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Strategic Talent Management

Employee Outlook



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Championing better work and working lives

The CIPD's purpose is to **champion better work and working lives** by improving practices in people and organisation development, for the benefit of individuals, businesses, economies and society. Our research work plays a critical role – providing the content and credibility for us to drive practice, raise standards and offer advice, guidance and practical support to the profession. Our research also informs our advocacy and engagement with policy-makers and other opinion-formers on behalf of the profession we represent.

To increase our impact, in service of our purpose, we're focusing our research agenda on three core themes: the future of **work**, the diverse and changing nature of the **workforce**, and the culture and organisation of the **workplace**.

WORK

Our focus on work includes what work is and where, when and how work takes place, as well as trends and changes in skills and job needs, changing career patterns, global mobility, technological developments and new ways of working.



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Our focus on the workforce includes demographics, generational shifts, attitudes and expectations, the changing skills base and trends in learning and education.

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Our focus on the workplace includes how organisations are evolving and adapting, understanding of culture, trust and engagement, and how people are best organised, developed, managed, motivated and rewarded to perform at their best.

About CIPD

The CIPD is the professional body for HR and people development. We have over 130,000 members internationally – working in HR, learning and development, people management and consulting across private businesses and organisations in the public and voluntary sectors. We are an independent and not-for-profit organisation, guided in our work by the evidence and the front-line experience of our members.

cipd.co.uk

About Halogen

Halogen Software offers an organically built cloud-based talent management suite that reinforces and drives higher employee performance across all talent programmes – whether that is recruiting, performance management, learning and development, succession planning or compensation. With over 1,750 customers worldwide, Halogen Software has been recognised as a market leader by major business analysts and has garnered the highest customer satisfaction ratings in the industry. Halogen Software's powerful, yet simple-to-use solutions, which also include industry-vertical editions, are used by organisations that want to build a world-class workforce that is aligned, inspired and focused on delivering exceptional results.

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Foreword from the CIPD

The CIPD is delighted to be partnering with Halogen on our important *Employee Outlook* tracker research. Going forward we will be releasing this main report twice yearly, in spring and autumn, exploring employees' current and changing attitudes to work and working life.

The key headline from this autumn 2013 survey is that 'talent is on the move'. Job seeking intentions, as tracked in the *Employee Outlook*, have now reached a two-year high with almost a quarter currently looking for a new job. This figure is fairly consistent across all three sectors.

The findings from this survey tie in with the changing economic climate, with recent data from the Office for National Statistics reporting a reduction in unemployment and our own

Labour Market Outlook showing positive net recruitment intentions at a post-recession high.

All of this should signal a warning to employers to up their game when it comes to retaining key talent. If they aren't monitoring their employees' progression and providing opportunities to talk about career development, they may well risk losing some of their most talented workers, who could vote with their feet and take advantage of a somewhat improved labour market outlook. Now more than ever, employers need to focus on ensuring their line managers are equipped with excellent people management skills, so they can play their role in fostering open and transparent cultures where people feel they can make a valued contribution and get recognition for it.

This autumn 2013 survey also reveals something of a reversal of fortunes for private and public sector employees, with public sector employees now enjoying higher job satisfaction and engagement levels than their counterparts in the private sector. Progression is important to more than three-fifths of employees across the board, but we know that it is particularly important to employees in the private sector. If employees aren't satisfied with their progression opportunities, this coupled with their drop in job satisfaction and engagement could mean that private sector employers are particularly at risk of a talent leak and, now more than ever, need to focus on talent retention strategies.

Claire McCartney
Adviser, Resourcing and Talent Planning, CIPD

Foreword from Halogen

The CIPD/Halogen *Employee Outlook* reveals some interesting findings in employee sentiment and mobility that reinforce the importance employers should place on talent engagement and retention strategies.

The lessening impact of the economic climate has created an environment ripe for an exodus of top talent. Just 24% of employees report recruitment freezes in their organisations, and more employees are now reporting that their organisations are not affected by the economic downturn.

Nearly one in four employees surveyed are currently looking for a new job. And that figure rises dramatically for those who are disengaged at work (71%); who are not satisfied with their jobs (62%); or who feel under pressure every day (62%).

Seeing this ‘talent on the move’ trend through the lens of current talent management practices is also useful. The survey examined employee perceptions of how their performance and potential is being assessed. Employee development and potential is clearly important: 58% noted that one of the most important aspects of their performance management process is development opportunities, and an impressive 61% of employees feel progression within their organisations is important. Yet 27% of employees have never had a performance review, where these talent management practices come into focus.

The interconnections between these findings demonstrate that organisations that want to keep top talent need to assess how well their talent management programmes are addressing employee needs and the needs of the organisation.

- Do managers have the tools and training to coach employees effectively?
- Are they giving employees meaningful feedback and recognition on a regular basis?
- Do employees know what is expected of them and how their work contributes to the organisation’s mission and success?
- Are managers engaging employees in discussions about career development opportunities?

