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THE CHANGING WORLD OF WORK

MARTIN MCIVOR AND BECKY WRIGHT

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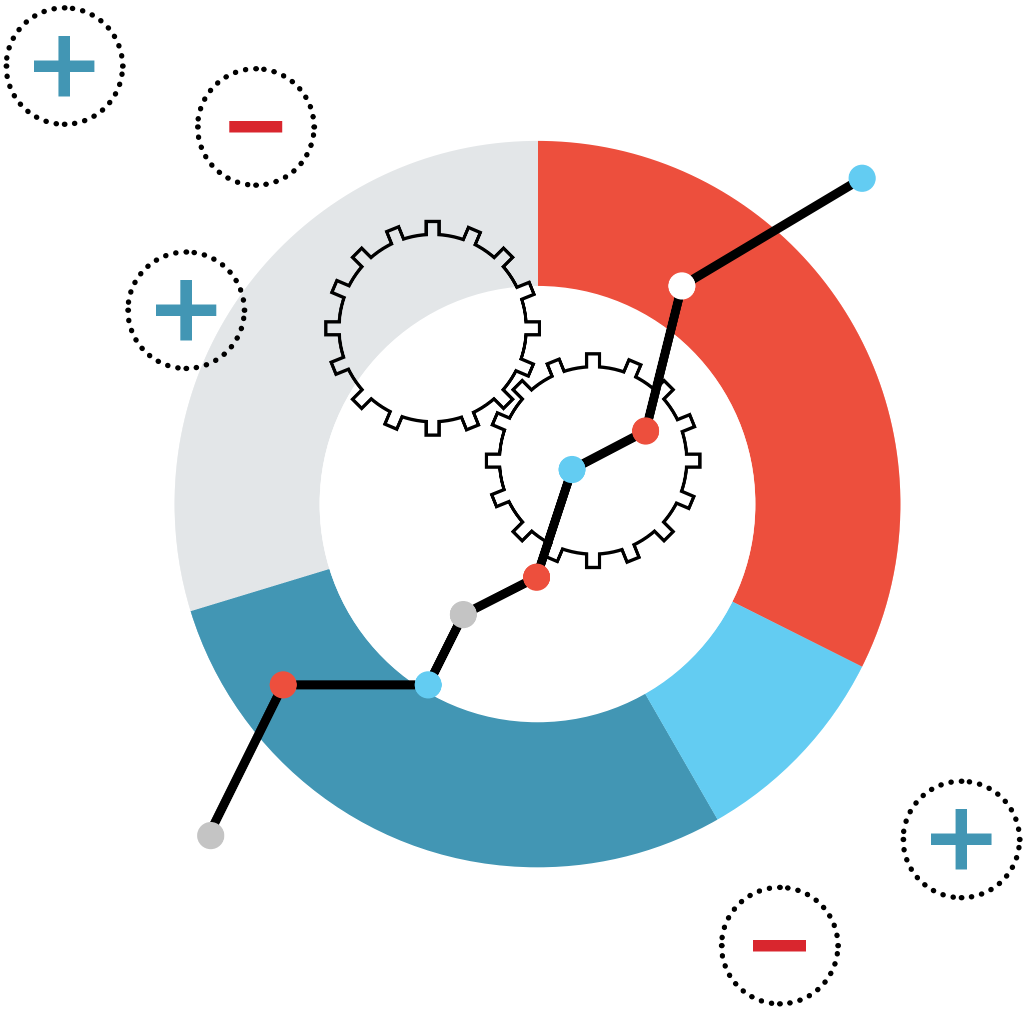
Key findings

- The broad shape and composition of the UK labour market has been changing and is expected to continue doing so. While total employment has taken a significant hit from Covid, latest forecasts are that it will revert to near trend over the next few years.

- Sectors highlighted in a previous Unions 21 report have mostly grown in line with forecasts, but there are some interesting divergences.

- Moving forward, the top three growth in jobs are health and social care (driven in large part by the expansion of social care), hospitality (particularly in food and beverage services) and lastly support services which covers a range of activities providing operational support to businesses and public sector organisations.

- Importantly, some sectors are seeing important compositional shifts in terms of occupations and the total share of self-employment is expected to grow, particularly in some industries.



Contents

An evolving labour market

The 'future of work' is a subject being examined, dissected and debated at great length today. As we begin to emerge from nearly 18 months of pandemic and move into a likely endemic scenario there is greater attention to new patterns of working, the introduction of new technologies and shifts in our relationship with work.

It is with this in mind, that this project aims to look not at the distant future but at the changes occurring now and expected to continue over the next few years, with an eye to implications for policy development and for the impact on workers.

Economic trend analysis is not a precise science and it is unlikely that the next five years will follow the exact paths traced here. However, the forecast data used for this report is based upon careful analysis of historic trends in combination with plausible assumptions about the likely impact of significant known factors. These include demographic change (eg a growing and ageing population likely to increase demand for retail, energy, construction and health and social care), advances in technology (with automation and AI impacting on middle skill occupations and job quality), and policy frameworks (from changes to migration and trade regimes resulting from Brexit, to shifts in production and consumption patterns dictated by the need to reduce carbon emissions).[1]

Our knowledge is far from perfect. But much can be learnt by bringing together reviewing the evidence we do have. Consolidating our understanding of what is happening, and identifying the most likely directions of change, will leave us better able to adapt and plan for the years ahead.

Wider context

Many of the forecasts in this report are in line with broad trends which have been reshaping the UK labour market for many years. These shifts provide the background and context to the industrial and occupational changes being experienced by workers.

A review of historic employment data for broad sectors for the past two decades confirms that:

- there has been strong growth in the numbers employed in business services, public ('non-marketed') services, and trade, accommodation and transport
- employment in construction, and 'primary sector and utilities' have remained comparatively low but broadly stable
- total employment in manufacturing has significantly declined.

These sectoral trends have combined with and in part reinforced long-term shifts in the *occupational* composition of the UK workforce. These have followed a pattern that has been described as the polarisation of the labour market, or the 'hourglass economy', with increases in both higher and lower qualified roles and a reduction in 'medium-skilled' roles.

Figure 1. Total jobs by broad sector 1996-2021

Source: Unions 21 analysis of ONS Workforce jobs data (see page 23)

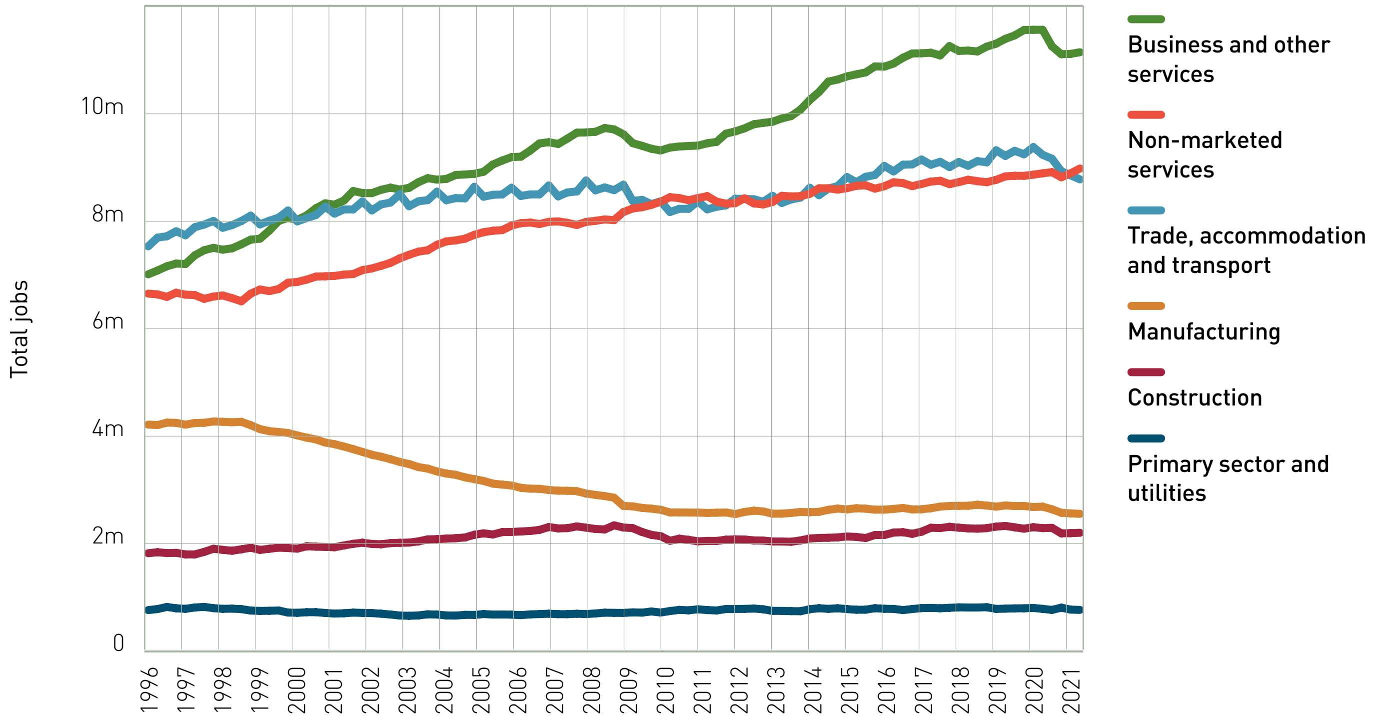
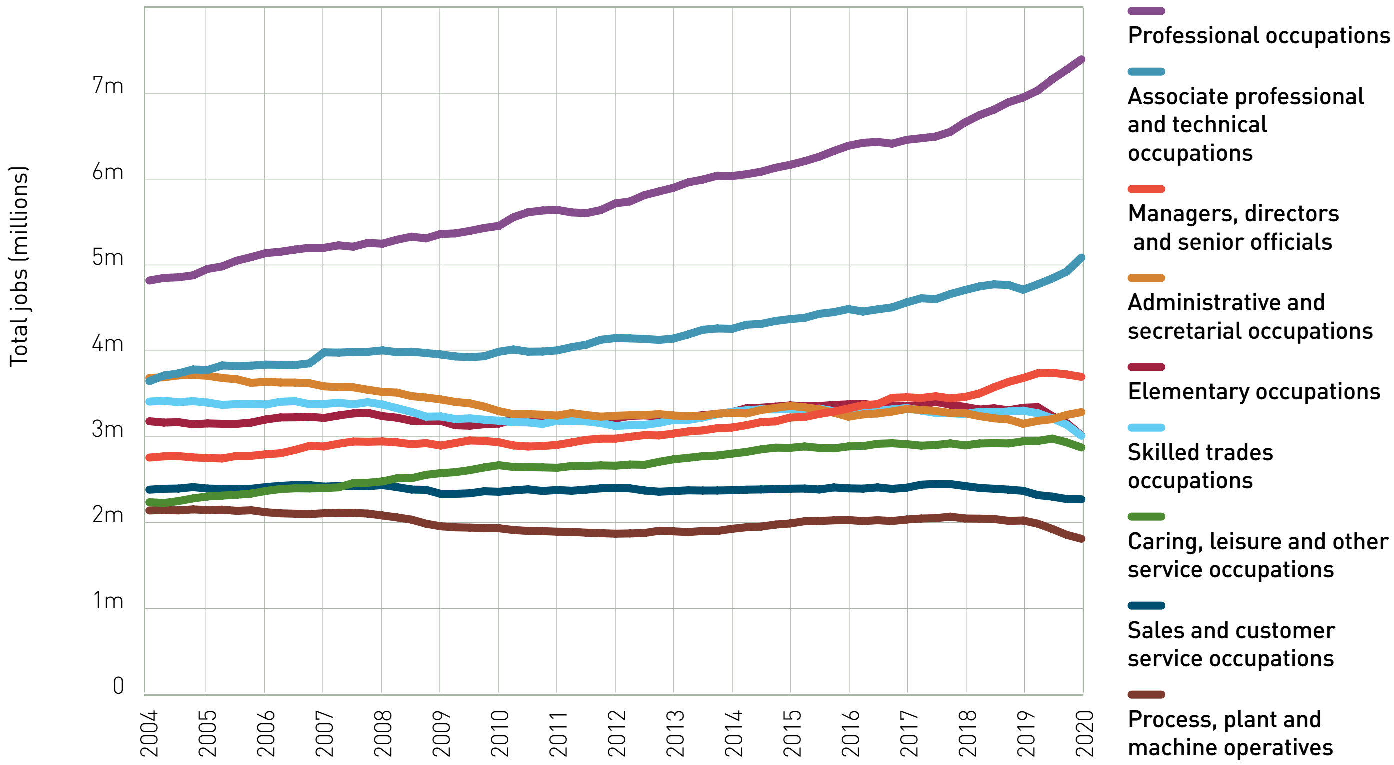


