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Report

Teacher Supply, Retention and Mobility in London

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Public



Teacher Supply, Retention and Mobility in London

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Executive Summary

London is a vibrant city and an attractive place for young teachers to come and work. However, despite the opportunities that London's education system offers, it faces a significant and growing teacher supply challenge as it struggles to retain teachers over the long term.

This research was carried out by NFER and commissioned jointly with the Greater London Authority, on behalf of the Teach London partners. The report explores the characteristics and dynamics of London's teacher labour market in unprecedented depth using quantitative analysis of data from the School Workforce Census, and supplemented by discussions with London teachers.

In the context of a national teacher supply challenge, the findings demonstrate that London's teacher labour market faces a particularly acute challenge over the coming decade and that this challenge is specific to London rather than a general pattern across other large English cities. The challenge requires action from policymakers, school leaders and other stakeholders in London's education system.

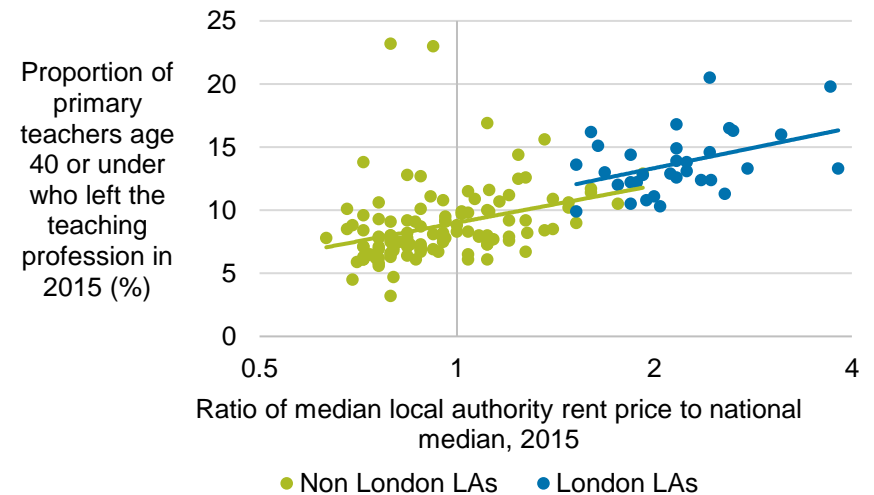
London's schools will need more teachers over the next few years as pupil numbers are forecast to grow rapidly, especially at secondary level. London already has more new entrants to its teacher workforce each year, driven by a greater proportion of newly qualified teachers (NQTs) than in other large cities and the rest of England. But these new teachers are not enough to replace the many teachers who leave teaching in London each year.

London has a higher rate of young teachers leaving the profession and a steady outflow of teachers in their thirties and forties to teach elsewhere. Higher proportions of schools with vacancies and of

unqualified teachers employed in London, compared to other areas, suggests that the labour market is already experiencing significant shortages in many areas.

While the vibrancy of London and the pace of its education system seem to initially attract younger teachers, there are factors that discourage teachers from remaining in London in their thirties and beyond. The most important factor driving low teacher retention in London is higher housing costs. The data shows a clear relationship between areas of England with higher rent prices, dominated by London boroughs, and higher rates of teachers aged under 40 leaving the profession. One teacher we spoke to said 'I don't want to leave, but I don't think we will ever be able to buy a house in London'.

Higher rent prices are associated with a higher rate of young teachers leaving the profession



Losing many mid-career teachers in London also affects the future leadership pipeline. We find that early career teachers are accelerated into middle leadership positions more quickly in London than they are in other areas, due to a lack of more experienced teachers to fill the roles. While these opportunities for quick progression can initially attract teachers to London, it may leave teachers feeling underqualified and therefore overwhelmed by their extra responsibilities. Middle leaders are more likely to leave the profession in London than in other areas, and more move out of London to teach elsewhere than move into the capital.

We recommend that policymakers, school leaders and other stakeholders in London's education system work to identify and implement policy interventions that ensure London's schools have enough high-quality teachers over the coming years. Our research highlights five key areas that are likely to yield the most effective remedies:

Cost of living – housing and childcare costs are significant barriers to retention. Childcare subsidies and term-time only childcare places may help to retain teachers who have children, or are considering starting a family. More research is needed to identify how new housing policies might be developed, or existing ones enhanced, to target teachers.

Recruiting teachers – teachers we spoke to suggested that more promotion of teachers' positive experiences of working in London, more London-based teacher recruitment fairs, greater availability of salaried training routes and more opportunities for pre-training work experience could all contribute to improving teacher recruitment.

Teacher pay – increasing the pay of teachers in London, for example by increasing London's pay scale points, is a potential remedy to make the cost of living more affordable. However, the main barrier to London schools raising teacher pay is school funding. Current school funding policy and the proposed national funding formula may limit the ability of London's schools to increase teachers' pay. The impact on schools close to the Inner/Outer London and Outer London/ Fringe pay area boundaries would also need to be considered carefully in any change, as increasing the differentials may have a detrimental impact on those just outside of a pay area.

Flexible working – NFER research has highlighted the positive impact that increasing opportunities for part-time and flexible working could potentially have on teacher recruitment and retention (Worth *et al.*, 2017; Bamford *et al.*, 2017). Such opportunities could be an important attraction for many teachers in London, where young teachers who are thinking about starting a family are leaving, or at least considering leaving. More research should be conducted to explore how schools in London might offer opportunities that are suited to the needs of London teachers.

Support and professional development – interviewees talked about the importance of support and professional development for teachers, particularly young and early career teachers who are likely to benefit from coaching, mentoring, and networking with others who have more experience. More should be done to share effective practice across schools in this area. A focus on health and well-being was also thought to be important to retaining teachers.

1. Introduction

Recruiting and retaining enough teachers to serve growing numbers of pupils is one of the key challenges currently facing England's education system. This challenge is particularly acute in London because of greater demand for teachers and a more challenging teacher supply situation.

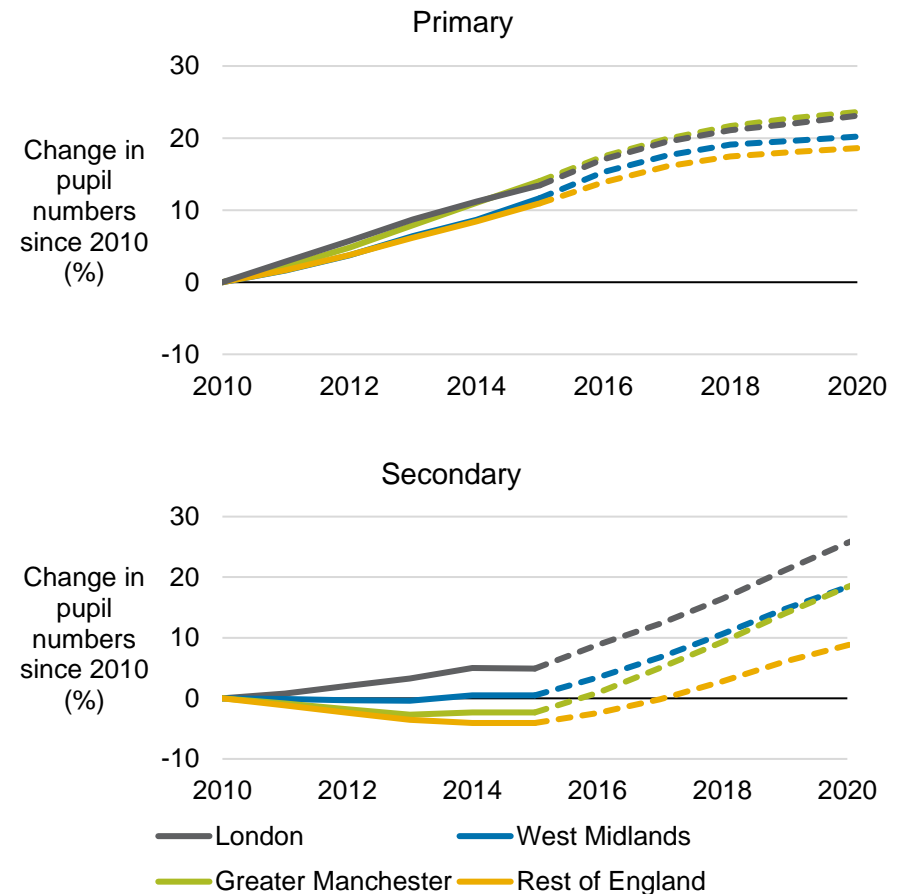
The Teach London strategy aims to make the case for a specific regional process for the training of new teachers across London and proactively influence the retention of the existing workforce and deepening of their skills base. The strategy is co-ordinated by the Greater London Authority, Teaching School Council in London and other partners. As part of this strategy, NFER is working in collaboration with the Teach London strategy group to gain a deeper understanding of the factors influencing the recruitment, retention and mobility of London's teaching workforce. This report presents the findings of that research.

London's teacher supply challenge

Demand for teachers in London is high and growing

The demand for teachers is primarily driven by the number of pupils in schools because of the legal, political and practical barriers to increasing class sizes. As shown in Figure 1, the number of pupils in England's primary schools has increased rapidly since 2010 and the growth is expected to slow down from 2017 onwards. Pupil numbers in England's secondary schools have fallen slightly since 2010, but are forecast to increase rapidly as the larger cohorts of primary school pupils make a transition into secondary education.

Figure 1 Pupil numbers are forecast to rise faster in London than elsewhere



Note: dashed line is a forecast. Source: NFER analysis of Department for Education data (School Census and School Capacity).

In general, pupil numbers in London have grown at a faster rate than most areas nationally since 2010. Primary pupil numbers have grown by 13 per cent in London, compared to 12 per cent in the West Midlands, 14 per cent in Greater Manchester and 11 per cent in the rest of England. At secondary level, pupil numbers in London have grown by five per cent between 2010 and 2015, whereas they have been flat or falling in other areas. Growth in secondary pupil numbers is forecast to be higher in London than nationally over the next few years: 12 per cent growth between 2017 and 2020, compared to 10 per cent nationally. This pupil growth, over and above the national average, creates additional demand for teachers in London that needs to be met with additional supply.

Teacher retention is more challenging in London

The supply of teachers changes over time due to teachers retiring or leaving the profession for other reasons, and teachers entering or re-entering the workforce.

Research by the Department for Education (DfE) showed that London's teacher labour market is different to that in other English regions in ways that make ensuring an adequate supply of teachers more difficult. London has a higher than average rate of teachers leaving the profession, proportion of unqualified teachers¹ and proportion of schools with vacancies or temporary staff (DfE, 2016).