If organisations can improve their ability to execute in these areas, they can improve employee accountability and engagement, and mitigate the retention risks they now face.

Donna Ronayne
Vice President of Global Marketing
Halogen Software

Key findings

From this survey onwards, we will be running the *Employee Outlook* twice yearly rather than quarterly. The survey will therefore run in spring and autumn every year. This will allow more time for trends to develop between surveys and we will also be running more topical focus outlook reports in between.

Job satisfaction and engagement

The proportion of engaged employees this quarter is 36%, broadly similar to the previous two quarters (spring: 37%; winter: 35%) but still below the levels of autumn 2012 (38%). Four per cent of employees are disengaged and 60% remain neutral.

and it now sits at +39 (spring 2013: +45; winter 2012–13: +48), while job satisfaction has increased substantially in the public sector (+41) (spring 2013: +25; winter 2012–13: +33).

Employee attitudes towards managers

Overall, attitudes towards line managers remain positive, with 64% of employees strongly satisfied or satisfied with their relationship with their line manager. This quarter sees a continued improvement in all ratings for senior managers, other than for their consultation of employees on important decisions, which stays at a very poor –22 net satisfaction.

Overall, attitudes towards line managers remain positive, with 64% of employees strongly satisfied or satisfied with their relationship with their line manager.

In a new section this autumn, we wanted to explore employees' perceptions of their performance management processes and progression opportunities and motivations.

Job satisfaction levels (+40) remain similar to spring (+41) and are down on previous quarters (winter 2012–13: +44; spring 2012: +47). Employees in the voluntary sector continue to be the most satisfied with their jobs (+54), with an increase from previous quarters (spring 2013: +52; winter 2012–13: +41). The private sector has seen job satisfaction decline steadily over the last few quarters

A quarter (25%) of all employees believe that it is very important to know that they are being considered for progression within their organisation, with a further 36% believing it is fairly important. Almost two-fifths (39%), though, maintain that this is not important at all.

Over half of employees had had a performance review within the last 6 (33%) or 12 (21%) months.

Over a quarter (27%), however, said that they had never had a performance review.

When it comes to the most important aspects of employees' performance reviews, feedback and recognition (81%) is seen to be the most important. The next important aspect is development opportunities (58%), followed by a chance to do some goal-setting (45%). When considering their most recent performance review, almost a third (32%) maintain that it met all their expectations and 45% rate it as meeting some of their expectations.

Work pressure

In autumn 2013 the proportion of employees reporting excessive pressure at work every day or once or twice a week is 41%, the same as spring 2013 and above previous quarters.

Sector differences show that employees in the public (42%) and the private (42%) sector are equally likely to feel excessive pressure either every day or once or twice a week; this represents a decrease for public sector employees (spring 2013: 51%) and an increase for private sector employees (38%). Fewer employees this quarter report being under frequent excessive pressure in the voluntary sector (34%, down from 41% in spring 2013).

Work-life balance

Employees' work-life balance has seen a slight increase in satisfaction to 58%, compared with 57% in spring 2013. Public sector employees' work-life balance has improved and stands at 60% (55% in spring 2013). At the same time voluntary sector employees have seen a sharp decline in satisfaction with work-life balance levels, from 61% in spring to 55% this quarter. This is, however, due to the extra hours the employees in this sector are required to spend at work, rather than the pressure they are experiencing in their jobs.

Employee attitudes and the economic downturn

Employees' fears over losing their jobs are on the rise again in the public sector (23% think it is likely or very likely they could lose their job compared with 18% in spring 2013 and 24% in winter 2012-13). The changes in the private and voluntary sector are only slight: 17% are concerned about losing their job in the private sector compared with 16% in the previous quarter, while voluntary sector employees' fears are on the decline to 18% from 19% in spring 2013.

Fewer employees overall report experiencing the consequences of the economic downturn on their organisation: 15% believe their organisation has not been affected, compared with 14% in spring

41%

In autumn 2013 the proportion of employees reporting excessive pressure at work every day or once or twice a week is 41%, the same as spring 2013 and above previous quarters.

//////
Nearly a quarter (24%) of employees are looking for a new job in autumn 2013; this represents an increase from previous quarters (spring 2013: 21%; winter 2012-13; 20%; spring 2012; 20%).

2013. Voluntary sector employees gained confidence the most (12% feel unaffected by the economic climate compared with 10% in the previous quarter). This could be due to a sharp decrease in voluntary sector organisations making redundancies (29% down from 49% in spring 2013) and planning to make redundancies (8% down from 25%).

Despite employees in the public sector being most concerned about losing their jobs, this autumn, the number of actual (46%) and planned (25%) redundancies they report in their organisations has decreased compared with the previous quarter (by 5% and 3% respectively). The economic downturn continues to have a lower degree of impact on employees in the private sector, although a slightly higher proportion of respondents reported redundancies (30% compared with 28% in

spring 2013) and training cutbacks (16% compared with 18% in the previous quarter).

