

2022



**Teacher Labour
Market in England**

Annual Report 2022

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Introduction

While the Covid-19 pandemic somewhat eased the teacher supply challenge in the short term in England, a resurgence in the wider labour market since pandemic restrictions began lifting in 2021 means the pressure on teacher supply witnessed before the pandemic has resumed. Improving teachers' pay and working conditions to make it an attractive and rewarding graduate career choice should be a policy priority once again.

The aim of the National Foundation for Educational Research's (NFER) 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 assesses the state of teacher supply as the pandemic's immediate impacts recede, as well as outlining the impacts of the pandemic on teachers' working lives.

In this report, we present data from the Universities and Colleges Admissions Service (UCAS) on postgraduate initial teacher training (ITT) applications to assess the impact of the resurgent wider labour market on interest in entering teaching. We also explore the latest retention trends and present new insights from an NFER survey of school leaders, conducted in autumn 2021, on their experiences of recruitment and retention during the pandemic. Within this teacher supply context, we assess the Department for Education's (DfE) proposals on teacher pay for 2022 and 2023.

We also present insights on teachers' workload and well-being throughout the pandemic, using data from the Labour Force Survey (LFS) and Annual Population Survey (APS). Crucially, using these household surveys means that we can compare the workload and well-being of teachers with similar individuals in other professions. Further details about the data sources used and definitions is in a separate methodology appendix.



Key findings and recommendations

The trends in teacher recruitment and retention data indicate that teacher supply challenges are returning in England

The resurgent labour market in the UK since summer 2021 has led to the Covid surge in postgraduate ITT applications subsiding in 2022. There is now a substantial risk that a large range of secondary subjects will not meet recruitment targets. These include perennial shortage subjects such as physics, maths, chemistry, computing, design and technology and modern foreign languages (MFL), as well as other subjects that typically recruit well, including geography, biology and English, art and religious education.

Teacher retention rates, having improved substantially in 2020 due to economic uncertainty and lockdowns, also appeared to be returning towards pre-pandemic levels in 2021. While there is no recent retention data from teacher censuses, senior leaders were more likely to report that teacher turnover (which includes teachers moving school, as well as leaving teaching) was higher than before the pandemic than they were in the same survey last year.

The evidence therefore seems clear that teacher supply challenges are re-emerging after two years of having eased somewhat due to the pandemic. Tackling this effectively requires policy action to improve the financial and non-financial attractiveness of teaching.

Teachers' real-terms pay is lower than in 2010/11 and has lost competitiveness relative to the wider economy over the last decade

Despite some above-inflation rises, average teacher pay in 2020/21 remained around 7 to 9 per cent below its 2010/11 level in real terms, depending on the measure used. This is in contrast to the average earnings of similar professionals, which were only one per cent below the 2010/11 level. Teacher pay has lost competitiveness relative to the wider economy over the last decade and the 2021/22 teacher pay freeze meant that teacher pay fell sharply in real terms, losing further competitiveness.

The Office for Budget Responsibility forecasts that average pay in the economy will rise by 3.9 per cent in 2022 and three per cent in 2023. In this context, the DfE's teacher pay proposal of an overall 3.9 per cent increase in 2022/23 and 2.6 per cent in 2023/24 seems insufficient to address the emerging recruitment and retention challenges.

While the Government's proposals on teacher pay target scarce resource relatively well at early-career teachers, by reducing the London pay premium the proposals risk exacerbating teacher shortages in London..

Recommendation: The Government should maintain the London teacher pay premium at its current level to avoid exacerbating teacher shortages in London schools

Teachers continue to work longer hours than similar individuals in other professions during term time and are more likely to want to work fewer hours

Workload is the reason most cited by ex-teachers for why they left teaching, which means ensuring teachers' workloads are manageable is an important part of a strategy to reduce the numbers of teachers leaving. Our analysis of LFS data shows that teachers' working hours were falling slightly before the pandemic and their perceptions of workload appeared to have been improving. Despite this slight fall in working hours, teachers continue to work more hours than similar individuals in other professions during term time.

However, the data for 2020/21 shows that teachers' working hours are similar to what they were in 2018/19 and remain higher than similar professionals during term time. Further progress with reducing teachers' workload would likely help to improve retention rates and shore up teacher supply in the face of a resurgent wider labour market.

Recommendation: Reducing teacher workload and supporting teacher well-being should remain a high priority for the Government

Schools' capacity to mentor trainees and new teachers is likely to remain under strain due to a range of pressures

NFER's survey of senior leaders in autumn 2021 finds that the number of ITT placements schools offered in 2021 increased slightly compared to the previous year. However, more trainees are in the system after enrolments rose during the pandemic, squeezing the existing capacity, which schools had reduced due to Covid-19. The most significant consideration that influenced senior leaders' placement capacity plans was 'concerns about the burden on school staff to provide support for trainees'. This may be linked to the increased demand for schools' mentoring capacity as a result of the Early Career Framework (ECF) national rollout, which began in September 2021. This increased demand is very likely to continue, as the ECF entitles all cohorts of early career teachers to additional mentoring and five per cent time off timetable in their second year.

One policy solution could be financial: 70 per cent of school leaders said 'increased financial support from Government' could support or encourage their school to take more trainee teachers. Another solution could be to re-introduce flexibilities to the ITT requirements to ease placement capacity concerns, and DfE have re-introduced some limited flexibilities in 2021/22. However, the impact on overall mentoring capacity is uncertain and may be undesirable if it means trainees not getting a sufficiently full and varied placement experience.

Recommendation: The Government should take action to ensure schools have sufficient long-term mentoring capacity to support the increasing numbers of trainees and new teachers entering the system