Figure 2. Total jobs by occupational group 2004-2020

Source: Unions 21 analysis of Annual Population Survey data (see page 23)



Revisiting previous forecasts

In 2017, Unions 21 reported on labour market changes and forecasts, highlighting three areas of employment expected to be the most important areas of net additional jobs in subsequent years:

- retail trade;
- food and beverage services (that is – primarily – cafés, restaurants, takeaways, pubs, bars and licensed clubs); and
- management services (recorded in the data as 'activities of head offices' and 'management consultancy activities').

The 2017 report also identified three areas as 'ones to watch' where we thought absolute or relative employment growth would be particularly strong:

- health and social care;
- construction;
- informational and technology (which includes computer programming, information services and telecommunications).

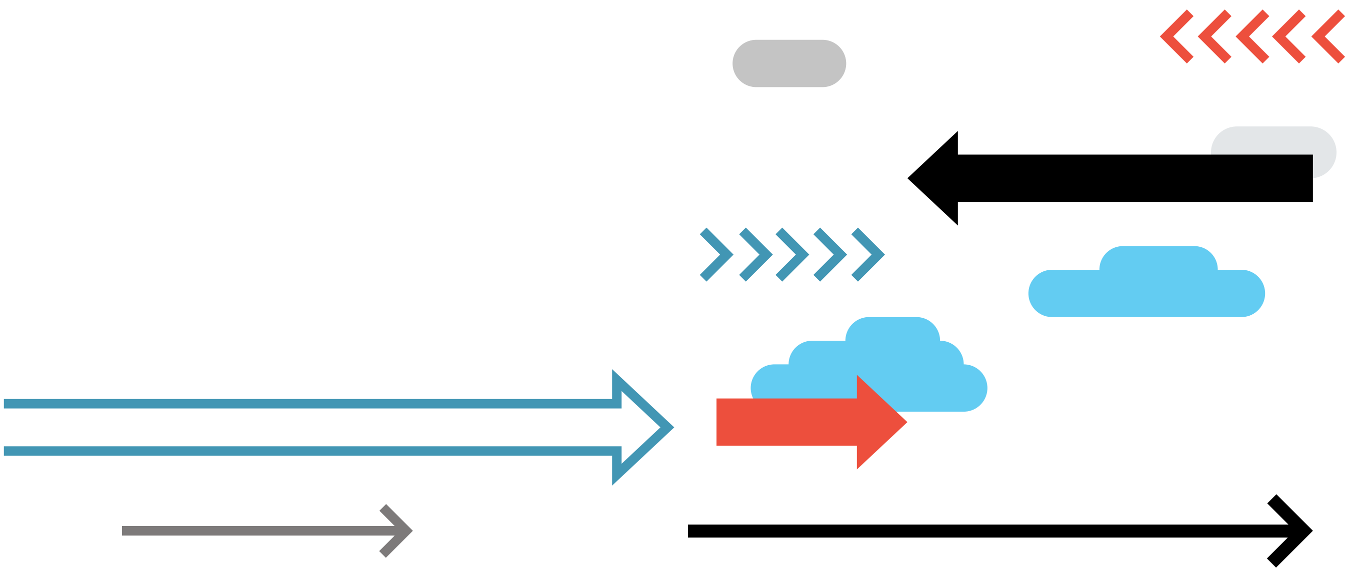
Official employment figures for the four years since these forecast were published[2] confirms that these expectations were broadly correct, though with some interesting divergences.

For example, management services did indeed see significant numbers of additional jobs though somewhat fewer than had then been forecast. Retail employment grew only slightly (though its size means that only modest relative growth means large numbers of additional jobs). This is likely to be partly due to the impact of automation, which the 2017 report noted was a significant uncertainty, though we have yet to see a downturn as sharp as that suggested by an alternative forecast published by the British Retail Consortium which it cited.[3]

Health and social care jobs have seen even stronger growth over the past four years than was forecast in 2017, with the data indicating a further acceleration over the past year, presumably an effect of additional recruitment to respond to the COVID-19 pandemic.

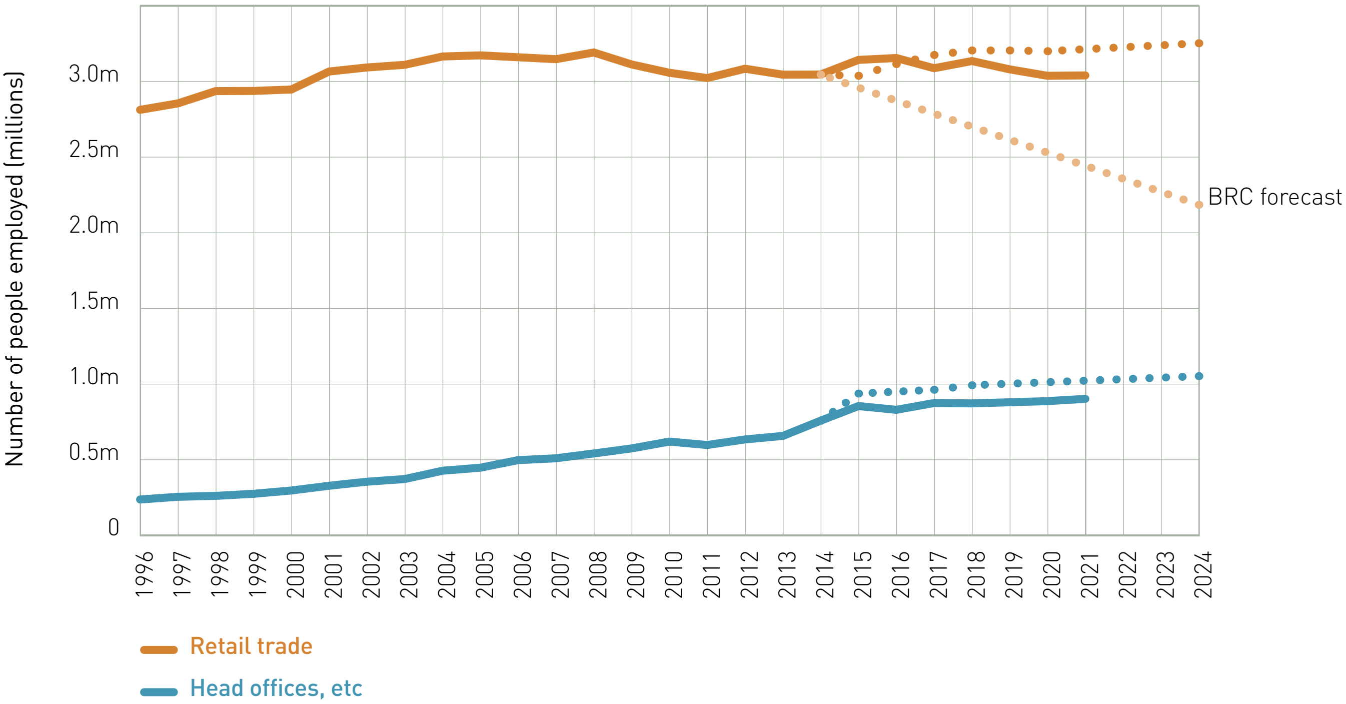
On the other hand, construction, food & beverage services, and information technology were also growing above forecast, but have been noticeably depressed in 2020-21.

