

2024



# Teacher Labour Market in England

Annual Report 2024

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## Introduction

The latest data on teacher recruitment and retention in England shows that teacher supply is in a critical state, representing a substantial risk to the quality of education. Last year's initial teacher training (ITT) recruitment was below target in almost every secondary subject, while this year's applications data suggests significant improvements for the current cycle are unlikely. Meanwhile, little progress has been made on reducing high teacher workload since the pandemic, which has a strong impact on retention. This affirms that actions that are ambitious and radical, yet cost-effective are urgently needed.

The aim of the National Foundation for Educational Research's (NFER) annual series of Teacher Labour Market reports is to monitor the progress the school system in England is making towards meeting the teacher supply challenge. The report summarises new research and key trends in teacher recruitment, retention and working conditions and points towards policy actions that are likely to have the greatest impact on addressing the challenges.

We use Department for Education (DfE) data on teacher training applications and registrations to show how last year's ITT recruitment compared to target and what recruitment is likely to look like this year. We also explore trends in teacher retention using data from the DfE's School Workforce Census (SWC).

Trends in recruitment and retention are driven by changes in the competitiveness of pay and working conditions in teaching compared to other jobs. We therefore also analyse trends in pay and working conditions, primarily using findings from the DfE's Working Lives of Teachers and Leaders (WLTL) survey, the Labour Force Survey (LFS) and the Global Survey of Working Arrangements (G-SWA).

The WLTL is a crucial source of sector-specific information on teachers' workload and perceptions of their working conditions while the LFS enables us to compare teachers' pay and working conditions to graduates in other occupations who are similar in age, gender and region. The G-SWA, meanwhile, enables us to explore the prevalence and value of flexible working in the UK. Further details about the data sources used and variable definitions are in a separate methodology appendix.



**“Teacher supply is in a critical state, which risks the quality of education that children and young people receive. Ambitious, radical and cost-effective policy actions to address teacher recruitment and retention are urgently needed.”**

Jack Worth, NFER  
School Workforce Lead



## Key findings and recommendations



Overall secondary recruitment for 2023/24 reached **half of its target**

**44 per cent more teachers** stated they intended to leave teaching in 2022/23 than the previous year

In 2024/25, **10 out of 17 secondary subjects** are forecast to under-recruit

### Teacher recruitment remains far below targeted levels and leaving rates are likely to increase

Last year's initial teacher training (ITT) recruitment data showed that the number of course registrations increased slightly over the previous year, when ITT recruitment hit a record low. However, last year's secondary recruitment still fell well short of the targeted number of recruits needed to maintain adequate staffing levels in schools.

Policy changes implemented last year to support international recruitment of teachers have shown some success in attracting international ITT trainees and teachers. Increases in training bursary generosity and eligibility also show signs of increasing recruitment for this cycle. However, any improvements are likely to be marginal. ITT applications to February 2024 suggest that 10 out of 17 secondary subjects are forecasted to under-recruit this year.

Teacher leaving rates increased in 2021/22 (the latest year of available data), in a return to pre-pandemic levels. In 2022/23, 44 per cent more teachers said they intended to leave teaching than in the previous year, which suggests that leaving rates may continue rising.

Falling recruitment and rising leaving rates point to the escalating severity of teacher under-supply in England. To address the challenge, policymakers need to consider what actions are available to support the attractiveness of teacher pay and working conditions.

### Little progress has been made on reducing teacher workload since the pandemic and the Government may face a challenge in meeting its workload reduction target

Labour Force Survey (LFS) data shows that, during term time, teachers work longer hours, and are more likely to perceive that they work too many hours, than similar graduates. Workload is the main reason why teachers leave teaching and workload reduction has been a policy priority for Government. In recent years, these efforts have focussed largely on reducing the burden of planning, administration and marking and led to a decrease in teachers' working hours between 2016 and 2019, particularly in these priority areas.

In 2023, the Government announced its ambition to reduce working hours by five hours per week within three years. However, teachers' working hours significantly increased in 2022/23 compared to the previous year, meaning that the Government faces a challenge in meeting this target.

Teachers now say that pupil behaviour is driving higher workload, and behaviour management and pastoral care are key priority areas for workload reduction. More support from outside agencies for specific pupil needs such as SEND support, mental health and safeguarding is a key enabler of further workload reduction.

Schools should therefore continue to sustain their workload reduction efforts, but the focus should now also include behaviour management and pastoral care. Government should also consider how external agencies for supporting specific pupil needs can be supported to help to shift some of the burden of managing pupil behaviour away from teachers.

**Recommendation 1: Government should set up an independent review focussing on how to reduce teachers' workload related to behaviour management and pastoral care, which should consider the role of external support services, such as for special needs and mental health.**

In 2022/23, teachers worked **six hours per week** more than similar graduates in other occupations in a typical working week

Teachers' working hours significantly increased between 2021/22 and 2022/23



**Last year's 6.5 per cent pay rise stalled, but has not substantially reversed, the deterioration in the competitiveness in teacher pay since the pandemic, especially for experienced teachers**

A series of below-inflation pay rises in the 2010s coupled with the 2021 pay freeze and subsequent cost-of-living crisis has meant that teacher pay has fallen significantly in real terms since 2010/11. Over the same period, earnings in the wider UK labour market have followed a trajectory of stronger growth, deteriorating the competitiveness of teacher pay growth compared to other jobs.

The delivery of £30,000 starting salaries has led to a slight improvement in the competitiveness of starting salaries. However, in 2023/24, starting salaries were still three per cent lower in real terms than in 2010/11, growth that was about seven percentage points lower than for average UK earnings.

The 6.5 per cent pay rise for experienced teachers (i.e. those at the top of the upper pay scale) was similar to forecast average earnings growth. It is therefore unlikely that last year's pay award has significantly improved the competitiveness of pay for experienced teachers which, in 2023/24, was 12 per cent lower in real terms than in 2010/11. This earnings growth was about 15 percentage points lower than for average UK earnings.

In 2023/24, real-terms growth in starting salaries since 2010/11 was **seven percentage points lower** than for average UK earnings

In 2023/24, real-terms pay growth for experienced teachers since 2010/11 was **15 percentage points lower** than for average UK earnings

**The 2024/25 pay award should exceed 3.1 per cent, and be fully-funded, in order to improve the competitiveness of teacher pay**

In its 2024 Evidence to the School Teachers' Review Body (STRB), the Department for Education (DfE) asserts that last year's pay award, coupled with improved stability in the overall economic outlook, mean that the 2024 pay award should 'return to a more sustainable level.' However, to help support adequate recruitment and retention, it is imperative that this year's award continues to improve the competitiveness of teacher pay relative to other jobs.

The Office for Budget Responsibility (OBR) forecasts that average earnings growth in the UK labour market will be 3.1 per cent in fiscal year 2024/25 and continue growing around two per cent for the next four years. In the short term, the 2024/25 pay award will, therefore, need to exceed 3.1 per cent. However, a longer-term strategy is also needed to help ensure that future teacher pay awards continue to improve the competitiveness of teacher pay.

Severe funding pressures facing all public services mean that schools are unlikely to be able to afford competitive pay awards for teachers on their own without either more funding or having to make cuts elsewhere. Funding to support teachers' pay must therefore come from Government. In the run-up to the next general election, political parties should develop their plans for how they will effectively address this challenge in the next parliament.

**Recommendation 2: Narrowing the gap between teacher pay growth and the wider labour market is key to supporting recruitment and retention. The 2024 pay award should therefore exceed the 3.1 per cent forecasted rise in earnings in the wider labour market and be fully-funded.**

**Recommendation 3: Political parties should set out their plans to develop a long-term strategy for pay-setting which reduces the gap in earnings growth with competing occupations, while ensuring that schools have sufficient funding to enact these pay increases without making cuts elsewhere.**

**Remote and hybrid working remains more prevalent in the wider graduate labour market than in teaching. We estimate that teacher pay would have to rise by 1.8 per cent to compensate for this inherent inflexibility**

Flexible working arrangements, such as ad-hoc schedule adaptations and off-site time for completing planning, preparation and assessment (PPA), are becoming slightly more common in teaching.

However, remote and hybrid working has proliferated in the wider graduate labour market since the pandemic, while remaining out of reach for most teachers. In 2022/23, 46 per cent of graduates reported they mainly worked from home and 65 per cent reported they worked either fully remote or in a 'hybrid' arrangement. Meanwhile, in 2021/22, two per cent of primary classroom teachers and one per cent of secondary classroom teachers reported that they had a formally-agreed arrangement to work remotely.

Hybrid and remote working is valued by employees. Similar graduates working in non-education occupations place a value on the option to work from home two or three days per week as equivalent to a 6.2 per cent salary increase. Yet access to hybrid and remote working for frontline public service professions is unlikely to ever match other jobs in the graduate workforce.

Providing compensation to workers in these professions is one option for preventing this inherent inflexibility from undermining the attractiveness of their jobs. We estimate this pay premium for teachers should be 1.8 per cent, which would need to be awarded on top of the pay rise needed to match teachers' earnings growth with the wider economy.

In 2022/23, 65 per cent of graduates reported they worked either fully remote or in a 'hybrid' arrangement

**Recommendation 4: Political parties should consider introducing a Frontline Workers Pay Premium to compensate public sector workers for the lack of remote and hybrid working opportunities in their jobs compared to the wider graduate labour market. We estimate that this would represent a 1.8 per cent consolidated pay increase for teachers.**





### Secondary ITT recruitment in 2023/24 reached half of its target

Recruitment to both primary and secondary ITT in 2023/24 was below the target number of trainees that the DfE estimated the school system needed to recruit to meet future staffing needs. This shows that post-pandemic teacher recruitment in England continues to be a significant policy challenge and is likely only to worsen without concerted action.