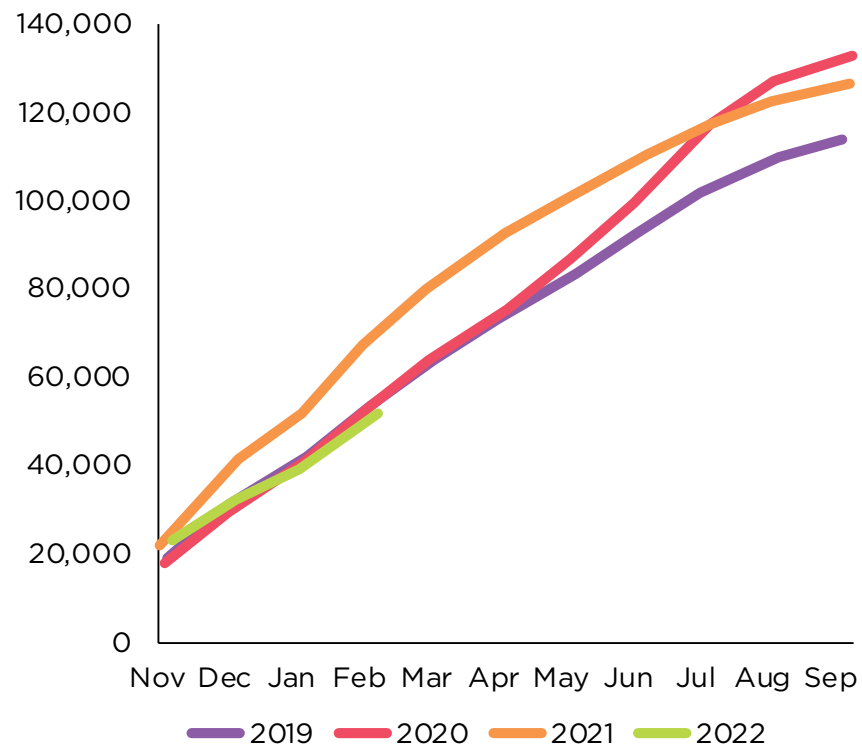
The Covid surge in postgraduate ITT applications has subsided in 2022

The number of applications to ITT in England was boosted in the 2020 and 2021 cycles by a surge of interest in entering teacher training. Uncertainty in the wider labour market prompted people to seek opportunities in teaching, which was still recruiting, as fewer job opportunities were available elsewhere. Data from UCAS shows that the number of applications at the end of the 2020 cycle was 17 per cent higher than the previous year, as the rate of applications picked up during the first Covid lockdown in spring and summer 2020. The surge continued in the early part of the 2021 cycle, through the second and third lockdowns between November 2020 and March 2021.

The rate of new ITT applications dropped off during the summer of 2021, as the wider labour market recovered after the Government eased Covid restrictions. The boost during the early part of the cycle meant that the recruitment numbers finished 11 per cent higher than 2019 by the end of the cycle. However, the subsequent slowdown indicated that future cycles were likely to be more challenging environments for recruiting teachers.

The early signs from the 2022 recruitment cycle data are that the level of ITT recruitment is similar to pre-Covid levels. As of February 2022, the number of applications are 23 per cent lower than in February 2021. This suggests that the overall end-of-cycle recruitment numbers are likely to be significantly lower than in 2020 and 2021. There is a substantial risk that a range of secondary subjects will not meet their recruitment targets and that teacher supply challenges are re-emerging after two years of those challenges having eased somewhat. However, the 2022 cohort of ITT applicants will not start teaching in schools as early-career teachers (ECTs) until September 2023, giving the Government and schools a window of time to plan and take action.

Total applications to postgraduate ITT in England



Source: NFER analysis of UCAS and DfE Apply data.

The resurgent labour wider market is the main reason for less interest in entering teaching, but reduced bursaries have also partly contributed

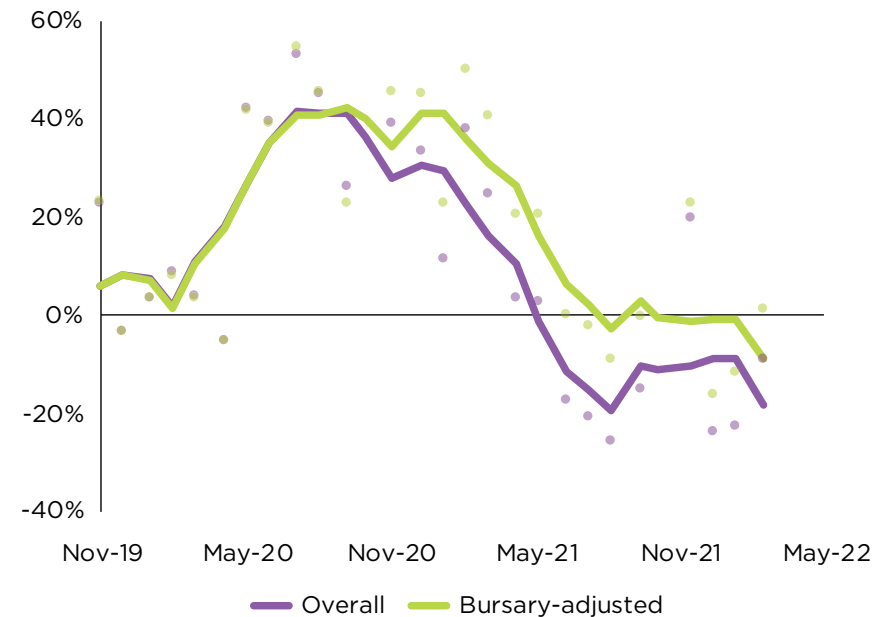
In response to the ITT application surge in summer 2020, DfE reduced or removed bursaries for a large number of subjects for the 2021 cycle. These were partially reversed for 2022 in four subjects (MFL, biology, design & technology, geography) in response to the summer 2021 slowdown, but remain lower than in 2019 for most subjects. As a result we would expect, all else equal, these lower bursaries to have a negative overall impact on recruitment numbers. But how much do these bursary changes account for the slowdown since spring 2021?

The chart shows the average number of ITT applications per month over the last three recruitment cycles, compared to the applications in the same month in 2019 (the last pre-Covid year). The purple line shows recruitment compared to 2019, and demonstrates the general recruitment pattern over the last two years: numbers surged after the pandemic began, up to 40 per cent higher than 2019 levels, which continued into early 2021. However, the rate of new applications fell from spring 2021 onwards as the economic recovery began, finishing below the level of summer 2019.

The green line shows the same measure, but after adjusting for the impact we would expect bursaries to have within each subject. Where a subject's bursary increases, we would expect average application numbers to be higher, all else equal. Research has consistently estimated that for every £1,000 of additional bursary, applications tend to increase by 2.9 per cent (NAO, 2016; Worth and Hollis, 2021). We use this ratio to account for the estimated impact of bursary changes and aggregate the bursary effects to assess their likely overall impact.

The chart shows that while the overall rate of new applications in early 2022 is below pre-Covid levels, the underlying recruitment level after adjusting for the effect of bursary changes (green line) is closer to the pre-Covid level. Therefore, the economic recovery is the main reason why overall application numbers have fallen so much in the last year. However, the gap between the lines shows that bursary cuts have played a small role, contributing to pushing the overall rate of applications (purple line) to below pre-Covid levels.

Number of new postgraduate ITT applications per month, compared to same month in 2019 cycle



Source: NFER analysis of UCAS and DfE Apply data.
Note: the dots show the actual monthly data, which is fairly volatile from month to month. The solid lines represent smoothed trend lines, based on a five-month moving average.

