

Statistical bulletin

# Business Register and Employment Survey (BRES) provisional results: 2014

The Business Register and Employment Survey (BRES) is the official source of employee and employment estimates by detailed geography and industry



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# 1. Main points

- Between 2009 (when the survey began) and 2014, the number of employees in the UK is estimated to have increased by 1.321 million (4.8%) to 28.7 million. The period between 2013 and 2014, accounts for two-thirds of this growth in the number of employees (0.873 million), with the East of England, the South West, Scotland and London showing particularly strong growth
- After an initial fall, the levels of employees in the northern regions, the South West and Scotland have only just surpassed the number of employees seen in 2009
- Between 2009 and 2014, the largest increase in employees has been in the professional, scientific and technical industries, closely followed by business administration and support services. In particular, business administration has seen a big increase in temporary employment agency activities over this period
- The professional, scientific and technical industry, which has shown particularly strong growth since 2009, can be seen to have a strong presence in London and the South East, with 8 of the 20 local authorities with the highest share of employees in this industry being in the South East and 6 in London. Conversely, 9 of the 20 local authorities with the lowest share of employees in this industry were in Wales
- Public administration and property were the only industry groups to show a fall in the number of employees between 2013 and 2014
- Between 2013 and 2014, 80% of local authority districts saw a decrease in the number of public sector employees, with 84% showing a decrease between 2009 and 2014. In contrast, 94% of local authority districts saw an increase in the number of private sector employees, with 88% growing between 2009 and 2014

## 2. Introduction

The Business Register and Employment Survey (BRES) is the official source of employee and employment estimates by detailed geography and industry. It is also used to update structural information on the Inter-Departmental Business Register, the main sampling frame for business surveys used to produce UK official statistics.

This statistical bulletin focuses on the strengths of BRES, giving employee estimates by region level and below and by broad industry group and below. There is also a section that looks at public and private sector estimates of employees. Many of the analyses contained in this bulletin make comparisons with 2009, the year that BRES was introduced.

The survey collects employment information from businesses across the whole of the UK economy for each site that they operate. This allows us to produce workplace-based employee and employment estimates by detailed geography and industry, full-time or part-time workers and whether the business is in the public or the private sector.

Due to the survey's large sample size (approximately 80,000 businesses), BRES is able to produce good quality estimates for detailed breakdowns by industry and geography. Indeed, no other ONS survey of regional and sub-regional employment data can provide the same level of industry detail. Furthermore, being a business survey, the quality of this industry data is very good and is recommended in preference to industry data from household surveys such as the Annual Population Survey. BRES provides both employee and employment data and is particularly recommended for analysis of employee data. All analysis in this bulletin is for data on employees.

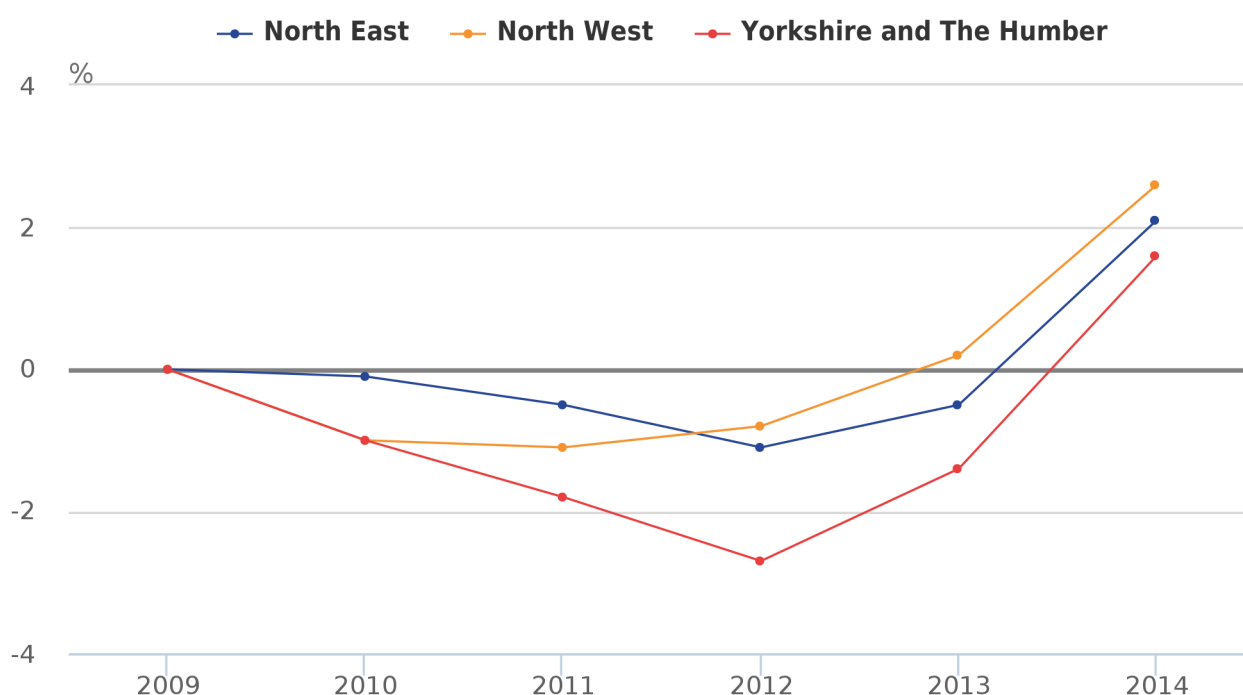
The employment data in BRES is the number of employees added to the number of working owners (for example, sole proprietors and partners). However, BRES does not cover the very small businesses neither registered for VAT nor PAYE, which make up a small part of the economy. As a result there is a difference between the BRES UK estimate of employment and the estimate from the ONS workforce jobs series. So for total employment figures, other ONS sources such as Workforce Jobs (regional) and the Annual Population Survey (sub-regional) can provide fuller coverage of total employment, albeit with a less detailed industrial breakdown.

Since BRES is based on a sample of businesses, it can be affected by sampling variability. In particular, the quality of the estimates may deteriorate for smaller geographies and this should be taken into account when making inferences about the figures. Quality measures accompany the BRES tables on our website.

### 3. Regional Estimates

**Figure 1a: Percentage change in employees since 2009 by region**

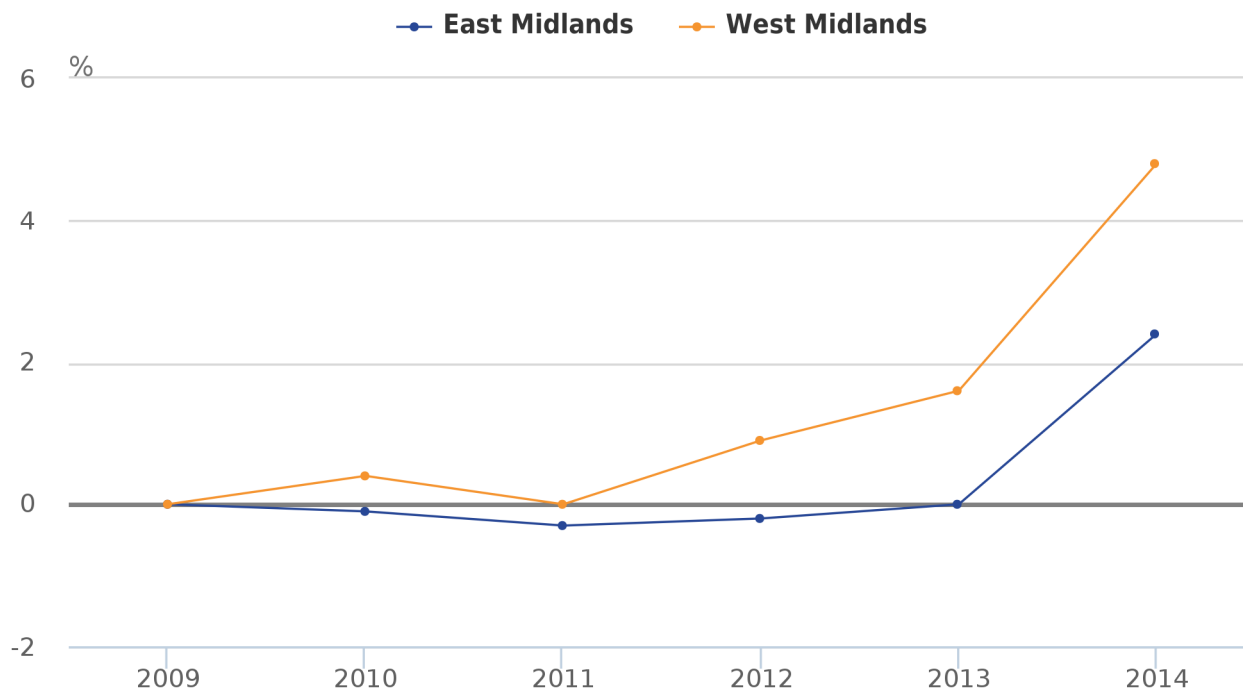
North



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 1b: Percentage change in employees since 2009 by region**

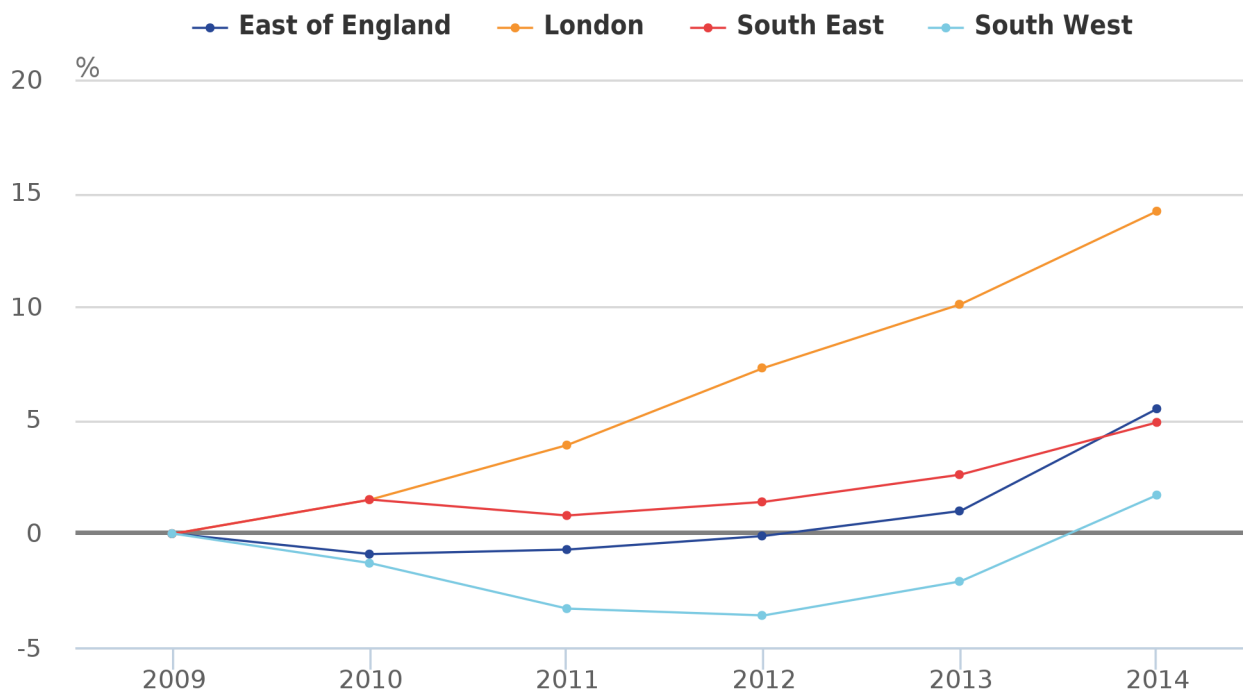
**Midlands**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 1c: Percentage change in employees since 2009 by region**