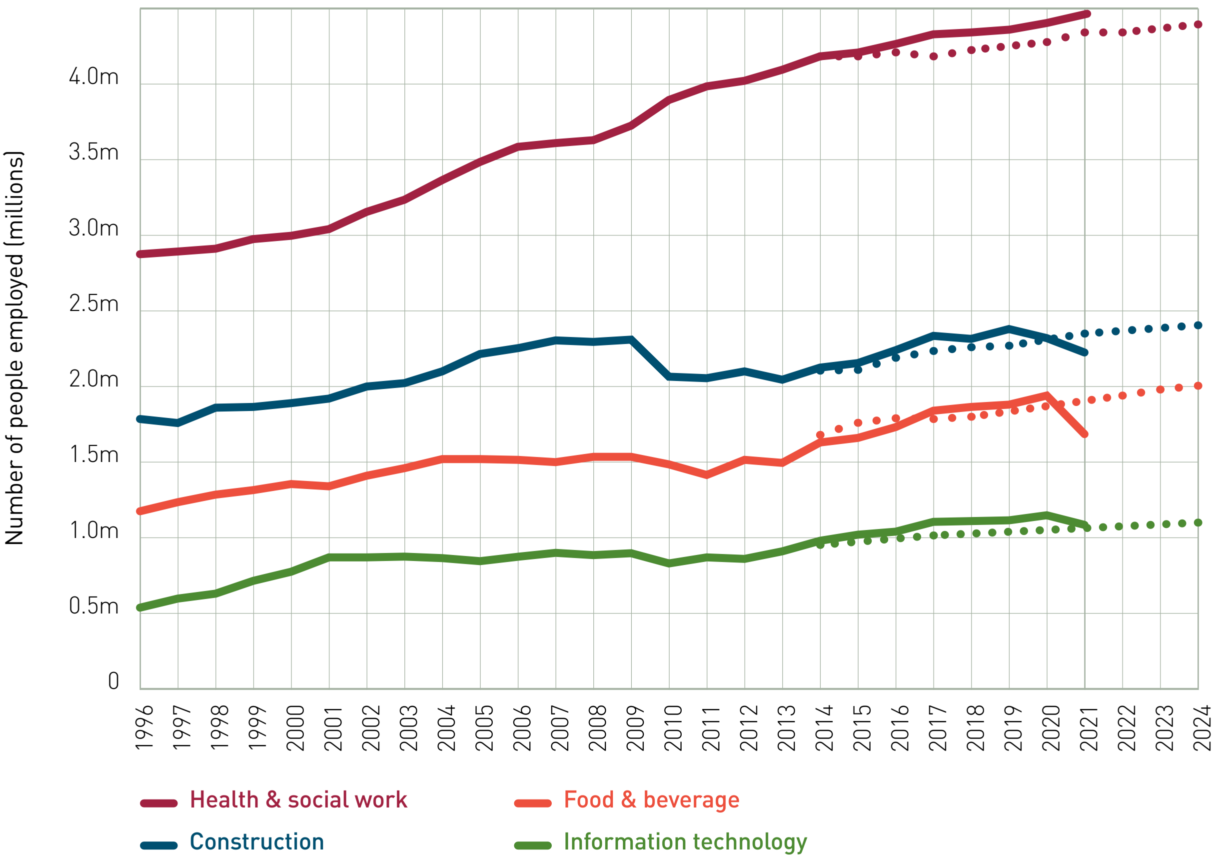
At this point in time it is especially hard to predict the extent to which industrial and occupational changes associated with the pandemic will prove to be permanent. We will return to this question below, but begin by setting out underlying trends and expectations which can be seen as the baseline against which such questions should be considered.



Figures 3 and 4. Previous forecasts (selected industries)

Source: Unions 21 analysis of Working Futures data and ONS Workforce Jobs data





The next five years: underlying trends

The Working Futures analysis upon which this report draws was completed before the onset of the Covid-19 pandemic in early 2020. While we know that the pandemic and associated recession has had dramatic impacts on the labour market, official forecasts for aggregate employment levels now predict a reversion to previous trends over the next few years.[4] The latest analysis from the Office for Budget Responsibility expects total UK employment to have returned to pre-Covid levels by the end of 2023, and for total numbers in work to increase further by around 400,000 by early 2026.

For this reason, we assume that the 2020 Working Futures forecasts of industrial and occupational change remain a reasonable starting point for considering what the medium-term future may hold. The important qualifier to this judgment is that even if the impact of the pandemic on the aggregate employment levels proves to be largely short-term, it seems plausible that some shifts in the industrial and occupational *composition* of the UK workforce resulting from the pandemic may prove to be more long-lasting. These possibilities are discussed in more detail later on.

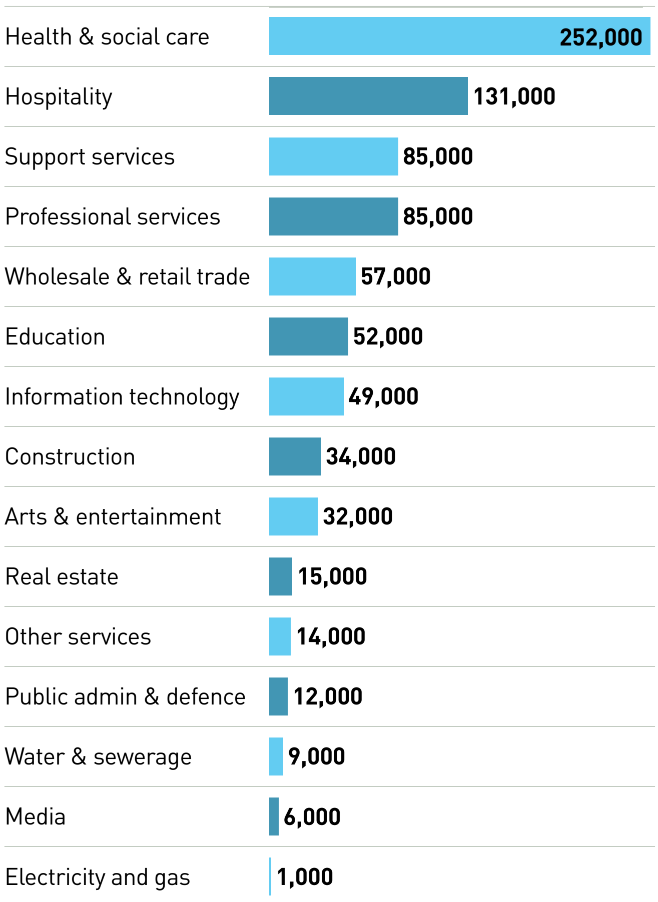
For this section, then, we look at the absolute scale and relative proportion of additional jobs that were forecast for different sectors and occupations for the years 2021 to 2027. On this basis, looking at broad sectors, we would expect to see the largest absolute number of net new jobs between 2021 and 2027 to be in the following areas:

- Health and social care (comprising Health, Residential care, and Social work), expected to grow by around **250,000** additional jobs
- Hospitality (comprising 'Accommodation' and 'Food and Beverage services'), expected to grow by around **130,000** additional jobs
- 'Support services' which comprise, primarily, operational and administrative services provided to businesses and public sector organisations such as security, cleaning, facilities management, travel services, call centres, and the supply of agency workers, and is expected to grow by around **85,000** additional jobs.

Health and social care, and hospitality, were also expected to be the *fastest* growing broad sectors of employment between 2021 and 2027, each growing by around **5.5%**. The third fastest growth area, expected to grow by over **4%**, was information technology.

Figure 5. Forecast net jobs growth 2021-2027

Source: Unions 21 analysis of Working Futures data



In more detail:

HEALTH AND SOCIAL CARE

'Health and social care' covers the NHS (as well as private healthcare and dentistry), residential care for the elderly and disabled, and 'social work' which includes childcare, domiciliary care for the elderly as well as various community and welfare services.

Within this broad sector, health accounts for around half of the forecast net new jobs (**130,000** out of 250,000), but relative to its size was expected to grow more slowly than residential care (**50,000** additional jobs) and non-residential care (**70,000** additional jobs), growing at **6%** and **7%** respectively.

HOSPITALITY

Hospitality comprises two sub-sectors, 'accommodation' (hotels, holiday parks, and halls of residence) and 'food and beverage' (restaurants, cafés, takeaways, pubs, bars and licensed clubs). While both sectors are expected to grow, the bulk of the additional jobs come from the food and beverage side, with **110,000** additional jobs and a fast relative growth rate of **6%** over the forecast period.