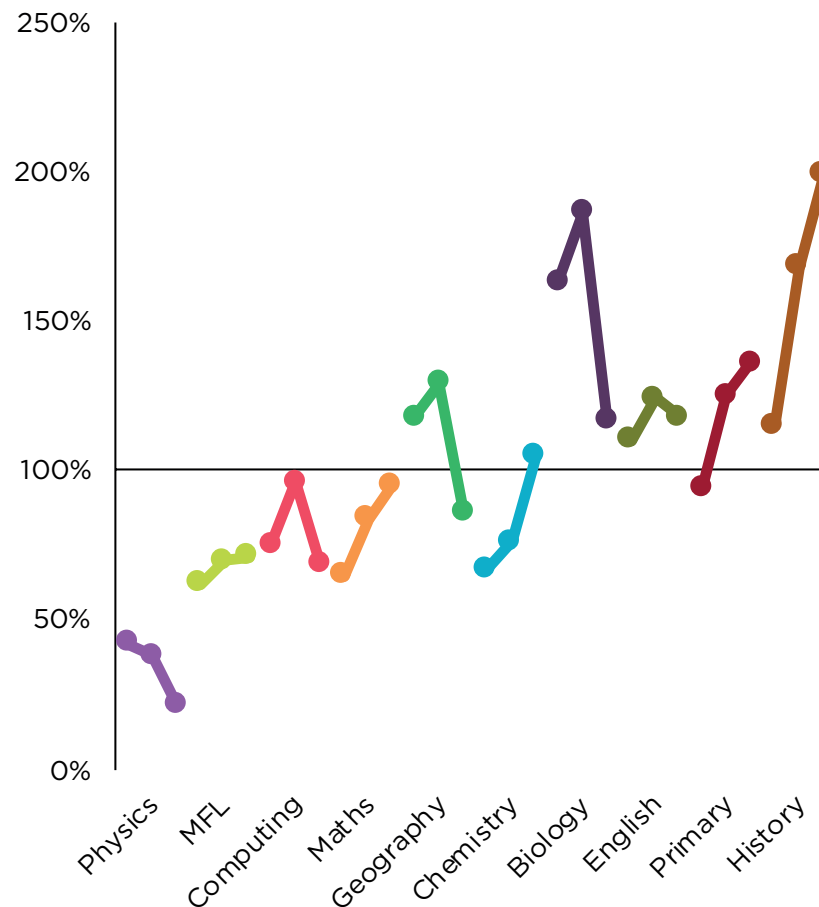
ITT recruitment for courses in 2021/22 remained below the targets required to meet the school system’s supply needs in a number of shortage subjects

Despite the boost in the number of applicants to ITT in the 2020 and 2021 application cycles, and resulting increase in the number of people enrolling into postgraduate ITT courses, the numbers recruited were not sufficient to meet DfE’s estimated requirements in a number of subjects. Physics, MFL, computing and maths remained below their respective targets in both years, as they did before the pandemic. However, changes to the way DfE calculates the ITT targets in 2022 have also had an impact on this measure. The physics target was almost doubled, to account for under-recruitment in previous years. The MFL target was reduced by around a third, which may reflect a more realistic approach by the Government to achieving its target of 75 per cent EBacc entry by 2025 (although no official change to the EBacc ambition has been announced).

The number of recruits for geography and biology fell sharply, including geography being below its target. Both subjects saw large cuts to their bursaries for the 2021/22 academic year, which is likely to have been a factor. However, the number of recruits compared to their respective targets increased for history and primary, in spite of the 2021 cycle being slower than the previous year overall and a £9,000 bursary cut for history.

Due to the recent slowdown in the number of ITT applications, the number of enrolments in ITT in 2022/23 is likely to be lower than the previous year across most subjects. This implies that a return to a more challenging overall teacher recruitment environment is likely to impact most significantly on perennial shortages subjects such as physics, maths, MFL and computing. These subjects recruited below their respective targets before the pandemic and failed to reach their targets during the pandemic in spite of the relatively benign recruitment environment. They are also likely to be furthest below target in the post-pandemic phase unless the Government takes further targeted action to bolster supply in these subjects.

Postgraduate ITT enrolments vs target 2019/20–2021/22 (%)



Source: Department for Education ITT Census.

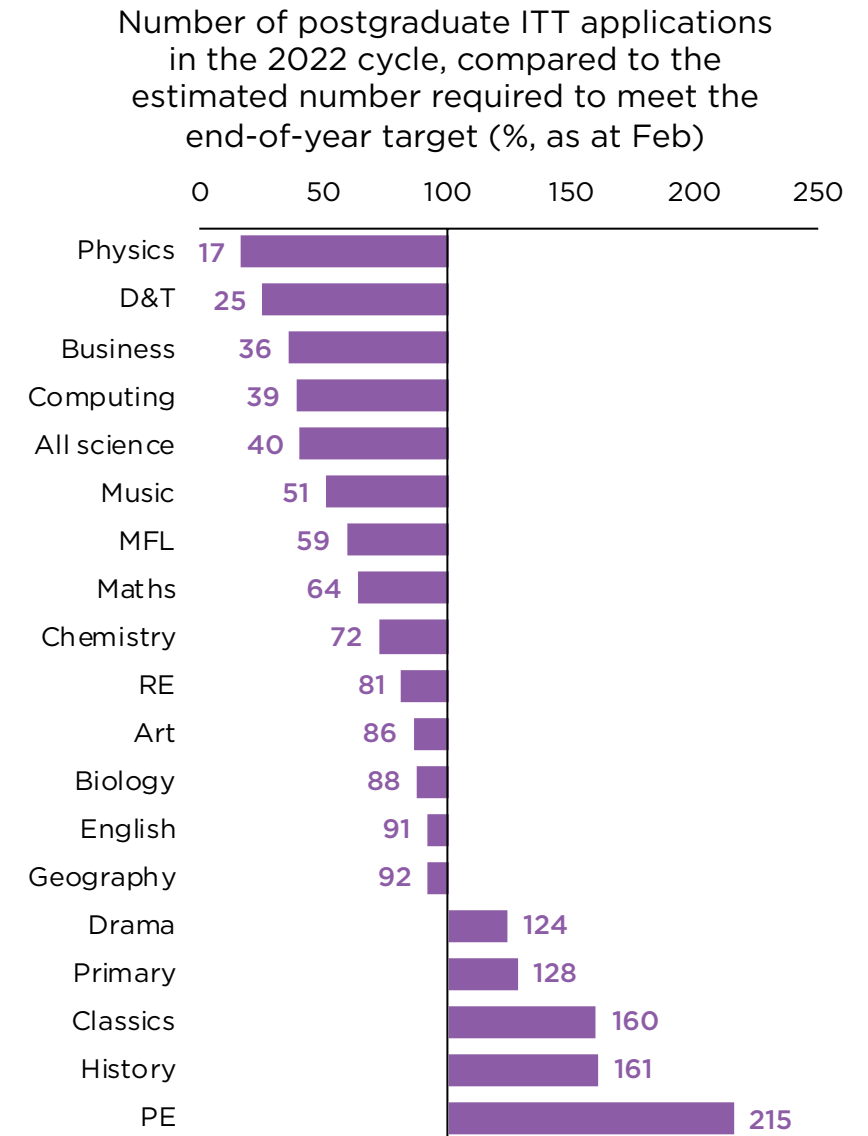
The current ITT application trends suggest that the majority of secondary subjects are likely to be below their targets at the end of the year