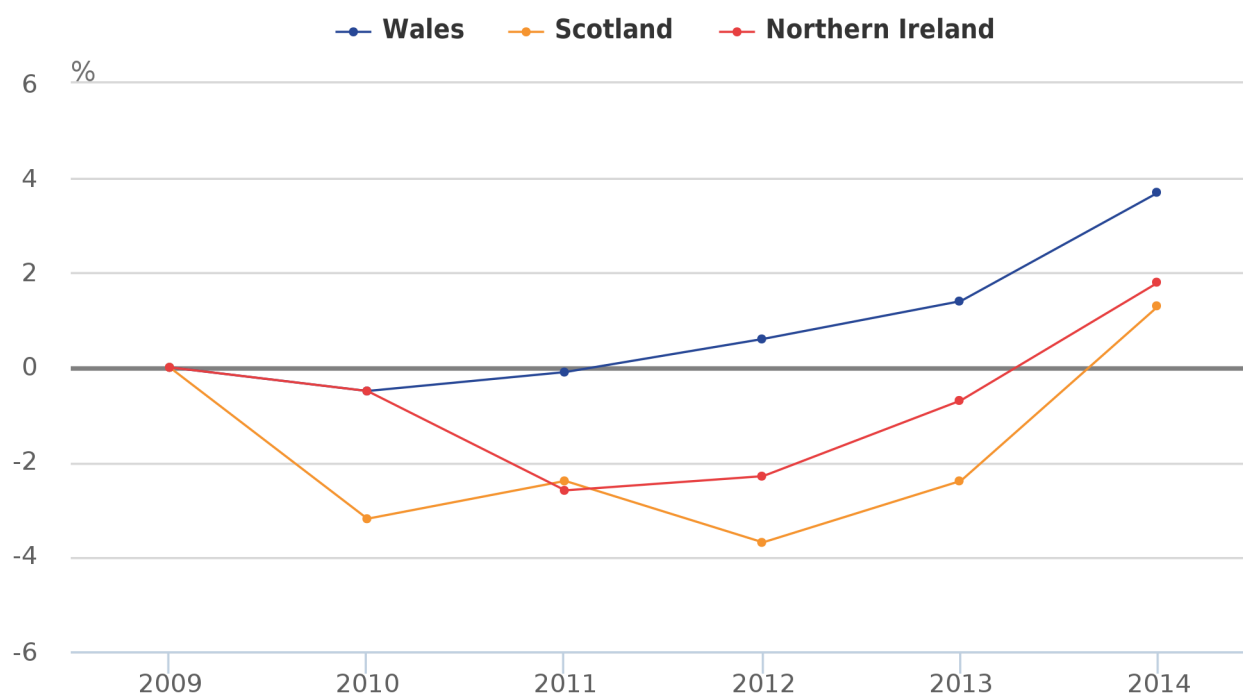
**South**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 1d: Percentage change in employees since 2009 by region**

Devolved Administrations



**Source: Business Register and Employment Survey (BRES) - Office for National Statistics**

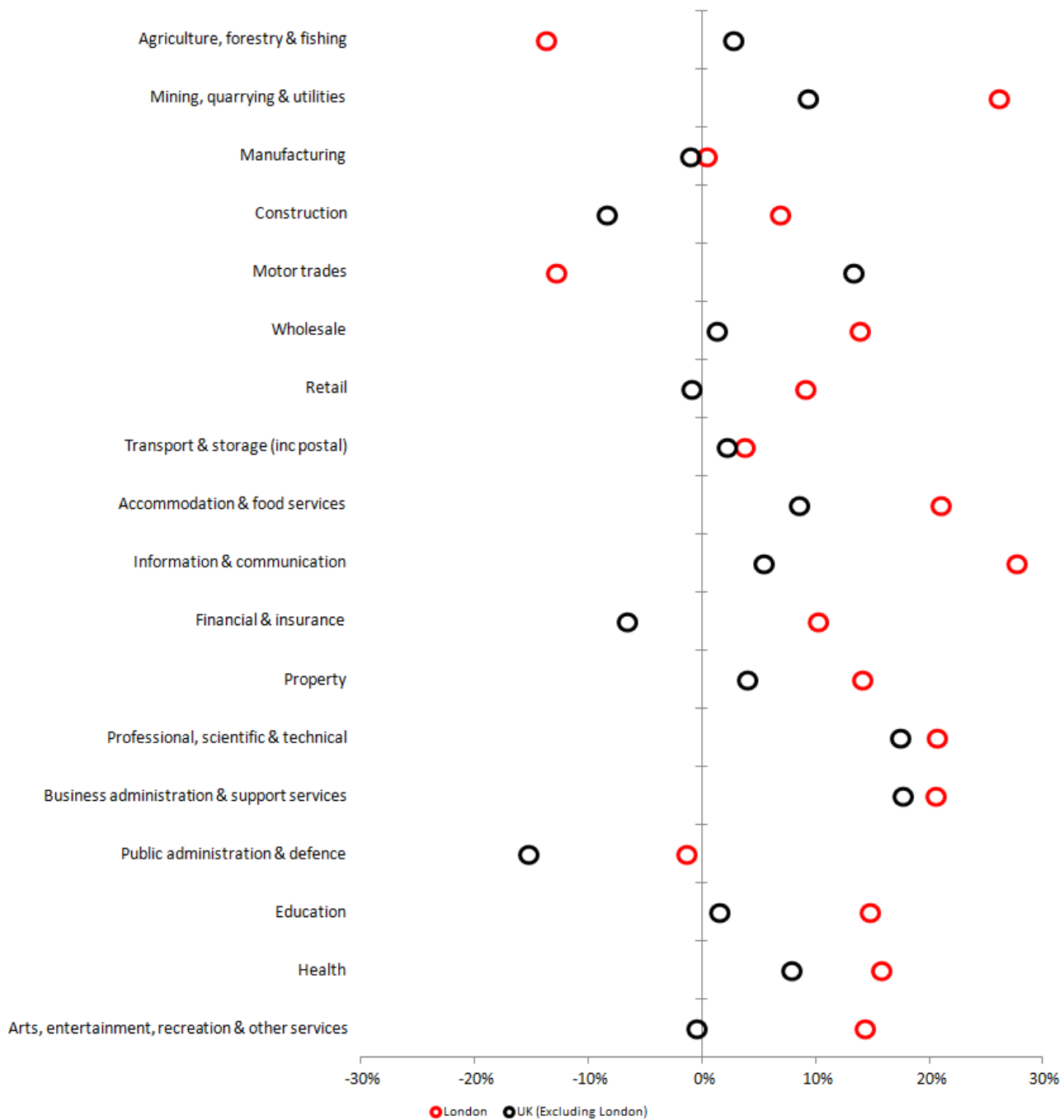
Between 2009 and 2014, the number of employees in the UK is estimated to have increased by 1.321 million (4.8%) to 28.7 million. The period between 2013 and 2014 (0.873 million) accounts for two-thirds of this rise.

Figure 1 shows that, since 2009, the percentage increase in employees varies between regions. London, for example, has shown very strong growth between 2009 and 2014. The midlands, Wales, the South East and the East of England on the other hand have also shown growth, but at a slower rate. The north (North East, North West and Yorkshire and The Humber), the South West, Scotland and Northern Ireland have seen a larger initial fall in employees over this 5 year period, only surpassing the 2009 level of employees in the most recent results for 2014.

Despite the large increase in the number of employees in London since 2009, the East of England (4.4%) and the South West (3.9%) have started to grow at a faster rate than London (3.8%) over the past year.

Between 2013 and 2014, the industries showing the largest absolute growth in the East of England were the accommodation and food services industry and the professional, scientific and technical industry. The industries with the largest growth in the South West were the professional, scientific and technical industry and the business administration and support services industry.

**Figure 2: Percentage change in employees between 2009 to 2014 for London and the rest of the UK by industry.**



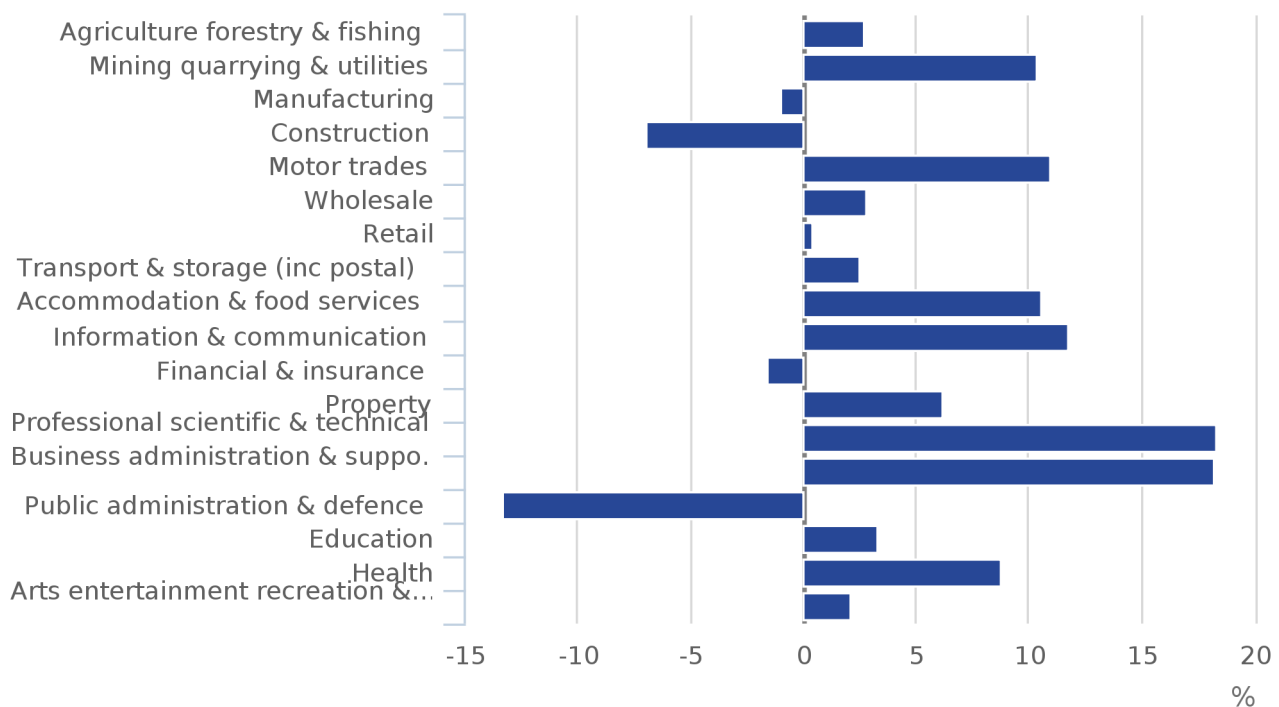
**Source: Business Register and Employment Survey (BRES) - Office for National Statistics**

Although the growth by industry type for each region can vary, London in particular exhibits some characteristics different from the rest of the UK as shown in Figure 2. For example, London has shown stronger percentage growth between 2009 and 2014 in 16 of the 18 broad industry groups, with the rest of the UK only having stronger growth in agriculture and motor trades.

A number of industries have shown an increase in the number of employees in London, despite the numbers falling for the rest of the UK. Construction and finance and insurance activities are examples of these. Interestingly, while the rest of the UK has shown a large fall in public administration, London has only a small fall.