¹Unqualified teachers include a range of teaching staff in different circumstances, including teachers in specialised roles, teachers who trained overseas but that have not registered their teaching qualification and teachers in the first year of School Direct training or the Teach First programme.

However, because large English cities such as Manchester and Birmingham are contained within larger regions containing other cities, towns and villages in this analysis, it is unclear whether these issues are unique to London, or are patterns common in other large cities. Whether this is London-specific or city-specific matters for determining where policymakers should focus their efforts to alleviate the teacher supply challenges. If issues are common to cities across the country then co-ordinated national action may be required, whereas London-specific issues suggest more local and tailored policy solutions are required.

NFER analysis of the teacher labour market compared London to other large English cities. The analysis found that London has higher rates of teachers leaving the profession and leaving for schools in other areas than other large English cities (Worth *et al.*, 2017). These findings strongly suggest that London's teacher supply challenges are specific to London, rather than being a nationwide urban phenomenon.

About this research

This research was carried out by NFER and commissioned jointly with the Greater London Authority. It explores the characteristics and dynamics of London's teacher labour market in unprecedented depth with quantitative analysis of school workforce data, supplemented by discussions with London teachers (see methodology in Appendix A).

The sections of the report set out the most important and policy-relevant findings from our analysis:

- section two shows the age profile of London's teacher workforce and how it has been shaped by low retention rates, particularly as teachers reach their thirties and forties
- section three shows that London's teacher labour market, characterised by high turnover, relies on greater inflows of new entrants
- section four explores data on vacancy rates and unqualified teachers, proxy measures for existing teacher shortages, which are higher in London than elsewhere
- section five shows that London's early-career teachers are accelerated into positions of responsibility and leadership earlier in their careers than elsewhere, which can be good opportunities for early career progression but may also be too much pressure too soon
- section six presents some conclusions and recommendations from the research.

² Birmingham, Coventry, Dudley, Sandwell, Solihull, Walsall and Wolverhampton.

Analysis of School Workforce Census data

We analyse data from six consecutive waves (2010-2015) of the DfE's School Workforce Census (SWC), which contains information on all teachers employed in state-funded schools in England, supplemented with other school-level data published by the DfE. We measure aspects of teacher supply in London and draw comparisons with other English large cities and the rest of England.

We analyse data on teachers in the state-funded primary and secondary schools. We also track a subset of NQTs who entered the workforce in 2011 over their journey in the first few years of their career. We identify the subset of early career teachers (ECTs) according to the location of their first job in teaching, (which does not necessarily correspond to where those teachers carried out their training, as the data does not include this information). The number of teachers identified in the cohort is shown in the Appendix.

We define London according to the 33 London boroughs and compare the characteristics of London's teacher workforce and labour market dynamics with the two next largest combined authorities in England: the respective local authorities that form the West Midlands Combined Authority² and the Greater Manchester Combined Authority³. We also make comparisons with the characteristics of the rest of England – excluding the three cities – to enable us to understand to what extent differences are London-specific or city-specific. See the Appendix for more information on our methodology.

³ Bolton, Bury, Oldham, Manchester, Rochdale, Salford, Stockport, Tameside and Trafford.

Discussions with London-based teachers

To gain an insight into the experiences of teachers in London and to explore some of the themes emerging from the quantitative analysis, we held discussions with ten London-based teachers (see the Appendix for the profile of teachers included) and one Director of a Teaching School who recruited to a London-based School Direct programme and oversaw a programme for London-based NQTs. Members of the Teach London strategy group recruited participants via their networks.

We asked the teachers for their views on: the attraction of working in London (the 'pull' factors); factors which might discourage some teachers from training and teaching in the capital (the 'push factors'); recruitment and retention challenges faced by London schools; and potential ways to address any workforce challenges. Their views on these issues are reflected throughout this report.

As the sample of teachers is small, their views are not representative of all London teachers. They are helpful for interpreting the quantitative findings and identifying themes that could be explored in more depth in further research. The GLA has commissioned further research, particularly focussed on housing and flexible working, the findings from which will be published later in the year.

2. Retaining London's teacher workforce

In this section we explore the age profile of London's teachers and how this relates to workforce retention. London's teachers are younger than in other cities and in the rest of England. The small sample of teachers we spoke to were initially attracted to teach in London by the perception that London's schools are at the 'cutting edge'. However, the youthful age distribution of teachers is driven by lower rates of teacher retention: more of London's teachers leave the profession than in other areas and London has a steady net outflow of teachers each year who move to teach elsewhere, especially those in their thirties and forties.

Our analysis shows that higher rates of teachers leaving the profession in London are associated with higher housing costs, suggesting this is a major reason why teacher supply is more challenging in the capital. Interviewees also suggested that it is harder for London schools to retain teachers because, in their view, there is greater challenge associated with being a teacher in London and because of the additional leadership responsibility sometimes put on teachers earlier in their careers.

For many, London is an initially attractive place to teach

We interviewed a small sample of London's teachers who talked about why they were initially attracted to working in the capital (the 'pull factors'). London was considered to be at the forefront of educational change. As one headteacher said, 'London is at the cutting edge. There is so much intellectual stuff going on, you feel fresh'.

Similarly, a secondary school teacher commented, 'If there is a new buzz in teaching we will have adopted it here before it hits suburbia'.

Interviewees perceived that there is a greater choice for teachers in London due to a larger number of schools with varying contexts (including social and cultural diversity and different levels of challenge). Teachers felt that this gave them the opportunity to make a real difference to young people's lives, 'You can make a real difference. That's what inspires us and keeps us going...those challenges and successes'.

The number and variety of schools, in turn, was thought to offer more opportunities for professional development and networking. Teachers perceived there were prospects for early progression which attracted them to London. Teachers we spoke to saw London as the '*cultural capital*' which enabled them to offer students valuable experiences, 'Everything is centred in London so we have so many opportunities we can give the students'.

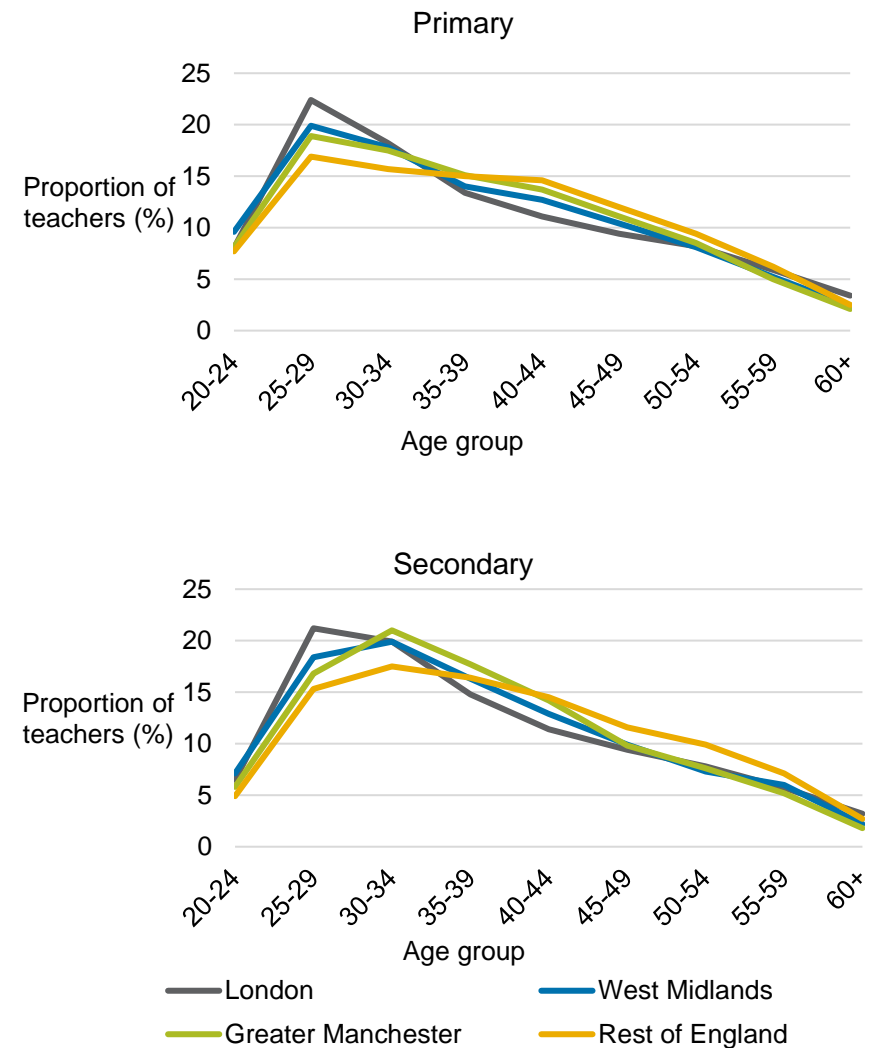
London's teachers are young

London's teachers are younger than the teaching workforce nationally. Figure 2 shows the age distribution of teachers in London compared to other major cities and the rest of England (average over period from 2010-2015). At both primary (above) and secondary (below) level, London has more teachers between the ages of 25 and 29 and fewer teachers between the ages of 35 and 44 compared to other areas. The West Midlands and Greater Manchester both have greater proportions of teachers in their twenties and fewer in their thirties and early forties than the rest of England, suggesting this age distribution is common to other large cities, but the pattern is most marked in London.

Among the sample of teachers interviewed, it was perceived that younger teachers would initially be attracted to the vibrancy of London. As one headteacher said, 'It's the best city in the world. It's the cultural capital'.

It was also felt that younger teachers may find it easier to cope with the pace of change in London, which was described as '*supersonically fast*'. Interviewees thought that this would initially attract younger teachers to the city, but there would come a point when they would experience '*burn out*'. Another secondary school teacher said, '*I know I can't do this until I'm 70, but I need to work until I'm 70*'. They perceived that teachers experienced a fast pace of change and pressure nationally, but felt that these issues were amplified in the capital.

Figure 2 London's teacher workforce is younger than that in the rest of the country



Retaining young and early career teachers in the profession is harder in London

The different age distribution in London is primarily driven by lower retention of young teachers; both retaining them in the profession and retaining them in London. London has a higher rate of teachers leaving the profession than other areas of the country⁴. Between 2010 and 2015 an average of 10.5 per cent of non-retiring teachers left teaching each year in London (around 4,000 teachers per year). This compares to the national average of 7.5 per cent.

Nationally, teachers in their twenties are the most likely to leave the profession, so London's lower retention rate is partly explained by the fact that its teacher workforce is younger compared to nationally. However, as shown in Figure 3, London also has a *higher* rate of leaving the profession among teachers in their twenties and thirties, compared to other areas (average over period from 2010-2015).