Additionally, all sectors appear to have resumed recruitment (24% report that recruitment was frozen, compared with 28% in the previous quarter).

Job-seeking

Nearly a quarter (24%) of employees are looking for a new job in autumn 2013; this represents an increase from previous quarters (spring 2013: 21%; winter 2012-13: 20%; spring 2012: 20%). There is little difference across the sectors in job-seeking intentions, with 24% of employees in the private and voluntary sectors and 23% in the public sector looking for a new job. This represents an increase in the private and public sectors but a noticeable decrease in employees looking for a new job in the voluntary sector.

Job satisfaction and engagement

The *Employee Outlook*

Engagement Index comprises a set of measures which are important to understanding the level of engagement an employee feels towards their organisation. The index consists of 16 items, weighted and aggregated together to give an overall score (see below).

The proportion of engaged employees this quarter is 36%,

broadly similar to the previous two quarters (spring: 37%; winter: 35%) but still below the levels of autumn 2012 (38%). Four per cent of employees are disengaged and 60% remain neutral.

Voluntary sector employees remain the most engaged (51%). Engagement levels continue to grow in the public sector (37% from 33% in spring 2013 and 29%

Employee Engagement Index

Factor	Items included in the factor
Going the extra mile	I will often take on more work to help relieve my colleagues' workloads. I will often work for more hours than those I am paid or contracted to do.
Alignment to organisation purpose	I know very clearly what the core purpose of my organisation is. I am highly motivated by my organisation's core purpose.
Work-life balance	I achieve the right balance between my home and work lives. Approximately how much of the time do you feel under EXCESSIVE pressure in your job?
Relationships with colleagues	I have positive relationships with my colleagues.
Satisfaction with role	My job is as challenging as I would like it to be. My organisation gives me the opportunities to learn and grow. I am satisfied with the content of my job role. Overall, how satisfied or dissatisfied would you say you are with your current job?
Attitude to senior managers	I have confidence in the directors/senior management team of my organisation. I trust the directors/senior management team of my organisation.
Satisfaction with line manager/advocacy	Overall how satisfied, or dissatisfied, are you with the relationship you have with your immediate supervisor, line manager or boss? How likely or unlikely would you be to recommend your organisation as an employer? I don't think my employer treats me fairly.

//////
 +40

Job satisfaction levels (+40) remain similar to spring (+41) and are down on previous quarters (winter 2012–13: +44; spring 2012: +47).

in winter 2012–13), while private sector engagement levels have dropped slightly (36%, 37% in spring 2013).

Engagement tends to decrease as the size of organisations increases and engagement also increases with seniority (see Tables 1 and 2).

Job satisfaction

Job satisfaction levels (+40) remain similar to spring (+41) and are down on previous quarters (winter 2012–13: +44; spring 2012: +47). Employees in the voluntary sector continue to be the most satisfied with their jobs (+54), with an increase from previous quarters (spring 2013: +52; winter 2012–13: +41). The private sector has seen

job satisfaction decline steadily over the last few quarters and now sits at (+39) (spring 2013: +45; winter 2012–13: +48), while job satisfaction has increased substantially in the public sector (+41) (spring 2013: +25; winter 2012–13: +33).

Employees in micro businesses (2–9 employees) are by far the most satisfied with their jobs (+63), followed by employees working in small organisations (10–49 employees) (+36). Older employees (55+ years) at a net satisfaction of +52 are also much more likely to be satisfied with their jobs than younger employees (18–24 years) at a net satisfaction of +20.

Table 1: The extent to which employees are engaged at work, by gender, sector and size of organisation (%)

	Engaged	Neutral	Disengaged
All	36	60	4
Men	35	61	4
Women	38	59	3
Voluntary sector	51	46	3
Private sector	36	60	4
Public sector	37	60	3
Micro businesses	58	42	0
Small businesses	43	53	4
Medium businesses	39	57	3
Large businesses	35	61	4

Base: 2,918; men: 1,469; women: 1,455; private: 2,153; public: 547; voluntary: 143; micro: 322; small: 339; medium: 296; large: 1,394

Table 2: The extent to which employees are engaged at work, by seniority (%)

	Senior manager	Middle manager	Junior manager	Non-managerial
Engaged	57	47	38	35
Neutral	40	49	59	61
Disengaged	3	4	4	4

Base: 2,918; senior manager: 107; middle manager: 282; junior manager: 504; non-managerial: 799

Table 3: Employee net satisfaction, by sector and size of organisation (net % satisfaction)

	Autumn 2013	Spring 2013	Winter 2013-12	Spring 2012
Overall	+40	+41	+44	+47
Voluntary sector	+54	+52	+41	+47
Private sector	+39	+45	+48	+47
Public sector	+41	+25	+33	+45
Micro businesses	+63	+53	+67	+65
Small businesses	+36	+38	+45	+51
Medium businesses	+32	+39	+36	+42
Large businesses	+33	+30	+37	+38

Base: 2,918; private: 2,153; public: 547; voluntary: 143; micro: 322; small: 339; medium: 296; large: 1,394

Employee attitudes towards managers

Attitudes to line managers

Overall, attitudes towards line managers remain positive, with 64% of employees strongly satisfied or satisfied with their relationship with their line manager. Employees in the voluntary sector are most satisfied with their relationship with their line manager (70% agreement), followed closely by employees in the public sector (67% agreement), with employees in the private sector least satisfied (62% agreement). Younger employees are also the age group most likely to be satisfied with their relationship with their line manager (74% agreement).