While it is still early in the 2022 ITT recruitment cycle and the situation still has the potential to change as the year progresses, the ITT application numbers so far suggest that meeting the recruitment targets by the end of the year is unlikely across a large number of subjects.

By combining the 2021 data on ITT application numbers with 2021/22 ITT enrolment and target numbers, we estimate what the application numbers might need to look like in 2022 in order for each subject to meet its respective target. We then compare the number of applications in each subject so far this year to the estimated target path. The chart, based on applications data up to mid-February 2022, shows an estimated indication of where subjects are likely to finish at the end of the cycle compared to their target, if the current trends continue.

The exact values should not be taken as precise forecasts because of uncertainties affecting of the forecasts. For example, the recruitment situation could still change during the rest of this cycle (for example, in response to the announced teacher pay rise) and the targets for this year (which DfE have yet to publish) may differ from those set for last year.

However, the analysis clearly shows that a number of subjects are at a high risk of not meeting their recruitment targets. These subjects include shortage subjects that often struggle to recruit to the target level including physics – which is estimated to be recruiting at around 17 per cent of the level required to meet its target – design and technology, computing, MFL, maths and chemistry. We also estimate that other subjects that have recruited relatively well in recent years, including biology, English, geography, art and religious education, are likely to finish the year below target. It is concerning that overall recruitment for the three science subjects is likely to be less than half of the overall target. In contrast, a number of subjects do seem, on the evidence so far, likely to exceed their targets, such as physical education, history and primary.



Teacher leaving rates appear to be returning towards pre-pandemic levels

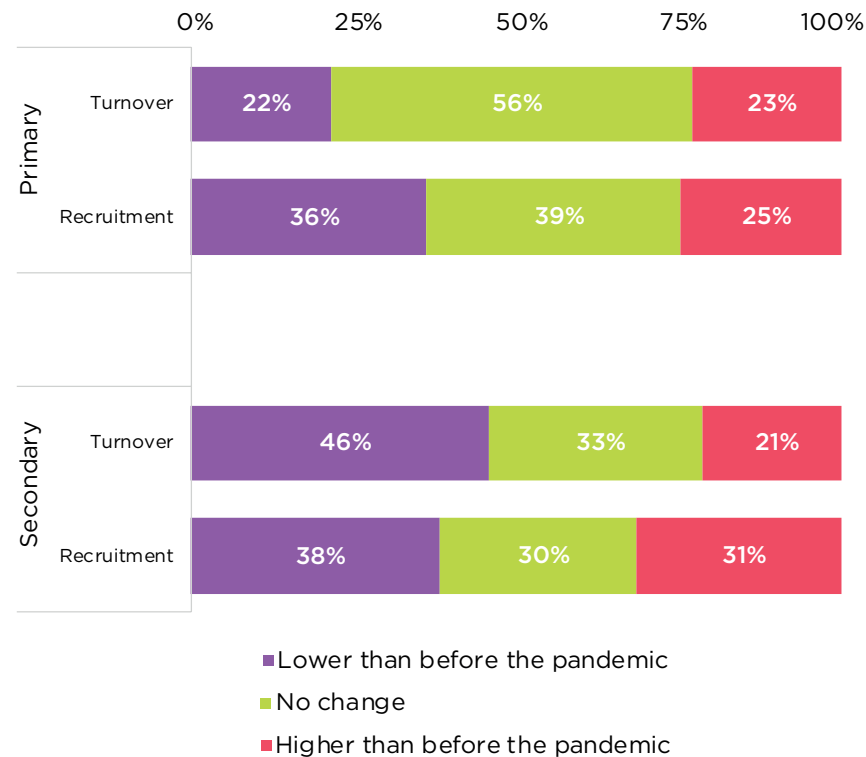
A key factor affecting the numbers of new teachers the school system requires, and the calculation of ITT targets, is the number of teachers who leave teaching. Greater retention aids teacher supply since every additional teacher retained is one less to recruit and train, as well as valuable expertise kept in schools after having trained, entered the classroom and gained experience.

DfE’s School Workforce Census (SWC) data shows that retention rates in 2020 were significantly improved compared to the years before the pandemic: the number of teachers leaving was 17 per cent lower than in 2019. This is consistent with teacher retention tending to improve during recessions, because job prospects outside of teaching become more uncertain (Hutchings, 2011). The Covid restrictions may also have made changing jobs more challenging and teachers may have been reluctant to leave their schools short-staffed during a crisis.

However, data from NFER’s autumn 2021 survey of senior leaders suggests that retention rates may be returning towards pre-pandemic levels. Around a fifth of primary leaders said teacher turnover (which includes teachers moving school as well as leaving teaching, although teachers leaving the profession forms the majority) was higher than before the pandemic and another fifth said turnover was lower. This suggests that turnover, and therefore perhaps retention, may be back to pre-pandemic levels. More secondary leaders said turnover was lower (46 per cent) compared to higher (21 per cent). However, these proportions are less stark than the same numbers we reported in last year’s report (50 and seven per cent, respectively), which may suggest that secondary leaving rates are increasing, but not fully to pre-pandemic levels.

Increased turnover has also affected schools’ recruitment behaviour. The survey indicates that primary and secondary school leaders were slightly more likely to say recruitment of new teachers was lower than before the pandemic compared to saying it was higher, but the differences are small. The figures are also far more balanced than those we reported last year, when only eight per cent of primary leaders and four per cent of secondary leaders said recruitment was higher than before the pandemic.

Level of turnover/recruitment in 2020/21, compared to before the pandemic



Note: survey questions: Turnover: ‘During the 2020/21 school year, did your school experience any change in teacher turnover compared to 2018/19?’. Recruitment = ‘Thinking about the amount of teacher recruitment activity in your school during the school year 2020/21, how did it compare to the level in 2018/19?’.