Figure 3 London's young teachers are more likely to leave teaching

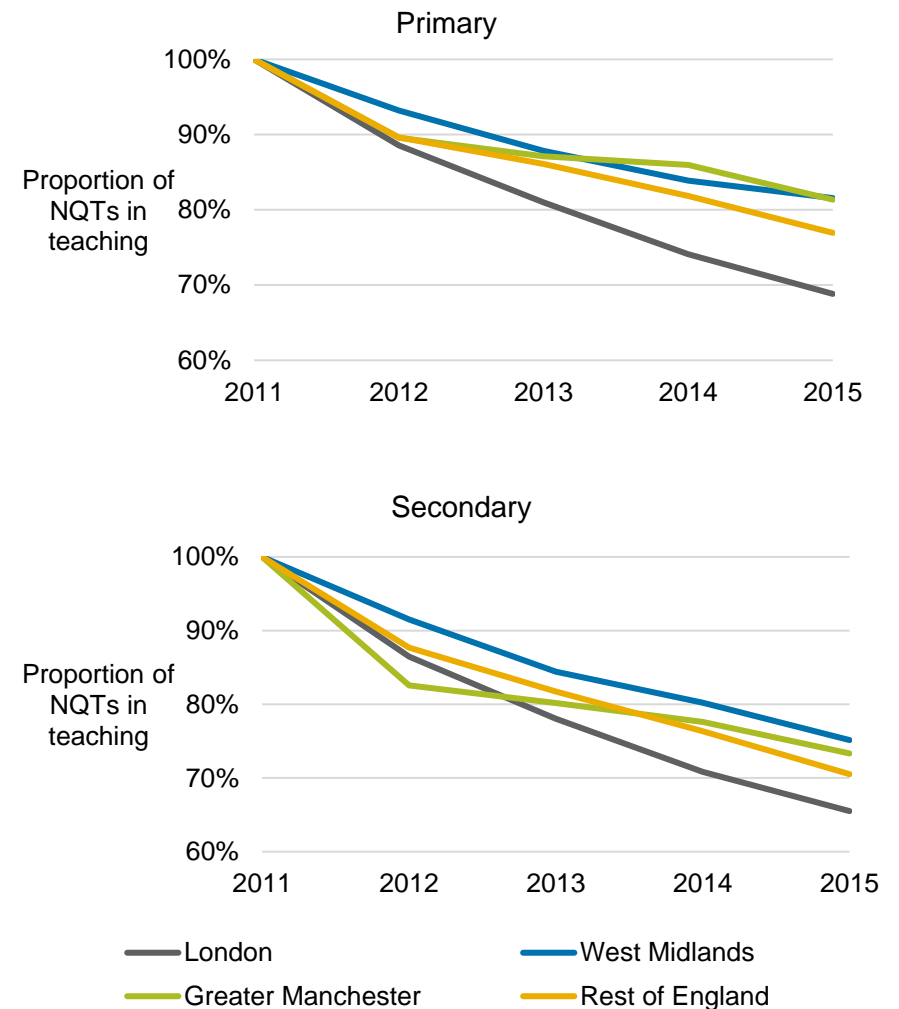


⁴ We refer to teachers leaving their post in the state-funded sector as 'leaving the profession' in this report, although it may also include moving to teach in further or higher education, in independent schools, in other UK nations or abroad.

Considering London's younger teachers are leaving the profession at a higher rate than other areas, and that the majority of NQTs are in their twenties (two-thirds of the 2011 cohort), it follows that London would also lose a higher proportion of NQTs than other areas. Indeed this is what we find.

Figure 4 shows the proportion of NQTs who entered the workforce in 2011 that remained in the profession over the following four years, split by the area of their first teaching post. We found that for both primary and secondary school teachers, those who started their career in London were the least likely to remain in the profession by 2015. Around a third of primary (31 per cent) and secondary (34 per cent) NQTs left the profession within 4 years of entering the profession. This is seven and four percentage points higher than the respective national averages for primary and secondary NQTs.

Figure 4 London's NQTs are more likely to leave teaching

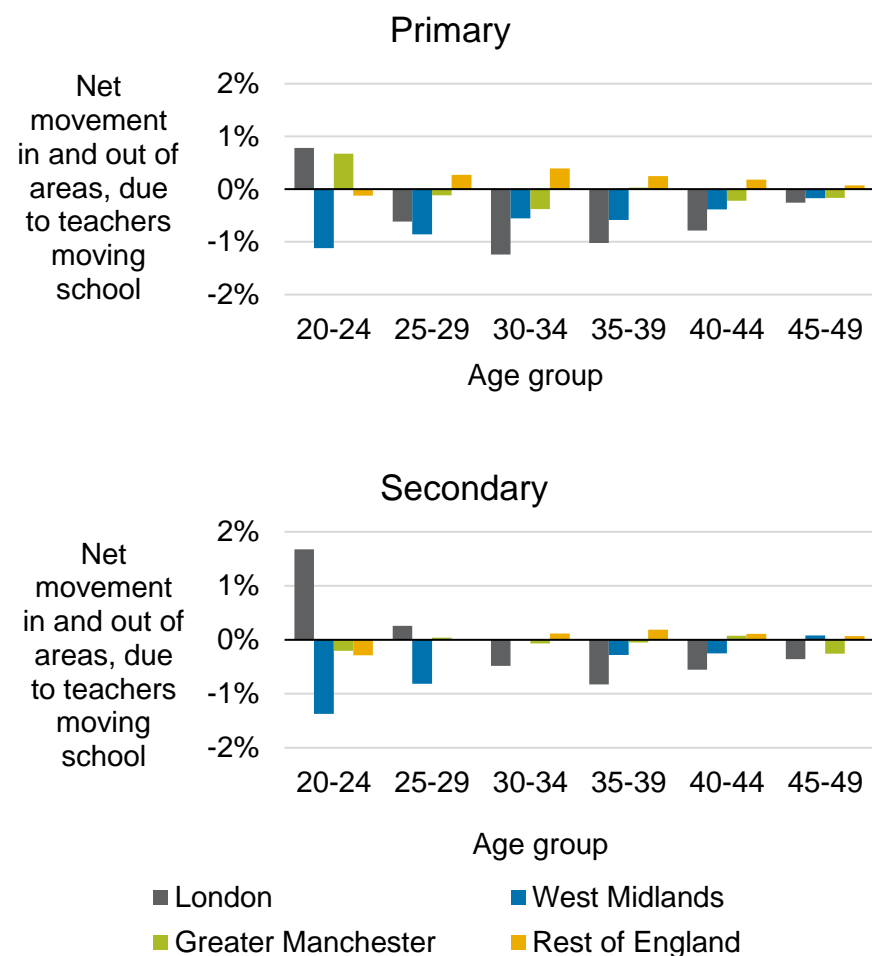


Many young and early career teachers stay in teaching but move out of London

Teachers staying in teaching but moving region when they move from one school to another, also negatively impacts on London's teacher supply. Figure 5 shows the net movement of teachers into each area, split by age. It is the difference between the number of teachers who move school and move *into* an area and the number of teachers who move school and move *out of* an area, as a proportion of the area's total workforce. The figures are an average over the period 2010-2015. As it is based on teachers moving from one school to another, it does not include those who join the profession (e.g. NQTs after completing their training) or leave the profession. A bar above zero means the area is a net importer of teachers of that age group, while a bar below zero means the area is a net exporter of teachers of that age group.

At both primary and secondary level, London is a net importer of teachers in their twenties (except for primary teachers age 25-29) and a net exporter of teachers at other ages, particularly those in their thirties. This same pattern is not evident in other large cities (for example, the West Midlands loses around one per cent of its primary and secondary teachers in their twenties each year to other areas) and the opposite is true in the rest of England.

Figure 5 The youngest teachers are moving into London, while teachers in their thirties are moving out



Note: a bar above zero means the area is a net importer of teachers of that age group, while a bar below zero means the area is a net exporter of teachers of that age group

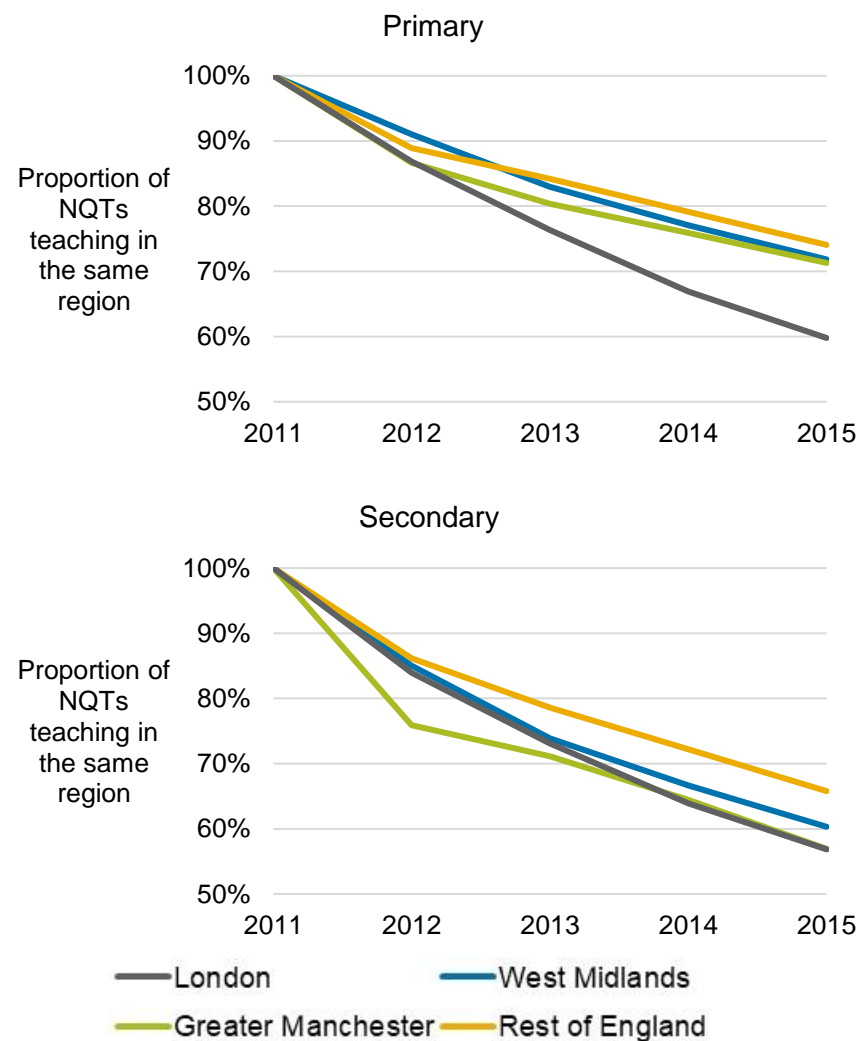
The same is true of early career teachers: London's NQTs are more likely to be teaching in another area within four years, compared to other areas. One headteacher interviewed gave examples of NQTs who, although had remained in teaching, had not been retained in London, 'I have a feed of NQTs who give me three years then move, then the next NQTs who give me three years then move, then the next...'