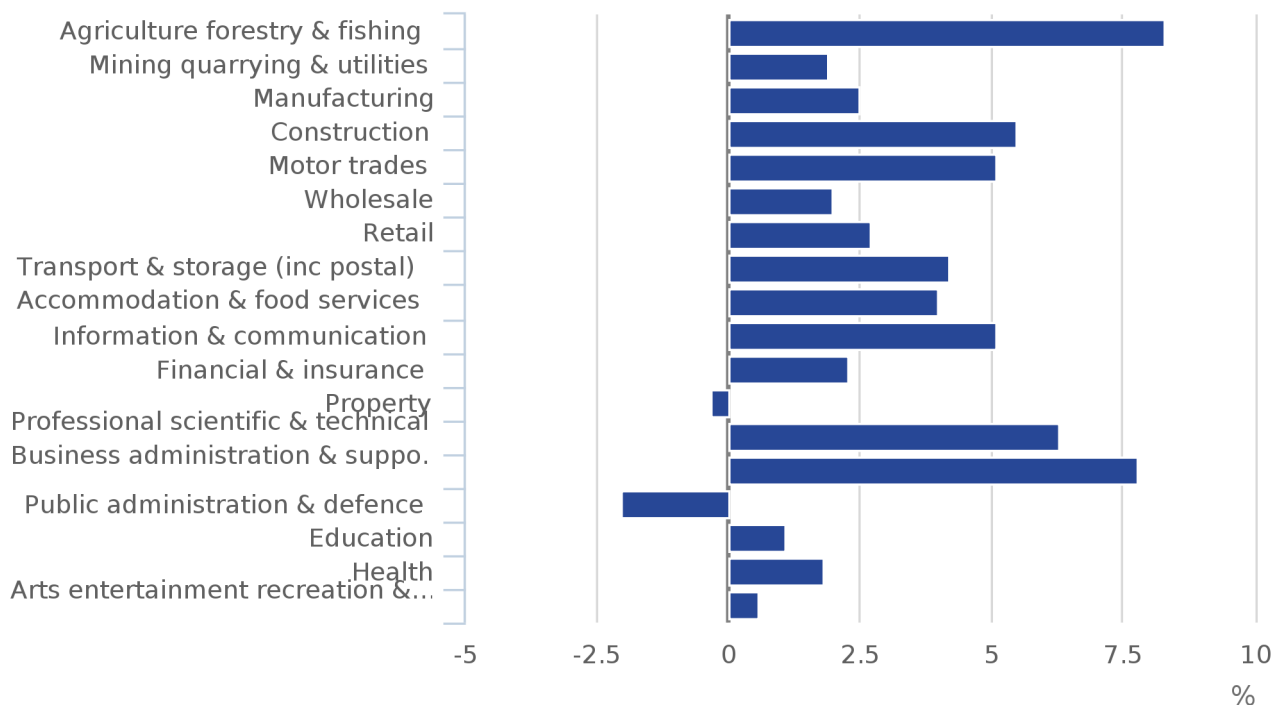
## 4. Industry comparison

**Figure 3a: Percentage change in employees by broad industry group, 2009 to 2014**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 3b: Percentage change in employees by broad industry group, 2013 to 2014**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

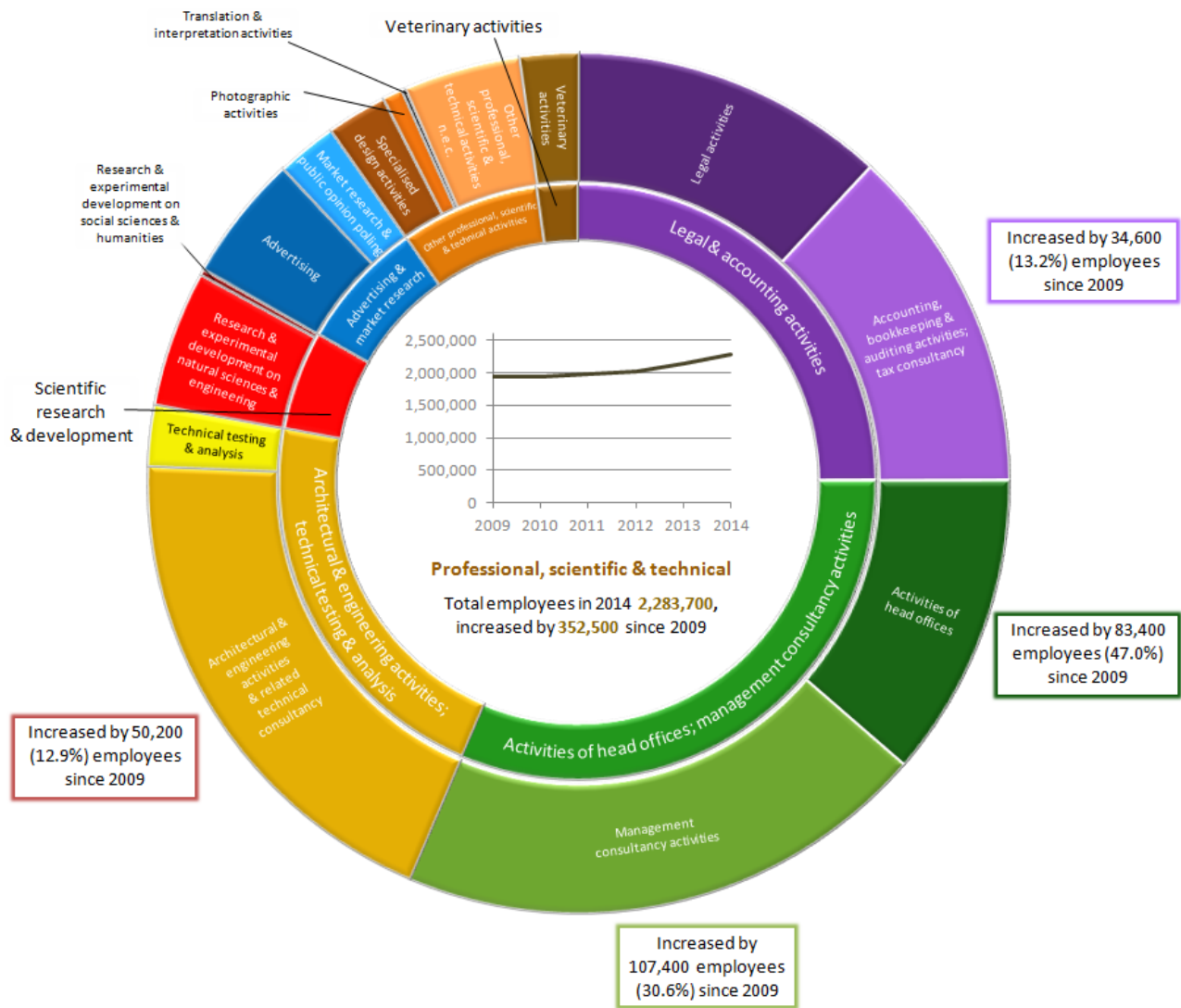
Between 2009 and 2014, the public administration and defence and construction industry groups have seen the largest percentage falls in employees. Public administration and defence continued its downward trend between 2013 and 2014.

The largest increase in employees since 2009 has been in the professional, scientific and technical industry group, closely followed by business administration and support services activities. Both of these industries also showed strong growth between 2013 and 2014.

The following section looks at these industries in more detail.

**Figure 4: Industries that make up professional, scientific and technical, 2014**

UK

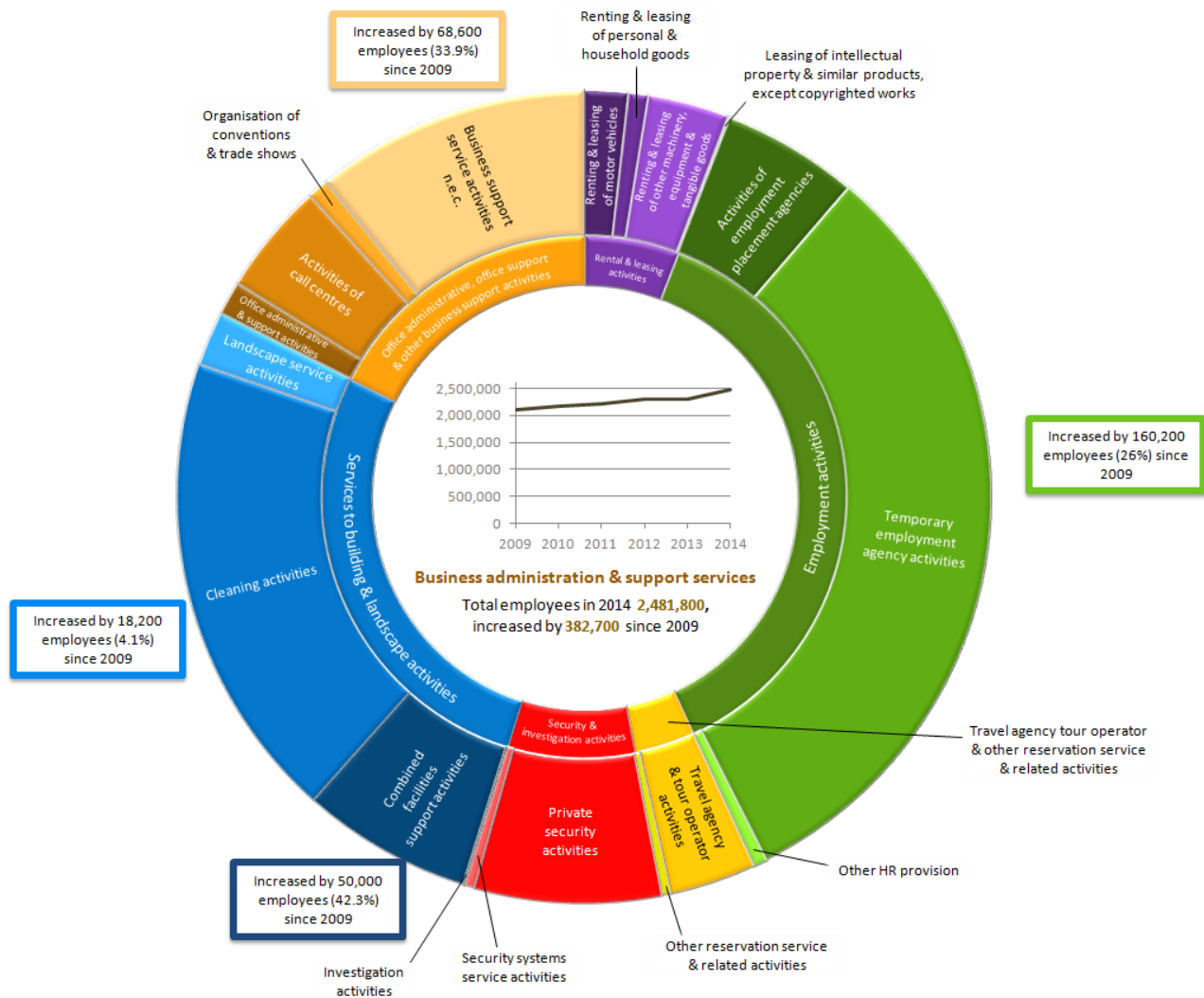


Source: Business Register and Employment Survey (BRES) - Office for National Statistics

Between 2009 and 2014, the top 3 growing industries in absolute terms within the professional, scientific and technical broad industry group were management consultancy activities, activities of head offices and architectural and engineering activities.