Figure 6. Forecast net jobs growth (%) 2021-2027: Health and social care

Source: Unions 21 analysis of Working Futures data

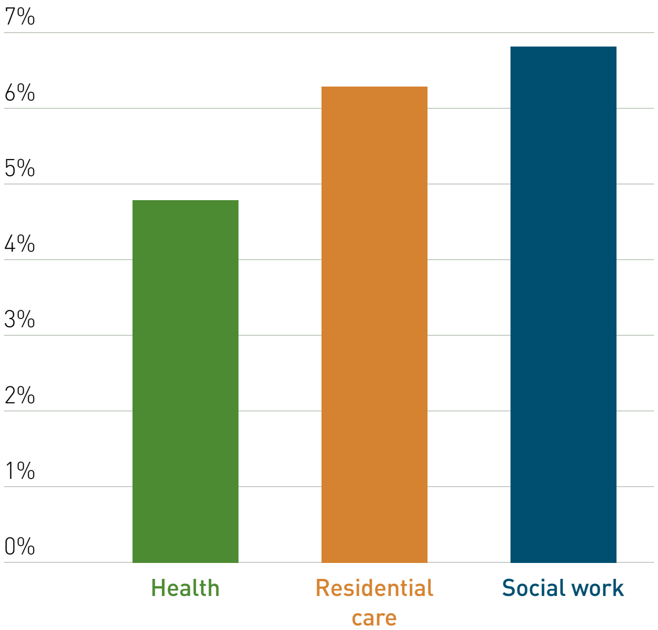
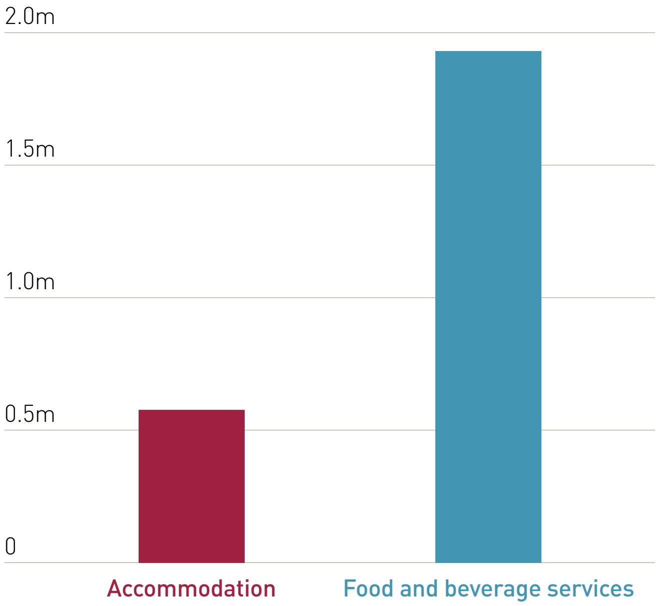
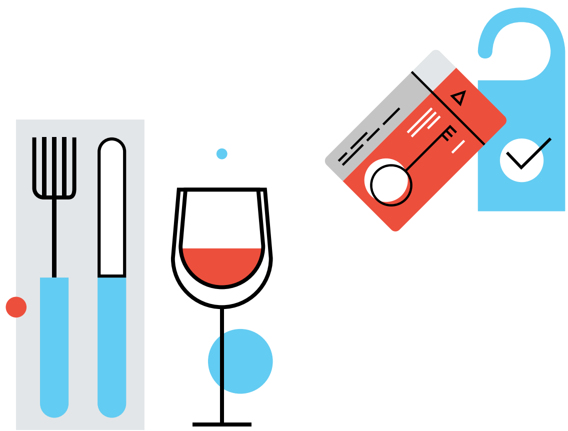


Figure 7. Forecast net jobs growth 2021-2027: Hospitality

Source: Unions 21 analysis of Working Futures data





SUPPORT SERVICES

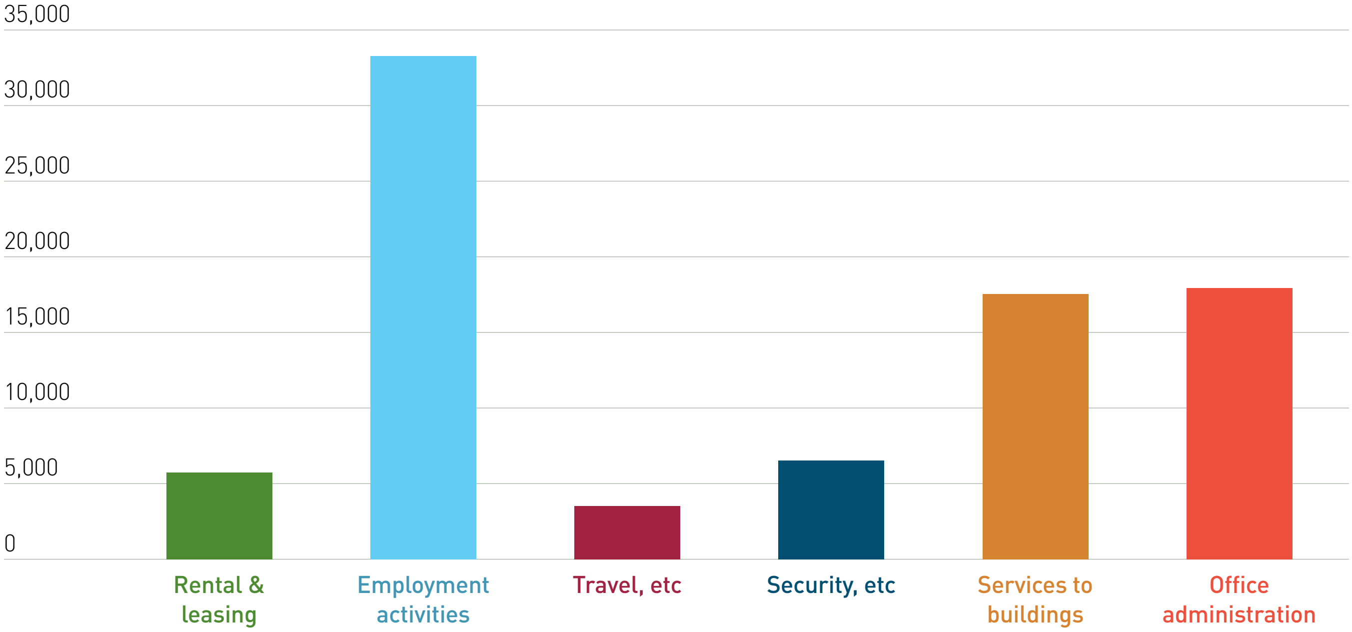
This broad sector covers a range of activities which provide operational and administrative support to businesses and public sector organisations. (It is distinguished in official statistics from 'professional services' which provide more knowledge-based support and consultancy such as law, accounting, management services, architecture, scientific research, and advertising). Its growth is thus likely to reflect well-known trends towards outsourcing and specialisation of these common operational and administrative functions which might in the past have been provided 'in house'. This shift of jobs from core employers to external agencies, represents a challenge to trade unions as much as an opportunity.

Although there is a relatively similar growth rate across the sub sectors of 2% to 3%, the largest absolute forecast growth is in 'employment activities', essentially the provision of contingent labour by employment agencies,[5] with over **30,000** additional jobs over the next five years. By far the largest group of workers employed in this sector are those in 'elementary administration and service occupations', accounting for around a third of the total. While employment agencies have been increasing their presence across all occupations, the growth in their role has been particularly pronounced for this occupational group, around one in ten of whom now work through the intermediary of an employment agency.

The other sub-sectors where large numbers of additional jobs were expected are 'services to buildings', which primarily comprises cleaning; and 'office administrative', within which the work of call centres may be the most significant.

Figure 8. Forecast net jobs growth 2021-2027: Support services

Source: Unions 21 analysis of Working Futures data



Compositional shifts within sectors

Figures and forecasts for the size of sectors as a whole do not tell us about how these sectors themselves may be changing. It is important to understand these shifts in the composition of sectors which can be as significant and consequential as changes in their overall size. This section highlights a number of shifts underway and expected to continue in the kind of employment provided by retail, public service, and manufacturing sectors.

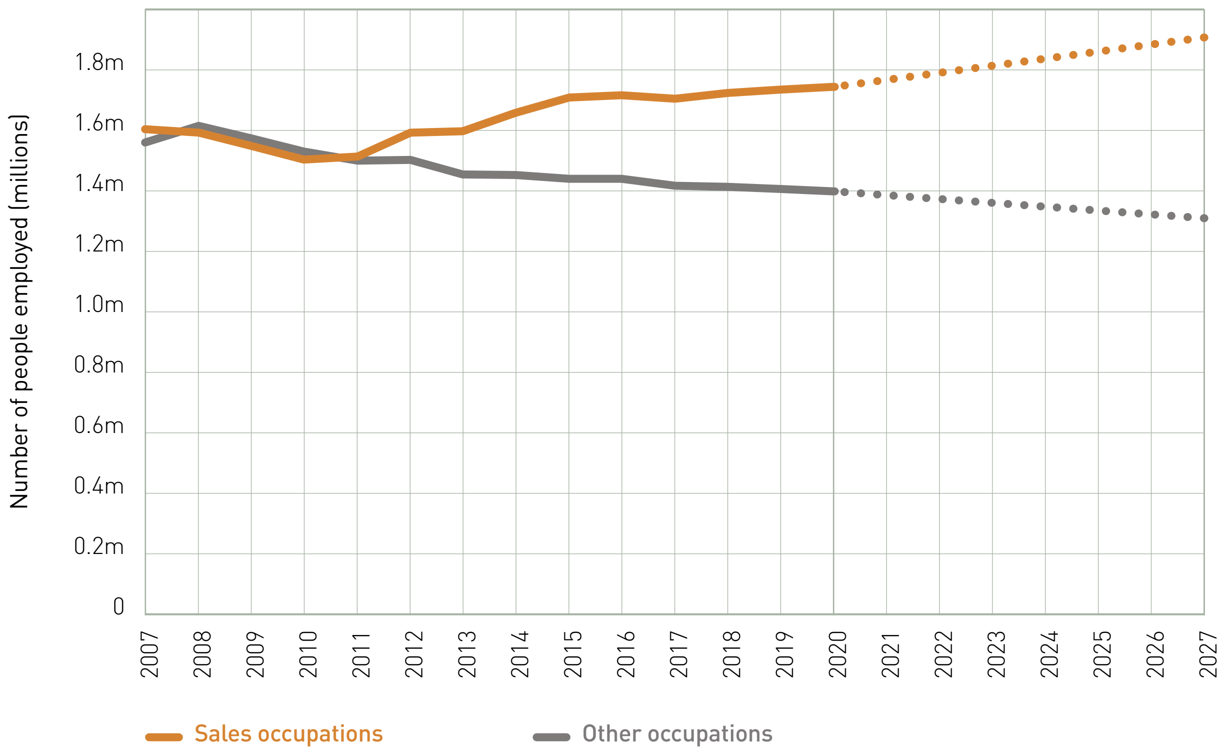
RETAIL

Despite some forecasts of automation and online shopping driving a rapid shrinkage, the retail sector is expected to continue growing as an employer. However a breakdown of total employment by occupation reveals that employment in traditional 'sales occupations' has indeed been falling and is expected to continue doing so.

Offsetting this, according to forecasts, is continued growth in a number of other occupations within the retail sector, particularly 'corporate managers and directors' (broadly, senior but not middle managers), 'business and public service associate professionals' (such as those working in purchasing or marketing), and 'elementary administration and service occupations' (which includes 'shelf fillers' but not check-out operators, as well as roles in areas like cleaning and security).

