some extent avoidable. Government plans should be, wherever possible, provided in good time and with full guidance. Any plans should be preceded by consultation with the profession.

## 2. The Autumn 2021 Spending Review should account for a measured three-year package of teacher pay increases

Despite the weak state of the UK public finances, a prolonged teacher pay freeze to reduce the Government budget deficit would be very likely to sow the seeds of the next teacher supply challenge, once the wider labour market recovers. Therefore, a sustained rise in teachers' pay over the next three years should be considered as part of the upcoming Spending Review.

## 3. The School Teachers' Review Body (STRB) should be given a permanent remit to make independent recommendations on teacher pay, even when the Government considers that pay should be frozen

The STRB is only invited to make independent recommendations when Government is required to change statutory regulations to implement pay uplifts. Currently this means that if the Government decides to freeze teacher pay, no regulation change is required, so the STRB is not invited to make recommendations. We recommend that this changes, instead giving the STRB a permanent role in making independent recommendations on the suitability of the Government's teacher pay proposals, even if the Government's preferred policy is to freeze pay.

## 4. The Government should closely monitor teacher absence data throughout the 2021 spring and summer terms, and publish the data regularly

If Covid-19 cases rise as restrictions are eased in spring 2021, this could have a negative impact on schools' staffing levels and their ability to remain open. The Government should closely monitor teacher absence rates at a granular level and make the information available to bodies outside Government to allow independent scrutiny of the approaches being taken.

## 5. The Government should take action to ensure schools have sufficient mentoring capacity to support the increasing numbers of new teachers entering the system

Covid-19 has squeezed schools' willingness and ability to offer ITT training placements. The Government introduced short-term flexibilities to the ITT requirements to alleviate the capacity squeeze due to Covid-19, but once these are removed a capacity squeeze may continue. As school leaders' concerns about the burden on school staff to provide support for trainees is an important explanatory factor, there is likely to be a lack of mentoring capacity. This may get worse in 2022 as the Early Career Framework national roll-out will require additional mentor capacity to support the second year of teachers' induction. Government should take action to ensure schools have the capacity to provide the necessary support for the increased numbers of new teachers.

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This work was produced using statistical data from ONS. The use of the ONS statistical data in this work does not imply the endorsement of the ONS in relation to the interpretation or analysis of the statistical data. This work uses research datasets which may not exactly reproduce National Statistics aggregates.

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