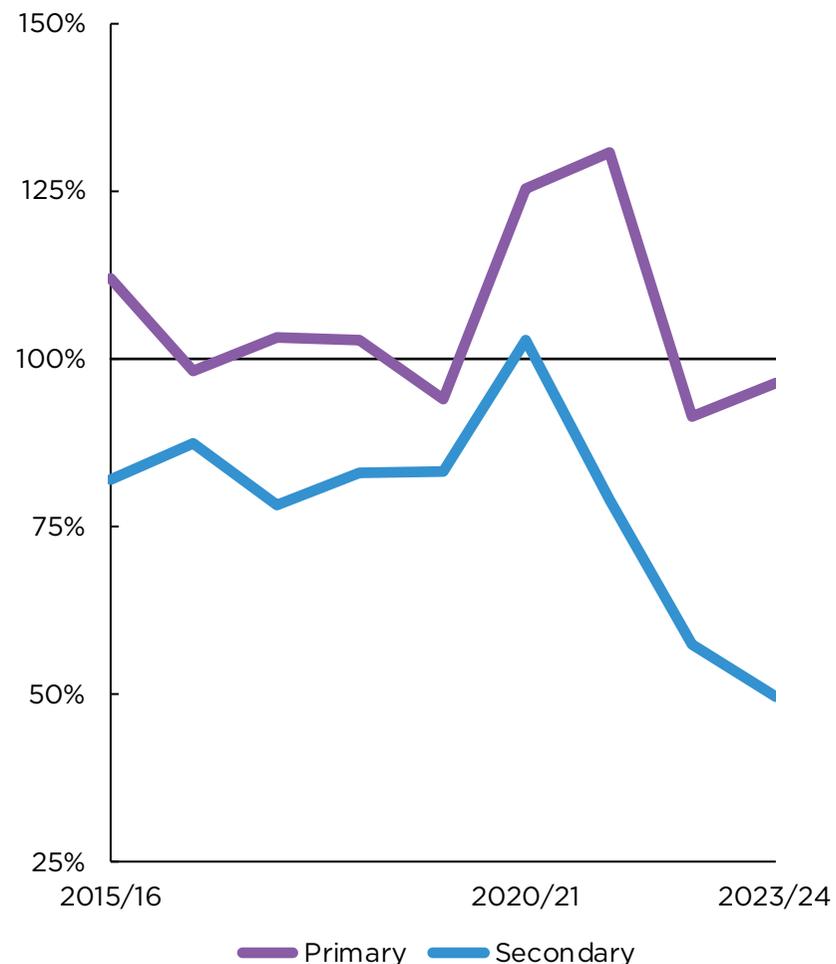
Last year's under-recruitment was most severe for secondary, which only reached half of its target. This was a continuation of a downward trend since the pandemic and was historically low recruitment relative to target.

Secondary under-recruitment was mainly driven by a significant increase in secondary recruitment targets, rather than a fall in recruits. The number of secondary ITT recruits in 2023/24, while 22 per cent lower than pre-pandemic, was up nine per cent compared to 2022/23. At the same time the overall target for secondary recruitment was up 26 per cent compared to 2022/23.

Recruitment targets are principally based on pupil projections alongside the estimated number of teachers entering and leaving teaching. Targets are then adjusted upwards or downwards based on how many teachers were recruited in the last two years. Rising teacher leaving rates alongside persistent under-recruitment of secondary trainee teachers since the pandemic were key drivers of target increases for the 2023/24 cycle (DfE, 2023b). The modest increase in secondary recruits in 2023/24 is therefore unlikely to be sufficient to meet increasing secondary pupil numbers and make up for recruitment shortfalls since the pandemic.

Recruitment for primary generally tends to be closer to target than for secondary. In 2023/24, primary recruitment reached 96 per cent of target which, while still below target, was much closer than for secondary.

Postgraduate ITT recruitment vs target  
2015/16 - 2023/24 (%)



Source: DfE ITT census (2015/16 - 2023/24)

### All secondary subjects except three under-recruited relative to target in 2023/24

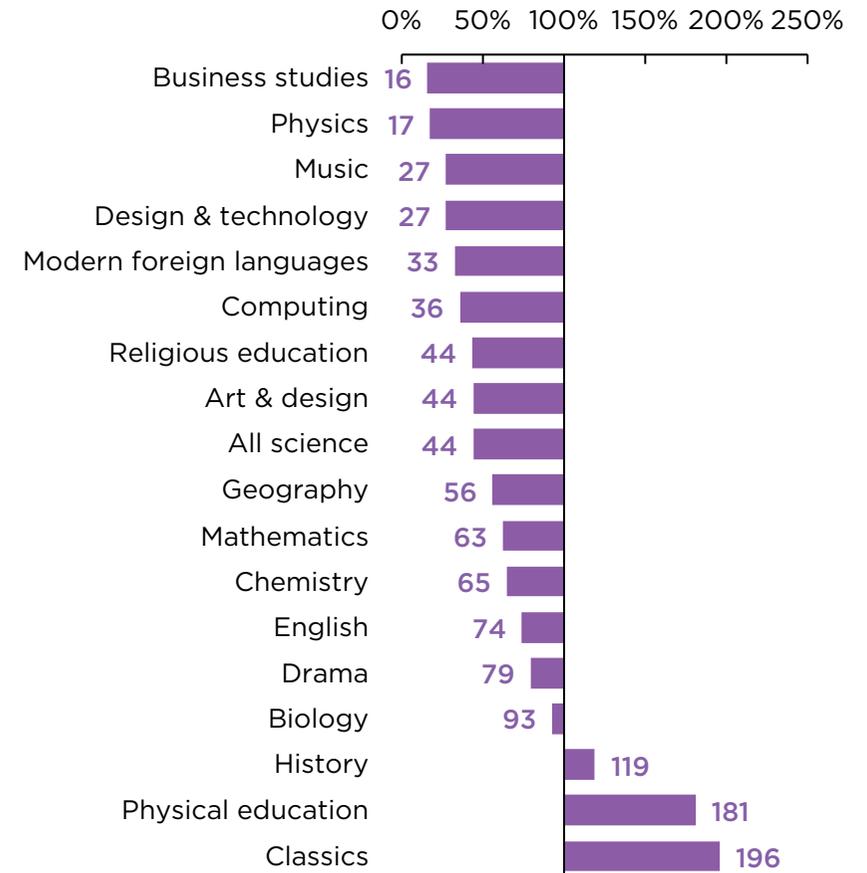
While overall secondary recruitment reached only half of target in 2023/24, under-recruitment was more severe in some subjects than others. Five subjects were at or below a third of target, including business studies and physics, which reached 16 and 17 per cent of target, respectively.

English and drama were around a quarter below target, while biology was only seven per cent below target. Biology, however, was an outlier among science subjects (biology, chemistry and physics) which, as a whole, reached 44 per cent of target.

The number of recruits in some subjects increased last year, likely driven by increases in training bursaries available for those subjects. However, recruitment targets also increased in 2023/24 for all but three secondary subjects. This meant that most secondary subjects under-recruited by more than they did in 2022/23, even though some subjects saw an increase in recruits. Target increases were highest for business studies and music, which is why these subjects were among the three which missed their targets by the most (DfE, 2023b).

Rising targets, coupled with only modest growth in recruitment in key secondary subjects, shows that shortages of subject specialist teachers are likely to represent a growing problem for schools, particularly in key shortage subjects, such as physics and modern foreign languages (MFL).

### 2023/24 postgraduate ITT recruitment vs target, by subject



Source: DfE ITT census (2023/24)

### New financial incentives aimed at international trainees have led to more physics recruits

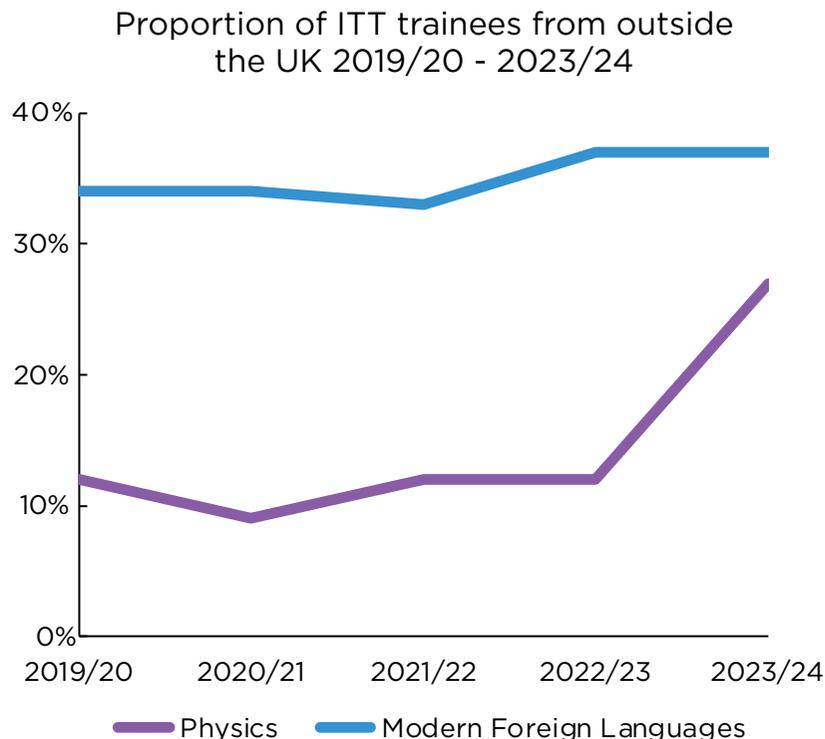
In March 2023, the Government introduced the international relocation payment (IRP) to attract trainees and already-qualified languages and physics teachers from abroad to train and / or work in England. The payment is worth £10,000 and is intended to help foreign teachers cover visa costs and other related relocation expenses. In addition to the IRP, non-UK physics and languages trainees are also eligible to receive training bursaries (worth up to £28,000 in 2024/25).

These policy changes helped to generate a surge in international applications in 2023/24, particularly in physics, where the overall number of applications was 253 per cent higher than the previous year. However, the surge in applications only led to a 41 per cent increase in acceptances, almost certainly because of a higher than average rejection rate. Further, there were only 13 per cent more physics enrolments, so a large proportion of the international acceptances also withdrew or did not register to a course. The surge in international applications therefore did not translate into a similar-sized surge in registrations.