Figure 9. Occupational composition: Retail trade

Source: Unions 21 analysis of Working Futures data



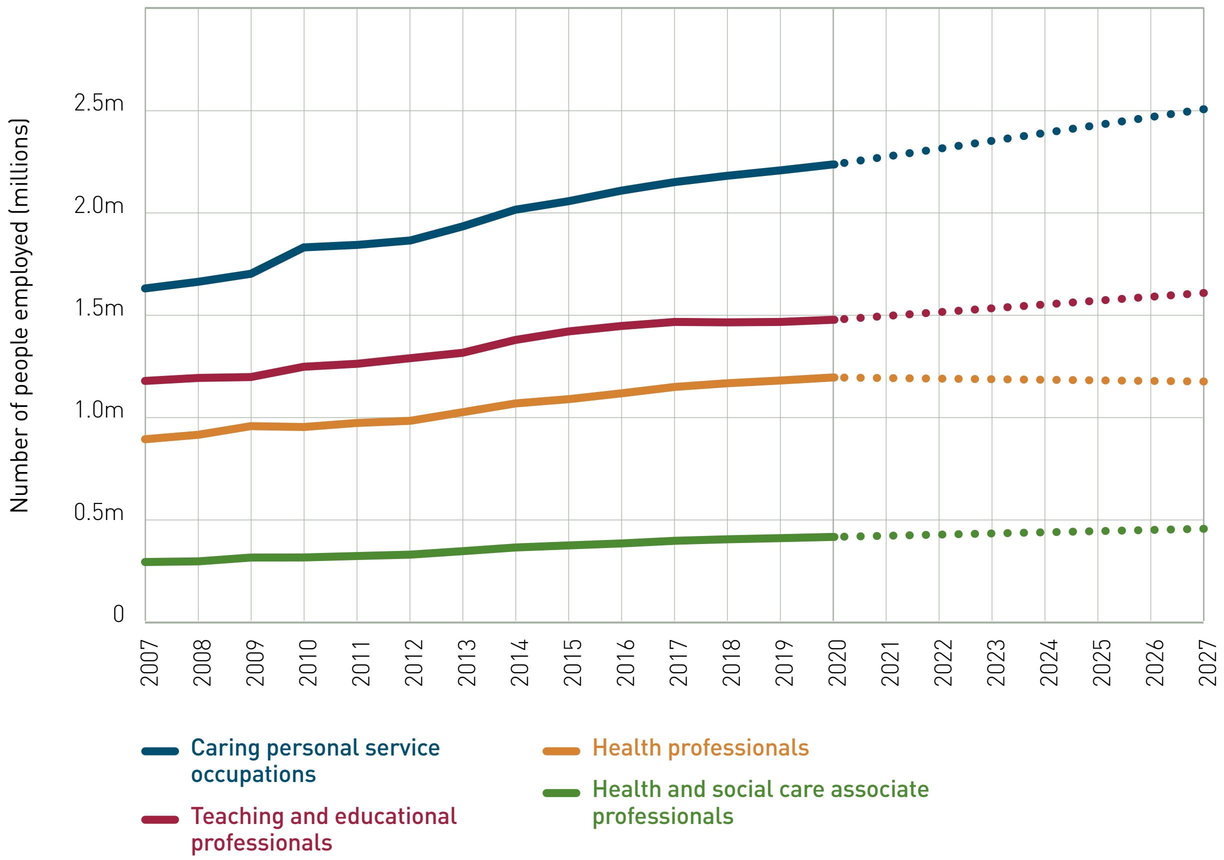
PUBLIC SERVICES

The largest public services, health, social care and education, are expected to see continued total employment growth (driven in large part by demographic trends) and are an important element in the wider growth of professional occupations (most obviously doctors, nurses, teachers and lecturers).

However it is worth noting that if we look across these three broad sectors, the largest and fastest growth in employment is being seen not in professional roles but in traditionally lower-qualified 'caring and personal service' roles. This includes nursery nurses, childminders, teaching assistants, healthcare assistants, auxiliary nurses, ambulance drivers, care workers and home carers.[6]

Figure 10. Occupational composition: Health, education and social care (selected occupations)

Source: Unions 21 analysis of Working Futures data



MANUFACTURING

Previously, we noted that manufacturing has for some time been an area of overall decline. However, it is important to recognise that some areas of manufacturing are now growth areas for higher qualified employment.

For example, the manufacture of motor vehicles, and of 'other transport equipment' (which includes aerospace, shipbuilding, motorcycle manufacturing and some parts of the defence industry) have in recent years seen increasing numbers of roles in science, research, engineering and technical occupations, even as the numbers of more traditional manufacturing trades and machine operating roles have declined. In the latter sector, STEM professionals are expected to become the largest occupational group over the next few years.

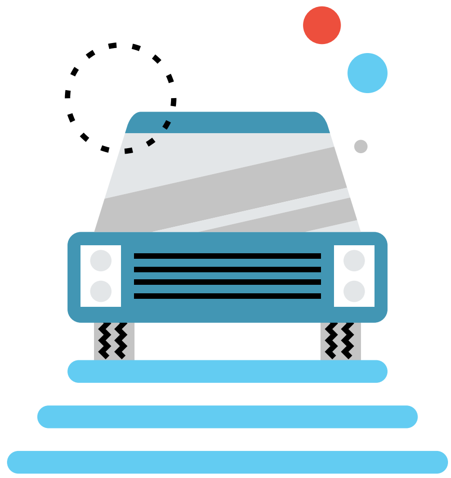


Figure 11. Occupational composition: Automotive manufacturing (selected occupations)

Source: Unions 21 analysis of Working Futures data

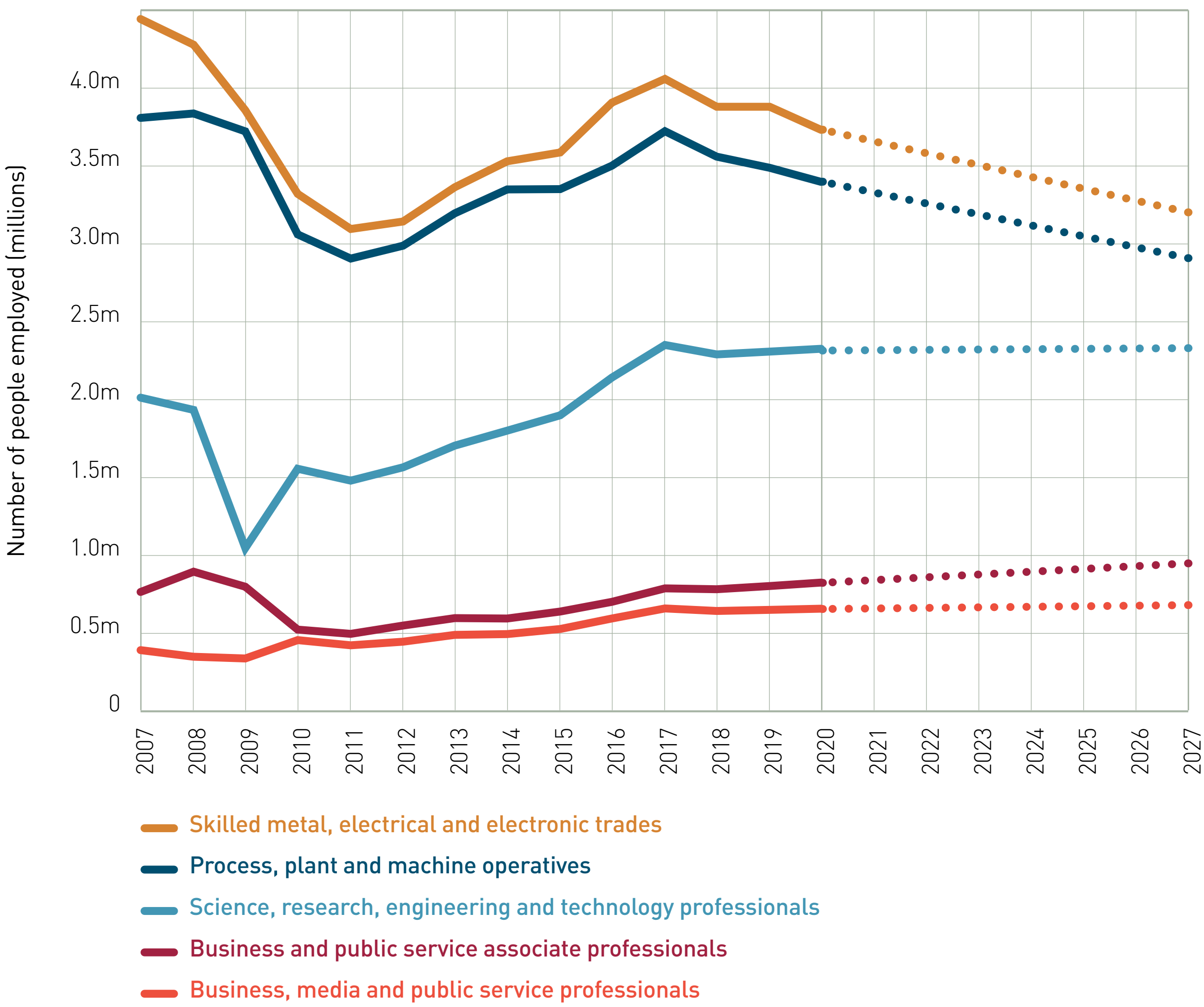
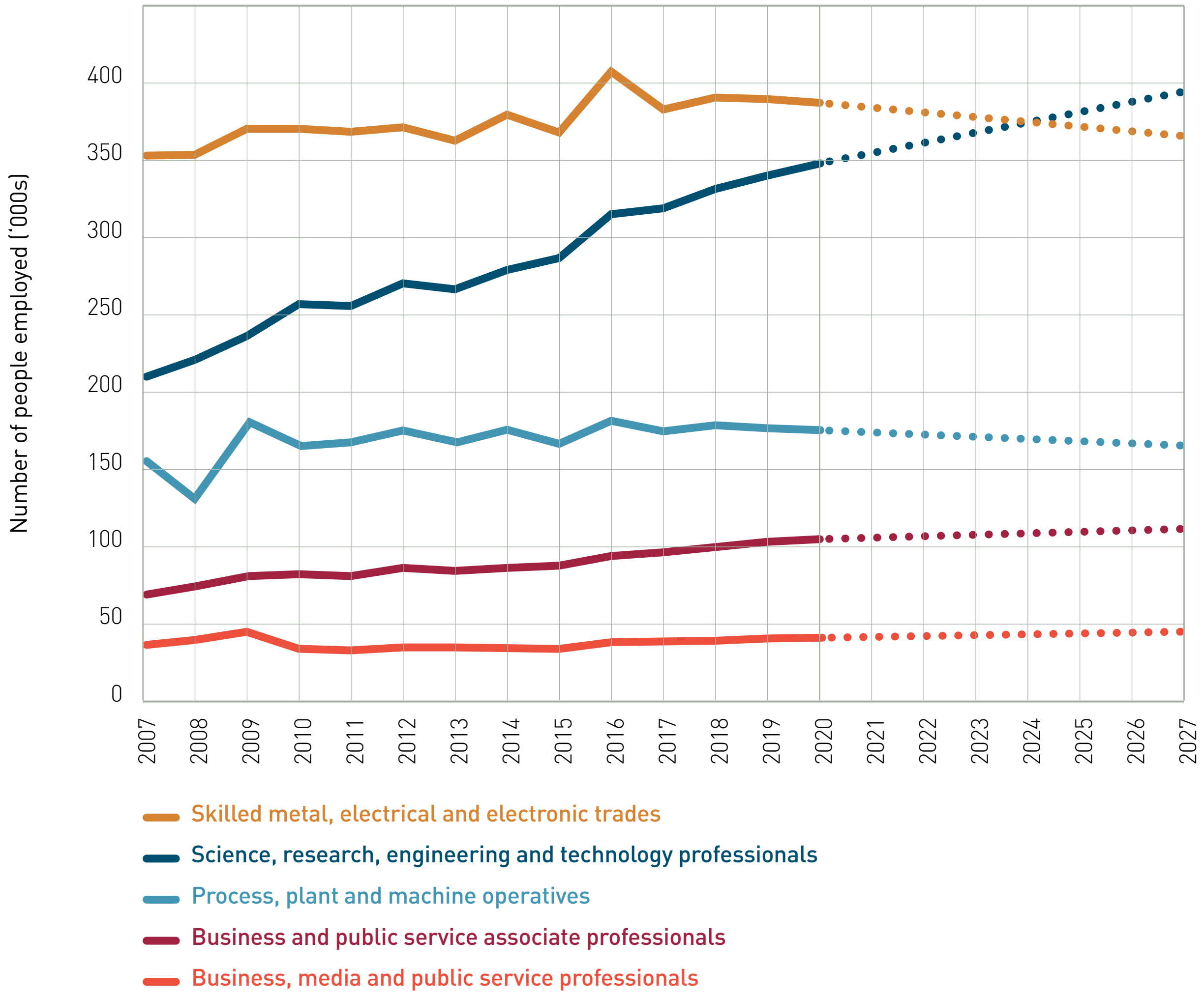
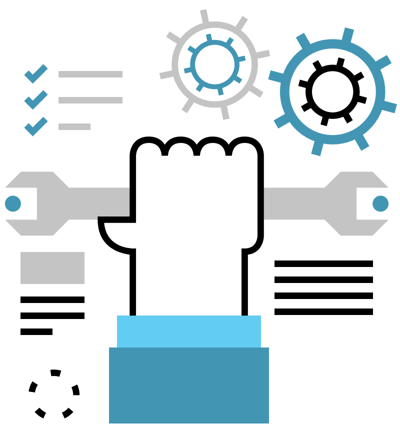