**Figure 5: Industries that make up business administration and support services, 2014**



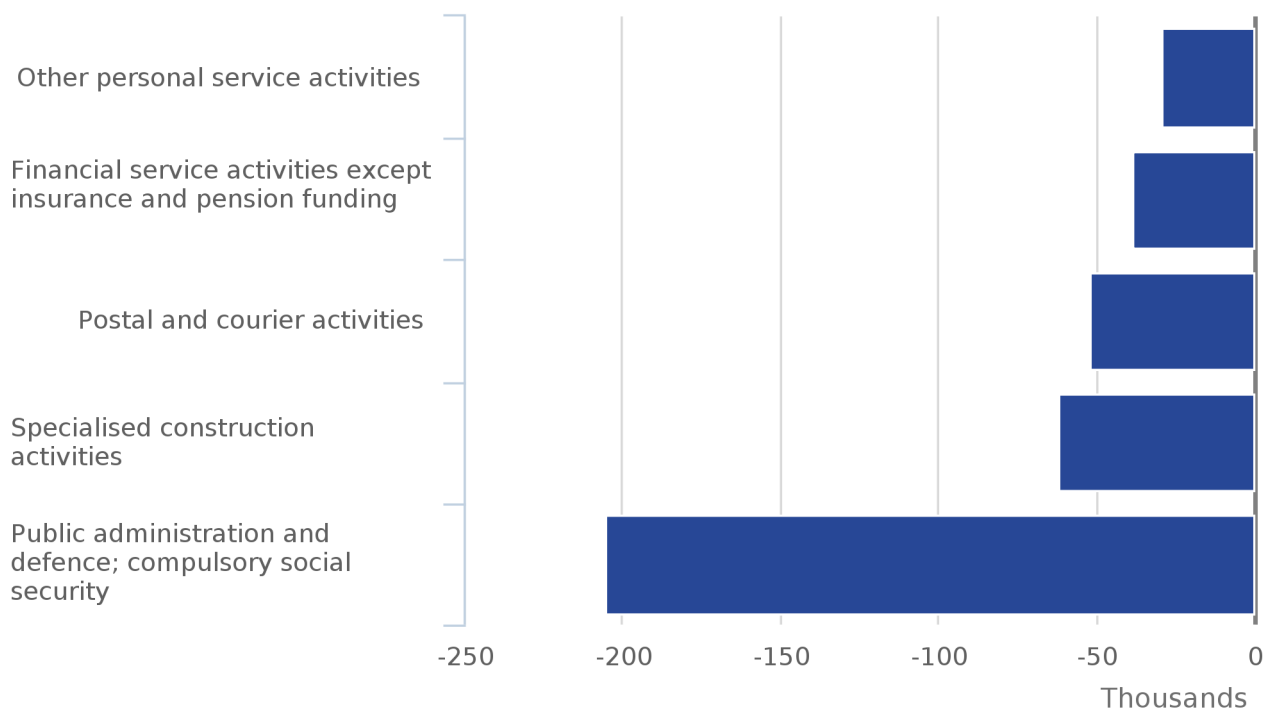


Source: Business Register and Employment Survey (BRES) - Office for National Statistics

The top 3 growing industries in absolute terms within the business administration broad industry group between 2009 and 2014 were temporary employment agencies, business support service activities and combined facilities support activities. Almost half of the increase in business administration activities can be attributed to growth in this industry between 2013 and 2014.

**Figure 6a: The 5 largest growths and declines in industry divisions between 2009 and 2014**

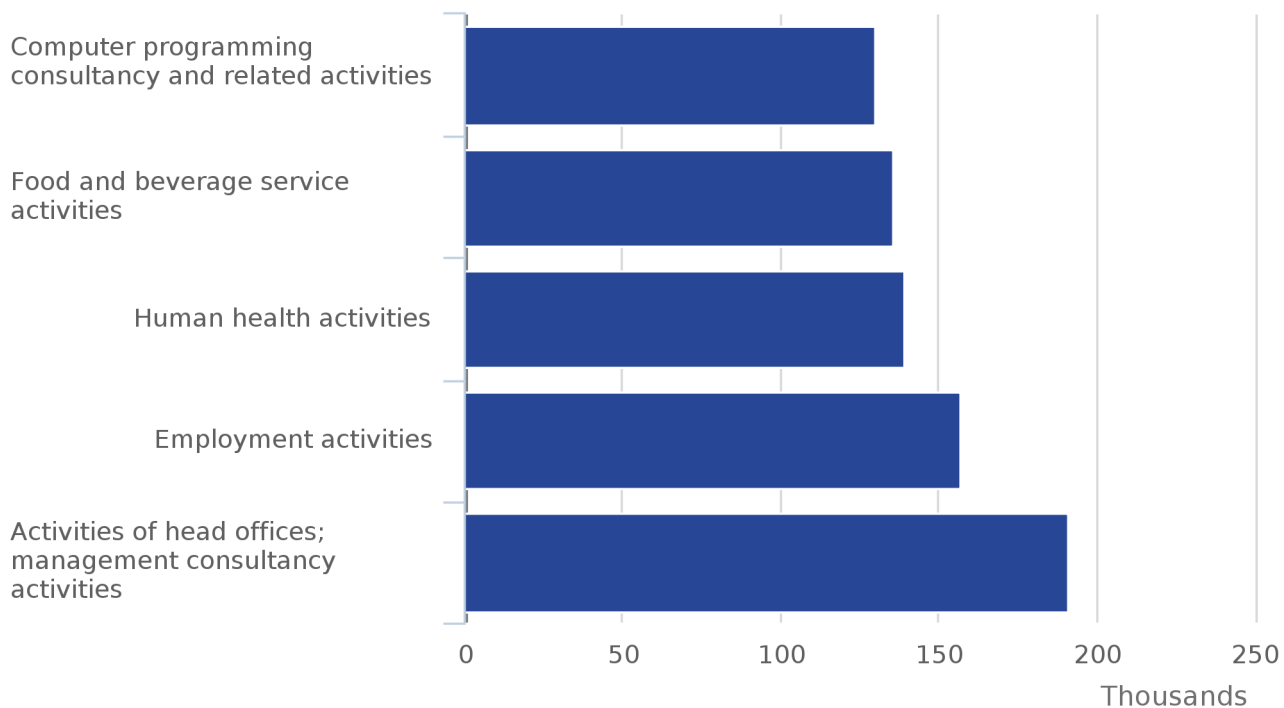
**UK - Fall**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 6b: The 5 largest growths and declines in industry divisions between 2009 and 2014**

**UK - Growth**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

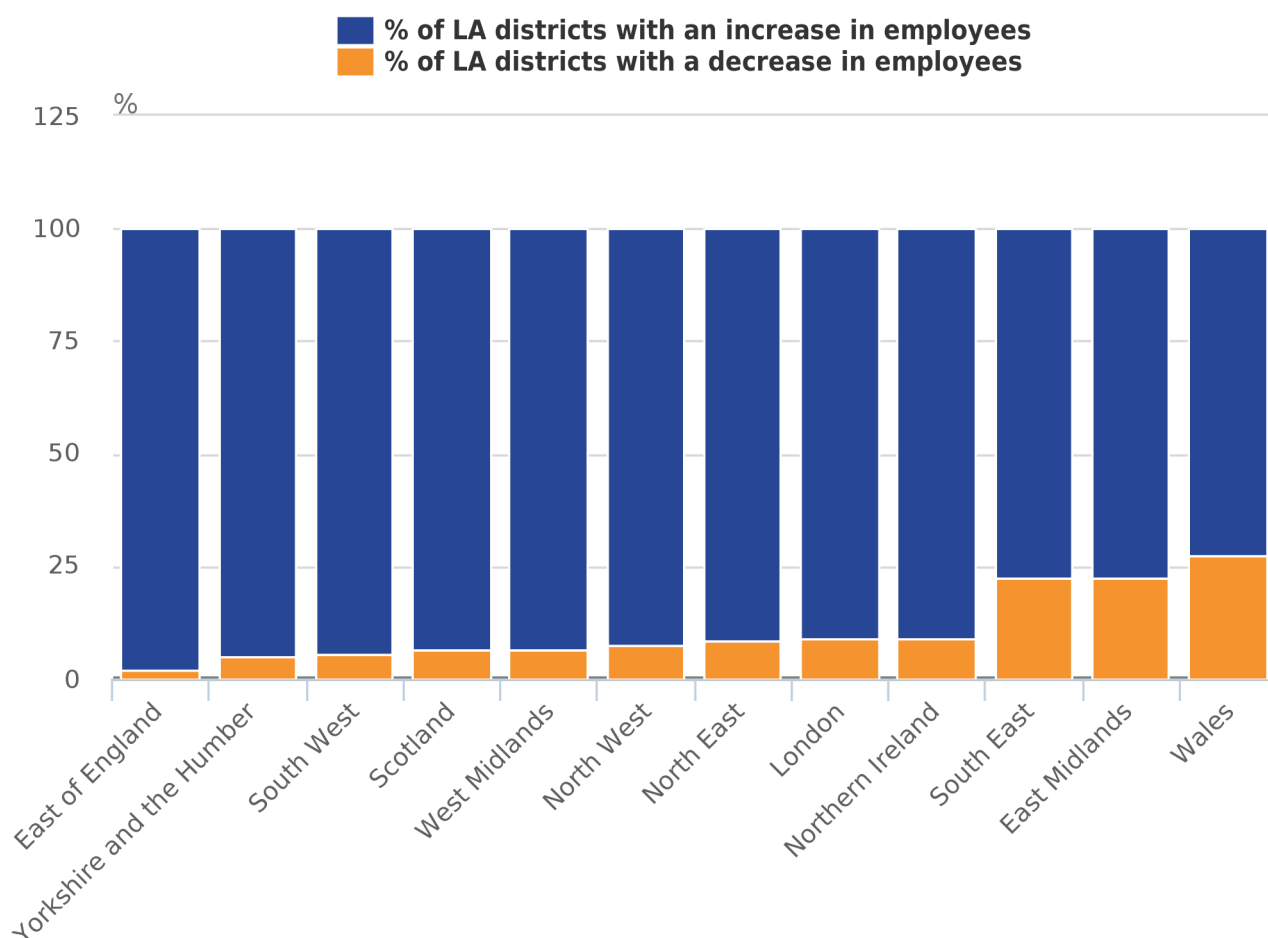
Public administration and defence; compulsory social security showed the largest decrease in employees between 2009 and 2014, while activities of head offices; management consultancy activities showed the largest increase.

## 5. Sub-regional estimates

The analysis in this section focuses on changes in employees at a local authority (LA) district level. Although regional estimates show interesting patterns and shifts over time, they can mask some of the sub-regional variation in the geographical distribution of employees. For example, growth in the East of England, which has shown the strongest growth in the number of employees between 2013 and 2014, has been driven by growth in the South Cambridgeshire and Luton LA. Similarly, the strong growth seen in the South West and Scotland has been driven by the Bristol and Glasgow LAs respectively.