Nonetheless, the IRP and expanded bursary eligibility is likely to have induced some international physics teachers to train in England. Of all trainees registered to a physics course in 2023/24, 27 per cent were non-UK nationals, which was an increase from around 10 per cent in previous years.

The changes also applied to MFL applicants, which led to an 87 per cent increase in MFL applications in the 2023/24 cycle. Ultimately, however, this only translated into a 33 per cent increase in registrations. The IRP and bursaries eligibility also appear not to have had as significant an impact on international MFL trainees as in physics, as the proportion of trainees from outside the UK in the 2023/24 cycle was roughly in line with previous years.

Overall, the data suggests that financial incentives for international trainees likely did help to boost teacher recruitment in 2023/24, and therefore can play a small part in addressing the overall teacher supply challenge. However, they did not improve recruitment to the required levels on their own and their impact on longer-term supply (e.g. retention) will need careful evaluation.



Source: DfE ITT census (2019/20 - 2023/24)

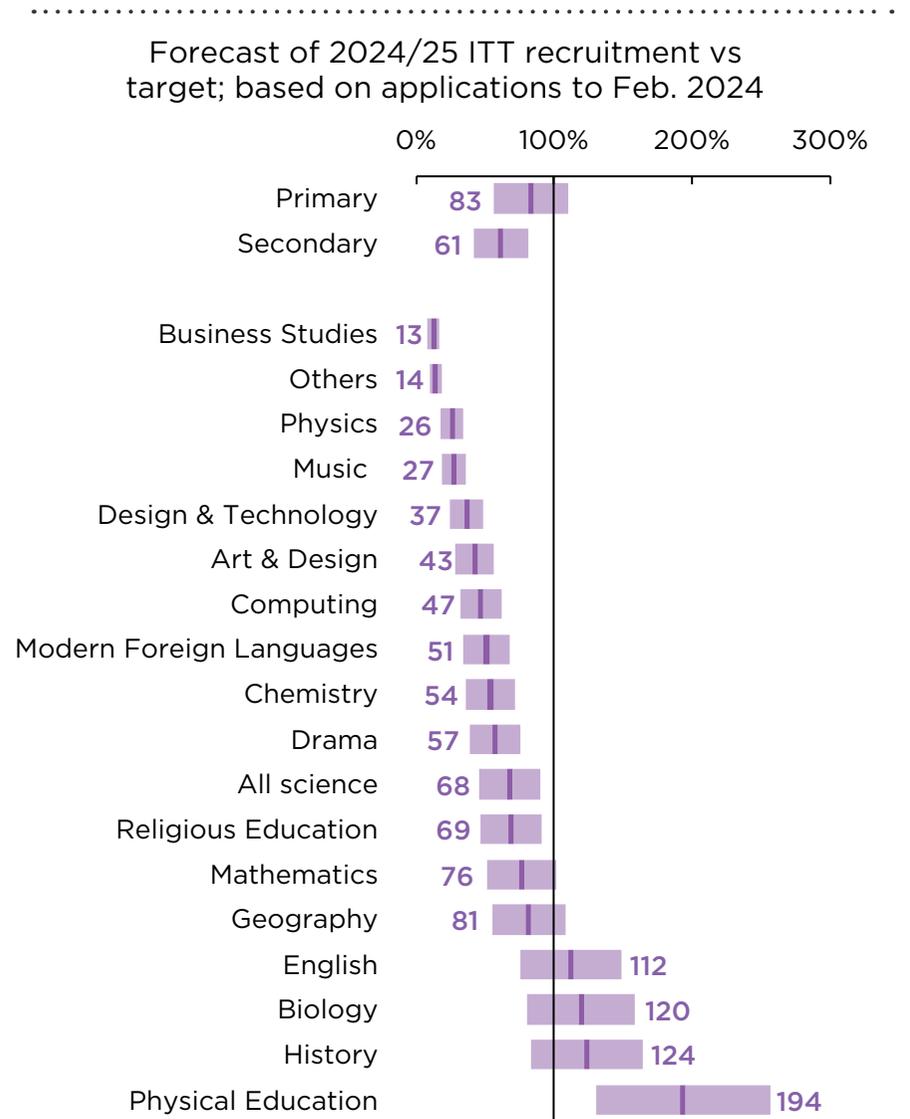
**Data on ITT applications so far this year suggests that 10 out of 17 secondary subjects are at risk of under-recruiting**

NFER’s forecast for recruitment in the 2024/25 cycle, based on applications made up to February 2024 alongside this year’s recruitment targets, suggests that overall secondary recruitment is likely to be around 61 per cent of target – an improvement compared to 2023/24. Primary recruitment however, which is usually at or above its target each year, is forecast to reach only 83 per cent of target next year. This would be a significant deterioration compared to previous years, driven in part by a two per cent increase in the 2024/25 primary recruitment target (DfE, 2024b).

Some secondary subjects (e.g. biology, English, religious education, geography, MFL, and physics) are on track for slight improvements in recruitment this year compared to last year, driven in part by slight improvements in recruitment. Target reductions for 2024/25 in several secondary subjects (including geography, design & technology, English and physics) have also contributed to this improved outlook (DfE, 2024b). Nonetheless, the forecast indicates that 10 out of 17 secondary subjects are at risk of under-recruiting this year.

There are some uncertainties inherent in this forecast. First, it is based on ITT applications made up to February 2024, which is still early in the cycle. Additionally, last year’s financial incentive policy changes for international trainees led to more applications than end-of-cycle registrations for physics and MFL. This has added additional complexity to the forecast as it means that February’s application figures may be overstating end-of-cycle recruitment (particularly for physics and MFL), which the forecast accounts for as much as possible (see the methodology appendix for details).

Nonetheless, while we may expect some modest overall improvement in recruitment this year, the forecast shows that most secondary subjects are still at risk of under-recruiting.



Note: Classics is forecast to reach 338 per cent of target but is not shown as it exceeds the scale of the chart. Forecasts represent the central estimate, with the shaded bands showing the predictions’ 95 per cent confidence intervals.

Source: NFER analysis of DfE Apply and UCAS data

## Recruitment in shortage subjects has improved slightly due to more generous bursaries

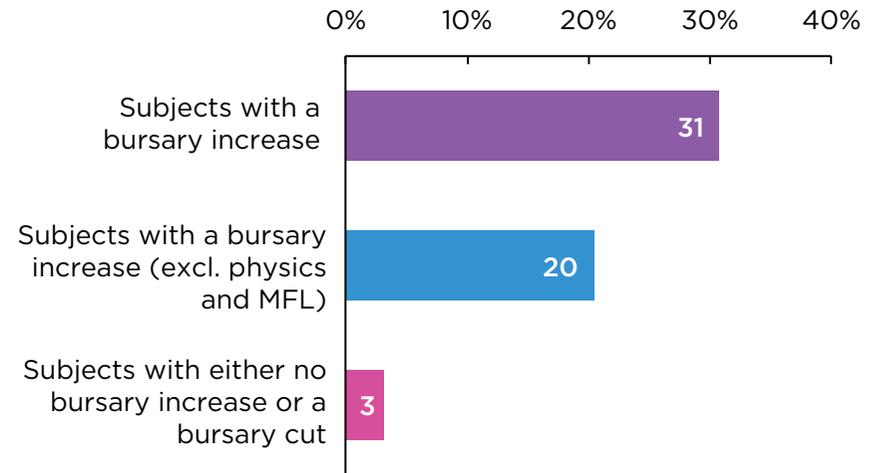
Training bursaries are a key policy tool available to the Government to support teacher recruitment in subjects where it is needed the most. Research clearly shows that bursary increases do lead to higher recruitment – a £1,000 increase in a subject’s training bursary on average leads to a 2.9 per cent increase in ITT applications (National Audit Office, 2016; Worth and Hollis, 2021).

Bursaries in eight out of 17 subjects increased this year – eligible maths, physics, chemistry and computing trainees in the 2024/25 cycle are able to receive the maximum bursary of £28,000. Bursaries of £25,000 are available for trainees in biology, MFL, geography, classics and design & technology. However, the bursary for English was cut from £15,000 to £10,000.

Bursary increases are likely a driver of improved recruitment in some subjects this year. Comparing February 2024 with February 2023, the cumulative number of placed applications for subjects where the bursary increased this year was 31 per cent higher than last year, while placed applications in subjects which did not experience a bursary increase were only three per cent higher. Even excluding physics and MFL, where the introduction of the IRP and changes to international bursary eligibility may have also helped support recruitment, applications in subjects which experienced a bursary increase this year were 20 per cent higher than last year.

Recent NFER research found that bursary increases are not associated with any significant difference in retention rates, and therefore help to generate a sustained increase in teacher supply over the long-term (McLean, Tang and Worth, 2023). Therefore, bursaries remain an important and cost-effective way of supporting teacher supply, particularly in shortage subjects.

Year-on-year change in recruitment numbers (2022/23 - 2023/24)



Source (top): NFER analysis of DfE Apply data (February 2023 and February 2024)

Source (bottom): McLean, Tang and Worth (2023)

A **£5,000 bursary** increase leads to **15 per cent** more ITT trainees and teachers teaching over the long term

£100m spent on bursaries has a **similar teacher supply impact** to an equivalent spend on early career payments

## Leaving rates continue to rise post-pandemic, although less so for recent cohorts of early career teachers

The latest data from the School Workforce Census (SWC) shows that 9.7 per cent of teachers left teaching in 2021/22. This was similar to the leaving rate in 2018/19, prior to the pandemic.