Figure 12. Other transport equipment (selected occupations)

Source: Unions 21 analysis of Working Futures data





SELF EMPLOYMENT

Self-employed workers have been growing as a share of the total workforce for over a decade. This trajectory was interrupted and set back by the impact of the pandemic, during which the self-employed were particularly likely to lose work and were often unable to access Government support. This led some to speculate that the trend to increased self-employment could go into reverse over the coming years.[7] However the latest forecasts from the Office for Budget Responsibility are that the underlying trend towards increasing self-employment will reassert itself over the coming years.[8]

Nevertheless the preponderance of self-employment is highly uneven across different sectors and occupations, and changes are not always in the same direction. Sectors with the fastest growing share of self-employment over recent years include pharmaceuticals manufacturing, veterinary services, publishing and advertising, though some of these are expected to see a slight shift away from self-employment in future years.

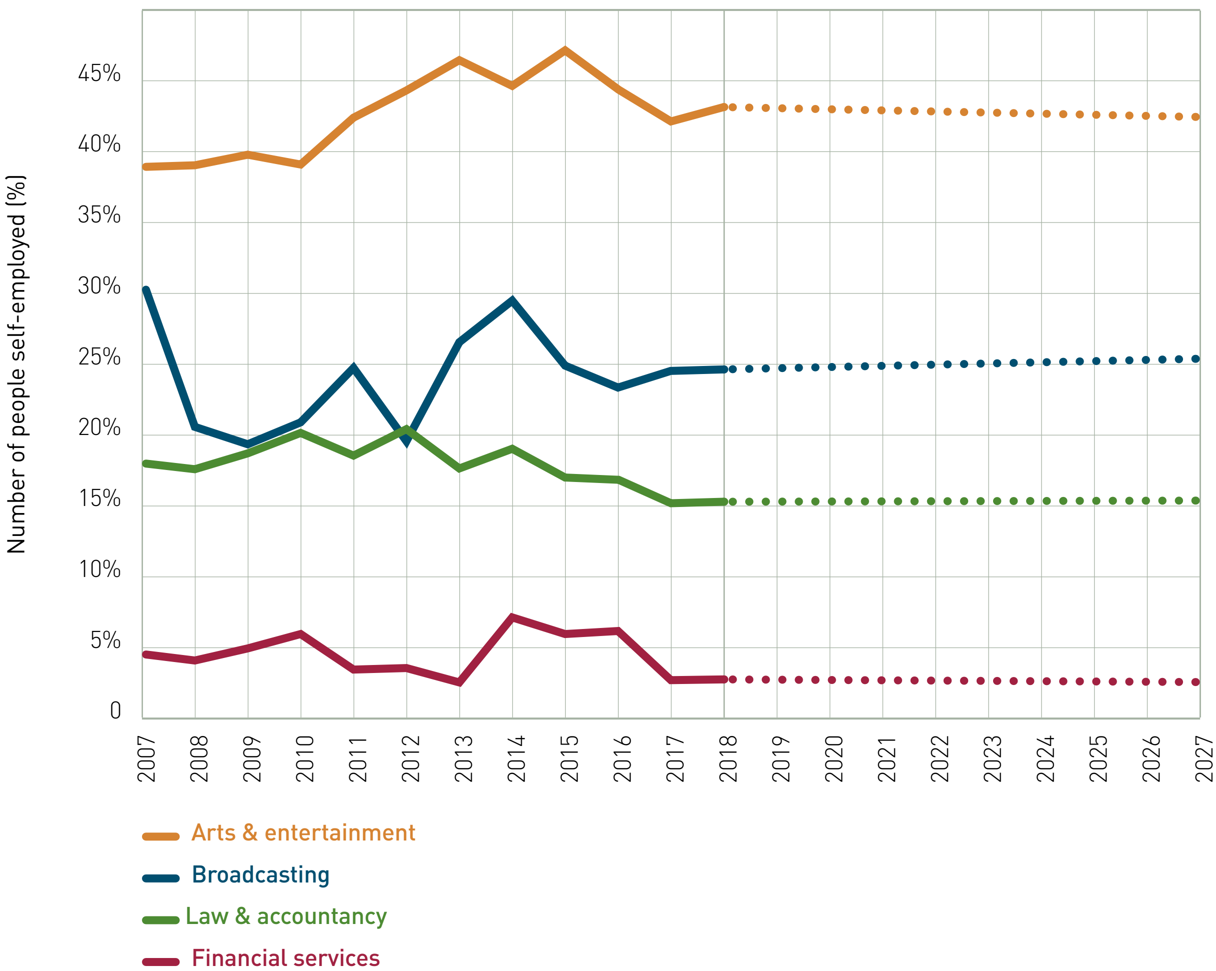
Figure 13. Self-employment as share of total jobs (%, selected sectors)

Source: Unions 21 analysis of Working Futures data

Meanwhile some other industries have seen fluctuating and at times declining levels of self-employment including financial services, law and accountancy, broadcasting and 'arts and entertainment' (though the latter two have remained among the most self-employment dominated of all sectors).

Figure 14. Self-employment as a share of total employment (%, selected sectors)