Attitudes to senior managers

This quarter sees a continued improvement in all ratings for senior managers, other than for their consultation of employees on important decisions, which stays at the rather poor -22 net satisfaction.

While employees in the public sector remain the most negative about their senior managers, there have been slight increases this quarter across all items and particular improvements in trust in senior managers (-14 from -25 in spring 2013) and treating employees with respect (+4 from -7 in spring 2013). Respondents

in the voluntary sector remain the most positive towards their senior leaders, but scores have dropped this quarter, particularly in relation to trust (+6 from +19 in spring 2013) and confidence (+11 from +23 in spring 2013). In the private sector scores have remained fairly similar to spring 2013, with a slight decrease in perceptions of consultation (-22 from -20) and clear vision (+30 from +32) and treating employees with respect (+18 from +19) and a slight increase in confidence (+15 from +14).

Table 4: Senior manager net agree scores (%)

	Autumn 2013	Spring 2013	Winter 2012-13
They consult employees about important decisions.	-22	-22	-27
They treat employees with respect.	+16	+14	+11
I trust them.	+5	+4	+3
I have confidence in them.	+8	+7	+5
They have a clear vision of where the organisation is going.	+26	+25	+25

Base: 2,550

Table 5: Senior manager net agree scores, by sector (%)

	Private sector		Public sector		Voluntary sector	
	Autumn 2013	Spring 2013	Autumn 2013	Spring 2013	Autumn 2013	Spring 2013
They consult employees about important decisions.	-22	-20	-30	-34	-5	+3
They treat employees with respect.	+18	+19	+4	-7	+29	+31
I trust them.	+12	+12	-14	-25	+6	+19
I have confidence in them.	+15	+14	-13	-22	+11	+23
They have a clear vision of where the organisation is going.	+30	+32	+9	+1	+36	+40

Base: 2,550; private: 1,814; public: 547; voluntary: 142

Performance management

In a new section this autumn, we wanted to explore employees' perceptions of their performance management processes and progression opportunities and motivations.

A quarter (25%) of all employees believe that it is very important to know that they are being considered for progression within their organisation, with a further 36% believing it is fairly important. Almost two-fifths (39%), though,

maintain that this is not important at all. Respondents from the private sector (26%) were significantly more likely to say that it is very important to know they are being considered for promotion than respondents in the public (21%) and voluntary (21%) sectors. Respondents aged 18–24 (42%) and 25–34 (43%) were the age groups most likely to say consideration for progression is very important to them.

27%

Over half of employees had had a performance review within the last 6 (33%) or 12 (21%) months. Over a quarter (27%), however, said that they had never had a performance review.

Table 6: How important is it for you to know that you are being considered for progression within your organisation? (%)

	All	Private	Public	Voluntary
Very important	25	26	21	21
Fairly important	36	36	38	36
Not at all	39	37	41	43

Base: 2,550; private: 1,814; public: 547; voluntary: 142

Over half of employees had had a performance review within the last 6 (33%) or 12 (21%) months. Over a quarter (27%), however, said that they had never had a performance review. The youngest 18–24 (44%) and the oldest (55+) (33%) respondents were most likely to say they have never had a performance review. Employees in the private sector were also significantly more likely (29%) than their public (18%) and voluntary sector (19%)

counterparts to say they had never had a performance review. As you would expect, employees who had been with their employer up to six months are most likely not to have had a review (60%), but a high proportion of employees who had been with their organisations for a significant amount of time had also not had a performance review (see Figure 1).

Figure 1: When was the LAST time you had a performance review?

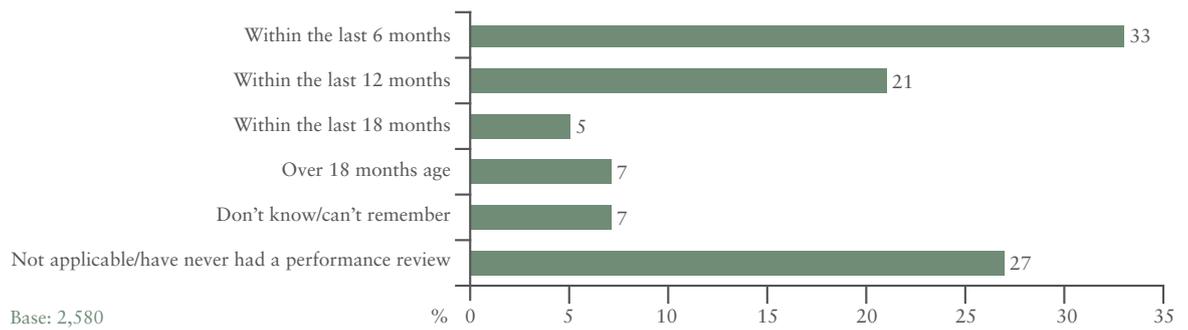


Table 7: Employees that have never had a performance review (by time with employer) (%)