Source: NFER senior leader survey Oct-Dec 2021. Primary N = 531, Secondary N = 307.

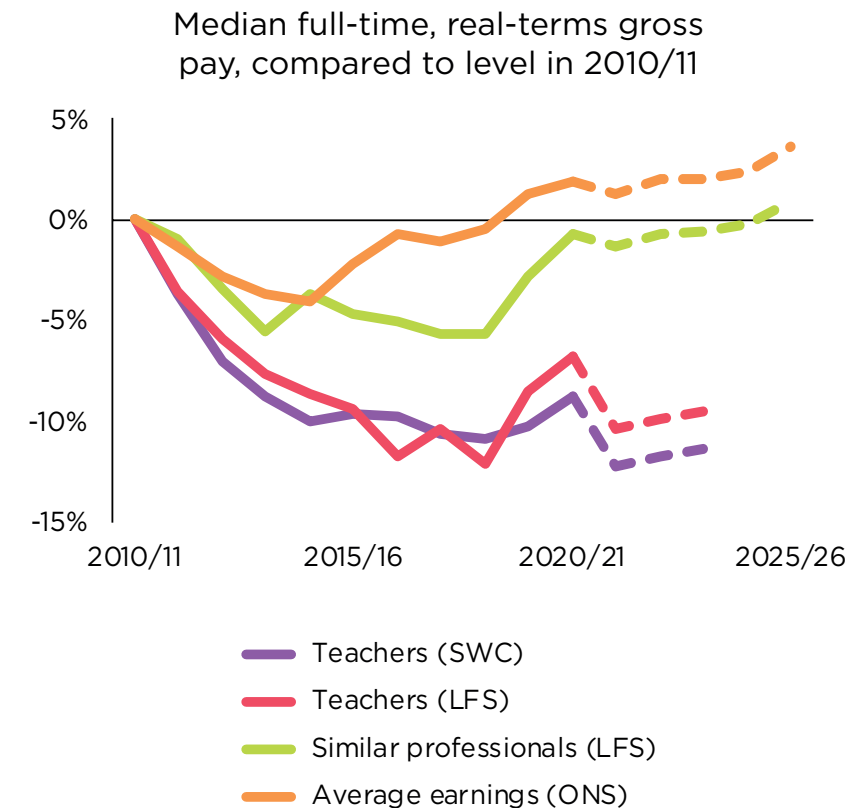
Teachers' pay is lower in real-terms than in 2010/11 and has lost competitiveness relative to the wider economy over the last decade

The trends in teacher recruitment and retention together suggest that while the pandemic and its associated recession eased the overall teacher supply challenge somewhat in the short-term, those impacts have now subsided. These trends are likely to mean teacher shortages re-emerge, unless policy measures are introduced to increase the attractiveness of teaching. A key policy tool for influencing recruitment and retention trends is teacher pay.

The chart shows that the real-terms value of median teacher pay has fallen as a result of public sector pay restraint through the early 2010s. Despite some recent above-inflation rises, median teacher pay in 2020/21 remained around 7 to 9 per cent below its 2010/11 level in real terms, depending on the measure used. This is in contrast to the median earnings of similar professionals in 2020/21, which are only one per cent lower than in 2010/11. Average earnings across the UK economy were two per cent higher in real terms in 2020/21, compared to their level in 2010/11.

The 2021/22 teacher pay freeze meant that teacher pay fell sharply in real terms as inflation reached five per cent. Average earnings in the UK economy and the median earnings of similar professionals also fell in real terms in 2021/22, but by less than in teaching. This means teacher pay has lost competitiveness over the last year, which is likely to contribute to additional recruitment and retention challenges.

Research has shown that changes to teacher pay – but especially how those changes compare to changes in pay outside of teaching – matter for retention (Hansen, et al, 2004; Dolton and van der Klaauw, 1999). The Office for Budget Responsibility forecasts that average pay in the economy will rise by 3.9 per cent in 2022 and three per cent in 2023 (OBR, 2021). In this context, the DfE's teacher pay proposal of an overall 3.9 per cent increase in 2022/23 and 2.6 per cent in 2023/24 seems insufficient to address the emerging recruitment and retention challenges (DfE, 2022). In 2023/24, depending on the measures used, the gap between teacher pay and teachers' outside option is likely to be between nine and 13 percentage points wider than in 2010/11. This continued lack of competitiveness is likely to inhibit improvement in teacher recruitment and retention.



Note: dotted lines are forecasts.
Sources: Department for Education: School Workforce in England; Office for Budget Responsibility: Economic and Fiscal Outlook, October 2021; NFER analysis of Labour Force Survey data; DfE evidence to STRB, 2022.

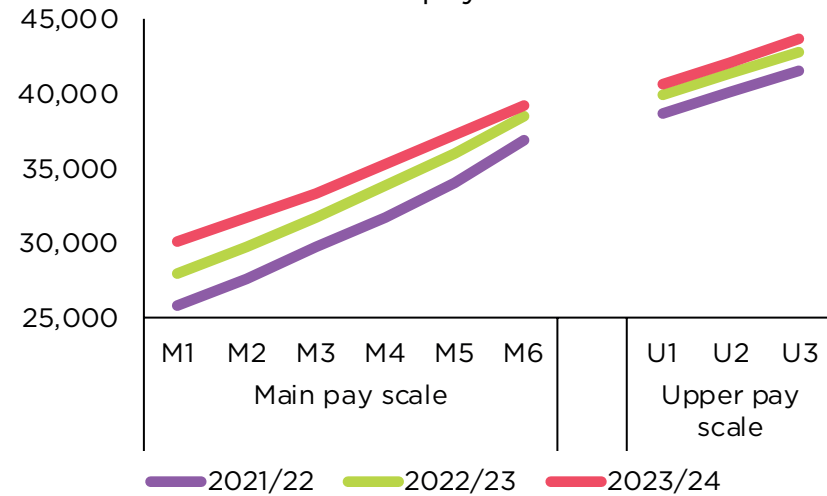
The Government's proposals on teacher pay are targeted effectively at early-career teachers, but risk exacerbating teacher shortages in London

DfE's detailed teacher pay proposals set out a reformed structure of teacher pay progression, with a starting salary of at least £30,000 throughout England by September 2023 that requires a 17 per cent increase in the starting salary over two years. This is achieved within the overall average pay envelope of 6.6 per cent primarily by making lower awards to more experienced teachers: the pay of upper pay scale teachers and school leaders is proposed to rise by 5.1 per cent.