Source: Unions 21 analysis of Working Futures data

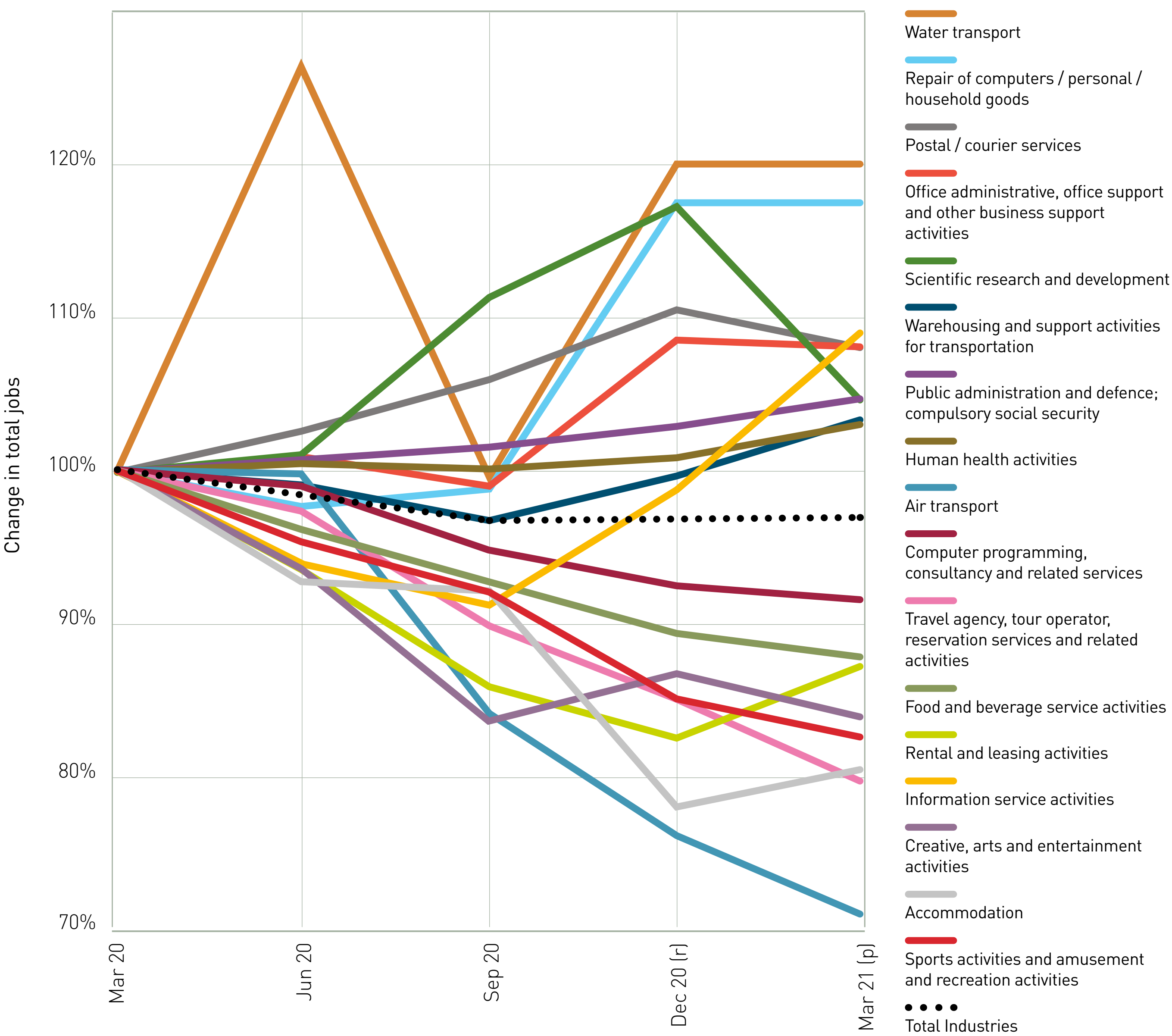


COVID-19: A labour market disruptor?

As noted above, the baseline forecasts set out so far were published in early 2020, before the economic impact of the Covid-19 pandemic was clear. Unsurprisingly, employment patterns have turned out to be very different in 2020 and 2021 than these forecasts envisaged. However, as noted, central expectations are that total employment levels will recover over the next two years and be close to the previously forecast trajectory by 2026. The forecasts we have for this period thus remain a reasonable baseline for thinking about what the labour market will look like in five years' time.

Figure 15. Change in total jobs Mar 20-Mar 21 (selected industries)

Source: Unions 21 analysis of ONS Workforce Jobs data (see page 23)



The question does arise, however, of whether the compositional changes in the UK workforce associated with the pandemic will prove to be entirely temporary or in some cases more long-lasting.

The data we now have for the period of the pandemic confirms that its employment impact has been highly uneven – while overall numbers of

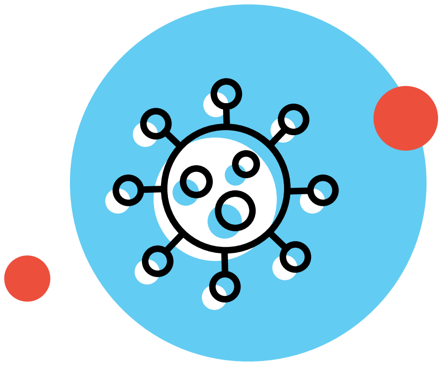
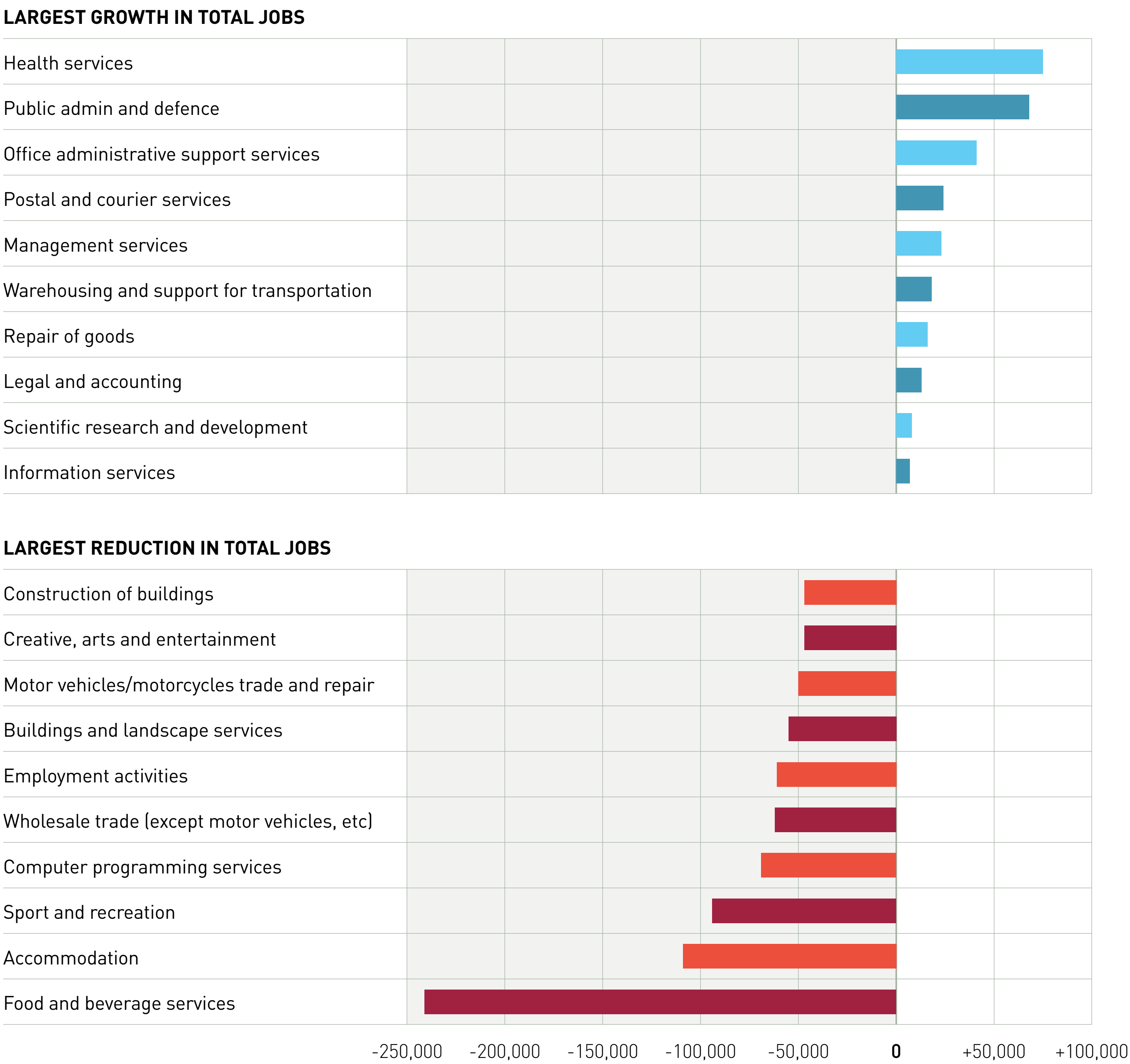


Figure 16. Absolute change in total jobs during pandemic (selected sectors)

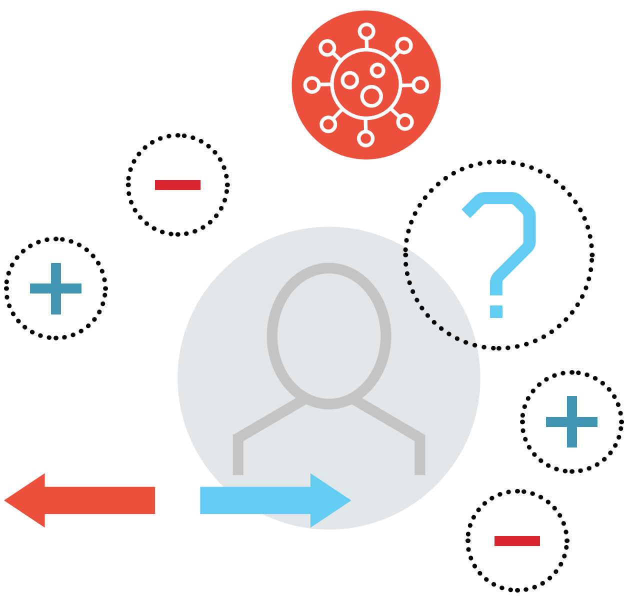
Source: Unions 21 analysis of ONS Workforce Jobs data (see page 23)



jobs fell, this was especially pronounced in some sectors, while other sectors saw a net increase.

Sectors which have seen the biggest proportionate increases in total numbers of jobs over the past 18 months include postal and courier services, information services (which includes web-hosting, cloud computing and streaming services) and health (which with 75,000 additional jobs created also saw the largest absolute growth). 'Water transport' (which covers sea, coastal and inland transport of both passengers and freight) also seems to have experienced a rapid increase in jobs, which might reflect restrictions on other forms of transport, though the relatively small size of the sector means that caution needs to be exercised in interpreting short term movements in statistical data. Large absolute increases were also seen in 'office administrative' support services (a category which includes call centres), management services, and warehousing (which combined with postal and courier saw an additional 42,000 jobs created).

Meanwhile areas which bore the brunt of public health measures saw the strongest negative effect on jobs, notably air transport (down nearly 30%), travel, accommodation, sport and recreation, and arts and entertainment (all down 15% to 20%). The largest absolute falls in total jobs were in food and drink services and accommodation, which in March 2021 recorded (respectively) 241,000 and 109,000 fewer jobs than a year previously.