Up to 6 months	6 months – 1 year	1–2 years	2–5 years	5–10 years	10–15 years	15–20 years	More than 20 years
60	44	34	28	18	21	19	20

Base: 2,580; up to 6 months: 198; 6 months – 1 year: 162; 1–2 years: 205; 2–5 years: 484; 5–10 years: 641; 10–15 years: 363; 15–20 years: 176; more than 20 years: 342

When it comes to the most important aspects of employees' performance reviews, feedback and recognition (81%) is seen to be the most important. The next most important aspect is development opportunities (58%), followed by a chance to do some goal-setting (45%). Almost a third (31%) point to the importance of having a chance for self-appraisal. Employees in the private sector

(27%) are significantly more likely than employees in the public (16%) and voluntary (16%) sector to choose the importance of understanding the link between pay and performance.

When considering their most recent performance review, almost a third (32%) maintain that it met all their expectations and 45% rate it as meeting some of their expectations.

Figure 2: What are the three MOST important aspects of your performance review? (%)

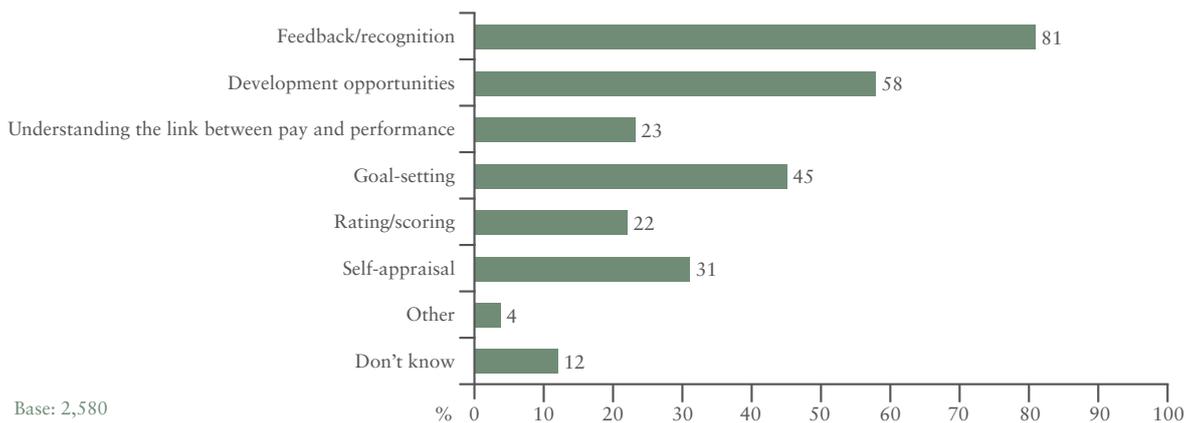
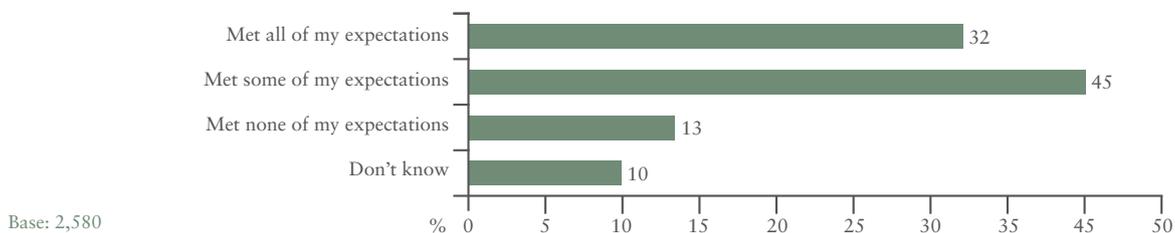


Figure 3: Considering your most recent performance review, how would you rate it in terms of meeting your expectations? (%)



Pressure at work

In autumn 2013 the proportion of employees reporting excessive pressure at work every day or once or twice a week is 41%, the same as spring 2013 but higher than previous quarters.

Men (42%) are slightly more likely than women (39%) to be reporting excessive pressure on a frequent basis this quarter. Sector differences show that employees in the public (42%) and the private (41%) sector are almost equally likely to

feel excessive pressure either every day or once or twice a week; this represents a decrease for public sector employees (spring 2013: 51%) and an increase for private sector employees (38%). Fewer employees this quarter, report being under frequent excessive pressure in the voluntary sector (34%, down from 41% in spring 2013).