**Figure 7: Percentage of local authority districts that have seen an increase/decrease in the number of employees between 2013 and 2014**

UK

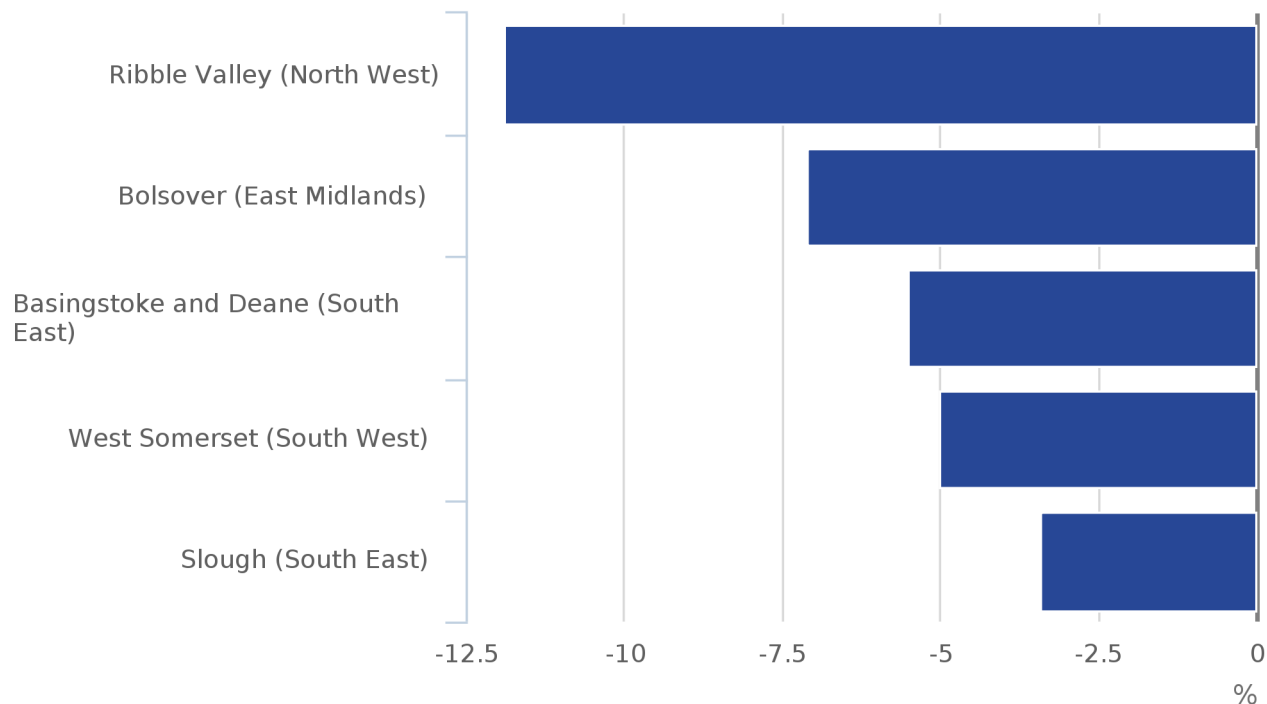


Source: Business Register and Employment Survey (BRES) - Office for National Statistics

Since the overall regional growth can be greatly affected by the growth in a small number of LAs, Figure 7 looks at the percentage of LAs within a region that have shown an increase or a decrease in the number of employees. This gives an indication of how well the growth is spread across all LAs within the region. For example, Yorkshire and The Humber is the region with the second highest proportion of LAs showing an increase in the number of employees. However, when looking at the region as a whole, it showed the seventh largest growth in employees. This is because growth in employees in Yorkshire and The Humber is spread relatively evenly across LAs compared with some of the other regions.

**Figure 8a: Local authorities showing the 5 biggest increases and decreases between 2013 and 2014**

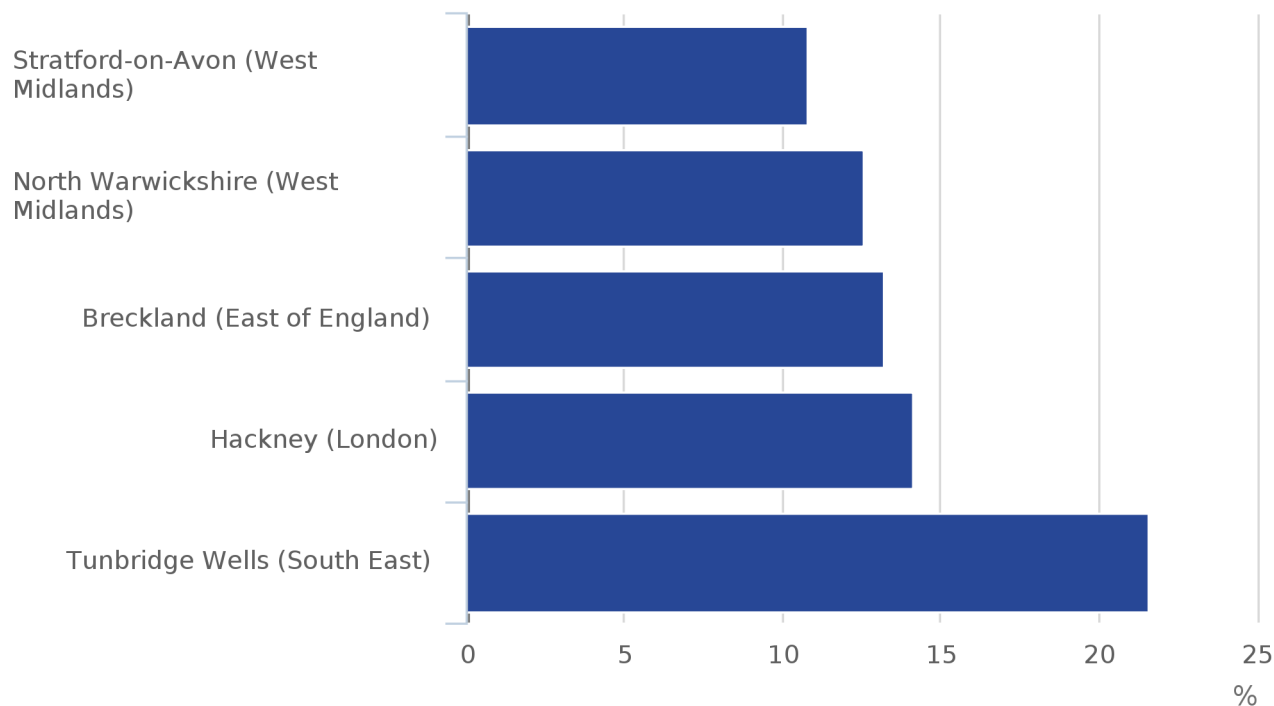
**UK - Five biggest fallers in terms of employees by LA district**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 8b: Local authorities showing the 5 biggest increases and decreases between 2013 and 2014**

**UK - Five biggest growers in terms of employees by LA district**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

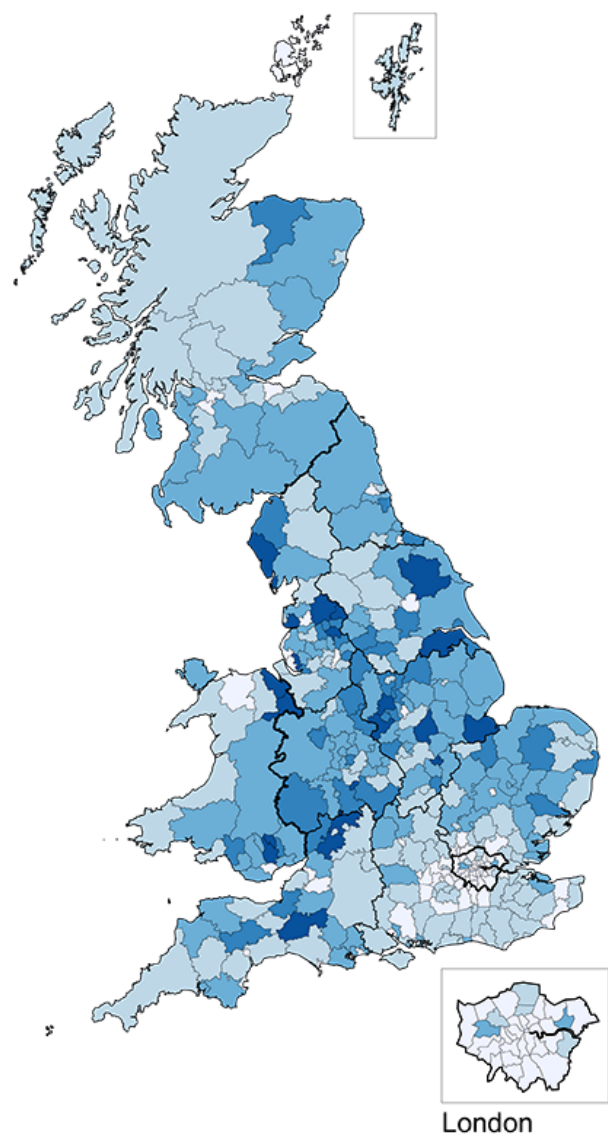
Figure 8 shows that the largest decrease in employees was seen in Ribble Valley (North West), while the largest increase was seen in Tunbridge Wells (South East).

Looking at the detailed geographical distribution of different industries can reveal some interesting results. In the section below, we compare the manufacturing and professional, scientific and technical industry groups, which show contrasting geographical distributions.

**Figure 9: Percentage of employees within local authority districts that are engaged in specific industries, 2014**

Great Britain

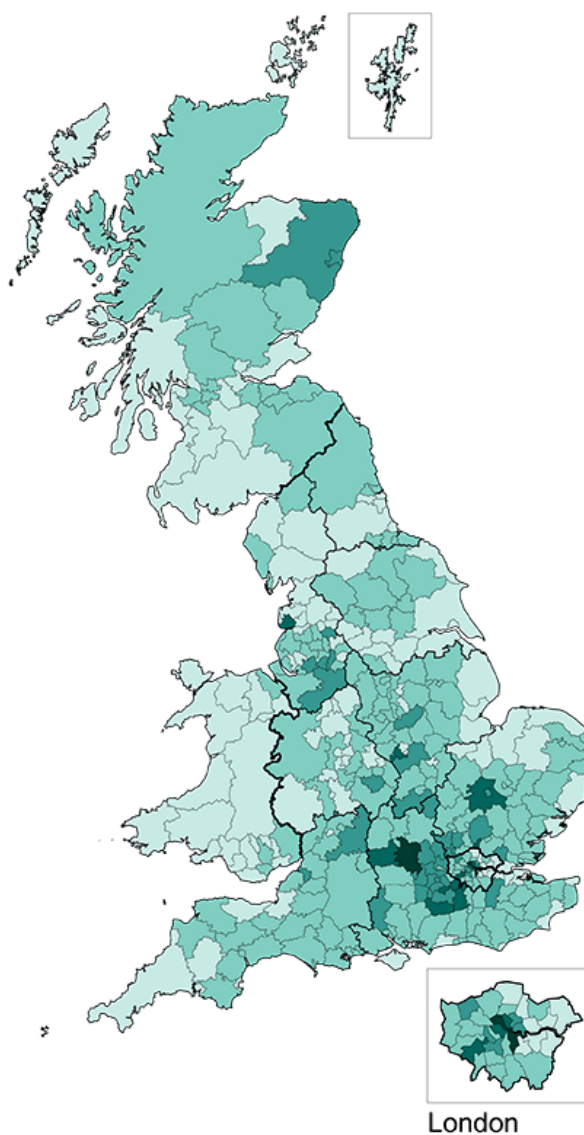
### Manufacturing



Percentage  
(Total number of areas = 380)

20.0 to 35.5	(22)
15.0 to 19.9	(40)
10.0 to 14.9	(113)
5.0 to 9.9	(128)
0.3 to 4.9	(77)

### Professional, scientific & technical



Percentage  
(Total number of areas = 380)

20.0 to 24.2	(4)
15.0 to 19.9	(13)
10.0 to 14.9	(40)
5.0 to 9.9	(195)
1.2 to 4.9	(128)

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Figure 9 shows the difference in the distribution of employees between the manufacturing and the professional, scientific and technical industries, with the latter having a greater presence in London and the South East and the former having a stronger presence outside of these regions.