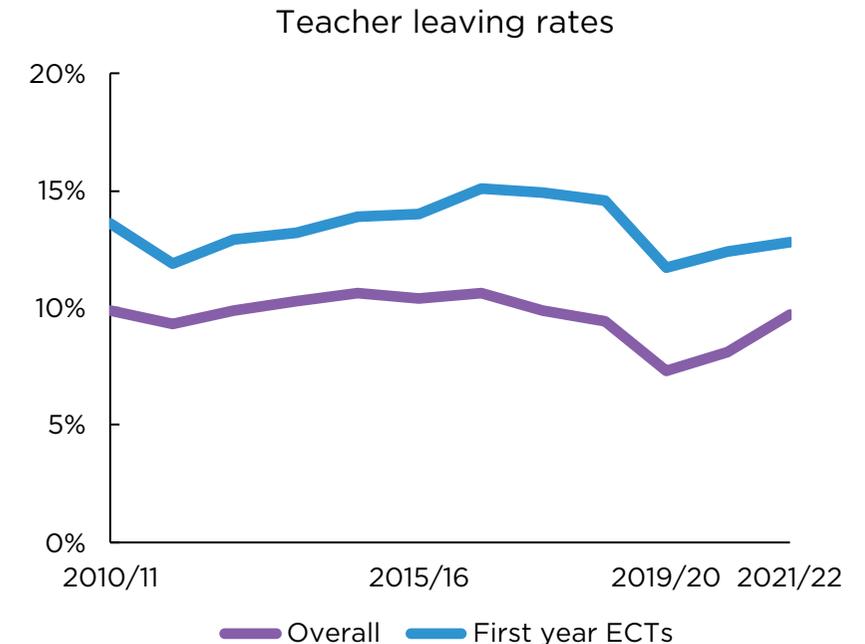
Leaving rates dropped considerably during the pandemic as teachers put off their decision to leave due to labour market uncertainty. Rising leaving rates in 2021/22 could reflect some of these delayed leaving decisions being taken then, during the post-pandemic recovery.

One potential bright spot in the leaving rate data is for early career teachers (ECTs) – those in their first two years of teaching. While ECTs are more likely to leave teaching than more experienced teachers, the SWC shows that leaving rates for first-year ECTs have followed a broadly similar pattern over time as other teachers. However, the post-pandemic rise in leaving rates has been more muted for first-year ECTs than for all teachers overall, rising by about one percentage point between 2019/20 and 2021/22, compared to three percentage points for all teachers.

This could be driven by numerous factors. For example, the DfE has been targeting pay rises at ECTs since 2017/18 to support ECT retention (School Teachers Review Body, 2023). Higher pay growth may have led to a differential increase in ECT's retention rate.

The 2021/22 cohort were also the first to experience the national roll-out of the Early Career Framework (ECF): a structured two-year entitlement to induction support, which aims to improve ECT retention. However, the retention outcomes for the first cohort of ECF inductees in the latest year of SWC data relates only to the end of their first year. The data therefore does not yet provide a complete picture of any potential impact of the ECF on ECT retention, for which one more year of SWC data (for 2023/24) will be required.

Isolating the impact of the ECF will also be very challenging since there is no contemporaneous comparison group to assess what might have happened to retention without the rollout of the ECF (e.g. given changes in pay). NFER will be publishing an evaluation of the impact of the ECF Early Rollout on retention later this year (Education Endowment Foundation, 2022).



Source: DfE School Workforce Census (2010/11 – 2022/23)

### Forty-four per cent more teachers said they intended to leave teaching in 2022/23 than in 2021/22.

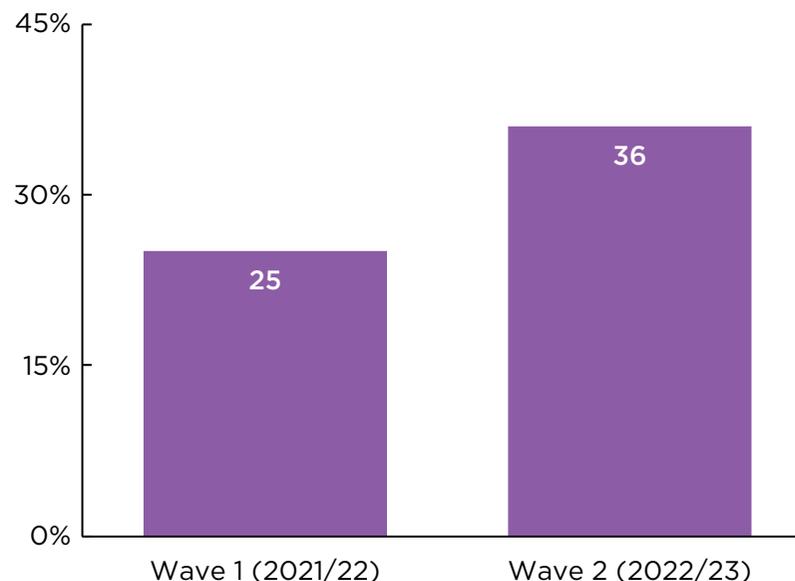
While the SWC is a valuable source of data for understanding the historical trajectory of retention rates, it is generally not informative about teachers’ leaving decisions within the last year due to its lag. Other sources of survey data, such as the Working Lives of Teachers and Leaders (WLTL) survey, can help to fill this timeliness gap.

The WLTL is a survey of teachers and leaders in state-sector schools, commissioned by the DfE, which collects data on teachers’ perceptions of their working environment. WLTL respondents were asked whether they intended to leave teaching within the next 12 months. In 2021/22, a quarter of respondents said that they intended to leave (Adams *et al.*, 2023). However, in 2022/23, 36 per cent of respondents said they were considering leaving – a 44 per cent increase on the previous year (DfE, 2024c).

A teacher’s stated intention to leave is not a perfect predictor of actually leaving. Only 12 per cent of respondents who said they were considering leaving teaching in 2021/22 left by the next year (DfE, 2024c). However, even if a fraction of those with an intention to leave actually do, the considerable growth in leaving intention suggests that leaving rates may continue to rise in the coming years. NFER will be conducting further research to explore whether the WLTL leaving intention data is a useful leading indicator of future retention rates.

Rising leaving rates have implications for teacher supply generally but also for DfE’s recruitment targets as teachers who leave teaching must be replaced by teachers entering the workforce. In its target setting for the 2023/24 cycle, the DfE assumed that retention rates would improve (DfE, 2023b). However, if retention rates have, in fact, worsened since the pandemic, then last year’s targets may have underestimated teacher demand, which would then need to be offset by higher future targets.

Proportion considering leaving teaching in the next 12 months



Source: Working Lives of Teachers and Leaders (waves 1 and 2)

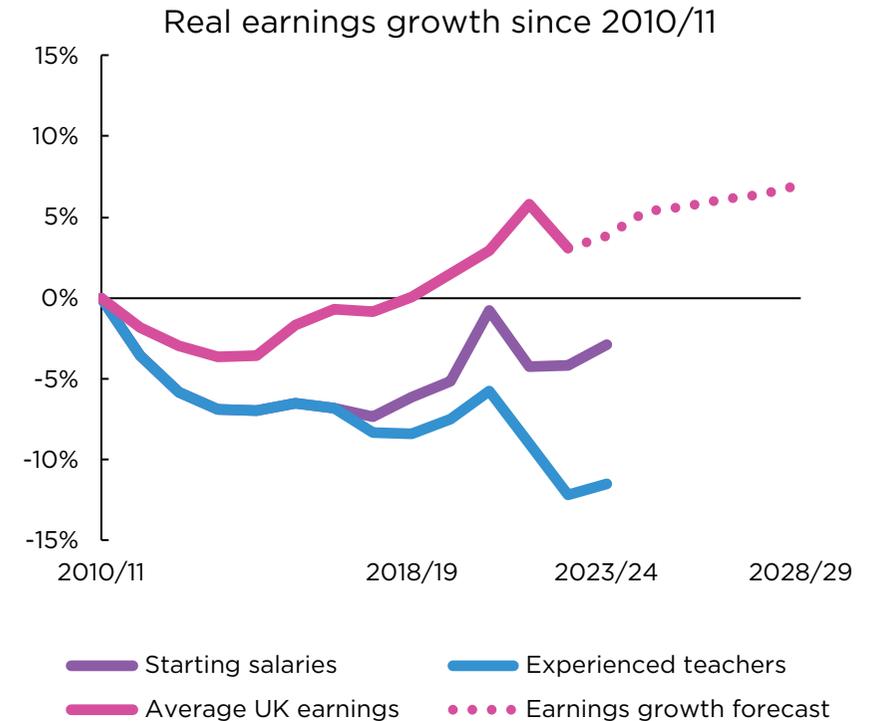
### Since 2010/11, teacher pay has fallen significantly in real terms and lagged behind earnings growth in the wider labour market

Public sector pay caps throughout the 2010s, the 2021/22 pay freeze and the cost-of-living crisis have meant that teachers' pay has failed to keep up with inflation since 2010/11. This has been most pronounced for more experienced teachers and school leaders. In 2023/24, despite the 6.5 per cent increase, pay for experienced teachers was 12 per cent lower in real terms than in 2010/11. Even though it was the highest rise in decades, the 2023/24 pay award has not substantially reversed the considerable pay deterioration experienced teachers have faced since 2010/11.

Starting salaries have fared relatively better because the Government has targeted higher pay rises at ECTs since 2017/18 (School Teachers Review Body, 2023). Pay for ECTs rose by 8.9 per cent in 2022/23 and 7.1 per cent in 2023/24 to bring starting salaries to £30,000 - a 2019 Conservative Party manifesto commitment. The starting salary increases mean they were only three per cent lower in real terms in 2023/24 compared to 2010/11.

However, over the same period, average earnings in the wider labour market have followed a stronger growth trajectory. Average earnings in the UK economy were three per cent higher in real terms in 2022/23 (the last full fiscal year of available data) than in 2010/11. This was about seven percentage points higher than for teacher starting salaries in 2022/23 and 15 percentage points higher than for experienced teachers. These gaps have grown from six and eight percentage points, respectively, before the pandemic in 2018/19.