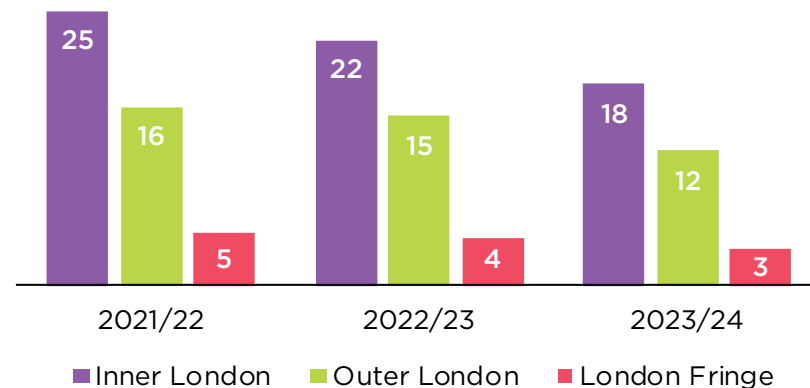
This results in a significant flattening of the pay structure, with less steep rises between points on the pay scales. This could result in more experienced teachers deciding to leave than would have under a uniform pay increase. Early-career teachers have the highest leaving rates and are likely to be most responsive to pay competitiveness. Therefore, targeting scarce resource at this group is likely to lead to a greater overall impact on teacher retention. DfE's analysis indicates that, even under conservative assumptions about how teachers respond to pay changes, its proposed changes help retain more teachers than would be retained under a uniform pay increase of the same value. However, the proposals do risk reducing the overall level of experience across the teaching profession.

Another of DfE's proposals to squeeze a 17 per cent starting salary increase into a 6.6 per cent overall increase in the pay bill is to reduce the London weighting. Starting salaries are already at or above £30,000 in London, so increasing the main pay scale in London by less frees up resource to increase starting salaries in the rest of England. The chart shows that the proposals imply reducing the Inner London premium in starting salary, compared to the rest of England, from 25 to 18 per cent. NFER research has shown that London schools tend to struggle more with recruitment and retention, and that the high cost of living is a significant factor (Worth et al., 2017). DfE's pay proposals risk exacerbating the supply challenges faced by London schools.

Proposed teacher salaries outside of London pay areas



Area-based pay premium, compared to the rest of England (based on starting salary)



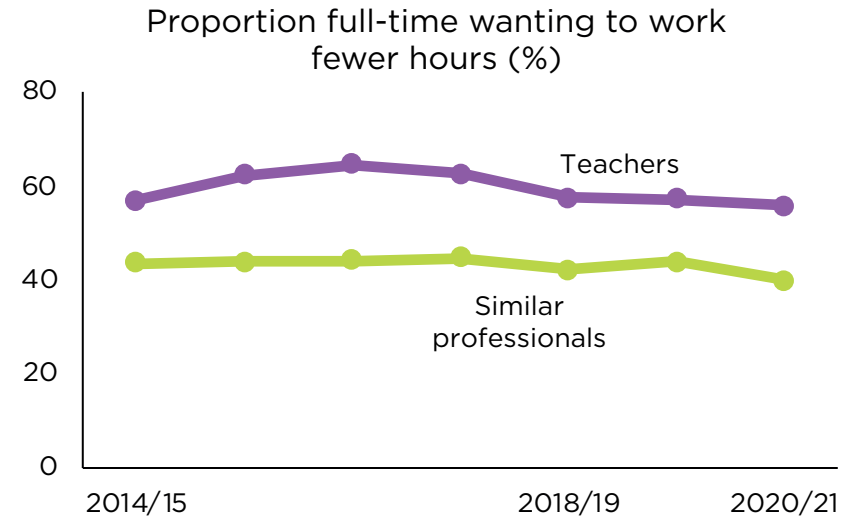
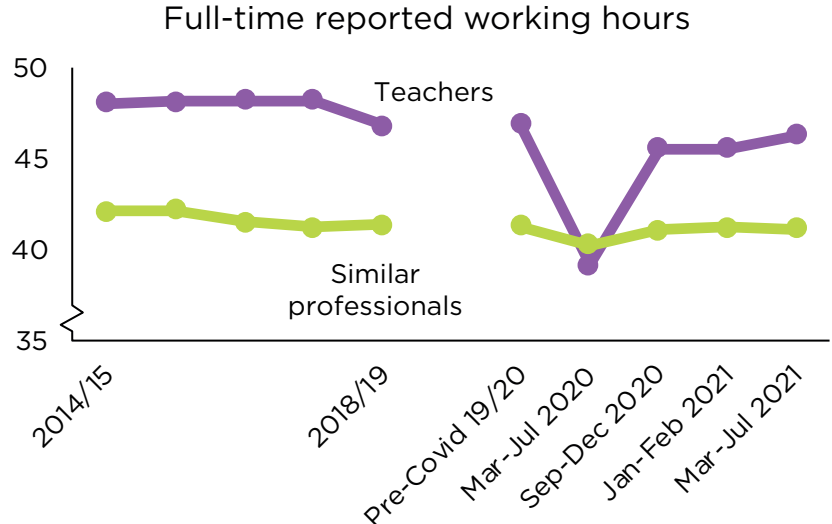
Teachers continue to work longer hours than other professions during term time and are more likely to report that they would prefer to work fewer hours

Workload is the reason most cited by ex-teachers for why they left teaching, which means ensuring teachers' workloads are manageable is an important part of a strategy to reduce the numbers of teachers leaving (DfE, 2017). Workload is in part about numbers of working hours, but is also a broader sense of how an individual's work feels and the tasks they are asked to undertake.

Before the pandemic, teachers were working longer hours in term time than similar professionals were in a usual week. LFS data shows that in 2018/19 full-time teachers were working around 47 hours in a 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 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. However, in the 2020/21 academic year - including during the second period of school closures in January and February 2021 - full-time teachers' working hours rose back 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.

Throughout the pandemic, teachers have remained more likely than similar professionals to report wanting to work fewer hours. In 2020/21, 55 per cent of full-time teachers would have preferred to work shorter hours, compared to 40 per cent of full-time similar professionals. This indicates that teacher workload remains a significant issue as more than half of full-time teachers perceive that they work too many hours.



Source: NFER analysis of Labour Force Survey data.

