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Employee Outlook

Quarter 1 - 2011



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Introduction

The Chartered Institute of Personnel Development (CIPD) has commissioned a quarterly survey among UK employees (including sole traders) to identify their opinions of and attitudes towards working life today, particularly during these difficult economic times.

YouGov conducted the latest quarterly online survey for the CIPD of 2,053 UK employees from 17–23 December 2010.

This survey was administered to members of the YouGov Plc UK panel of more than 285,000 individuals who have agreed to take part in surveys. The sample was selected and weighted to be representative of the UK workforce in relation to sector and size (private, public, voluntary), industry type and full-time/ part-time working by gender. The sample profile is normally derived from census data or, if not available from the census, from industry-accepted data.

Panellists who matched the sample profile (as explained above) were selected at random from the YouGov Plc UK panel and sent an email inviting them to take part in the survey. Respondents were drawn from a mixture of public, private and voluntary organisations.

Size of organisation was classified in the following way: sole trader (one-person business), micro business (2–9), small business (10–49), medium (50–249) and large (more than 250).

Net scores refer to the proportion of people agreeing with a statement minus those disagreeing.

Summary of Key Findings

Job Satisfaction

Overall, job satisfaction has fallen slightly this quarter and stands at +39 compared with +42 in autumn 2010. This, however, still represents a reasonable increase from summer 2010, when the job satisfaction score was +35.

Young people (aged 18–24) continue to be the most satisfied with their jobs (+55). Although this is down since last quarter, it still represents a big jump from the +3 job satisfaction recorded in summer 2010.

Employees working in the voluntary sector remain the most satisfied (+45), followed by private (+40) and then public sector workers (+37). Job satisfaction among public and voluntary sector employees fell compared with the previous quarter, while private sector employee job satisfaction held steady.

Communication and Advocacy

Half of respondents (50%) feel fully or fairly well informed about what is happening within their organisations. This is a slight decrease from last quarter (54%). Respondents from the voluntary sector are most likely to feel fully or fairly well informed (55%), with public sector respondents least likely to be feeling informed (46%).

Pressure at Work

The proportion of employees saying they are under excessive pressure at work, either every day or once or twice a week, has edged up slightly to 40%. Compared with the last quarter, there has been a jump in the proportion of public sector staff saying they are under excessive pressure either every day or once or twice a week. Voluntary sector employees are also more likely to report being under excessive pressure. The proportion of private sector staff saying they are under excessive pressure is unchanged.

Employee Attitudes and the Economic Downturn

Job Security

In all, 20% of workers think it likely or very likely they could lose their main job as a result of the economic downturn – little changed from last quarter's figure (19%).

Nearly a third of public sector staff think it likely or very likely they could lose their job, up from 25% for the previous quarter. In contrast, only 17% of private sector employees think it likely they could lose their job, unchanged from the autumn *Employee Outlook*. Just over one in five (22%) of voluntary sector workers think it likely they could lose their jobs, down very slightly from 23% for the previous quarter.

Employees across all sectors are more pessimistic about their chances of finding a new job if they were to be made redundant than they were in the previous quarter.

Compared with the previous quarter there has been an increase in the proportion of employees saying their organisation has made or is planning to make redundancies. Public sector employees are more likely than staff from the other two main sectors to say their organisation has made (37%) or is planning to make redundancies (53%), with both of these measures edging up compared with the previous quarter.

The proportion of private sector employees reporting a pay freeze increased slightly to 42% from 40%, while 44% of voluntary sector employees say their employer has frozen pay compared with 53% for the previous quarter.

In all, a third of workers (36%) say their employer has frozen recruitment, little changed from the previous quarter.

Standard of Living

The survey finds that any wider improvement in the UK economy has yet to filter down to the workplace, with respondents three times more likely to say their standard of living has worsened (31%) over the last six months as they are to say it has improved (10%).

Job-Seeking

Nineteen per cent of respondents are looking for a new job with a different employer. This proportion has decreased gradually across the last few quarters of the survey.

In a change from last quarter, respondents from the public sector are least likely to be looking for a new job and those in the voluntary sector are most likely to be seeking out new opportunities.

Job Satisfaction

Overall, job satisfaction has fallen slightly this quarter and stands at +39, compared with +42 in autumn 2010. This, however, still represents a reasonable increase from summer 2010, when the job satisfaction score was +35.

Young people (aged 18–24) continue to be the most satisfied with their jobs (+55). Although this is down since last quarter, it still represents a big jump from the +3 job satisfaction recorded in summer 2010. Again, this might indicate that with high youth unemployment, employees of this age are feeling grateful just to have a job. There has been a slight increase in the job satisfaction of 25–34-year-olds this quarter (+29; autumn: +26), however, overall this age group is still the least satisfied with their jobs.