There is a statistically significant link between perceptions of senior managers and exposure to excessive

pressure at work. Employees who *strongly disagreed* that senior managers had a clear vision (63%), that they had confidence in senior managers (63%), trusted them (63%), felt respected by them (66%) and felt consulted by them (60%) were significantly more likely to be experiencing excessive pressure daily or once or twice a week.

Table 8: Proportion of employees saying they are under excessive pressure at work... (%)

	Autumn 2013	Spring 2013	Winter 2012-13
Every day	13	13	12
Once or twice a week	28	28	26
Once or twice a month	26	26	27
Less frequently than once a month	22	24	24
Never	12	9	12

Base: 2,580

Table 9: Proportion of employees saying they are under excessive pressure at work... (%)

	All	Men	Women	Private	Public	Voluntary
Every day	13	15	11	13	14	8
Once or twice a week	28	27	28	28	28	26
Once or twice a month	26	24	27	24	29	33
Less frequently than once a month	22	21	22	23	19	20
Never	12	13	11	12	11	13

Base: 2,918; men: 1,469; women: 1,455; private: 2,153; public: 547; voluntary: 143

Work–life balance

Employees' satisfaction with their work–life balance has seen a slight increase to 58%, compared with 57% in spring 2013. Work–life balance improved for both men and women (1% increase for both groups since the spring).

Public sector employees have appeared to recover their levels of work–life balance, with 60% agreeing or strongly agreeing that they achieve the right balance between home and work. This is compared with 55% of public sector employees agreeing or strongly agreeing in spring 2013, following a drop from 57% in winter 2012–13. Private sector employees reported a 1% increase to reach 58% agreeing or strongly agreeing that they

achieve the right balance between work and home lives.

On the other hand, the voluntary sector has seen a sharp decline in satisfaction with work–life balance levels, from 61% in spring to 55% this quarter. This is below the 64% of winter 2012–13 but equal to their levels of work–life balance satisfaction in autumn 2012 (55%). Although employees in the voluntary sector are the least likely to feel under excessive pressure in their jobs every day, or once or twice a week, more of them are reporting that they work more hours than they are paid or contracted to do, reaching the levels of winter 2012–13 (63%).

60%

Public sector employees have appeared to recover their levels of work–life balance, with 60% agreeing or strongly agreeing that they achieve the right balance between home and work.

Table 10: Proportion of employees agreeing they achieve the right balance between their work and home lives... (%)

	All	Men	Women	Private	Public	Voluntary
Strongly agree	12	11	13	12	14	12
Agree	46	43	49	46	46	43
Neither agree nor disagree	14	15	13	14	16	12
Disagree	19	20	18	19	17	20
Strongly disagree	8	9	6	8	7	10

Base: 2,918; men: 1,469; women: 1,455; private: 2,153; public: 547; voluntary: 143

Overall, the degree of satisfaction with work–life balance declined the more hours the respondents worked each week.

Some respondents are more likely to agree that they achieve the right level of work–life balance than others depending on the hours they were contracted to work, and the hours they actually worked. Overall, the degree of satisfaction with work–life balance declined the more hours the respondents worked each week. However, those on zero-hour contracts were more likely to agree or strongly agree that they achieve the right balance between work and home life, even when they worked more than 40 hours per week, suggesting that they were more in control of

accepting or declining additional working hours.

Those contracted to work between 1 and 24 hours per week were most likely to be satisfied with their work–life balance when they worked their contracted hours (72%), compared with those contracted to work 25–40 hours (66% agree or strongly agree they achieve the right work–life balance by working contracted hours), and those on more than 40-hour contracts (only 37% satisfied with working their contracted hours).

Table 11: Proportion of respondents agreeing or strongly agreeing that they achieve the right balance between work and home life, by hours contracted and actually worked (%)

		Actual hours worked		
		1–24	25–40	More than 40
Contractual hours	Zero hour	72	63	45
	1–24	72	56	25
	25–40	–	66	40
	More than 40	–	–	37

Base: 2,580

Employee attitudes and the economic downturn

Employees' fears over losing their jobs are on the rise again in the public sector (23% think it is likely or very likely they will lose their job compared with 18% in spring and 24% in winter 2012–13). Private sector employees are only slightly more concerned about job loss than in spring (17% compared with 16% in spring). The concerns in the voluntary sector are on the decline again, although only to 18% from 19% in spring 2013.

Those who felt insecure in their jobs were also less likely to report higher levels of engagement. Only 9% of those who think they are likely or very likely to lose their job are engaged, compared with 63% of those who believe job loss is unlikely. A further 29% of those feeling insecure in their jobs are disengaged.