Teachers experienced high anxiety and low life satisfaction in early 2021

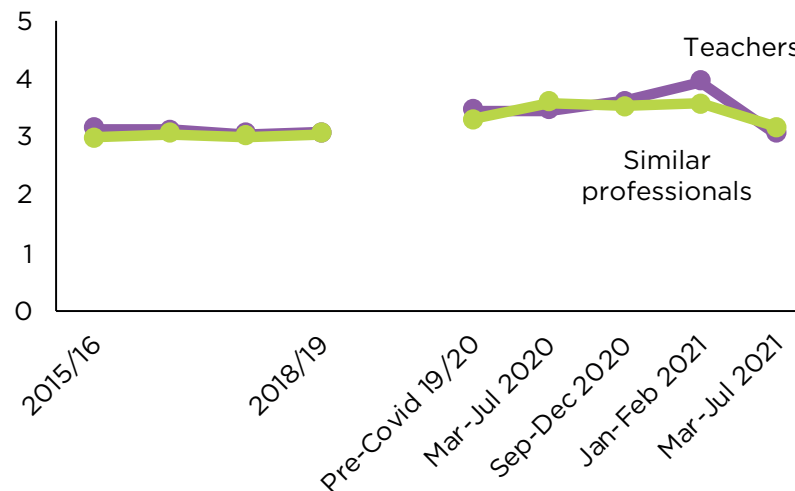
The pandemic led to an increase in anxiety across society, as measured by one of the Office for National Statistics (ONS) personal well-being measures in the APS.

Before the pandemic, when asked ‘overall, how anxious did you feel yesterday?’ both teachers and similar professionals reported their anxiety level as being, on average, a score of around 3.0. The month-by-month data we showed in last year’s report found that the average rose to more than 4.0 in both groups in March 2020, before falling steadily through the spring (Worth and Faulkner-Ellis, 2021). The latest APS data shows that anxiety among both teachers and similar professionals began to rise in autumn 2020. During the second period of school closures in January and February 2021, teachers’ anxiety levels were again high, at an average of 4.0. This was higher than for similar professionals, at 3.6, but the difference was not statistically significant. Since March, the level of anxiety among teachers and similar professionals has returned to pre-pandemic levels of around 3.0.

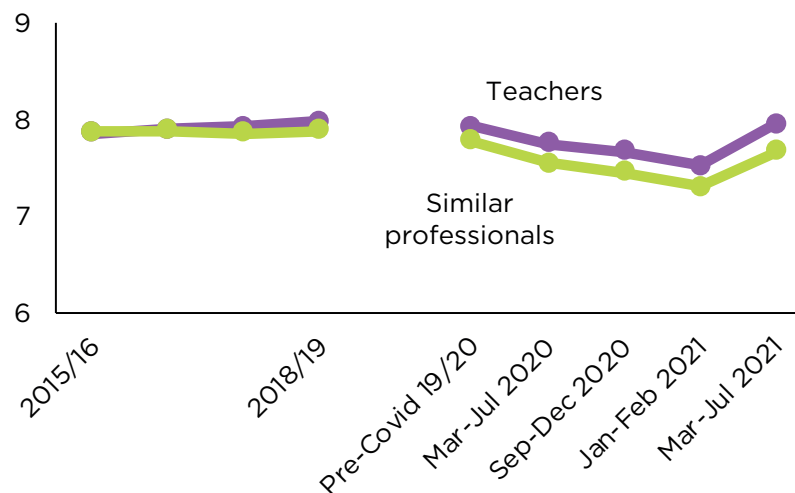
Similarly, life satisfaction fell for both teachers and similar professionals during the pandemic, with a low point during the national lockdown and school closures in January and February 2021. But again, since March 2021 the levels for both groups have returned to pre-pandemic levels.

Perhaps surprisingly, teachers’ life satisfaction has been significantly higher than among similar professionals during the pandemic. This could be linked to higher job security or to a sense of professional fulfilment from public service during a time of crisis. When asked ‘to what extent do you feel that the things you do in your life are worthwhile?’, teachers reported significantly higher levels compared to similar professionals, both before and during the pandemic. The pro-social motivation of teachers may imbue them with a greater sense of feeling the things they do are worthwhile throughout their career, compared to similar individuals in other professions.

Average anxiety level (0-10)



Average life satisfaction level (0-10)



Source: NFER analysis of Annual Population Survey data.
 Note: where 0 is ‘not at all’ and 10 is ‘completely’.

ITT school placement capacity increased slightly in 2021, but schools' mentoring capacity is likely to remain under strain due to a range of pressures

NFER surveys of senior leaders in summer and autumn 2020 indicated that the pandemic led to schools reducing the number of ITT placements they offered to ITT providers in the 2020/21 academic year (Worth and McLean, 2020). This occurred just at the time that more trainees came into the ITT system as a result of the application surge, so the supply of placements was squeezed just when demand for them increased.

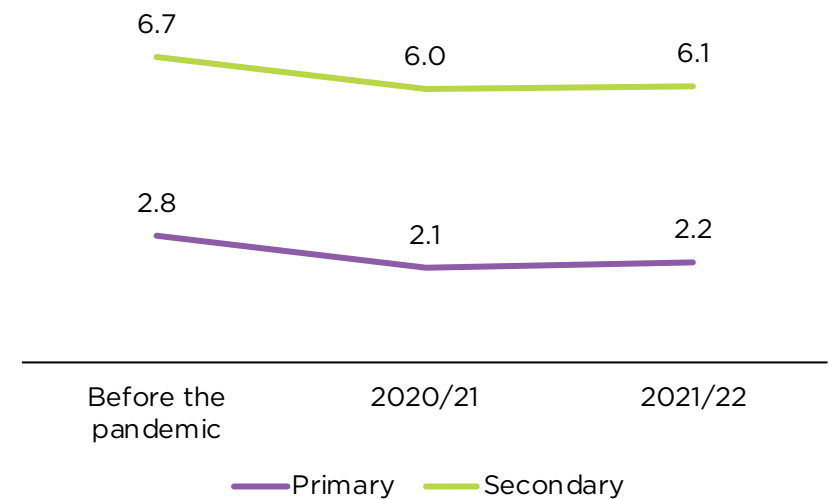
The DfE introduced a range of flexibilities to the ITT requirements for 2020/21, such as relaxing the need for trainees to spend 120 days in a school and be placed in more than one setting, as a short-term measure to manage the capacity squeeze. However, the Government re-imposed the requirements for the 2021/22 academic year.

We surveyed senior leaders again in autumn 2021, and asked how many ITT placements they planned to offer in the 2021/22 academic year. The proportion of schools offering at least one placement increased from 65 to 72 per cent of primary schools and 88 to 95 per cent of secondary schools. However, the data in the chart shows that the average number of placements offered per school has risen only slightly, from 2.1 to 2.2 for primary schools and 6.0 to 6.1 for secondary schools.