The gap between the job satisfaction of men (+35) and women (+45) has increased this quarter (autumn: men (+42), women (+43)).

Employees working in the voluntary sector remain the most satisfied (+45), followed by private (+40) and then public sector workers (+37). Job satisfaction among public and voluntary sector employees fell compared with the previous quarter, while private sector employee job satisfaction held steady.

Like last quarter, the smaller the organisation, the more satisfied employees are with their jobs this quarter: micro (+55), small (+42), medium (+33) and large (+29).

Employee net satisfaction by age

	Winter 2010-11	Autumn 2010	Summer 2010
18 - 24	+55	+62	+3
25 - 34	+29	+26	+31
35 - 44	+33	+38	+34
45 - 54	+37	+41	+26
55+	+53	+55	+53

Employee net satisfaction by sector and size of organisation

	Winter 2010-11	Autumn 2010	Summer 2010
Overall	+39	+42	+35
Voluntary Sector	+45	+55	+53
Private Sector Firm or Company	+40	+40	+33
Public Sector	+37	+42	+31
Sole Traders	+67	+52	+53
Micro Businesses	+55	+58	+50
Small Businesses	+42	+48	+28
Medium Businesses	+33	+40	+32
Large Businesses	+29	+33	+28

Pressure at work

The proportion of employees saying they are under excessive pressure at work, either every day or once or twice a week, has edged up slightly to 40%. Men are significantly more likely to feel under excessive pressure (45%) than women (35%) and the gap between the sexes has increased since the previous quarter.

Compared with the last quarter, there has been a jump in the proportion of public sector staff saying they are under excessive pressure either every day or once or twice a week, from 44% to 48%.

Voluntary sector employees are also more likely to report being under excessive pressure (42%) compared with the previous quarter (33%).

The proportion of private sector staff saying they are under excessive pressure is unchanged at 38%. Workers aged 55 and above are much less likely to report being under excessive pressure than younger workers.

How Often Workers Feel Under Excessive Pressure at Work (%)

	All	Men	Women	Private	Public	Voluntary
Every day	13	15	11	12	18	13
Once or twice a week	27	30	24	26	30	29
Once or twice a month	24	22	26	24	26	23
Less frequently than once a month	22	20	24	23	18	22
Never	14	13	16	15	7	14

How Often Workers Feel Under Excessive Pressure at Work, by Age (%)

	18 – 24	25 – 34	35 – 44	45 – 54	55+
Every day	12	12	14	15	12
Once or twice a week	33	31	28	29	21
Once or twice a month	23	24	28	23	21
Less frequently than once a month	23	24	21	19	24
Never	9	10	9	14	22

Employee Attitudes and the Economic Downturn

In all, 20% of workers think it likely or very likely they could lose their main job as a result of the economic downturn. However, there is a growing contrast between the private and public sectors, highlighting the increasing concerns public sector staff have about job security against the backdrop of public spending cuts. Nearly a third (31%) of public sector staff think it likely or very likely they could lose their job, up from 25% for the previous quarter. In contrast, only 17% of private sector employees think it likely they could lose their job, unchanged from the autumn *Employee Outlook*.

Just over one in five (22%) voluntary sector workers think it likely they could lose their jobs, down very slightly from 23% for the previous quarter.

There is very little difference between men and women in their opinions on whether it is likely they could lose their jobs as a result of the economic downturn.

Employees across all sectors are more pessimistic about their chances of finding a new job if they were to be made redundant than they were in the previous quarter.

Just 8% of workers think it will be easy or very easy to find a new job, compared with 10% who felt this way in autumn 2010. In all, 67% of staff think it will be difficult or very difficult to find a new job, in contrast to 63% who thought this for the last quarter.

Public sector staff are particularly downbeat about their job prospects if made redundant, with just 6% saying it would be easy to find a new job compared with 11% last quarter, and 72% believing it would be difficult in contrast to 68% for the previous three months.