She felt such turnover can be positive as her school had a regular cycle of new enthusiastic teachers, but acknowledged the implications for the future pipeline of senior leaders once her leadership team near the point of retirement.

Figure 6 shows the proportion of NQTs who entered the workforce in 2011 that were still working in the same region over the following four years. Only 60 per cent of London's NQTs were still teaching in London after four years, below the national average of 71 per cent.

Although secondary school NQTs have a lower rate of retention than primary school NQTs, London's retention of secondary school NQTs is more similar to other cities. After four years, 43 per cent of secondary school NQTs had left the profession or moved to other areas. This is the same rate as Greater Manchester and slightly higher than the West Midlands, and six percentage points higher than the average for the rest of England.

Figure 6 London's early-career teachers are among the least likely to remain teaching in London



Higher housing costs are an important driver of lower retention rates in London

It is important to understand the factors that are driving young and early-career teachers away from London as the higher rate leaving the profession or moving to work elsewhere creates larger gaps in teacher supply that need to be filled each year.

Interviews with teachers suggest that the vibrancy of London and the pace of its education system seem to initially attract younger teachers, while there are factors that could discourage teachers from remaining in London in their thirties and beyond. Staying in London at the point of wanting to settle down and start a family was considered challenging, which could be why the data shows that the proportion of teachers in London drops once they reach their thirties. This was thought to primarily be because of the cost of housing (either rental costs or difficulties in obtaining a mortgage that covered high house prices in London). One NQT commented that, *'it is not about the job, it's about whether I can teach and stay in London'*. Housing costs then coupled with the cost of childcare were considered to be the main barriers to remaining in teaching in London, as illustrated by Case A.

Case A. Housing and childcare costs as push factors as teachers get older

Mr A. was aged 33 and was the Head of School at a primary special school. He came to London nine years ago as he had friends in the city and he decided to train as a teacher via a School Direct Salaried route. He did not expect to stay in London for more than two or three years, but he settled in the city and married another teacher five years ago. They then bought a house together: 'we were lucky as we were able to buy a house through a shared ownership scheme'. They are now having to make a decision about whether they could remain in London and start a family, due to concerns about high mortgage and childcare costs combined. He said, 'The big fear for us is whether we can afford to live in London with a family. As soon as a child comes in the picture we'll be on the breadline. We've got a high mortgage. I love London and don't want to leave. It's about affordability'.

One headteacher said that housing and childcare costs were the reasons some younger teachers at her school had left London, 'Every one of my teachers who has left London has wept about having to leave, but they can't afford a decent quality of life. That's a massive catastrophe'.

One young teacher did not want to leave London but felt she might have to at the point she and her partner ever wanted to purchase a property, 'I don't want to leave, but I don't think we will ever be able to buy a house in London. That's not to do with not having a deposit, it's about the percentage of salary they will give us as a mortgage'.

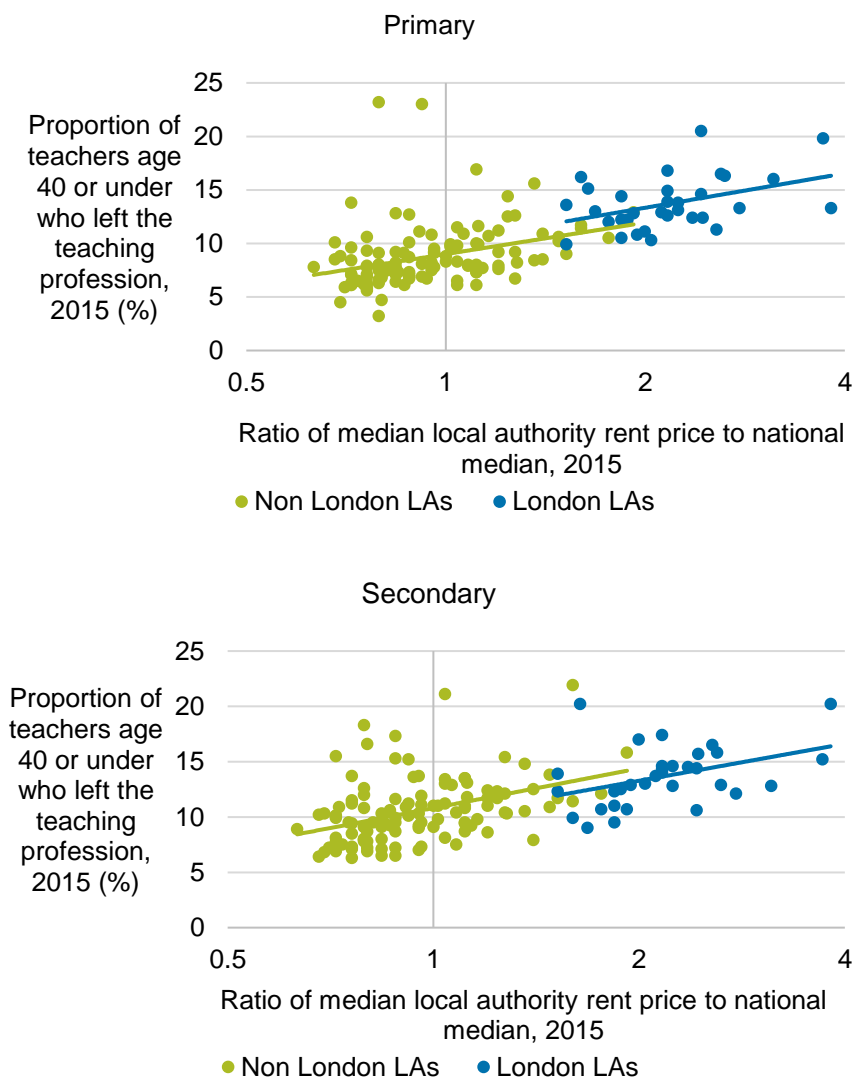
There was a perception that the profile of teachers in London might be younger as they might be more willing to rent a house (rather than wanting to purchase a property) and to live in shared housing at a younger age, but then move on once they get older and want to 'settle down'. One young teacher said, 'I could pretty much earn the same somewhere else', but have a lower cost of living. This could be a factor in why teachers leave London to teach elsewhere.

Data from the SWC, combined with data on local authority-level rent prices from the Valuation Agency Office, lends weight to the hypothesis that housing costs are a major reason why London's teachers are more likely to leave the profession than teachers in other areas. Figure 7 shows the relationship between the proportion of primary and secondary teachers aged 40 or under leaving the profession in a local authority area and the level of rent prices in that area compared to the national average. The blue points are London's boroughs and the green points are local authorities outside London.

Median rent prices are above the national average in every London borough and are more than double the national average in most boroughs. There is variation around the average, but the data shows a clear relationship between higher rent prices and higher rates of young teachers leaving the profession. The same relationship is also evident with data on local area house prices: rent prices and house prices have a high correlation (around 0.9).

A high correlation between high housing costs and high retention rates does not necessarily imply that one causes the other. For example, a strong labour market with good employment opportunities may be associated with both high rates of teachers leaving the profession and high rent prices. However, corroboration with our teacher interviews suggests they are likely to be an important factor.

Figure 7 Higher rent prices are associated with a higher rate of young teachers leaving the profession



Other issues in London also make retention more challenging

Interviewees referred to other possible factors that could be driving young and early-career teachers away from London. They raised a question about whether new recruits had enough understanding of what being a teacher is really like in reality, and that once they had been in teaching for a relatively short period they may decide it is not the career choice for them. Teaching was described as *'a profession, not a job'* and *'a lifestyle choice'*. This is not necessarily a London-specific issue, but the interviewees perceived that the pressures faced in London schools were intensified compared with other areas, meaning teachers need to be sure it's the career for them. They felt that teacher training providers *'need to be honest about the profession and the commitment'* and that they should *'train fewer but keep them'*. Teachers interviewed would encourage those considering the profession to gain some experience of working in a school before they started their training (for example, work experience or working as a Teaching Assistant) so they fully understand the role. General life experience to gain *'maturity and resilience'* was also thought to be important before becoming a teacher.

The teachers we interviewed felt that the different routes into teaching prepared NQTs to different extents. For example, School Direct training programmes were considered challenging. One teacher who had taken that route said, *'you're in at the deep end...sink or swim'*, but in hindsight felt that this had prepared them for their first NQT year. Those who had followed a PGCE route said they had

'developed a good pedagogical understanding' but felt less prepared for practice in the classroom in their NQT year.

Teachers interviewed discussed the importance of *'nurturing and supporting'* NQTs once they were in the role, to help retain them (for example, by offering coaching and mentoring opportunities). One headteacher said, *'it's very daunting [for an NQT] to be given the job then told "figure it out"'*. This point is likely to relate to NQTs nationally, not just in London. Indeed, NFER's Engaging Teachers research found that if teachers felt they were being well supported they were less likely to want to leave the profession (this was the case for teachers generally, not just NQTs) (Lynch, *et. al*, 2016).

Other push factors that interviewees felt might discourage teachers from remaining in London interestingly overlapped with some of the initial pull factors. These factors could be relevant to young, early career teachers but also teachers further along in their careers. For example, teachers were said to be initially attracted to the challenges London schools had to offer, but it was felt that over time this could take its toll. They acknowledged that there are challenging schools nationally, but their own view was that the nature and scale of challenge might be greater in London. One early career teacher in a primary school said:

Families [in London] are so vulnerable. You work with them day in and day out...it is very hard not to feel their pain. They don't get a lot of support [elsewhere]. Where do you stop supporting them? I love that [the challenge] but people can burnout as you have to commit so much.

Teachers also commented on the scale of mental health problems, which they felt responsible for, but unqualified to support, 'There is a

lack of facilities and specialisms for students to get support elsewhere...you are more than just a teacher’.

The importance of support for teachers, to protect their health and well-being, was considered crucial for retention. It was felt that an opportunity for a career break or secondment ‘*to recharge your batteries*’ might be welcomed by some teachers and help to retain them longer-term.

NFER’s Engaging Teachers research found that support for students’ and teachers’ mental health, and health and well-being generally, was considered important for teacher retention *nationally* (Lynch, *et. al*, 2016). This could include schools having a governor, trustee or member of the senior management team responsible for monitoring staff and student welfare, to create a supportive and positive school culture and address the root causes of any stress or disengagement. Although these issues might not be London-specific, the teachers we interviewed perceived that the challenges might be greater in London compared with other areas of the country.