The extent to which these impacts prove long-lasting depends not only on whether public health measures (such as social distancing and quarantining) need to be retained or reintroduced, but also whether, even in the absence of these, some changes to consumption habits, business models or public policy priorities are not completely reversed (as many now expect of increases to online shopping, remote working, and health spending). The likelihood pointed to by available data and expert commentary is that the extent of any enduring Covid effect will vary from sector to sector.

For example, food and beverage services might be expected to bounce back quite strongly as public health restrictions are lifted – and perhaps are already doing so.[9] Meanwhile air transport will clearly take longer to recover – international aviation bodies currently expect a return to 95% of pre-pandemic levels of traffic by 2024.[10] Rail transport faces an even more uncertain future, with many expecting a permanent reduction in commuter traffic.

Other areas may see a lasting boost from the pandemic – 'postal and courier services', for example, may experience a permanent acceleration of what was already relatively rapid employment growth. Analysts expect part of the shift towards online shopping and home delivery to be permanent,[11] with economies of scale making it much more profitable for retailers.[12] Amazon was reported to have increased its UK workforce by a third to over 40,000 by the end of 2020.[13]

We should not, however, allow these shorter-term uncertainties to prevent us taking due account of what we do know about the long-term trends and predictable factors that will shape the next five years. The uneven unwinding of Covid's economic legacy may slow or accelerate some of the dynamics we have identified, but is unlikely to alter the overall scale or direction of travel.

What do workers think?

The shifts mentioned here are already being felt by workers across occupations and sectors. In our recent polling,[14] the future of work for workers centred on COVID-19 and how it will continue to affect their work. While the overwhelming majority said that they had felt supported by employers during the pandemic, over 50% of immediate concerns on what work looked like in its next iteration was COVID-19 related. In more detail, responses related to the impact of redundancies as work changed or demand declined, workload stemming from staffing shortages, working hours being reduced, cuts in pay and what shifts to hybrid/remote working would look like.

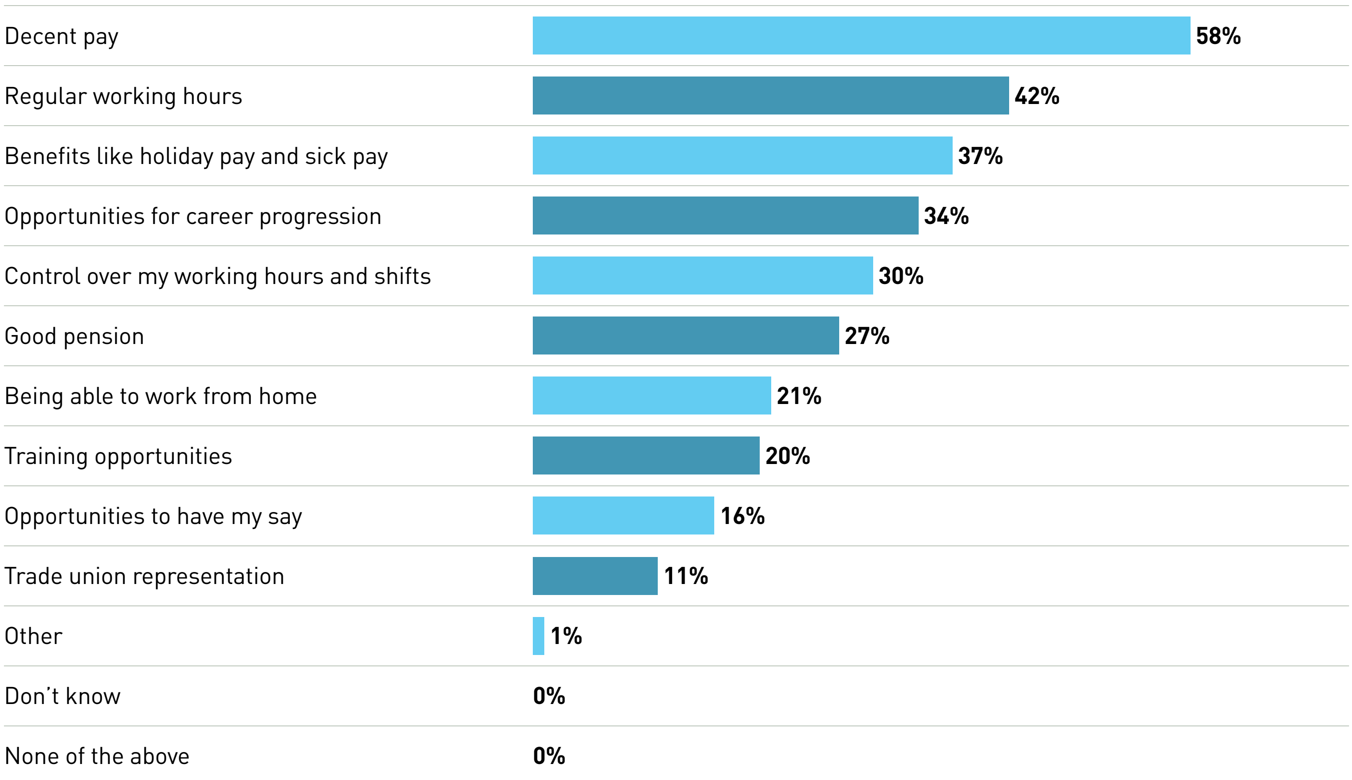
Workers are still looking for traditional markers of a good job, with the top three being decent pay, regular working hours and holiday/sick pay. In areas of worker shortage therefore, these will be highest on the list of considerations in job adverts or recruitment outreach. Indeed, the consideration of pay was highest amongst those in wholesale, retail and transportation sectors.

Out of all of the respondents, food and beverage workers sought regular hours and 42% of respondents in this area wanted more say in the decisions at work. These workers were also more likely than any other group to look for a new job should there be an issue at work.

The survey also suggested that workers who experience a union presence have a better appreciation of the value of a voice at work.

Figure 17. "Which of the following, if any, are the top three things you look for in 'a good job'?"

Source: Survation/Unions 21 poll August 2021



METHODOLOGY AND KEY SOURCES

The Unions 21 report *The Changing World of Work*, published in 2017,[15] was primarily based upon forecast data in the Working Future Report published in 2016 by the UK Commission for Employment and Skills.[16] This provided, as the Unions 21 report stated, "the most comprehensive projections that are available for the UK labour market".

This report reviews, updates and develops the forecasts used by Unions 21 in 2017 on the basis of:

- The most up-to-date outturn data (to March 2021) on the number of jobs (including self-employed roles) in different industrial sectors provided by the ONS Workforce Jobs survey.[17]
- New forecasts for UK jobs growth by industry and occupation up to 2027 produced by the Institute for Employment Research in collaboration with Cambridge Econometrics to inform the most recent Working Futures report published in February 2020. As the final report explains, this analysis is "based upon the use of a variety of research methods, ranging from complex econometric modelling, to other more qualitative approaches".[18]
- A literature review of relevant data, analysis and discussion that could usefully supplement these sources, focussing especially on sources helpful for considering the immediate and longer term impact of the 2020-21 Covid-19 pandemic and associated recession.

As with any economic forecast, the forecasts used in this report are subject to a high degree of uncertainty, and should be taken as offering plausible scenarios rather than exact predictions. This is especially true in the wake of such a disruptive and unprecedented event as the Covid-19 pandemic. They are, however, based upon the best available existing data and expert judgments of the most likely scenarios going forward, and give a good indication of the most likely direction and scale of change over the years ahead.

Unless otherwise stated 'employment' and 'jobs' includes self-employed roles.

Unless otherwise stated, quoted figures are for total number of jobs, both full and part time, not full time equivalent figures.

For the most part this report makes use of standard industrial and occupational classification schemes used by the Office for National Statistics and many international bodies. No classification scheme is perfect, and boundaries between types of job or enterprise cannot always be precisely and definitively drawn. The categories used to organise this data may not always correspond to what we immediately think of as the boundaries of a particular 'industry' (for example, rail maintenance work is counted under 'civil engineering' rather than 'rail transport'). However these schemes are internationally recognised and underpin the most extensive datasets and forecasting models that are currently available. Where relevant, ambiguities and complexities in the definitions are highlighted; detailed descriptions of the categories can be consulted at the ONS website.[19]

REFERENCES

1 For more information about the data and analysis upon which this report is based, see the Appendix on methodology and key sources.

2 Forecasts used in original NIESR research have been compared to outturn data from the ONS Workforce Jobs series; there may be some differences in the datasets used but analysis shows them to be broadly comparable.

3 https://brc.org.uk/media/54304/retail_2020_-final.pdf

4 Economic and Fiscal Outlook, Economy supplementary tables, March 2019 and March 2021: https://obr.uk/download/march-2019-economic-and-fiscal-outlook-supplementary-economy-tables/; https://obr.uk/download/march-2021-economic-and-fiscal-outlook-supplementary-economy-tables/

5 https://onsdigital.github.io/dp-classification-tools/standard-occupational-classification/data/SingleClass.html?soc=92&from=9

6 For more examples see https://onsdigital.github.io/dp-classification-tools/standard-occupational-classification/data/SingleClass.html?soc=61&from=612

7 https://www.resolutionfoundation.org/app/uploads/2020/04/Labour-market-Spotlight.pdf

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18 https://www.gov.uk/government/publications/labour-market-and-skills-projections-2017-to-2027. Thanks are due to the Institute for Employment Research at Warwick University for supplying the full dataset underlying these forecasts

19 See https://www.ons.gov.uk/methodology/classificationsandstandards/ukstandardindustrialclassificationofeconomicactivities/uksic2007 and https://onsdigital.github.io/dp-classification-tools/standard-occupational-classification/ONS_SOC_occupation_coding_tool.html

FIGURE SOURCES

Figure 1: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/workforcejobsbyindustryjobs02

Figure 2: https://www.nomisweb.co.uk/datasets/aps168

Figure 15: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/employeejobsbyindustryjobs03 and https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/selfemploymentjobsbyindustryjobs04

Figure 16: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/employeejobsbyindustryjobs03 and https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/selfemploymentjobsbyindustryjobs04

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