In terms of the proportion of jobs that were professional, scientific and technical, 9 of the bottom 20 LAs in Great Britain were in Wales, notably Merthyr Tydfil and Torfaen, which were the second and third smallest proportions respectively (the Isles of Scilly in the South West had the smallest). On the other hand, 8 of the top 20 LAs were in the South East and 6 in London. The top 3 were all in London, followed by South Oxfordshire in the South East.

In terms of the proportion of jobs that were in manufacturing, all of the bottom 20 LAs were in the south, with London representing 13 of these. In contrast, the top 20 LAs were more evenly spread across the country, with 6 in the North West, 5 in the East Midlands and 3 in both Wales and the South West. The North West had 4 of the top 5, with the additional LA being in Wales.

**Figure 10: Top and bottom 5 local authority districts for specified industries**

UK

Bottom 5 LA districts for the Professional, scientific & technical industry		
Isles of Scilly	South West	1.2
Merthyr Tydfil	Wales	2.1
Torfaen	Wales	2.1
Scarborough	Yorkshire and the Humber	2.2
Hyndburn	North West	2.3
Top 5 LA districts for the Professional, scientific & technical industry		
City of London	London	24.2
Camden	London	21.4
Southwark	London	20.8
South Oxfordshire	South East	20.7
South Cambridgeshire	East of England	19.9
Bottom 5 LA districts for the Manufacturing industry		
City of London	London	0.3
Epsom and Ewell	South East	0.6
Westminster	London	0.6
Lambeth	London	0.8
Southwark	London	0.9
Top 5 LA districts for the Manufacturing industry		
Copeland	North West	35.5
Pendle	North West	31.7
Flintshire	Wales	31.2
Ribble Valley	North West	27.5
Barrow-in-Furness	North West	26.8

Source: Business Register and Employment Survey (BRES) - Office for National Statistics

## 6. Focus on the regional distribution of main industries

This section below looks at the regional distribution of employment for industries that have shown the biggest rise and fall in employees since 2009.

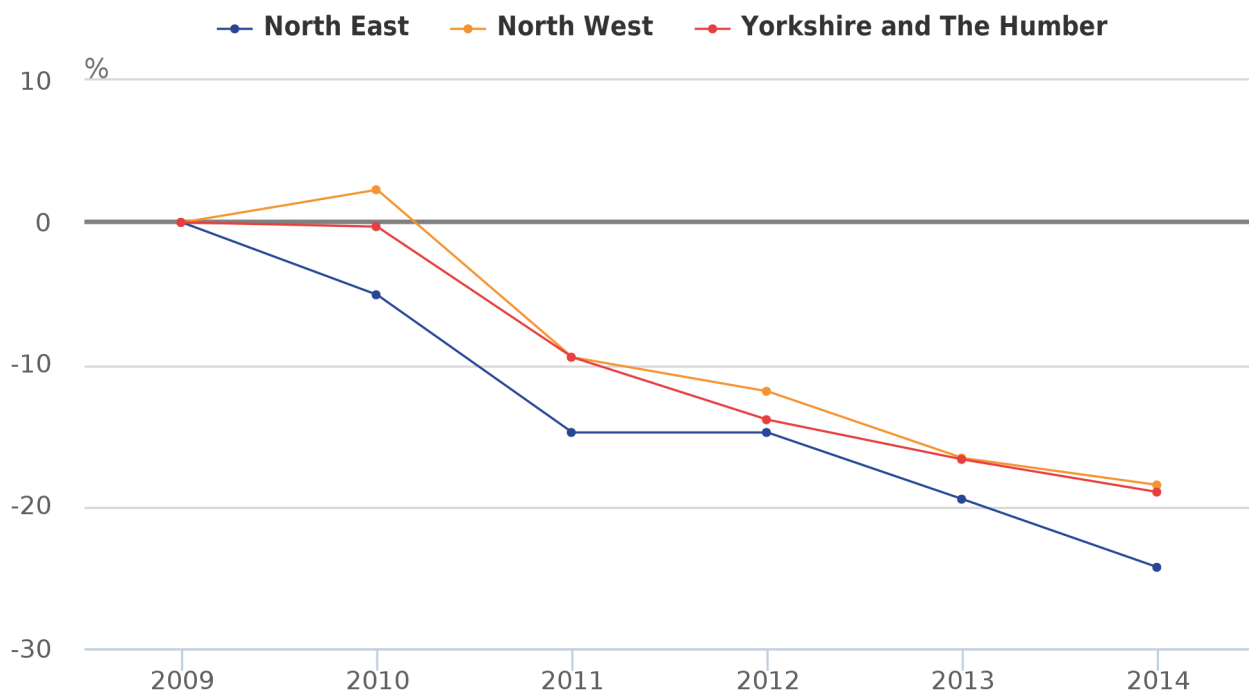
### Public administration and defence

This includes activities of a governmental nature, normally carried out by the public administration.

Public administration and defence has seen a long-term decrease in every region, particularly in the East Midlands, the North East and the East of England. London, Scotland and Northern Ireland have seen a small increase this year.

**Figure 11a: Growth relative to 2009 in the public administration and defence industry by region**

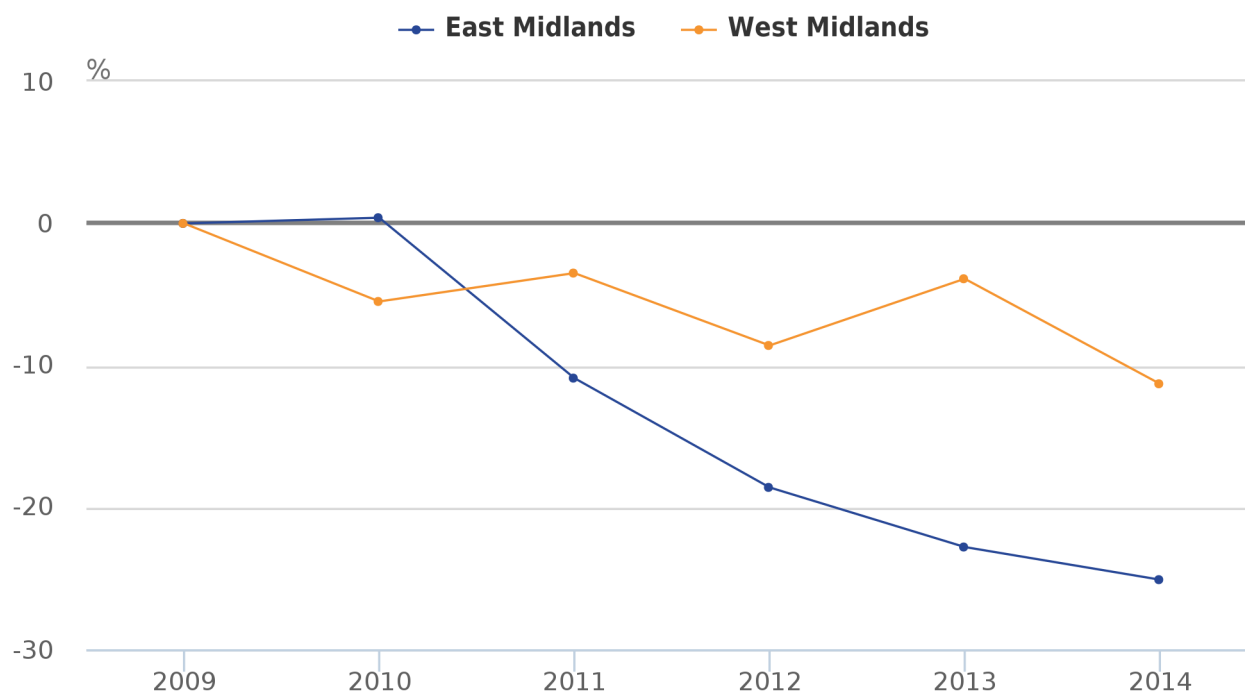
UK - North



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 11b: Growth relative to 2009 in the public administration and defence industry by region**

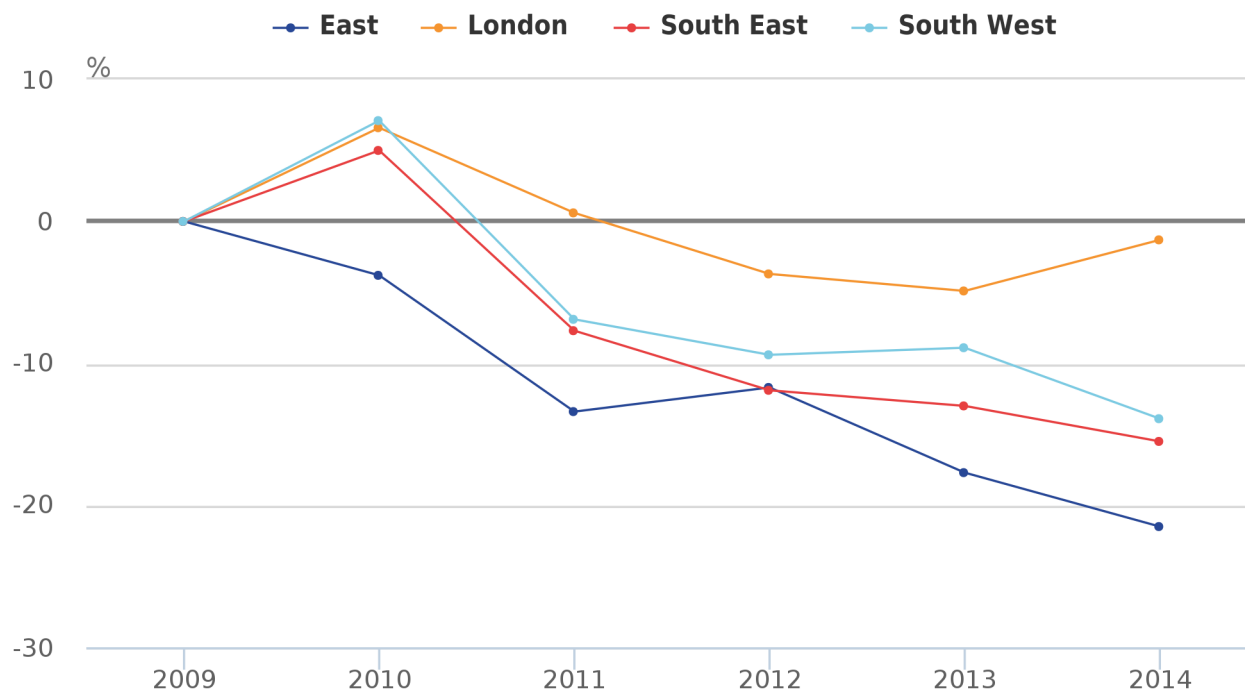
UK - Midlands



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 11c: Growth relative to 2009 in the public administration and defence industry by region**