The retention challenges faced in London suggest that its teacher labour market relies on greater inflows of new entrants, which we look at in the next section.

3. Recruiting new teachers to fill the supply gaps

London has higher rates of teachers leaving the profession compared to in other areas, as well as a small but steady outflow of teachers from the capital to other areas. This creates supply gaps that need to be filled by new teachers each year. Growing teacher demand in London, driven by increasing pupil numbers, also means that more teachers are needed to enter the workforce each year. Are enough new teachers being attracted into London’s workforce to fill the gaps?

London attracts the most new entrants

London has more new entrants to its teaching workforce each year than other areas, as a proportion of its workforce. Primary entrants represent around eleven per cent of the teacher workforce in London, compared to around ten per cent in other large cities and nine per cent across the rest of England. The pattern is similar at secondary, where new entrants represent over nine per cent of London’s workforce, compared to eight per cent in other cities and seven per cent in the rest of England. However, it is not clear from this data alone whether these entrants are enough to meet the demand.

Figure 8 shows the composition of the new entrants in London, other cities and the rest of England (average over period from 2010-2015). The data suggests that the supply of new teachers in London is driven by a higher proportion of NQTs. Other large cities have a higher proportion of NQTs in the workforce than the rest of England, but London stands out as having the highest share. The level of deferred NQTs, returners and qualified teachers that are new to publicly-funded state education (PFSE) in London is similar to in other areas.

Figure 8 London’s system relies on a greater supply of NQTs

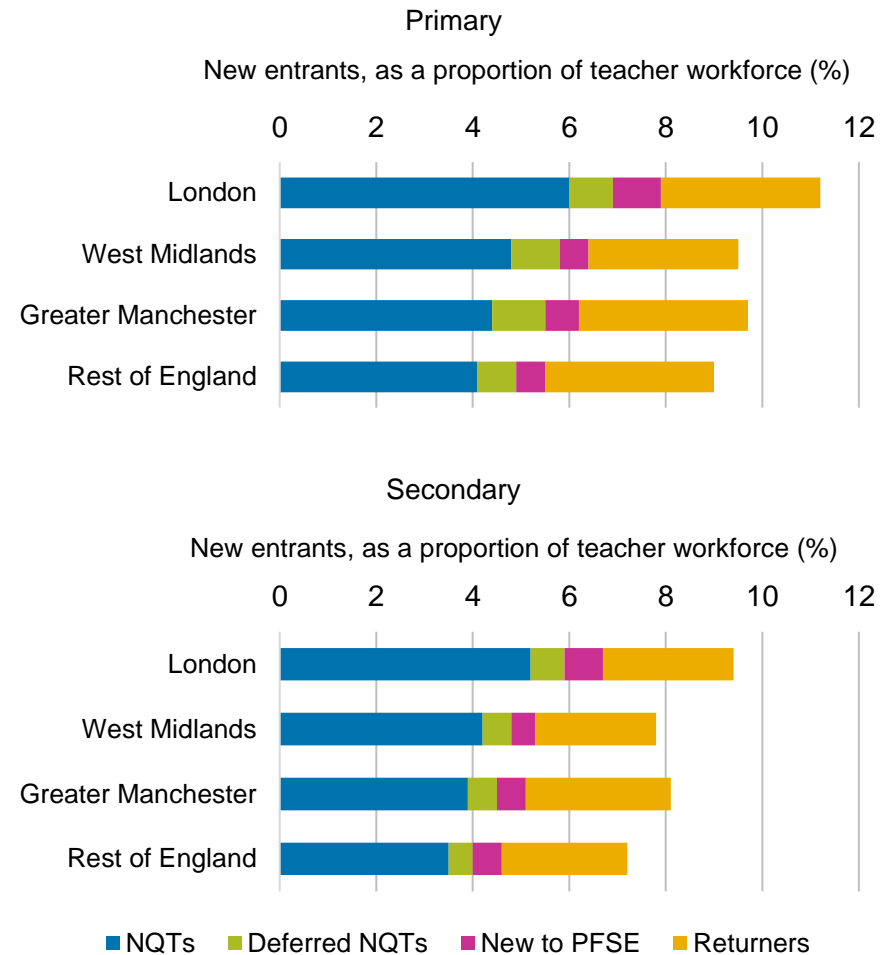


Figure 9 Higher rent prices are associated with a higher proportion of NQTs in an area

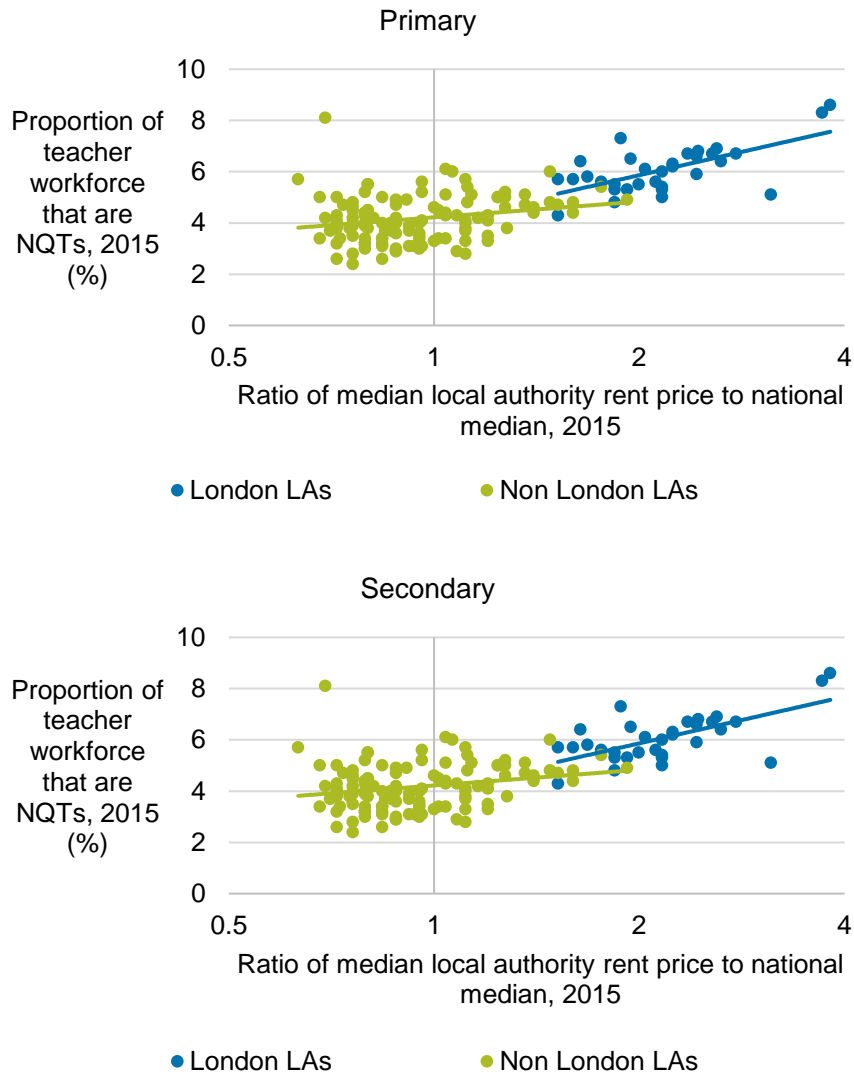


Figure 9 shows the relationship between the proportion of primary and secondary teachers that are NQTs in a local authority area and the level of rent prices in that local authority relative to the national average. Consistent with the finding that rent prices in a local authority are associated with lower levels of teacher retention, higher rent prices are also associated with higher proportions of NQTs to replace them. London’s teacher labour market, and particularly the Inner London boroughs with the highest housing costs, is generally less good at retaining teachers and therefore relies more heavily on new entrants, particularly NQTs, to fill gaps in supply.

Interviews with teachers help us to understand what might prevent some new recruits from training in London, which could be an issue if there are still not enough new teachers attracted into London to meet the higher demand.

The cost of living in London was considered the main barrier which could discourage teachers from initially training or teaching in the city. They felt that this was not helped by a cut in bursaries and what they thought was a limited supply of salaried training routes. Some of the teachers interviewed had trained via School Direct Salaried and ‘*couldn’t have done it unsalaried*’ and felt there should be an increase in such opportunities. However, the head of a teaching school said she continued to successfully recruit teachers to an unsalaried School Direct programme by advertising the benefits, which she said were ‘*a partnership with an academic centre of excellence, a training consortia of schools that are either good or outstanding, and you’re guaranteed a job in one of these schools*’. Nevertheless, it was considered beneficial if recruits were from the London area, as they were more likely to be retained.

Teachers also felt that the media could more accurately represent the positive aspects of being a teacher in London to attract new recruits. They perceived that there was a misconstrued negative image of London schools and students portrayed by the media, which could explain why some teachers are not attracted to the city.

London is not attracting enough new entrants to fill teacher supply gaps

Analysis published by the Department for Education in February 2018 suggests that despite London having a higher proportion of its workforce that are NQTs, not enough are being trained to meet the additional demand (DfE, 2018). The analysis uses a simple model to predict what proportion of England's new teachers each region will need in the future on the basis of trends in the pupil and teacher populations. It then compares the prediction with how many initial teacher training places were filled in 2017/18 to estimate the extent to which each region is training the share of teachers that it needs.

The results suggest that London trains more teachers than its pupil numbers, or forecasts of future pupil numbers, would suggest it needs. However, after accounting for the combination of growth in pupil numbers and a higher proportion of teachers in London leaving the profession each year, the indicators suggest London is undersupplied with trainees.

The DfE analysis suggests that the East of England and the South East are undersupplied with trainees to a greater extent than London is. However, this analysis does not take account of the proportion of teachers who move region as a result of moving school (a limitation that is noted in DfE's report). Our analysis shows that London schools are disproportionately affected by inter-regional teacher movement.

We also found that 41 per cent of London teachers who move to a school outside of London move to a school in the South East and 34 per cent move to the East of England (a combined total of 75 per cent). This suggests that DfE's analysis understates the level of undersupply in London and slightly overstates the level of undersupply in the South East and East of England.

Nonetheless, the analysis confirms that the number of teacher training places in London are insufficient to cover the need for new teachers generated by high pupil growth and low teacher retention.