How likely is it that you could lose your job as a result of the economic downturn? (%)

	Winter 2010-2011				Autumn 2010			
	All	Private	Public	Voluntary	All	Private	Public	Voluntary
Very Likely	4	3	8	8	4	3	6	3
Likely	16	14	23	14	15	14	19	20
Neither Likely nor Unlikely	27	27	28	23	28	28	29	23
Unlikely	27	28	24	26	30	31	26	26
Very Unlikely	20	22	12	23	18	18	14	24
Don't Know	6	5	5	7	6	6	7	5

If you were to lose your job, how easy do you think it would be to find another? (%)

	Winter 2010-2011				Autumn 2010			
	All	Private	Public	Voluntary	All	Private	Public	Voluntary
Very Easy	2	2	1	2	2	2	2	1
Easy	6	6	5	5	8	8	9	10
Neither Easy nor Difficult	20	21	18	21	22	23	17	25
Difficult	38	38	40	39	36	35	38	38
Very Difficult	29	27	32	30	27	27	30	22
Don't Know	6	6	4	3	5	5	4	4

Compared with the previous quarter there has been an increase in the proportion of employees saying their organisation has made or is planning to make redundancies. Public sector employees are more likely than staff from the other two main sectors to say their organisation has made (37%) or is planning to make redundancies (53%), with both of these measures edging up compared with the previous quarter.

Almost one in four respondents (24%) report their employer has cut back on training in response to the economic downturn, a slight reduction from last quarter's figure of 26%. Nearly half (46%) of public sector employees say this is the case compared with 28% of voluntary sector respondents and 18% of those in the private sector.

The proportion of employees saying their organisation has frozen pay has increased to 46% from 43% for the previous quarter. Almost two-thirds (63%) of public sector employees now report this is the case compared with 55% saying this in the autumn 2010 *Employee Outlook* survey. The proportion of private sector employees reporting a pay freeze increased slightly to 42% from 40%, while 44% of voluntary sector employees say their employer has frozen pay compared with 53% for the previous quarter. In all, a third of staff (36%) say their employer has frozen recruitment, little changed from the previous quarter.

The survey asks a number of questions around the issue of relationships and well-being in the workplace to gauge the extent to which external pressures are impacting on day-to-day working life. Just over a fifth of staff say there has been an increase in conflict at work as a result of the economic downturn – a slight increase from last quarter's figure of 18%. The proportion of public sector employees saying there has been an increase in conflict at work has edged up to 28% from 24%, while 18% of voluntary sector employees report an increase in conflict compared with 12% for the previous quarter. In all, 19% of private sector staff report an increase in conflict at work in contrast to 17% for the last quarter.

In which ways, if at all, has your organisation been affected by the economic downturn? (%)

	Winter 2010 – 2011			
	All	Private	Public	Voluntary
It has made redundancies	34	33	37	32
It is planning to make redundancies	20	10	53	23
It has cut back on training	24	18	46	28
It has cut back on the number of hours that people work	19	20	18	17
It has increased the number of hours that people work	6	7	4	4
It has frozen pay	46	42	63	44
It has cut pay	7	7	6	2
It has frozen recruitment	36	29	66	23
It has reduced the amount contributed to employee pensions	6	6	5	7
It has reduced employee benefits/perks	19	19	20	16
It has been affected in some other way	20	17	28	35
It has not been affected by the employee downturn	12	15	1	12
Don't Know	7	8	3	5

In which ways, if at all, has your organisation been affected by the economic downturn? (%)

	Autumn 2010			
	All	Private	Public	Voluntary
It has made redundancies	30	31	29	32
It is planning to make redundancies	19	10	50	17
It has cut back on training	26	20	45	32
It has cut back on the number of hours that people work	21	23	17	17
It has increased the number of hours that people work	7	7	7	6
It has frozen pay	43	40	55	53
It has cut pay	6	7	5	3
It has frozen recruitment	37	31	65	25
It has reduced the amount contributed to employee pensions	6	6	6	4
It has reduced employee benefits/perks	18	18	20	28
It has been affected in some other way	23	20	27	34
It has not been affected by the employee downturn	12	14	3	14
Don't Know	6	7	4	4

Just 14% of respondents report an increase in bullying at work by line managers – a slight fall in comparison with the previous quarter. This measure has fallen slightly across all the main sectors over the same period.

Just over half of respondents report an increase in stress at work, again little changed from the autumn 2010 *Employee Outlook* survey.

The proportion of staff saying there has been an increase in people taking time off sick as a result of the economic downturn has edged up to 26% from 21%. There has been a particular increase in the proportion of public sector employees reporting an increase in sickness absence, with 37% now saying this is the case compared with 28% for the last quarter.

As a result of the economic downturn, have you noticed any of the following? (%)

	Winter 2010-2011				Autumn 2010			
	All	Private	Public	Voluntary	All	Private	Public	Voluntary
An increase in conflict at work between colleagues	21	19	28	18	18	17	24	12
An increase in bullying by line managers	14	12	18	12	16	14	21	18
An increase in stress	51	48	63	44	52	48	63	55
An increase in people taking time off sick	26	22	37	23	21	19	28	18
None of these	40	43	29	48	40	43	32	39
Don't Know	6	6	4	3	5	5	4	4

The survey also asked respondents to agree or disagree with a number of statements on how they as individuals have been affected by the economic downturn. Respondents are more likely to agree they feel less secure in their jobs than they were for the previous quarter. Exactly half of respondents agree they feel less secure in their jobs in contrast to 7% that disagree (net agree score +27).