UK - South

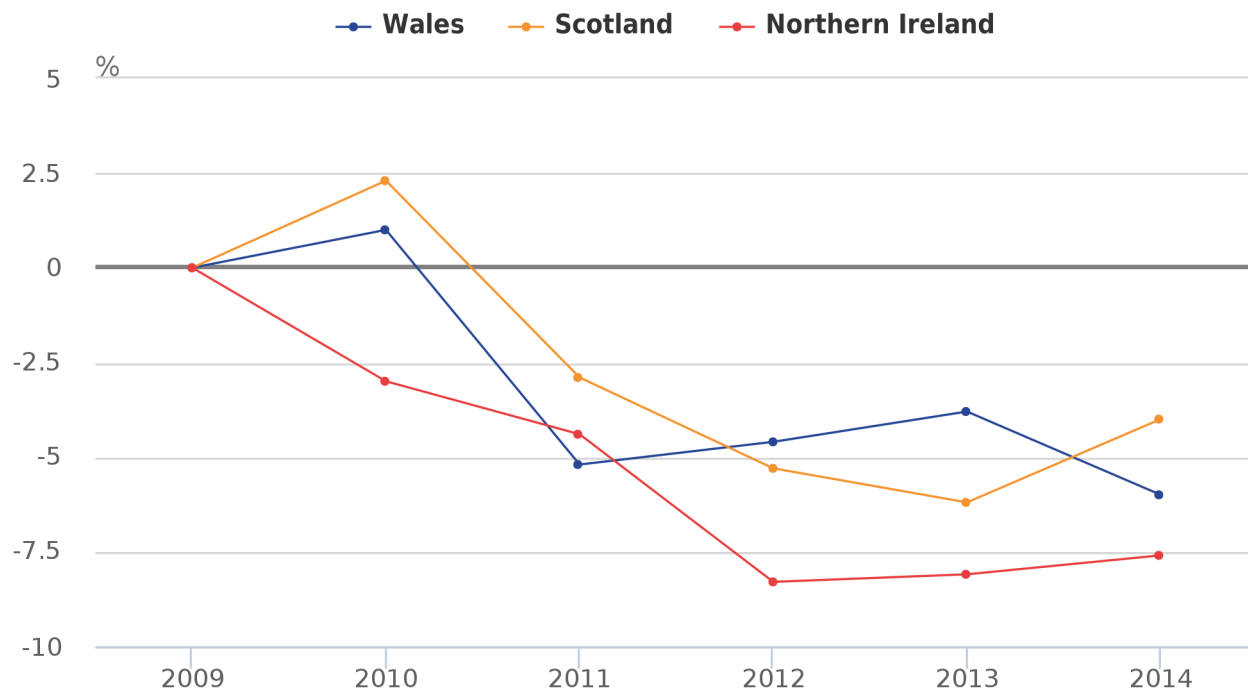


Source: Business Register and Employment Survey (BRES) - Office for National Statistics



**Figure 11d: Growth relative to 2009 in the public administration and defence industry by region**

UK - Devolved administrations



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

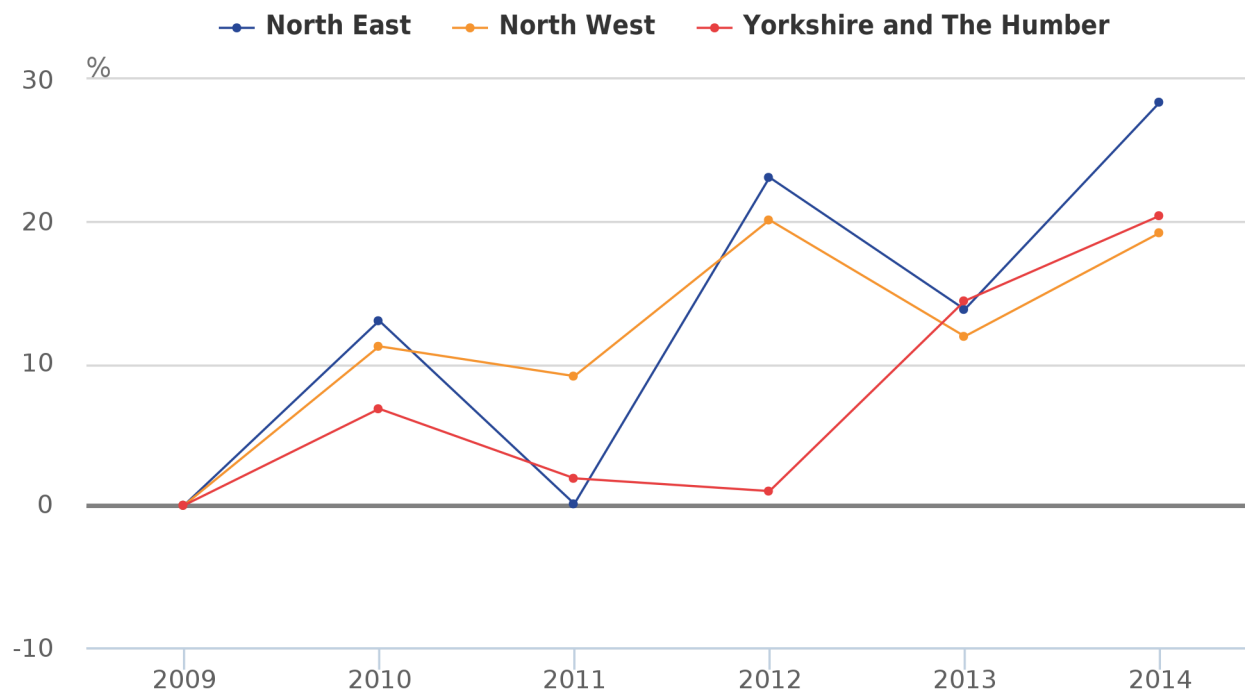
## Business administration and support services

This section includes a variety of activities that support general business operations. It differs from professional, scientific and technical in that their primary purpose is not the transfer of specialised knowledge.

Business administration and support services have seen significant growth in all regions since 2009, growing by over 20% in the North East, the East Midlands, the West Midlands, London and Yorkshire and The Humber. Until 2013, Wales had shown a decline, but due to significant growth between 2013 and 2014, the number of employees in Wales is now also above 2009 levels.

**Figure 12a: Growth relative to 2009 in the business administration and support services industry by region**

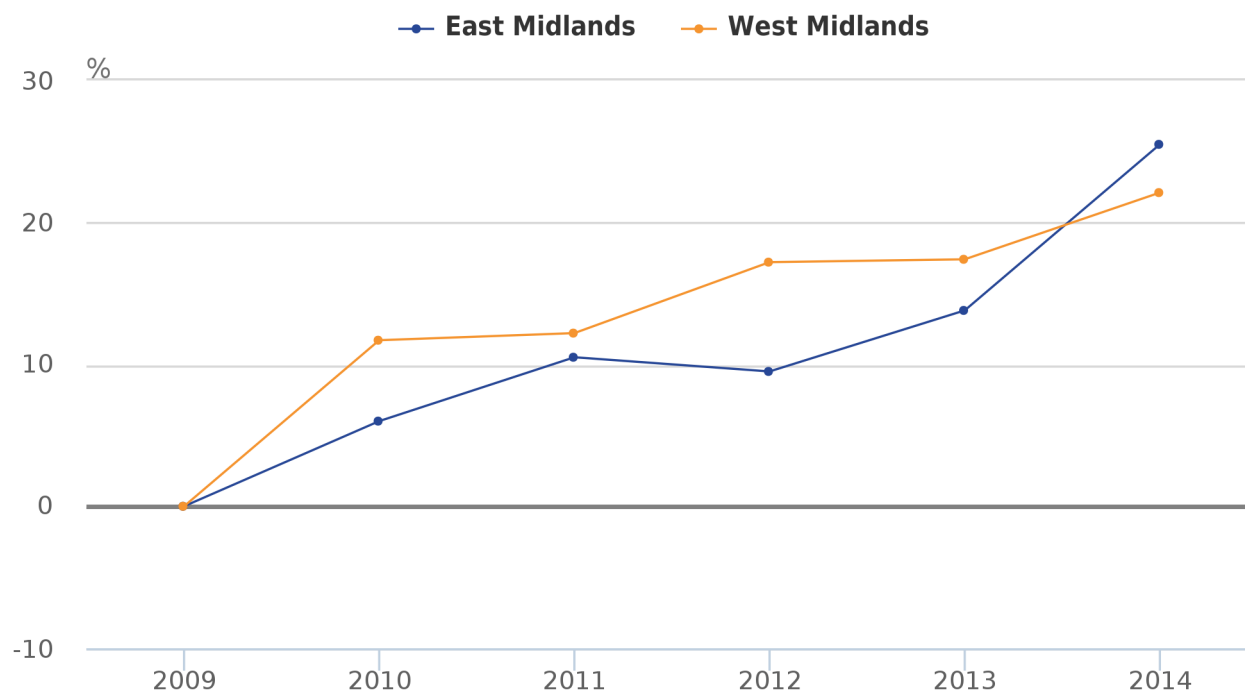
UK - North



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 12b: Growth relative to 2009 in the business administration and support services industry by region**

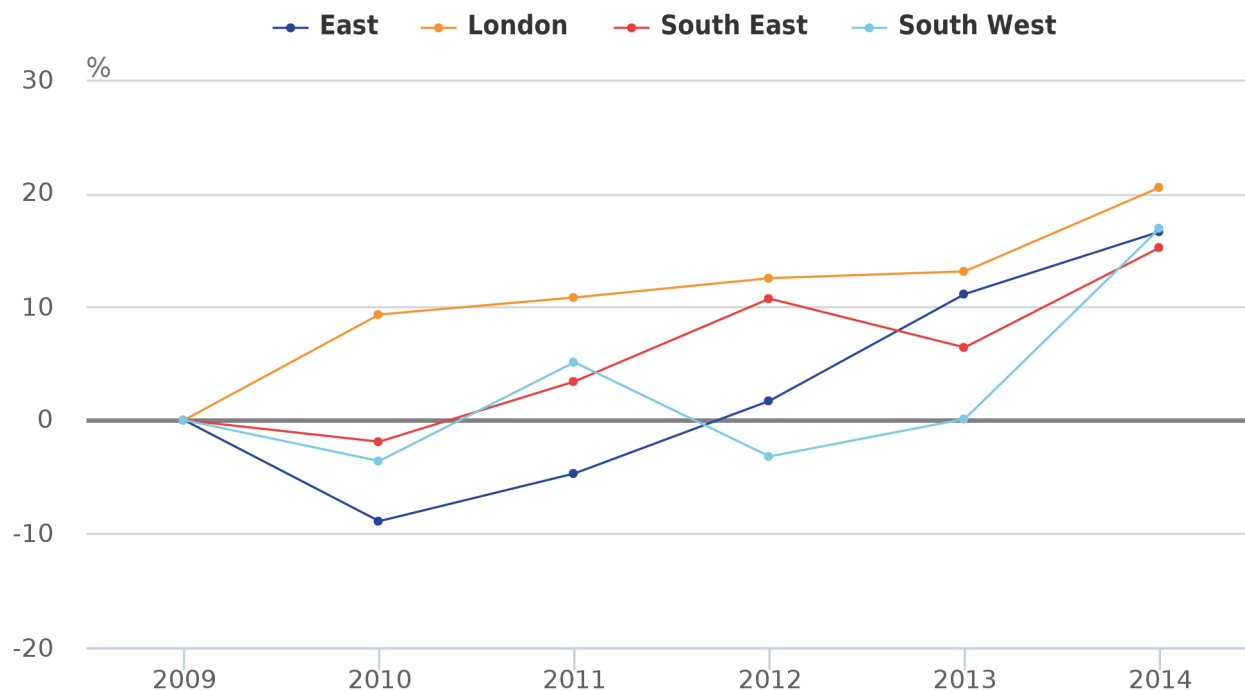
UK - Midlands



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 12c: Growth relative to 2009 in the business administration and support services industry by region**