Senior leaders reported a range of considerations that influenced their school's placement capacity plans, many of which had changed in importance since 2020. The most significant factor for primary senior leaders remained 'concerns about the burden on school staff to provide support for trainees' (41 per cent). However, 'concerns about having too many different people in school' fell from 39 per cent to 17 per cent, and was also less of a concern for secondary senior leaders. The issue of the burden on staff to support trainees was also a salient factor for secondary senior leaders, rising from 30 per cent to 36 per cent. However, secondary leaders increasingly recognised the benefit of ITT placements for supporting recruitment: 46 per cent cited this as a consideration compared to 36 last year. This also increased as a consideration for primary leaders, from 25 to 33 per cent.

Increased concern about the burden on staff to support trainees may be linked to the increased demand for schools' mentor capacity as a result of the ECF national rollout, which began in September 2021. This is highly likely to continue, as the ECF entitles all cohorts of early career teachers to additional mentoring and five per cent time off timetable in their second year.

Average number of ITT placements per school, by academic year



Source: NFER senior leader surveys. Oct-Dec 2020: Primary N = 514, Secondary N = 349. Oct-Dec 2021: Primary N = 531, Secondary N = 307.



Conclusions



The resurgent labour market has led to the Covid surge in postgraduate ITT applications subsiding in 2022. We estimate that there is a substantial risk that a range of secondary subjects are unlikely to meet their recruitment targets, which includes shortage subjects such as physics and maths as well as a range of other subjects that typically recruit well, such as English. Teacher retention rates, having improved substantially in 2020 due to economic uncertainty and lockdown, also appeared to be returning towards pre-pandemic levels in 2021. **The evidence therefore seems clear that significant teacher supply challenges are re-emerging after two years of having eased somewhat due to the pandemic.**

Tackling teacher supply effectively to avoid shortages re-emerging and having a significant impact on schools requires policy action to improve the attractiveness of the teaching profession. This policy action needs to target both financial and non-financial factors, as both are important influences on teachers' recruitment and retention decisions.

The Office for Budget Responsibility forecasts that average pay in the economy will rise by 3.9 per cent in 2022 and three per cent in 2023. In this context, the DfE's teacher pay proposal of an overall 3.9 per cent increase in 2022/23 and 2.6 per cent in 2023/24 seems insufficient to revive the underlying loss of teacher pay competitiveness over the last decade and address emerging recruitment and retention challenges. **A continued lack of pay competitiveness is likely to hinder attempts to improve teacher recruitment and retention.**

While the Government's proposals on teacher pay target scarce resource relatively well at early-career teachers, by reducing the London pay premium the proposals risk exacerbating teacher shortages in London. **We recommend that the Government should maintain the London teacher pay premium at its current level to avoid exacerbating teacher shortages in London schools.**

The DfE's 2019 recruitment and retention strategy had a particular focus on non-financial factors for improving teacher retention. Unmanageable workload is the most-cited reason by ex-teachers for why they left teaching, and reducing teacher workload was a key part of the strategy. Our analysis of LFS data suggests that teachers' working hours were falling just before the pandemic and their perceptions of workload appeared to have been improving. However, our latest analysis shows there has been no more progress in 2020/21. **Further progress with reducing teacher workload in future years would likely help to improve retention rates and shore up teacher supply in the face of a resurgent wider labour market. Reducing teacher workload and supporting teacher well-being should remain a high priority for the Government.**

Ensuring that trainees and early-career teachers are well supported by their experienced colleagues as they begin their careers is another important non-financial factor for retention and featured strongly in the DfE's 2019 strategy. However, our survey data shows that the pandemic has squeezed schools' capacity for offering training placements, and senior leaders' key concern is the burden on school staff to provide support for trainees. The national rollout of the ECF is squeezing schools' mentoring capacity further still, which is likely to continue in the rollout's second year.

One policy solution could be financial: 70 per cent of school leaders said 'increased financial support from Government' could support or encourage their school to take more trainee teachers. Another solution could be to re-introduce flexibilities to the ITT requirements to ease placement capacity concerns, and DfE have re-introduced some limited flexibilities in 2021/22.



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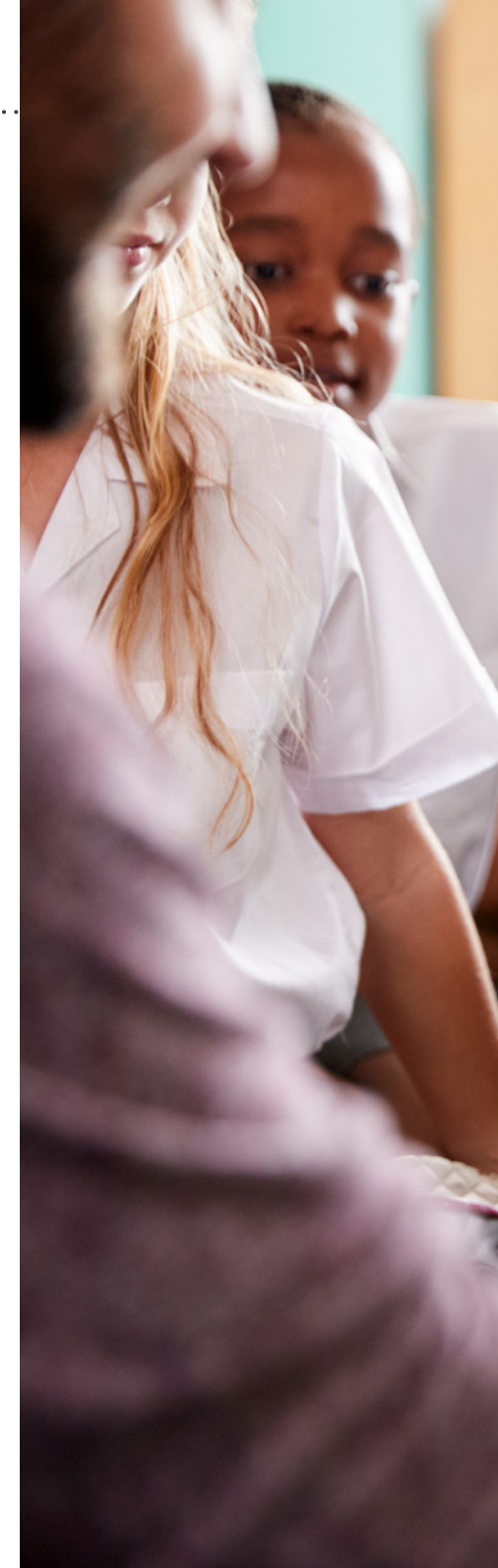
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List of data sources

See the separately published methodology appendix for more details on the data sources, methodology and measures used.

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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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