The 2023/24 pay rise was similar to the rate of average earnings growth, so is unlikely to have significantly narrowed these gaps. Moreover, in its March 2024 Economic and Fiscal Outlook, the Office for Budget Responsibility (OBR) forecasts that earnings in the wider labour market will continue to grow in real terms from 2024/25 to 2028/29 (Office for Budget Responsibility, 2024). Teacher pay will therefore need to match these increases just to maintain competitiveness relative to other jobs.



Notes: 'Experienced teachers' refers to teachers at the top of the upper pay scale. Dotted line represents the forecast of real earnings growth based on OBR projections from March 2024.

Source: School Teachers' Pay and Conditions Document, Office for National Statistics, Office for Budget Responsibility

### Teachers' position in the income distribution has fallen significantly since 2010/11

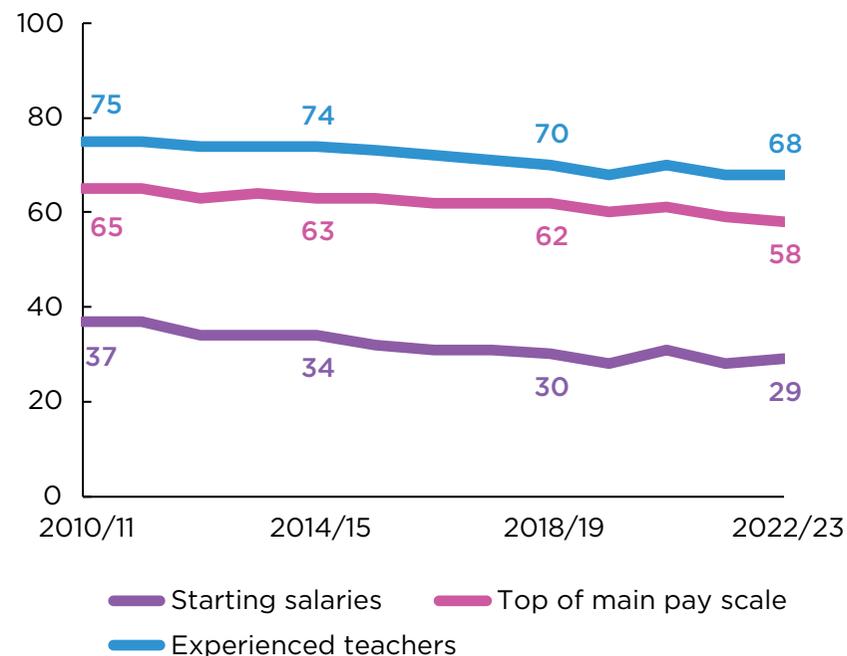
Research clearly shows that the competitiveness of teacher pay relative to other occupations is linked to teacher recruitment and retention (Dolton and van der Klaauw, 1999). Comparing earnings growth for teachers to the wider labour market can, therefore, be useful to understand changes in competitiveness, since NFER research shows that teachers leave teaching for a wide variety of non-professional jobs (Worth and McLean, 2022).

However, strong average earnings growth in the UK economy has been driven in part by above-inflation increases to the minimum wage. After adjusting for inflation, the National Living Wage has increased by 14 per cent between April 2015 and February 2023 (Low Pay Commission, 2023). Therefore, comparing teacher pay growth to average earnings growth in the entire labour force may risk overstating the fall in competitiveness of teacher pay, relative to other jobs at a similar part of the income distribution.

Data from the Annual Survey of Hours and Earnings (ASHE) shows the position that classroom teacher pay has held in the income distribution over time, which may be a better indication of how the competitiveness of teacher pay has changed. In 2010/11, teachers' starting salaries were at the 37th percentile of earnings for full-time workers in England (i.e. 37 per cent of other full-time workers in England earned less). The top of the main pay scale was at the 65th percentile, while experienced teachers were at the 75th percentile.

By 2022/23, teachers' position in the income distribution had deteriorated. Teachers on starting salaries had fallen to the 29th percentile while those at the top of the main pay scale and experienced teachers had fallen to the 58th and 68th percentiles, respectively. Most of this deterioration occurred prior to the pandemic, but even the significant 2022/23 pay rise has not substantially improved this position. ASHE data is not yet available for 2023/24 to show how last year's pay award has affected this picture. Nonetheless, the data supports the conclusion that the competitiveness of teacher pay has deteriorated over time.

Position in the full-time income distribution in England (percentile; 2010/11 - 2022/23)



Note: 'Experienced teachers' refers to teachers at the top of the upper pay scale.

Source: School Teachers' Pay and Conditions Document; NFER analysis of ASHE data (2010 - 2023)

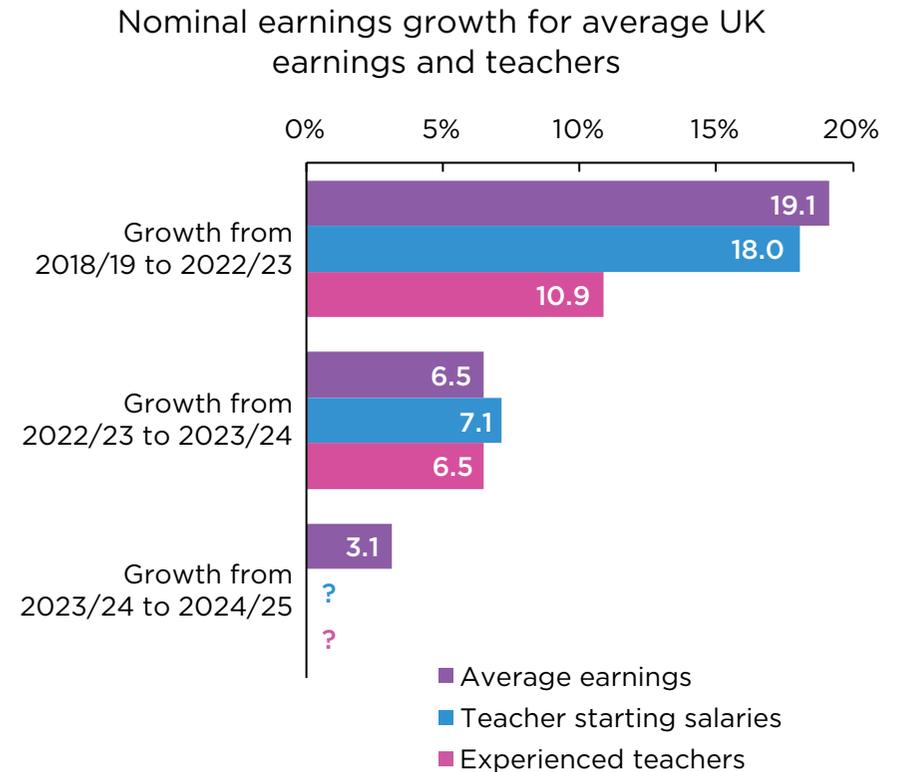
### Teacher pay needs to at least match the expected 3.1 per cent average earnings growth to maintain competitiveness

Last year's teacher pay award, while the highest in decades, was similar to average earnings growth across the labour market in fiscal year 2023/24. It is therefore unlikely to have significantly contributed to narrowing the gap in earnings growth compared to the wider labour market, particularly for experienced teachers, which had further widened since before the pandemic.

In its 2024 Evidence to the School Teachers' Review Body (STRB), the DfE states that last year's pay award coupled with more stability in the macroeconomic context, 'support[s] the return of teacher pay awards to a more sustainable level' (DfE, 2024a). However, a pay award that at least keeps the competitiveness of teaching stable relative to the outside labour market is important for supporting both recruitment and retention.

The OBR forecasts that average earnings will rise by 3.1 per cent in 2024/25. Therefore, the teacher pay award needs to at least match the expected 3.1 per cent average earnings growth to maintain competitiveness. Exceeding average earnings growth is likely to improve competitiveness, but would require more resource to support it at a time when both school and public finances are severely constrained.

The pay award also needs to be affordable for schools. Research from the Institute for Fiscal Studies (IFS) suggests that a three per cent pay rise for teachers, alongside forecasted increases in other school costs, is likely to exceed schools' available funding for 2024/25 (Sibieta, 2024a, 2024b). Setting a competitive pay award without any additional funding for schools would likely increase the pressure on school budgets when more than half of schools are already in deficit and facing other cost pressures (Julius and Schwendel, 2024). Therefore, additional funding to implement a competitive pay award would need to come from Government.



Notes: 'Experienced teachers' refers to teachers at the top of the upper pay scale. Based on OBR earnings growth projections from March 2024.

Source: School Teachers' Pay and Conditions Document, Office for National Statistics, Office for Budget Responsibility

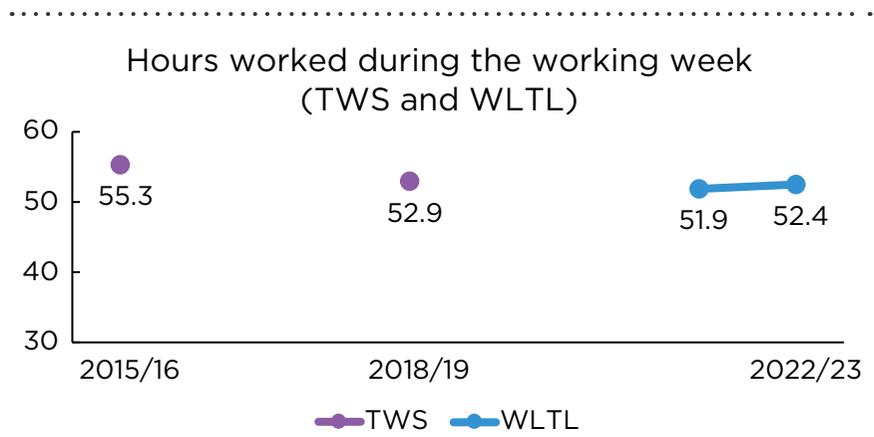
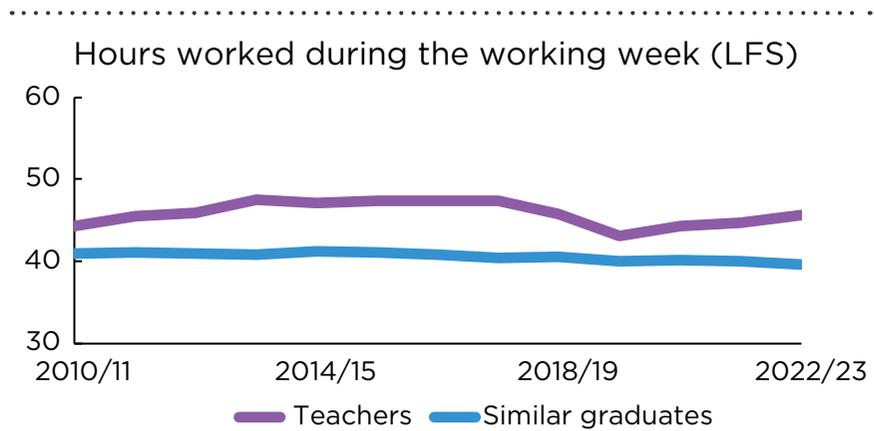
### Teachers' working hours increased in 2023 and Government may face a challenge in meeting its workload reduction target

High workload has a strong negative impact on teacher retention (Lynch *et al.*, 2016; Adams *et al.*, 2023). Nearly all (94 per cent) of the teachers who were considering leaving cited high workload as a reason (DfE, 2024c).