4. Existing teacher shortages

While London has more new entrants joining its teaching workforce each year, DfE analysis suggests that the new entrants are not enough to fill the gaps in supply created by growing demand and lower retention rates. Measuring existing teacher shortages using administrative data is difficult for a number of reasons. First, there is no reliable way of establishing exactly how many teaching posts each school needs – with which to compare to how many it actually has to assess if it is experiencing a shortage – because each school’s needs will differ for a variety of reasons. Second, if teacher shortages exist, then school leaders may be presented with a trade-off between teacher quantity and quality that may be dealt with differently in different schools. For example, a school may receive applicants for a vacancy but not be satisfied with the quality of the applicants. In that situation school leaders may choose to either employ a teacher that is below their quality expectations, to ensure the class has a teacher, or use supply cover to fill the vacancy while it is re-advertised.

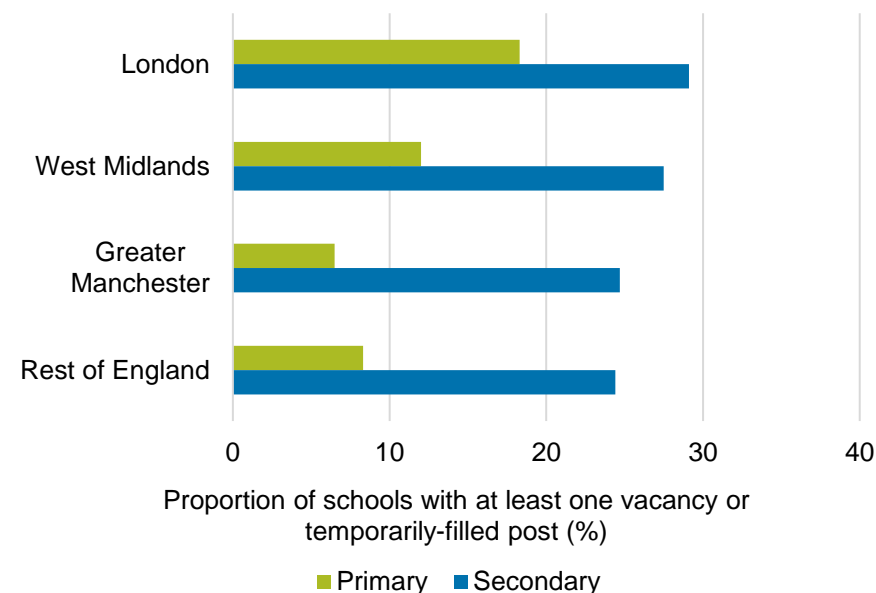
We therefore analyse two measures that are imperfect proxies of teacher shortages by area, which may indicate recruitment issues: the proportion of schools with open vacancies or temporarily-filled posts in November and the proportion of teachers that are unqualified.

Vacancies and temporarily-filled posts

Figure 10 shows the proportion of schools who report having at least one vacancy or temporarily-filled post in November 2015 (using data from the school-level vacancy returns from the School Workforce Census). It shows that for both primary and secondary schools,

London has a higher proportion of schools that did not fill vacant posts with suitable permanent staff. Six per cent of primary schools in Greater Manchester failed to recruit enough permanent staff, while three times as many primary schools (18 per cent) in London reported having a vacancy or temporarily-filled post. The number of secondary schools with vacancies is higher than the number of primary schools across the country. London has the highest proportion of secondary schools with at least one vacancy or temporarily-filled post (28 per cent), four percentage points higher than the average in the rest of England.

Figure 10 More London schools have vacancies and temporarily-filled posts than in other areas



Having an open vacancy or a temporarily-filled post in November (during the first term of the school year, which is when the vacancy data is collected) may be an indication of teaching roles that were not able to be filled during the main recruitment round in the spring and summer. However, there are cases where shortages may not show up in vacancy data (e.g. if school leaders reluctantly fill a post with a teacher they regard as less than ideal) and other cases where vacancies may not necessarily indicate a shortage (e.g. filling a non-critical need, such as a secondary school looking to hire a teacher for a future additional course), meaning it is an imperfect proxy.

Teachers interviewed perceived that recruitment of teachers to fill vacancies had become increasingly difficult. Two headteachers described what they considered to be a '*dismantled local authority system*', commenting that the local authority had previously managed recruitment, but it was now the responsibility of individual schools or local alliances. As a result, some schools are reliant on recruitment agencies, which were said to have '*cornered the market*'. The view was that recruits were advised by agencies to apply via them, which costs schools more due to '*huge finders fees*'. Agencies were not always thought to find the 'right' candidates. As one teacher in a primary school said, 'A new teacher came via an agency and lasted a day, and another lasted only a few weeks...they aren't getting the right people'.

Teachers also felt that the media could more accurately represent the positive aspects of being a teacher in the capital city to attract applicants to vacant posts in the city. As one headteacher who had taught in London for 35 years questioned:

Is there enough public sharing of the outcomes of London schools? Do people know that disadvantaged kids in London

outperform non-disadvantaged kids nationwide? A lot of people have a stereotype of London kids...they don't have the right image. There is so much aspiration.

Teachers suggested that positive case studies of what it is like to be a teacher in London are disseminated, 'There is so much joy in the job. It's all about changing kids' lives and making a difference'.

Unqualified teachers

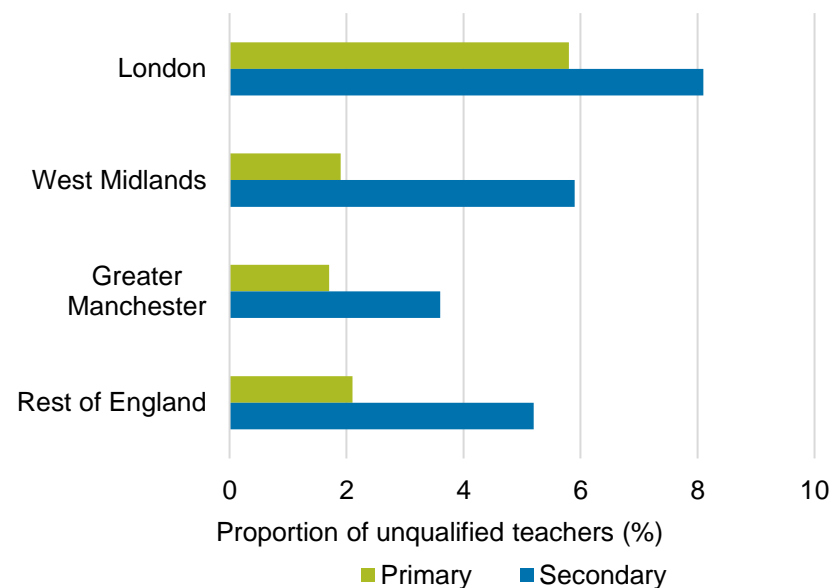
Employing unqualified teachers may be an indication of a vacant post being filled with lower quality staff, under the assumption that a qualified teacher would be preferred, but no suitable qualified teacher applied for the post. If a school is struggling to fill posts, it is likely that they are employing unqualified teachers due to a lack of better options. However, it could also reflect schools employing a teacher in a specialised role where an unqualified teacher with particular skills is preferred to qualified alternatives or employing an unqualified teacher to reduce expenditure. Unqualified teachers could also be teachers who trained overseas but that have not registered their teaching qualification, perhaps because of different regulatory requirements between England and the teachers' home jurisdictions. In that case, schools may be satisfied to employ them in spite of not securing qualified teacher status (QTS). It could also be capturing teachers that later go on to achieve QTS, for example, teachers in the first year of School Direct training or the Teach First programme.

Figure 11 shows the proportion of the teacher workforce in London, other large cities and the rest of England between 2010 and 2015 that did not have QTS. Only around two per cent of primary school teachers in Greater Manchester are unqualified, whereas London has three times as many, with around six per cent of its primary

workforce. The proportion of unqualified teachers is generally higher among secondary teachers across the country, but is highest in London compared to other areas. Eight per cent of secondary teachers in London are unqualified compared to six per cent in the West Midlands, four per cent in Greater Manchester and five per cent in the rest of England.

In combination, this evidence suggests that London already faces significant existing teacher shortages, in addition to growing demand and a challenging climate for recruiting and retaining teachers.

Figure 11 London has a higher number of unqualified teachers than other areas



5. Leadership progression

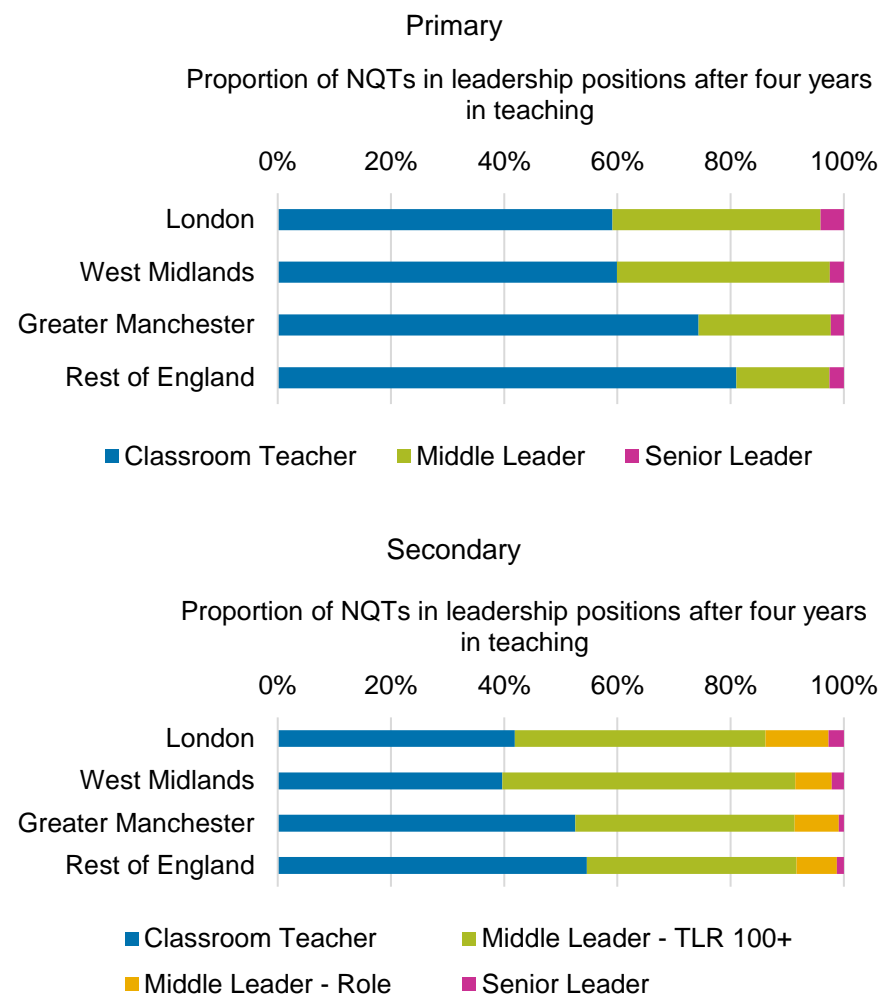
The higher rate of young and early-career teachers leaving London has consequences for the future pipeline of middle and senior leaders. We analyse the career progression of those in the 2011 cohort of NQTs who remained teaching in the same region for the subsequent four years, and compared their rates of progression into leadership roles by area. Does London's lower retention rate affect the progression prospects for those who do stay? And what are the implications of low retention rates for London's pipeline of future school leaders?