In contrast, compared with the previous two quarters they are less likely to disagree that they are developing new skills as a result of the downturn, which perhaps suggests that because many employers are still reluctant to invest in new staff until demand consolidates, they are relying on existing staff to fill in the gaps. Compared with the previous quarter there has also been an increase in the proportion of staff agreeing they feel worried by the future. In all, 58% of respondents agree they feel worried by the future while 16% disagree (net agree score +42). Two-thirds (66%) of public sector employees say they feel worried by the future compared with 54% of those in the private sector and 59% in the voluntary sector.

Since the previous quarter there has been a further increase in the proportion of staff who agree there are more office politics and that their workload has increased.

The survey finds that any wider improvement in the UK economy has yet to filter down to the workplace, with respondents three times more likely to say their standard of living has worsened (31%) over the last six months as they are to say it has improved (10%). The financial situation of employees has also deteriorated slightly since the last quarter, when 9% of staff said their personal standard of living had improved compared with 29% who said it had deteriorated.

Ways in which individuals have been affected by the economic downturn

	Winter 2010-11	Autumn 2010	Summer 2010
I feel less secure in my job	27	25	22
I am learning new skills	-10	-18	-20
There are more opportunities to progress	-57	-59	-62
I feel confident of finding work elsewhere	-47	-45	-46
I feel worried by the future	42	36	34
There are more office politics	20	17	16
There is more conflict in the workplace	-1	-9	-8
There is more stress at work	40	40	39
I am concerned about being made redundant	14	10	3
I am less trusting of colleagues	-24	-10	-14
I am less trusting of my manager	-6	-10	-14
My workload has increased	28	18	20

Job-Seeking

Nineteen per cent of respondents are looking for a new job with a different employer. This proportion has decreased gradually across the last few quarters of the survey.

Are you looking for a new job with a different employer? (%)

Winter 2010 – 2011	19
Autumn 2010	21
Summer 2010	22

In a change from last quarter, respondents from the public sector are least likely to be looking for a new job and those in the voluntary sector are most likely to be seeking out new opportunities. This might be a result of concerns over job security, with public sector employees more wary about moving job and jeopardising redundancy entitlements that they have built up in their current job.

Proportion looking for a new job, by sector (%)

	Winter 2010 – 2011	Autumn 2010
Autumn 2010		21
Summer 2010		22
Voluntary		

Employees aged between 18 and 34 years old are most likely to be looking for a new job with a different employer, while those aged 55 and above are least likely to be job-hunting. Full-time workers are more likely than part-time workers to be looking for a new job with a new employer.

Proportion looking for a new job, by age, and whether employed full-time or part-time (%)

18 – 24	25
25 – 34	27
35 – 44	20
45 – 54	21
55+	9
Full-time	21
Part-time	14

Conclusions

At the start of 2011 there is little sign yet of a sustainable economic recovery from the perspective of employees. The proportion of workers that think it likely they could lose their job has climbed marginally since the previous quarter. This is particularly the case among public sector employees, with more than one in three now saying it is likely they could lose their job.

These findings are not surprising given that more than half of public sector respondents report that their organisation is planning to make redundancies.

Employees across all sectors are also more likely to think it will be hard to find a new job in the event of being made redundant, suggesting that confidence on the ground of the wider labour market remains poor.

In addition, the proportion of employees saying their standard of living has worsened over the last six months has increased, indicating that the effects of inflation and generally low wage settlements are putting workers under increasing financial pressure.

Job satisfaction has dipped compared with the last quarter's unexpected rebound, which we interpreted as employees placing increased

value on simply having a job in the light of the £81 billion of public spending cuts announced in the autumn Comprehensive Spending Review.

Employees continue to be generally positive in their attitudes towards their immediate line managers; however, most manager ratings are down slightly from autumn and summer, which might indicate that under-pressure managers are finding it harder to devote as much time as they should on their people management responsibilities.

Overall, respondents remain less positive in their attitudes towards their senior managers, particularly over the extent their senior leaders consult them about important decisions.

Perceptions of leadership are much worse in the public sector than the other main sectors. However, encouragingly, views of senior leaders in the public sector have slightly improved since last quarter, particularly around confidence in leaders and clarity of organisational vision. This suggests that public sector leaders are beginning to invest more time in outlining organisational purpose – a key building block for supporting employee engagement in tough times.



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