Reducing excessive workload has been a policy priority for Government since the 2016 Workload Challenge. The Teacher Workload Survey (TWS) and Labour Force Survey (LFS) data both showed that working hours for teachers fell between 2015/16 and 2018/19. The DfE has an ambition to reduce working hours by five hours per week within three years (DfE, 2024d) and has set up a workload reduction taskforce to provide recommendations on how to meet this target.

However, the latest LFS data shows that teachers' reported working hours increased last year, by one hour per week, to 45.7 hours per working week in 2022/23. Teachers work longer hours in a typical working week than similar graduates (i.e. graduates with similar demographic characteristics who work outside of teaching - see methodological appendix for full definition) and this gap has widened since the pandemic. Teachers work roughly similar hours when averaged across the year, due to having longer holiday periods.

WLTL data also showed that teachers' working hours increased by about half an hour in 2022/23 compared to the previous year. Teachers generally report higher working hours in the WLTL - and its predecessor, the TWS - than in the LFS. However, despite this, both data sources track a similar pattern over time, including the rise in working hours in 2022/23. The latest data shows that working hours are rising, just as the Government is aiming to reduce working hours, meaning it may face a considerable challenge in doing so.



Note: Representative of full-time teachers and similar graduates who worked a full week during the survey reference week.

Source (top): NFER analysis of Labour Force Survey data (2010/11 - 2022/23).

Source (bottom): Teacher Workload Survey (2016, 2019); Working Lives of Teachers and Leaders (waves 1 and 2).

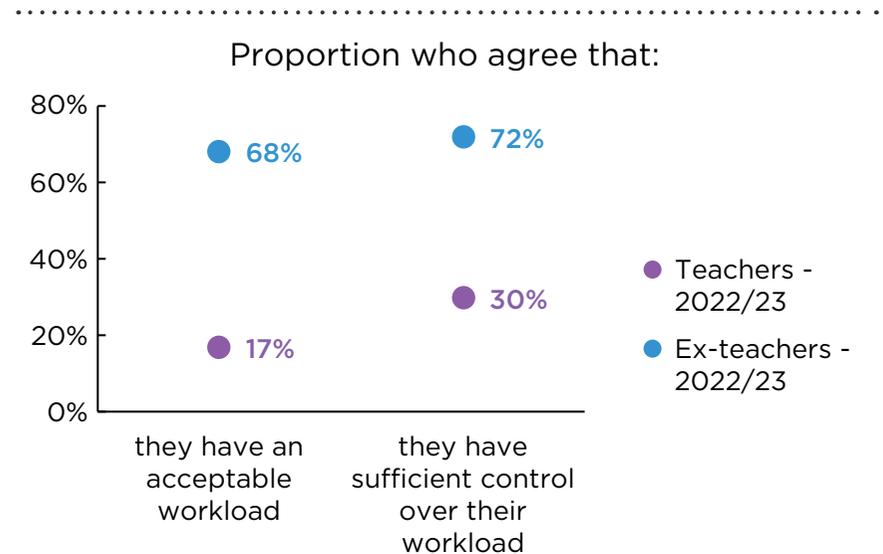
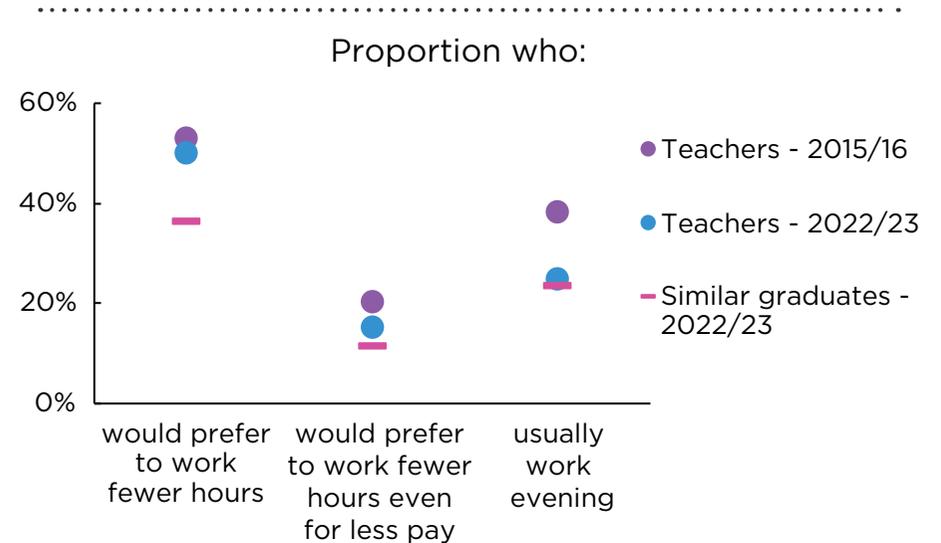
**Despite some improvements since 2015/16, most teachers remain dissatisfied with their workload**

Teachers in 2022/23 were more likely than similar graduates to feel that they work too many hours. LFS data shows that half of teachers in 2022/23 reported that they would prefer to work fewer hours, compared to 37 per cent of similar graduates. Similarly, 15 per cent of full-time teachers reported that they would prefer to work fewer hours even if it meant less pay, compared to 12 per cent of similar graduates. However, the proportion of teachers who reported that they usually work evenings was not statistically significantly different from similar graduates working in other occupations.

The fall in working hours prior to the pandemic has coincided with the proportion of teachers reporting they would prefer to work fewer hours, who would accept a pay cut to do so, and who usually work evenings, which have all fallen since 2015/16. However, this fall has not eliminated the gaps in preferences for fewer hours with similar graduates.

Teachers also have high dissatisfaction with their workload. WLTL data shows that only 17 per cent of teachers felt that they had an acceptable workload in 2022/23. Similarly, only 30 per cent felt they had sufficient control over their workload (IFF Research, 2024).

The WLTL also suggests that leaving teaching is associated with an improvement in workload satisfaction. Among ex-teachers surveyed in 2022/23 who had left teaching for another job the previous year, 68 per cent reported that they felt they had an acceptable workload in their new job, four times more than for teachers in service that year. Meanwhile, 72 per cent of ex-teachers felt they had sufficient control over their workload in their new job, 2.5 times higher than for teachers that year (IFF Research, 2024).



Source (top): NFER analysis of Labour Force Survey data (2015/16 and 2022/23).

Source (bottom): Working Lives of Teachers and Leaders (wave 2).

### Schools have adopted strategies to address high workload, but behaviour management and pastoral care remains a key priority area for further workload reduction

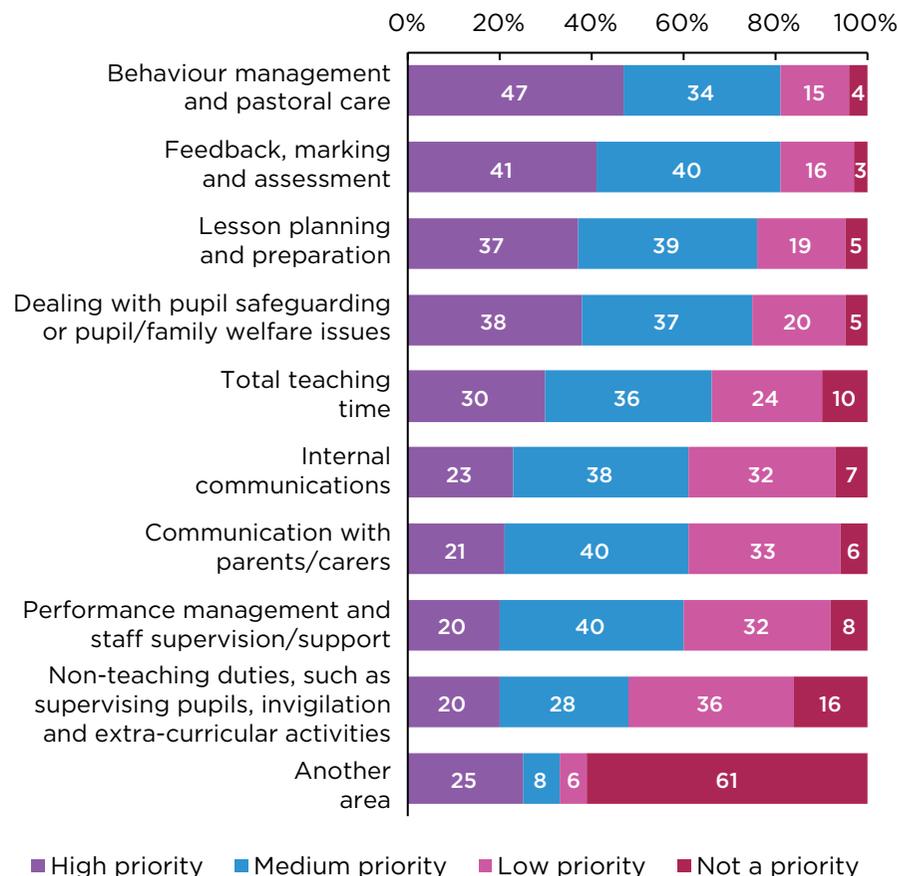
NFER’s recent practice review on managing teacher workload for the Education Endowment Foundation (EEF) shows that schools recognise the importance of reducing teacher workload (Martin *et al.*, 2023). Among teachers and leaders surveyed, nearly all said that their school had implemented at least one workload reduction strategy between 2021/22 and 2022/23, while most schools had adopted more than one. Teachers were more likely to have positive views of their workload where their school had adopted multiple workload reduction strategies.