Early-career teachers who stay in London are accelerated into leadership positions

Figure 12 shows that after four years in teaching, more primary school NQTs in London have been promoted to middle or senior leadership roles than in Greater Manchester and the rest of England, though similar to the West Midlands. Four years after entering as an NQT, 41 per cent of London's early-career primary teachers are promoted to middle or senior leadership roles, 22 percentage points higher than the rest of England (see box for our definition of middle leadership).

A greater proportion of secondary NQTs are promoted to middle and senior leadership roles after four years than primary NQTs. The proportion is higher in London, compared to Greater Manchester and the rest of England. For secondary, NQTs in the West Midlands have the highest rate of progression with 52 per cent of NQTs in leadership roles, two percentage points higher than London, and 15 percentage points higher than the rest of England.

Figure 12 Early career teachers progress to middle leadership more quickly in London



One interpretation of this finding is that schools may be using TLR payments (typically around £2,000) to top up the pay of young teachers in London to encourage them to stay. However, another interpretation is that early-career teachers are accelerated into leadership roles in London because of gaps created by existing leaders leaving the area.

Definition of middle leadership roles in the analysis

We adopt a definition of middle leadership in the SWC used by DfE, as any of the following: Leading Practitioner, Head of Year, Head of House, Head of Department, Behaviour Manager/Specialist, Data Manager/Analyst, Extended Schools Manager/Support, SEN Co-ordinator, Learning Manager, or a teacher in receipt of a Teaching and Learning Responsibility (TLR) payment of at least £100 (DfE, 2017). Senior leaders are defined as headteachers, deputy headteachers and assistant headteachers.

The definition of middle leadership combines information on TLRs because the definition of roles in the SWC is sometimes applied inconsistently across schools. We split our analysis for secondary schools between those who are middle leaders according to a role and those who are only identified as a middle leader because they receive a TLR (usually a lower level of middle leadership). However, our measure of middle leadership based on role may underestimate the true amount because of missing data. This should be borne in mind, but does not affect comparisons between areas, assuming that the rate of missing data on teacher roles is similar across areas.

Interviews with teachers suggested that (early) progression opportunities could initially attract teachers to London. As one NQT said, 'To be in London for five years and do three different levels of job is probably quite attractive'.

One interviewee had been in teaching for seven years and had recently moved to London for promotion, 'I wanted to be head of department. I wouldn't get that opportunity [this early] elsewhere'.

She felt that was because there is less turnover and less volume of opportunities elsewhere. Yet it was also perceived that quick acceleration could add too much pressure to a young and/or early career teacher, as illustrated by Case B.

Case B Career progression

Miss B had been a teacher for three and a half years, all of which had been spent in London. She had trained via a School Direct Salaried route and had secured a teaching role at the primary school where she had undertaken her training. She had recently been awarded a Teaching and Learning Responsibility (TLR) as Head of Early Years. She said:

I've got a TLR because I'm the most experienced one in the early years. I would rather learn from someone with ten years' experience. I can do all of the reading I need to, but I want to learn from people with more experience than me. I don't feel qualified to do the job that I'm doing now.

As shown in Case B, there are examples of teachers who perceive that they are being given TLRs too quickly because there is a lack of more experienced teachers to fill the roles. However, this may leave teachers feeling underqualified and therefore overwhelmed by their extra responsibilities. As one headteacher commented:

People progress before they have honed their craft. They then think “I can’t do this” and leave. There are NQT+1’s with TLRs who are now struggling. It’s too much pressure.

Interviewees suggested that, although the extra salary was welcomed, this did not always outweigh the pressure experienced if a teacher felt unqualified to fulfil the role, so a TLR might not always work if used as a retention strategy. Interviewees stressed the importance of support (including coaching and mentoring) for young and early career teachers who are given progression opportunities.

Retaining middle leaders is more challenging in London

To investigate whether TLRs were being used successfully as a retention tool, we analysed retention and mobility rates of teachers with different leadership responsibilities. Figure 13 shows that London’s primary and secondary middle leaders are leaving the profession at a higher rate than in other areas (average for period from 2010-2015).

This does not necessarily suggest that TLRs are ineffective at improving retention, as the leaving rate of these teachers may have been even higher if they hadn’t received TLRs. However, the experience of teachers suggests that additional leadership responsibilities are best given when the recipient is ready, rather than

simply when the opportunity is available. Interviewees also stressed the importance of on-going support if given extra responsibilities.

Figure 13 London’s middle leaders leave the profession at a higher rate than in other areas

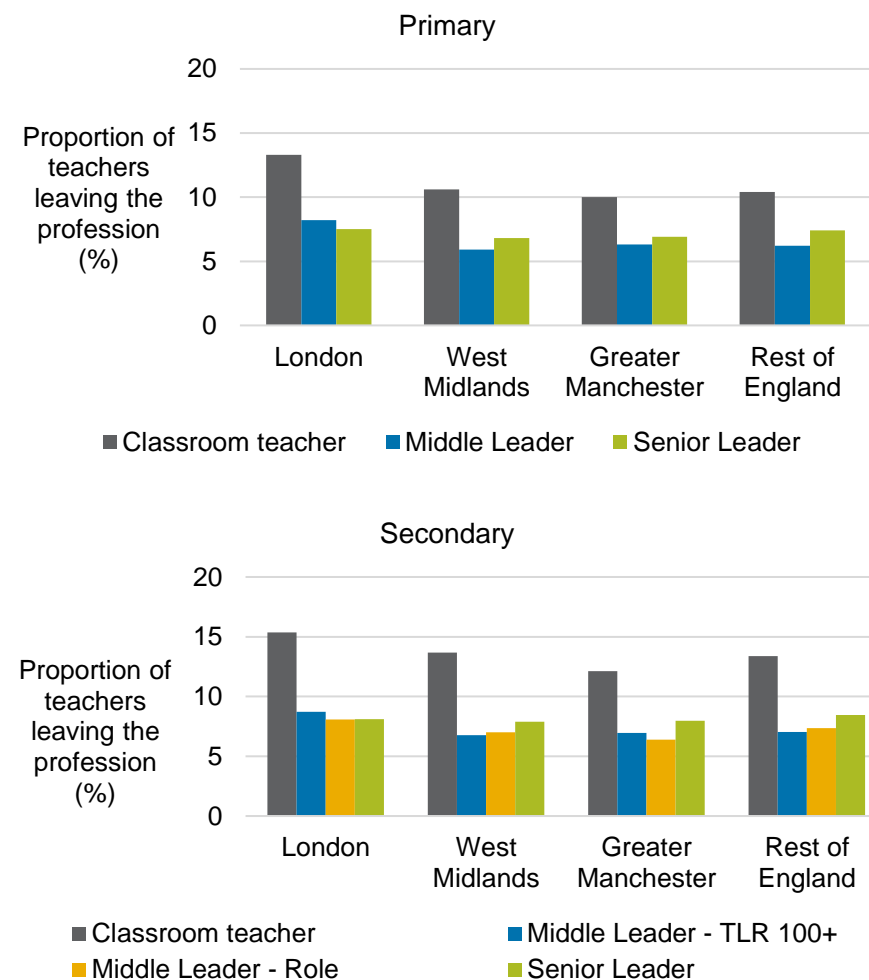
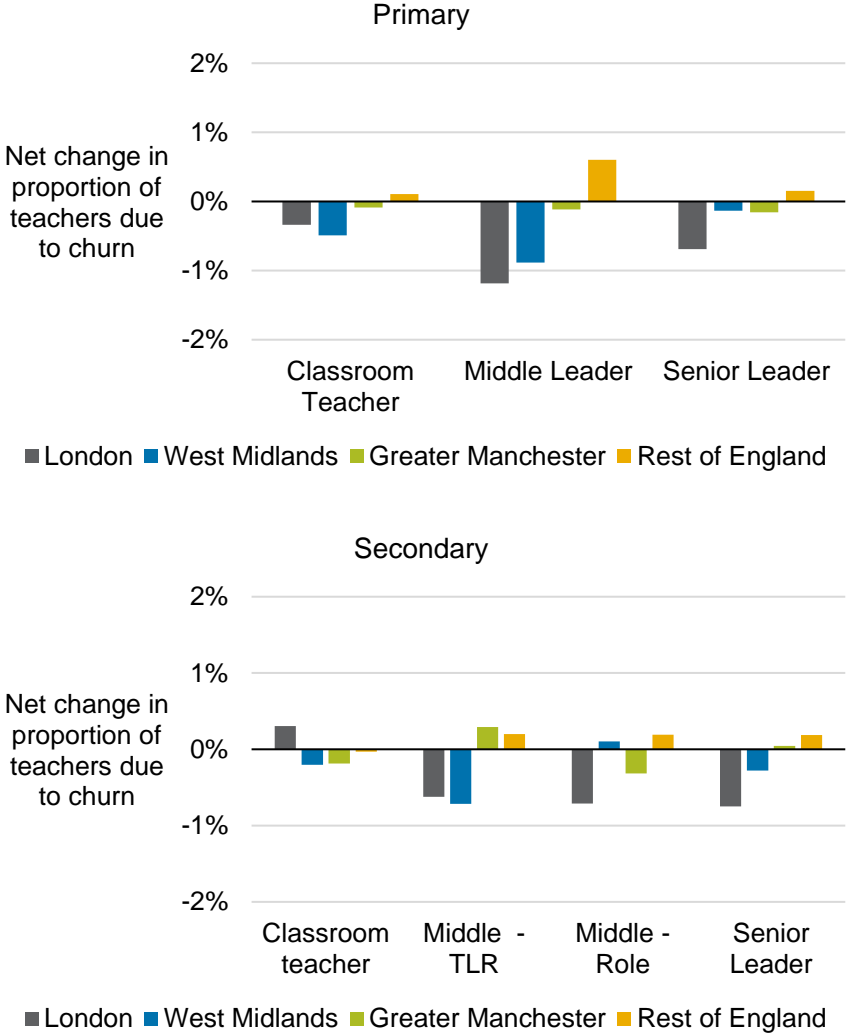


Figure 14 shows the effect of teachers moving area when they move school on the supply of middle and senior leaders (average for the period 2010-2015). As with Figure 5, a bar above zero signifies a net increase of teachers into the region, whereas a bar below the 0% line signifies a net decrease of teachers.