Fewer employees overall report experiencing the consequences of the economic downturn on their organisation: 15% believe their organisation has not been affected, compared with 14% in spring 2013. Voluntary sector employees gained confidence the most (12% feel unaffected by the economic downturn compared with 10% in the previous quarter). This is perhaps due to a sharp decrease

in voluntary sector organisations making redundancies (29% down from 49% in spring 2013) and planning to make redundancies (8% down from 25%). Although the voluntary sector may be keeping individuals on, current employees were more likely to experience pay freezes and changes in working hours, but less likely to experience a cut in pension contributions or other benefits and perks.

Despite employees in the public sector being most concerned about losing their jobs, this autumn the number of actual (46%) and planned (25%) redundancies they report in their organisations has decreased compared with the previous quarter (by 5% and 3% respectively). A smaller proportion of employees in the public sector indicated that their organisation has cut back on training (34% compared with 45% in spring 2013), have frozen pay (63% compared with 71%) or cut pay (7% compared with 11%).

The economic downturn continues to have a lower degree of impact on the employees in the private sector, although a slightly higher proportion of respondents reported redundancies (30% compared

Fewer employees overall report experiencing the consequences of the economic downturn on their organisation: 15% believe their organisation has not been affected, compared with 14% in spring 2013.

with 28% in spring 2013) and training cutbacks (16% compared with 18% in the previous quarter). On the other hand, planned redundancies, pay freezes and reduction to employee benefits are all on the decrease in the sector.

All sectors appear to have resumed recruitment, with only 24% of employees reporting that recruitment has been frozen, compared with 28% in the previous quarter.

Table 12: Proportion of employees saying it is likely or unlikely that they could lose their jobs as a result of the economic downturn... (%)

	All	Private	Public	Voluntary
Very likely	4	4	5	4
Likely	14	13	18	14
Neither likely nor unlikely	27	27	26	25
Unlikely	31	32	29	32
Very unlikely	19	20	17	20
Don't know	5	5	5	6

Base: 2,918; private: 2,153; public: 547; voluntary: 143

Table 13: In which ways, if at all, has your organisation been affected by the economic downturn? (%)

	All	Private	Public	Voluntary
It has made redundancies.	33 (-1)	30 (+2)	46 (-5)	29 (-20)
It is planning to make redundancies.	11 (-2)	7 (-1)	25 (-3)	8 (-17)
It has cut back on training.	20 (-2)	16 (-2)	34 (-11)	23 (-5)
It has cut back on the number of hours that people work.	18 (0)	19 (-2)	16 (+3)	14 (+4)
It has increased the number of hours that people work.	6 (-1)	5 (-1)	6 (-3)	13 (+1)
It has frozen pay.	38 (-3)	31 (-1)	63 (-8)	48 (+8)
It has cut pay.	6 (-1)	6 (0)	7 (-4)	4 (-3)
It has frozen recruitment.	24 (-4)	21 (-3)	40 (-3)	18 (-2)
It has reduced the amount contributed to employee pensions.	6 (0)	4 (-1)	12 (+3)	6 (-10)
It has reduced employee benefits/perks.	16 (-1)	14 (-1)	23 (0)	12 (-9)
It has been affected in some other way.	17 (-2)	14 (-3)	22 (-2)	25 (-3)
It has not been affected by the economic downturn.	15 (+1)	18 (0)	5 (+1)	12 (+2)
Don't know	11 (+4)	12 (+5)	8 (+4)	9 (+6)

Base: 2,918; private: 2,153; public: 547; voluntary: 143

Job-seeking

Nearly a quarter (24%) of employees are looking for a new job in autumn 2013; this represents an increase from previous quarters (spring 2013: 21%; winter 2012–13: 20%; spring 2012: 20%). There is little difference across the sectors in job-seeking intentions, with 24% of employees in the private and voluntary sectors and 23% in the public sector looking for a new job. This represents an increase in the private and public sectors but a noticeable decrease in employees

looking for a new job in the voluntary sector. This quarter also sees more female (27%) than male (22%) employees looking for a new job and age differences show that younger employees are significantly more likely to be looking for a new job than older employees.

Finally, as you might expect, disengaged employees are much more likely to be looking for a new job (71%) than engaged employees (9%).

Nearly a quarter (24%) of employees are looking for a new job in autumn 2013; this represents an increase from previous quarters (spring 2013: 21%; winter 2012–13: 20%; spring 2012; 20%).