Much of the focus of reducing workload in recent years has been on managing teachers’ administrative burden (CooperGibson Research, 2023). However, teachers and leaders surveyed in NFER’s research also highlighted several areas which they felt were priority areas for further workload reduction. The area highlighted most frequently as being a high priority by respondents was behaviour management and pastoral care.

Teachers say that pupil behaviour is driving higher workload. WLTL data shows that in 2022/23, 57 per cent of teachers said they spent too much time on behaviour incident follow-up, versus 50 per cent the previous year (DfE, 2024c). This is in line with evidence showing that behaviour management has become more of a challenge since the pandemic. WLTL data shows that only 49 per cent of teachers rated pupil behaviour in their school as ‘good’ or ‘very good’ in 2022/23, down from 58 per cent the previous year (DfE, 2024c).

Overall, despite the steady progress made at reducing workload in the areas of planning, marking and administration between 2015/16 and 2021/22, more progress is needed. Schools’ workload reduction efforts need to be sustained, but attention should turn to examining external workload drivers. For example, 63 per cent of teachers cited more support from outside agencies for specific pupil needs such as SEND support, mental health and safeguarding as a key enabler of further workload reduction (Martin *et al.*, 2023).

Approaches identified as priorities to reduce workload in schools



Source: Martin *et al.* (2023)

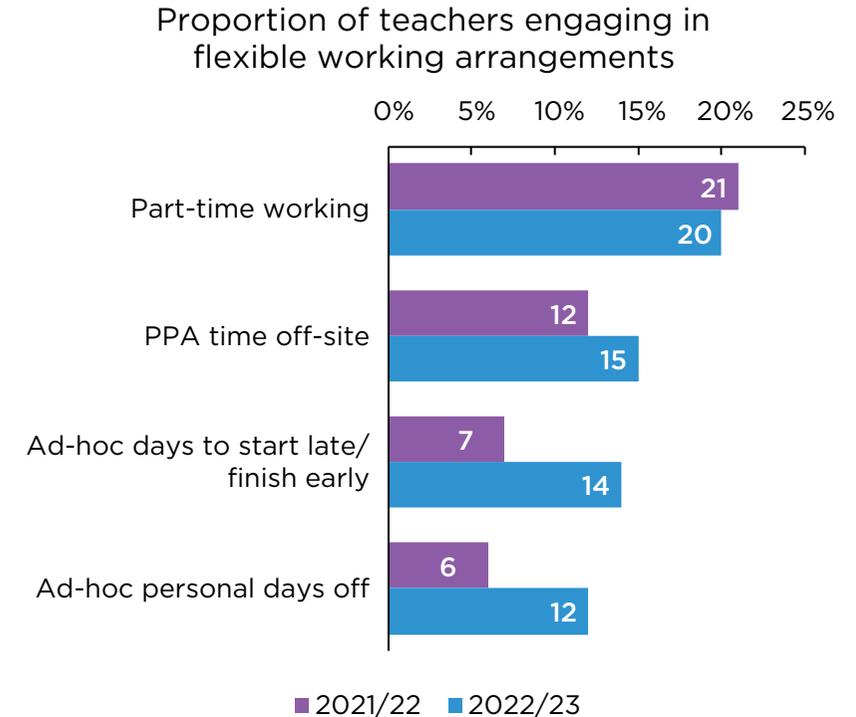
### Flexible working arrangements for teachers became slightly more common in the last year

NFER's recent evidence review on flexible working for the EEF shows that there is considerable demand among teachers for flexible working (ad-hoc and regular working schedule adaptations as well as part-time working), which outstrips the availability of such arrangements in schools (Harland, Bradley and Worth, 2023).

WLTL data shows that flexible working has become more common in schools. While the proportion of teachers working part time was slightly lower in 2022/23 than the previous year, teachers who reported that they have ad-hoc days off, or days starting late or finishing early doubled (DfE, 2024c). Similarly, the proportion of teachers who reported that they had an arrangement to complete their planning, preparation and assessment (PPA) time off-site increased from 12 to 15 per cent.

There is currently no causal evidence on how introducing flexible working arrangements for teachers may impact on retention rates. However, research shows that teachers value the availability of flexible working – the possibility of moving from full-time to part-time working if requested is valued the same as a 4.3 per cent pay rise (Burge, Lu and Phillips, 2021). This suggests that improvements in the availability of flexible working may lead to higher retention rates.

Research also suggests that introducing flexible working arrangements tends to have other positive impacts as well, such as increased well-being, job satisfaction, attendance, motivation, teaching capacity, expertise and career progression. While flexible working arrangements can involve costs on schools and pupils, surveys of teachers and leaders suggest that these benefits can often outweigh the costs (Harland, Bradley and Worth, 2023).



Source: Working Lives of Teachers and Leaders (waves 1 and 2)

### Remote and hybrid working remains substantially more prevalent in the wider graduate labour market than in teaching

Like other frontline public sector jobs, remote working is largely unavailable to most teachers. WLT data shows that in 2021/22, two per cent of primary classroom teachers and one per cent of secondary teachers reported that they had a formally-agreed arrangement to work remotely (Adams *et al.*, 2023)

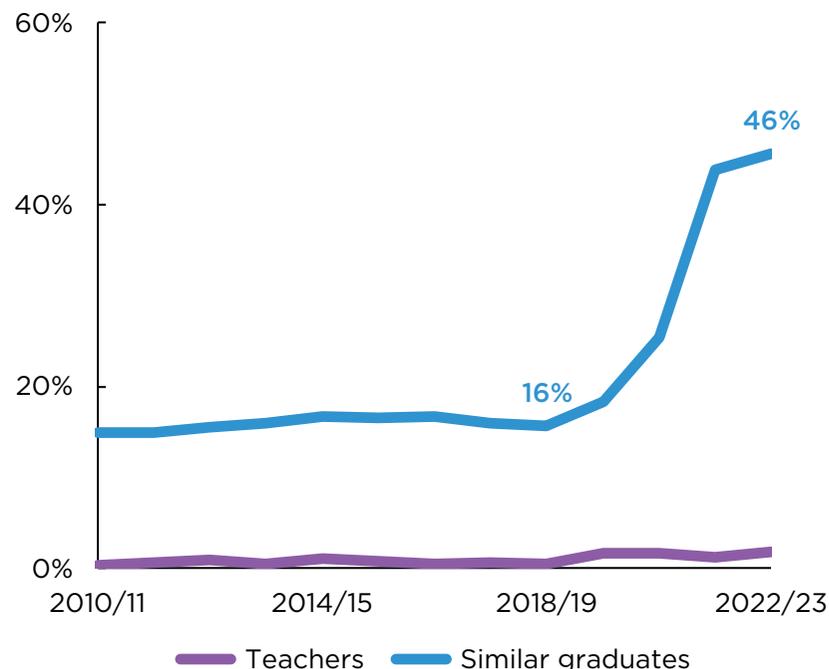
However, LFS data shows that remote working remains popular with employees in England, having increased during and since the pandemic. In 2022/23, 46 per cent of similar graduates reported that they worked mainly from home. This was about three times higher than pre-pandemic levels and slightly higher than in 2021/22.

The proportion of graduates who work either fully remote or in a hybrid arrangement (i.e. work at least one day from home but not necessarily the whole week) is even higher. According to data from the G-SWA, 65 per cent of similar graduates in the UK working outside of education worked from home at least one day during the survey reference week in 2022. This was highest among those who have children and who have a commute of one hour or more.

Surveys show that the prevalence of remote working is likely to remain high in the labour market in the future (Shah *et al.*, 2024). The G-SWA also shows that more than a third (36 per cent) of graduates in the UK would look for a new job offering the ability to work remotely one to two days per week if their employer mandated a full return to the office.

Most teachers would also highly value the additional flexibility that remote working can bring – more than half of teachers surveyed in a TeacherTapp poll thought they should be allowed a regular day to work from home (Ford, 2022). The sustained prevalence of remote working in the labour force since the pandemic is therefore likely to continue to act as an incentive to leave teaching for teachers unable to gain additional flexibility in their teaching job.