The data shows that London’s primary middle leaders are most likely to leave London to teach elsewhere, compared to other areas. The rest of England has a net increase in the population of primary middle leaders, drawn in particular from London and the West Midlands. Figure 14 shows that there is a net increase in the number of secondary classroom teachers into London: the youngest teachers being attracted to London. However, middle leaders in London and the West Midlands are the most likely to move out to other areas. London also has the most secondary senior leaders moving away, and the rest of England has a net increase.

London’s NQTs are accelerated into middle leadership earlier than they are elsewhere in the country (except for the West Midlands). This is likely to be because of higher rates of middle leaders in London leaving the profession and moving to teach in other areas. These trends are concerning for London’s future pipeline of senior leaders. Interviewees felt that while this might initially seem like a positive progression opportunity, some teachers might feel they have been progressed too early and feel pressure that could lead them to leave the profession or move elsewhere. The importance of support was emphasised by the teachers we talked to.

Figure 14 London’s middle leaders are the most likely to move out of London to teach in other areas



6. Conclusions and recommendations

This report has highlighted that while London is a vibrant city that is an attractive place for young teachers to come and work, it also faces a significant and growing teacher supply challenge.

London has lower rates of teacher retention compared with other cities and the rest of England. This is strongly associated with higher housing costs in the capital, which make staying long-term difficult for many teachers in their thirties and forties.

London has a greater flow of NQTs (and other entrants) as a proportion of its teacher workforce, which helps to fill supply gaps opened up by lower rates of teacher retention. However, higher than average vacancy rates and numbers of unqualified teachers suggest that these inflows are insufficient, and that London is struggling to recruit enough teachers, and the challenge is greater compared with other areas.

The increasing demand for teachers in London and the difficulty of recruiting new teachers across the country means that retaining more teachers in London should be a key objective for policymakers and system leaders.

Based on the evidence from our quantitative analysis, and from our interviews with a small sample of London-based teachers, we suggest some of the potential solutions to the London teacher supply challenges. These should be explored at greater-depth through further research. The GLA has commissioned LKMco to conduct a follow-up piece of research on the challenges of teacher recruitment and retention in London, with a particular focus on housing and flexible working.

Cost of living (housing and childcare costs)

Our analysis has highlighted the cost of living as the main barrier to longer-term retention of teachers in London. Teachers interviewed expressed a strong desire to continue teaching in London, but the cost of housing (later coupled with the cost of childcare if they want to start a family) was a significant barrier, which could lead to them moving outside of London to teach or leaving the profession entirely.

Policymakers should look at how housing policy interventions could help to retain more teachers in London. Interviewees talked about the difficulty of securing a mortgage and wanted more availability of shared ownership house purchasing schemes, special mortgage rates, and 95-100% mortgages. While teachers are eligible for many intermediate housing schemes, including shared ownership and affordable rent, demand for houses through these schemes often outstrips supply. Teachers may not be eligible for some schemes: a two-teacher household, both with salaries at or above the middle of the main pay range in London (M3), would have a combined income that is too high to qualify for London Living Rent. Some teachers may also need more information about available schemes, if they are not aware of what is on offer. Schemes initiated by groups of schools to provide housing for their staff, which are being trialled in London, may also help teachers to access affordable housing (Staufenberg, 2017).

Teachers we spoke to also felt that help to cover the cost of childcare could help to retain teachers (for example, childcare subsidies and term-time only childcare places so teachers do not have to pay in the school holidays to retain their place).

Teacher pay

Another potential remedy to make the cost of living more affordable is to increase the pay of teachers in London. The teacher pay scale has additional weightings for Inner and Outer London, meaning teacher pay is already higher in London than the rest of England for a given level of experience. However, teachers we interviewed did not think the differential was high enough to compensate the higher cost of living.

Since 2014 schools have been given more discretion over teachers' pay and official pay scale spine points have been removed, although they are still published by teacher unions and used by many schools (Burgess *et al.*, 2017). Increasing London's pay scale points – whether in line with increases applied to the rest of the country, or as an increase to the London differential – may improve retention if the pay increase is indeed passed on to teachers. One interviewee also suggested financial bonuses, which were working well as a recruitment and retention strategy at her school.

However, the main barrier to London schools raising teacher pay is school funding. Nationally, school funding has not increased for several years and is unlikely to increase over the next few years (Williams and Grayson, 2018; Belfield *et al.*, 2017). The proposed national funding formula will reallocate school funding away from historically well-funded areas, such as London, to other areas. This means that national constraints on funding growth will be felt strongest in London, limiting the ability of London's schools to increase teachers' pay to improve retention.

Recruiting teachers

More promotion of teachers' positive experiences of working in London (for example, dissemination of case-studies) was suggested as a recruitment strategy. More London-based recruitment fairs were called for by the teachers we interviewed, including those specifically related to London schools and teachers considering a career in the capital. Some teachers we interviewed said that potential teachers who already live in London should be targeted as they might be less likely to move outside of the city. The [Teach London](#) website is one possible location for positive case studies and information on recruitment events.

A central recruitment 'location' for London schools was suggested (for example, a recruitment website or mobile App). The fact that the Teach London website includes links to information on teaching vacancies in a number of boroughs should be promoted.

The availability of training subsidies and salaried training routes could be increased, to attract recruits to London with its high cost of living. Some interviewees who had trained via the School Direct Salaried route said they could not have afforded to train in London without this financial help.

Potential recruits should be given the opportunity to spend time in a school before training (for example, by participating in work experience or working as a TA), to help them decide if they want to pursue a career in teaching.

Flexible working

NFER research has highlighted the positive impact that increasing opportunities for part-time and flexible working could potentially have on teacher recruitment and retention (Worth *et al.*, 2017). Greater flexibility over working patterns may incentivise former teachers who left the profession, for example to have families or care for relatives, to return to work part-time. Better part-time opportunities may also encourage teachers who are at risk of leaving the profession in future because they cannot work part-time to stay.

Such opportunities could be an important attraction for many teachers in London, where young teachers who are thinking about starting a family are leaving, or at least considering leaving (for example, Case A). However, if housing costs and pay are a particular issue affecting London's teachers, then there may be less demand for part-time opportunities if it implies a reduced salary. Further research should be conducted to explore whether increased availability of flexible working opportunities is likely to improve teacher retention in London.

Teachers we interviewed suggested that a teaching career should include the opportunity for 'career breaks', including sabbaticals and secondments. This, in their view, would help teachers '*recharge their batteries*' without them feeling the need to leave the profession entirely.

Support and professional development

Interviewees talked about the importance of support and professional development for teachers, particularly young and early career teachers who are likely to benefit from coaching, mentoring, and networking with others who have more experience. A focus on health and well-being was also thought to be important.

A number of teachers we interviewed said that they did not know where to get information about successful workforce strategies adopted by other schools. More should be done to share effective practice.

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Appendix A: Methodology

School Workforce Census data

The School Workforce Census (SWC) is a statutory data collection for all maintained schools and academies in England, made by the Department for Education. The SWC collects information about individual teachers, teaching assistants and other school staff. The individual information collected includes characteristics of staff (gender, age, ethnicity), types of contract and how they are deployed on full or part time, roles and responsibilities, salary details, sickness absence details, qualifications held and the curriculum taught for a sample of secondary schools.

The SWC is collected annually in November and was first collected in 2010. Individual teacher records are linked across years, so teachers' employment movements from year to year can be analysed, including changes in teachers' role, the school they are employed in and whether or not they are still a teacher in the state-funded system. Our analysis used longitudinal data from six waves of the SWC, from 2010 to 2015. We matched information about the region the school is in from the DfE's Get Information About Schools website.

We used data from the DfE's school census and school capacity data collections to analyse differences in historical and forecast growth in pupil numbers. We also used Valuation Agency Office data on local authority-level rent prices to look at the relationship between local rent prices and indicators of local teacher supply.

Our analysis draws comparisons between the teachers employed in schools in four geographical areas, defined according to which local authority the school is in:

- **London:** schools in the 33 London boroughs.
- **West Midlands:** Birmingham, Coventry, Dudley, Sandwell, Solihull, Walsall and Wolverhampton local authorities.
- **Greater Manchester:** Bolton, Bury, Oldham, Manchester, Rochdale, Salford, Stockport, Tameside and Trafford local authorities.
- **Rest of England:** the remaining local authorities in England.

Part of our analysis focussed on the cohort of newly qualified teachers (NQTs) who entered teaching in the state-funded sector in 2011, split by the area of their first school. The table below shows that the number of NQTs in this cohort within each region is modest, but sufficient for high-level analysis of retention rates.

Table A1 Sample size for NQT analysis

Area	Number of NQTs in the 2011 cohort
London	2,563
West Midlands	781
Greater Manchester	606
Rest of England	8,079

The limitations of looking at this cohort of NQTs for analysis of teachers' early-career journeys are that:

- it does not distinguish between those who trained in the area and those who trained outside and moved to the area for their first job in teaching
- it excludes those who did not complete training and those who entered teaching outside the state-sector (e.g. in independent schools or overseas)
- it excludes those who deferred entry for more than a year after completing teacher training.

Qualitative research

Members of the Teach London strategy group recruited teachers via their networks for NFER to interview. Two group discussions took place, obtaining the views of ten teachers (see the table below for the profile of the teachers included). In addition, a face-to-face interview was carried out with one Director of a Teaching School who recruited to a London-based School Direct programme and oversaw a programme for NQTs.

The discussions took place in December 2017 and each lasted approximately one hour and thirty minutes. Interviews were semi-structured and question themes included: what attracts teachers to London ('pull factors'); factors which could discourage teachers from teaching in London or reasons for lower retention rates ('push factors'); popular routes into teaching; recruitment challenges faced by London schools; and possible strategies to address recruitment and retention challenges.

As the sample of teachers is small, their views are not necessarily representative of all teachers. They can, however, offer insights into the experiences of some teachers teaching in London and themes for further, larger-scale research.

Table A2 Profile of teachers interviewed

	Current role	Gender	Number of years in teaching	Number of years teaching in London	School phase
1	Lead practitioner	Female	17	12	Secondary
2	Head of department	Female	7	<1	Secondary
3	Head of department	Female	5	4	Secondary
4	Music teacher	Female	3.5	3.5	Secondary
5	Headteacher	Female	25	25	Primary
6	Headteacher	Female	35	35	Primary
7	Subject coordinator and recruits science and maths teachers	Female	8	6	Secondary
8	Head of school	Male	9	9	Primary
9	NQT	Female	<1	<1	Primary
10	Head of early years (TLR maternity cover)	Female	3.5	3.5	Primary

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