Table 14: Proportion looking for a new job, by sector (%)

	Autumn 2013	Spring 2013	Winter 2012–13
All	24	21	20
Private sector	24	20	18
Public sector	23	22	22
Voluntary sector	24	35	33

Base: 2,918; private: 2,153; public: 547; voluntary: 143

Table 15: Proportion looking for a new job, by age (%)

18–24	25–34	35–44	45–54	55+
51	30	28	25	15

Base: 2,918; 18–24: 146; 25–34: 495; 35–44: 662; 45–54: 698; 55+: 923

Table 16: Proportion looking for a new job, by engagement (%)

	Engaged	Neutral	Disengaged
Yes	9	31	71
No	91	69	29

Base: 2,918

Conclusions

The autumn 2013 *Employee Outlook* findings contain two interesting themes. Firstly, there seems to be a swapping of fortunes for private and public sector employees since spring 2013, with public sector employees now feeling more engaged and satisfied in their jobs than their private sector counterparts (voluntary sector employees continue to be the most engaged and satisfied). And, secondly, the findings are showing real indications that talent is preparing to be on the move again and that employees in general

enjoying a higher job satisfaction and engagement level than their counterparts in the private sector. Public sector employees are also reporting a better satisfaction with their relationships with their line managers than employees in the private sector. Public sector employee ratings of their senior leaders have been consistently poor – since we started surveying in spring 2009 – but this autumn we continue to see improvements, noticeably in relation to trust in senior managers and treating employees with respect. At the same time, ratings of senior management consultation in the private sector have dropped slightly. So what could be the reasons for this reversal in fortunes? Despite a downward trend in actual and planned redundancies in the public sector, more employees this autumn are concerned about their personal job security, with 5% more thinking it is likely or very likely that they could lose their job. We know that often when people are faced with job insecurity or see colleagues being made redundant, it makes them more grateful to have a job. There does, however, seem to be a noticeable positive shift in the public sector in employees' satisfaction with line managers (and a negative shift in the private sector) and also improved trust in senior managers that might well be making the difference.

Our autumn findings show a reversal of fortunes for private and public sector employees, with public sector employees now enjoying a higher job satisfaction and engagement level than their counterparts in the private sector.

are feeling more optimistic about the jobs marketplace – a signal which organisations should not take too lightly.

A swapping of fortunes for the private and the public sectors

Our autumn findings show a reversal of fortunes for private and public sector employees, with public sector employees now

Signs that talent is preparing to be on the move again

Meanwhile, for the whole of the employee sample, there are real signs that talent is preparing to be on the move again. Job-seeking intentions continue to rise this autumn and have reached a two year high; almost a quarter (24%) are actively looking for a new job with a different employer. This figure is fairly consistent across the sectors. Despite public sector employees feeling greater job insecurity, employees report overall less negative impact from the economic climate and a decrease in organisations implementing recruitment freezes.

Further, our new questions exploring employees' experiences of performance management tell us that more than three-fifths of employees believe that it is very or fairly important to know that they are being considered for progression within their organisation. Employers need to be aware that if that isn't currently happening, they risk losing some of their most talented employees,

who might well vote with their feet and take advantage of a somewhat improved labour market outlook.

Despite public sector employees feeling greater job insecurity, employees report overall less negative impact from the economic climate and a decrease in organisations implementing recruitment freezes.

Additionally, it is employees from the private sector who are most likely to say progression is important to them, so if they aren't experiencing progression opportunities, coupled with their reversal of fortunes this autumn, private sector employers might be particularly susceptible.

Background to the survey

The CIPD has commissioned a twice-yearly 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 survey for the CIPD of 2,918 UK employees in September 2013. This survey was administered to members of the YouGov Plc UK panel of more than 350,000 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. 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).

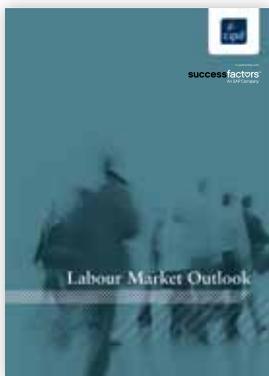
Emails were sent to panellists selected at random from the base sample. The email invited them to take part in a survey and provided a generic survey link. Once a panel member clicked on the link they were sent to the survey that they were most required for, according to the sample definition and quotas. The sample profile is normally derived from census data or, if not available from the census, from industry-accepted data.

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

CIPD Outlook Series

The *Employee Outlook*, produced in partnership with Halogen, is part of the CIPD Outlook series, which also includes the *Labour Market Outlook* and the *HR Outlook*. Drawing on a range of perspectives (and with the opportunity to compare data across our regular surveys), this triad of research enables the CIPD to offer unique insight and commentary on workplace issues in the UK.

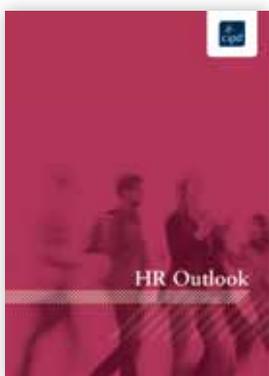
Others in the series



Labour Market Outlook

The *Labour Market Outlook*, published in partnership with SuccessFactors, provides a quarterly update on key HR, economic and labour market statistics. The aim of the survey is to produce an industry-valued benchmark of key HR statistics that can be used by CIPD members, as well as those in government, policy and wider business circles.

cipd.co.uk/labourmarketoutlook



HR Outlook

The *HR Outlook* provides valuable insight and expert commentary on the HR profession. It explores the size and shape of HR functions, comments on the capabilities of HR professionals and outlines emerging trends and future priorities.

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