Proportion of teachers and similar graduates that primarily work from home



Source: NFER analysis of Labour Force Survey data (2010/11 – 2022/23)

### Teacher pay would have to rise by about 1.8 per cent to compensate for the lack of availability of remote and hybrid working

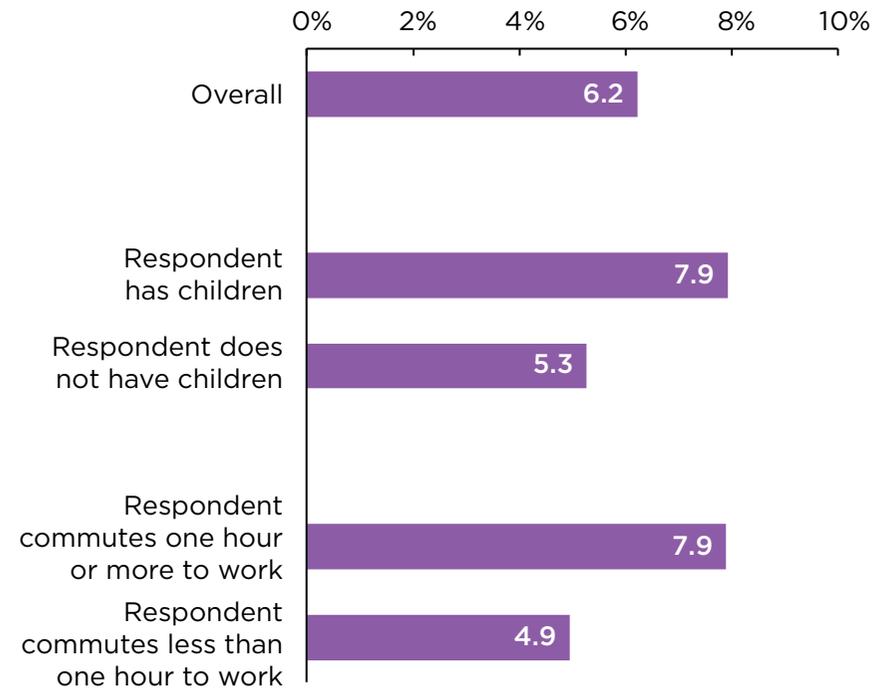
The gap in availability of remote and hybrid working between teaching and the wider graduate labour market needs to be compensated for to maintain the level of competitiveness teaching had before the pandemic (all else being equal). Matching the level of hybrid working is not feasible in a frontline profession such as teaching, but increasing pay could help to compensate.

This is already happening within the wider labour market. Surveys of UK employers show that earnings growth has tended to be higher among employers that do not make great use of remote working than among those that do (Shah *et al.*, 2024). This is consistent with evidence from the United States, which showed that, between 2021 and 2023, employers which did not extend access to remote working to their employees tended to have earnings growth which was two percentage points higher than among employers which did expand access to remote working (Barrero *et al.*, 2022).

Remote working is highly valued by employees in the UK. G-SWA data shows that among similar graduates working in non-education occupations, the option to work from home two or three days per week had the equivalent value as a 6.2 per cent salary increase. This was highest among those with children, and those who have a commute of an hour or more.

We estimate that a consolidated pay increase of 1.8 per cent for teachers could be appropriate compensation to maintain competitiveness. This is based on the average value of remote working of 6.2 per cent, multiplied by the 29 percentage point faster growth since the pandemic in the prevalence of remote working in the graduate labour market compared to in teaching (see the methodology appendix for more detail). Crucially, this compensatory pay rise would need to improve the competitiveness of teacher pay growth relative to other jobs to have the intended effect. Therefore, it should be awarded on top of pay rises that match earnings growth in the wider economy.

Value (in % of salary) of the option to work remotely 2-3 days per week



Note: Represents the value similar graduates place on the option to work remotely 2-3 days per week. See the methodology appendix for a detailed definition of similar graduates.

Source: NFER analysis of Global Survey of Working Arrangements data (waves 1 and 2).



## Conclusions

Teacher supply in England is in a critical state that represents a substantial risk to the quality of education. Since the pandemic, secondary teacher recruitment has been far below what is needed to meet schools' needs for new teachers, and this is unlikely to be any different this year. Applications for the 2024/25 ITT cycle so far suggest recruitment for 10 out of 17 secondary subjects is at risk of missing targets.

Policy measures to address teacher undersupply, by improving recruitment and / or retention, is urgently needed. Given the scale of the challenges, policymakers need to consider actions that are ambitious and radical, while also cost effective.

There have been pockets of positive progress in the last year. Actions to attract international trainees appear to have had some success, although the long-term benefits in terms of supply are uncertain. Slight improvements to bursary and retention payment generosity are also likely to boost recruitment and retention, given the evidence demonstrating their effectiveness. There has also been a promising increase in flexible working opportunities that are not part-time working, which are likely to improve teacher well-being and job satisfaction, while not reducing full-time equivalent teaching hours.

However, on key factors associated with recruitment and retention there has been little or no progress. Workload is cited by 94 per cent of teachers as a reason for considering leaving teaching. Despite some progress in reducing working hours before the pandemic, two different data sources suggest that teachers' working hours significantly increased in 2022/23, meaning that the Government may face a challenge in meeting its workload reduction target.

NFER research found that schools are aware of the need to manage teacher workload and are putting strategies in place. However, teachers now say that behaviour management and pastoral care are key priority

areas for workload reduction and more support from outside agencies for specific pupil needs such as SEND support, mental health and safeguarding is a key enabler of further workload reduction. This is in line with evidence showing a recent trend of worsening pupil behaviour since the pandemic.

The 2016 independent workload review groups recommended that much of the focus on teacher workload reduction should be on reducing the burden of planning, administration and marking. Teacher workload reduced during the period 2016-2019, particularly in the areas identified as priorities.

These workload reduction efforts should be sustained, but the focus should now also include behaviour management and pastoral care. Government should also consider how outside agencies for supporting specific pupils needs (such as SEND support, mental health and safeguarding) can help to shift some of the pupil behaviour burden away from teachers.

**Recommendation 1: Government should set up an independent review focussing on how to reduce teachers' workload related to behaviour management and pastoral care, which should consider the role of external support services, such as for special needs and mental health.**

The competitiveness of teacher pay matters for both recruitment and retention. However, a series of below-inflation pay rises, the 2021 teacher pay freeze and the cost-of-living crisis have led teacher pay to fall significantly in real terms over the last decade. Meanwhile, higher earnings growth in the wider labour market outside teaching has led to teacher pay losing competitiveness against the wider labour market over time.

Last year's 6.5 per cent pay rise has stalled, but not substantively reversed, any of the deterioration in teachers' pay competitiveness since the pandemic. However, the 2024/25 pay award provides an opportunity to improve the competitiveness of teacher pay. The OBR forecasts that earnings in the wider labour market will rise by 3.1 per cent next year. In the short term, this year's pay award will therefore need to exceed 3.1 per cent to help improve the competitiveness of teacher pay next year.

More broadly, a clear long-term strategy is needed to help ensure that future teacher pay awards continue to improve pay competitiveness over the long term. This is likely to be a considerable challenge given the severe funding pressures facing all public services, including education.

Schools are unlikely to be able to afford any such pay awards for teachers on their own without making cuts elsewhere. Funding for competitive pay rises for teachers must therefore come from Government. In the run-up to the next general election, political parties should develop their plans for how they will effectively address this challenge in the next parliament.

**Recommendation 2: Narrowing the gap between teacher pay growth and the wider labour market is key to supporting recruitment and retention. The 2024 pay award should therefore exceed the 3.1 per cent forecasted rise in earnings in the wider labour market and be fully-funded.**

**Recommendation 3: Political parties should set out their plans to develop a long-term strategy for pay setting which reduces the gap in earnings growth with competing occupations, while ensuring that schools have sufficient funding to enact these pay increases without making cuts elsewhere.**

Access to flexible working arrangements is an area where teaching lags other occupations. A degree of inflexibility is inevitable in teaching, but research shows that since the pandemic many schools have begun making changes to their flexible working policies. Part-time working is the most common flexible working arrangement available to teachers but ad-hoc days off or days to start late / finish early are also becoming more common.

Little robust evidence exists showing the causal relationship between teachers' access to flexible working arrangements and retention, but there is plenty of perceptual evidence of its importance. Just like other graduates, teachers highly value the ability to work flexibly, so improvements in the availability of flexible working arrangements may help improve retention, along with overall teacher well-being.

Nonetheless, it is important to be realistic about the limits of flexibility in teaching. Like police officers, doctors and other NHS workers, access to hybrid and remote working, is unlikely to ever match other jobs in the graduate workforce, where nearly two-thirds of employees work hybrid.

Providing compensation to frontline public service workers such as teachers is one option for preventing this inherent inflexibility from undermining the attractiveness of their jobs. Based on the increase in the prevalence of remote working in the graduate workforce and the value employees place on the ability to work remotely, we estimate that this pay premium for teachers should be 1.8 per cent. Crucially, this would need to be awarded on top of the pay rise needed to match teachers' earnings growth with the wider economy.

**Recommendation 4: Political parties should consider introducing a Frontline Workers Pay Premium to compensate public sector workers for the lack of remote and hybrid working opportunities in their jobs compared to the wider graduate labour market. We estimate that this would represent a 1.8 per cent consolidated pay increase for teachers.**





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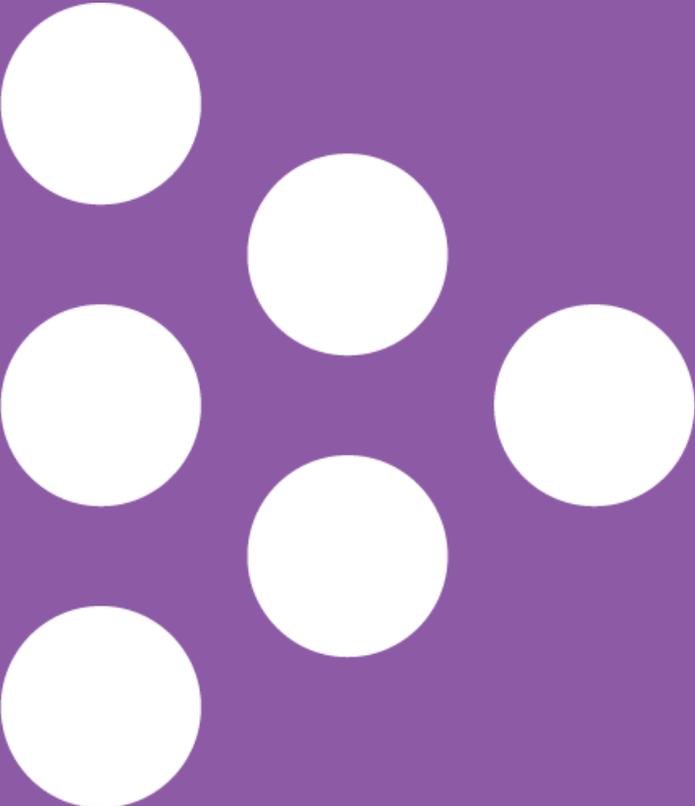
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