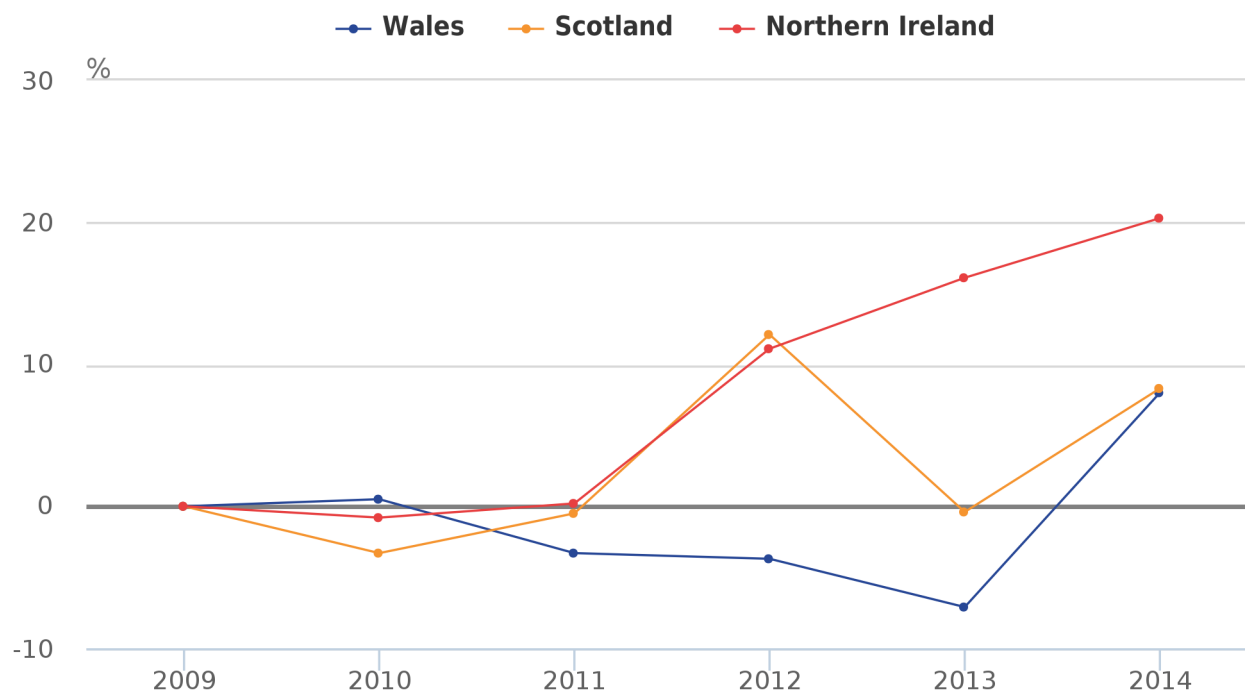
UK - South



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 12d: Growth relative to 2009 in the business administration and support services industry by region**

UK - Devolved administrations



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

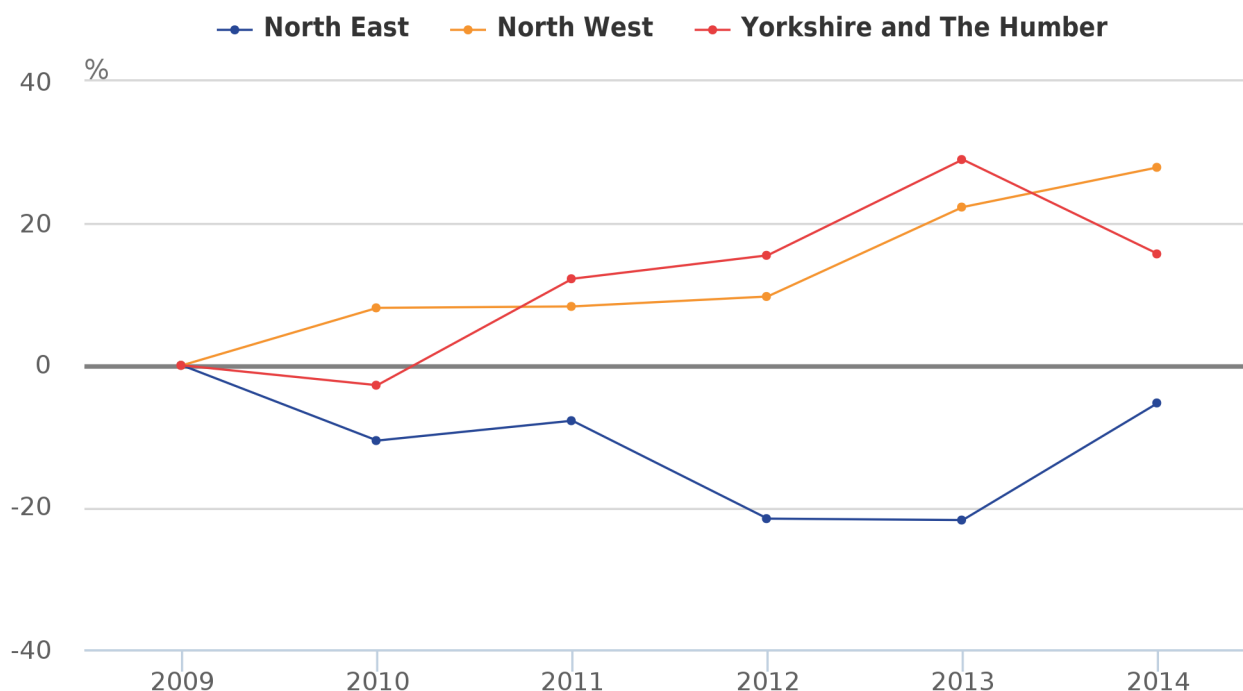
## Professional, scientific and technical

This includes specialised professional, scientific and technical activities. These activities require a high degree of training and make specialised knowledge and skills available to users.

Professional, scientific and technical services have seen significant growth since 2009, growing by over 20% in the East of England, the North West, the West Midlands and London. Growth particularly rebounded in the East Midlands, which by 2011 had declined by 14.9% but now has grown by 18.9% compared with 2009. The North East showed a decline between 2013 and 2014 and, despite a large increase in 2014, is still behind 2009.

**Figure 13a: Growth relative to 2009 in the professional, scientific and technical industry by region**

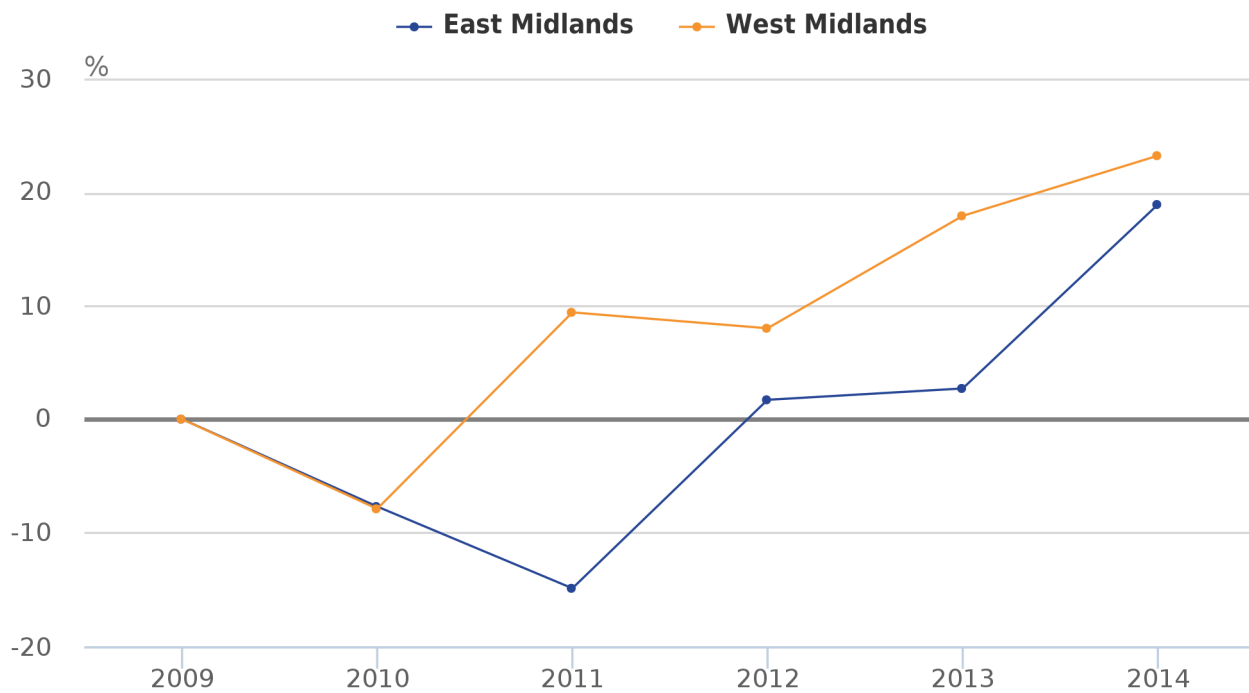
UK - North



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 13b: Growth relative to 2009 in the professional, scientific and technical industry by region**

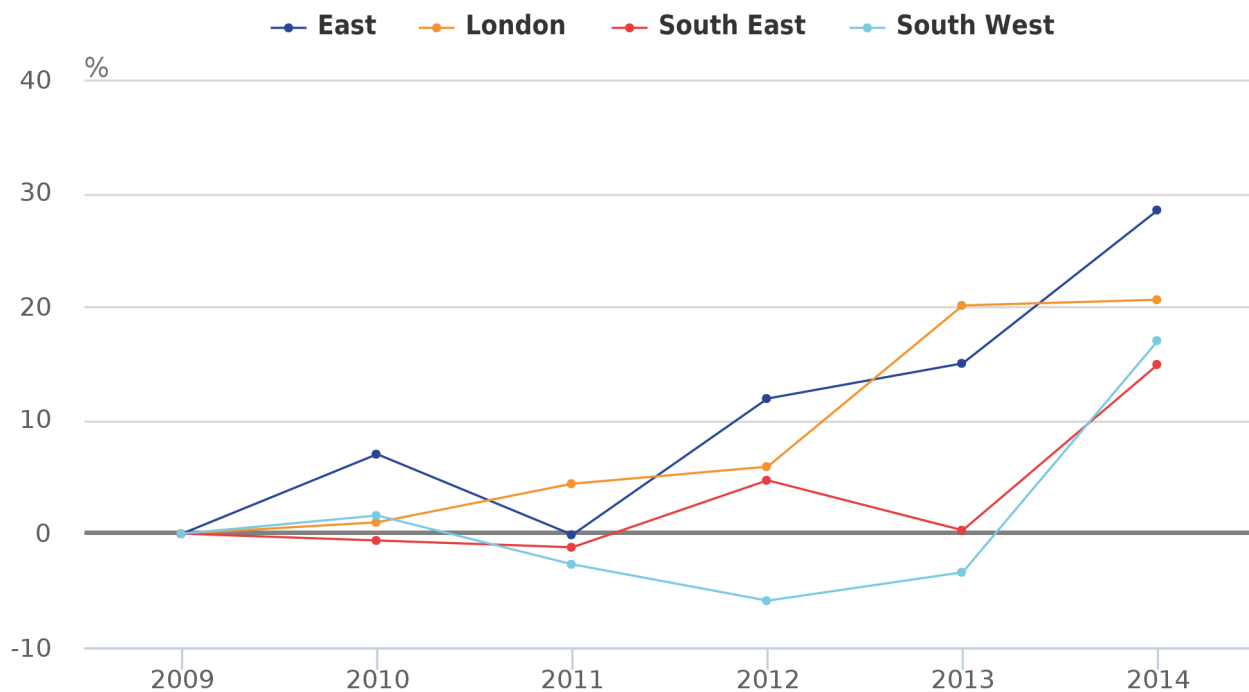
UK - Midlands



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 13c: Growth relative to 2009 in the professional, scientific and technical industry by region**

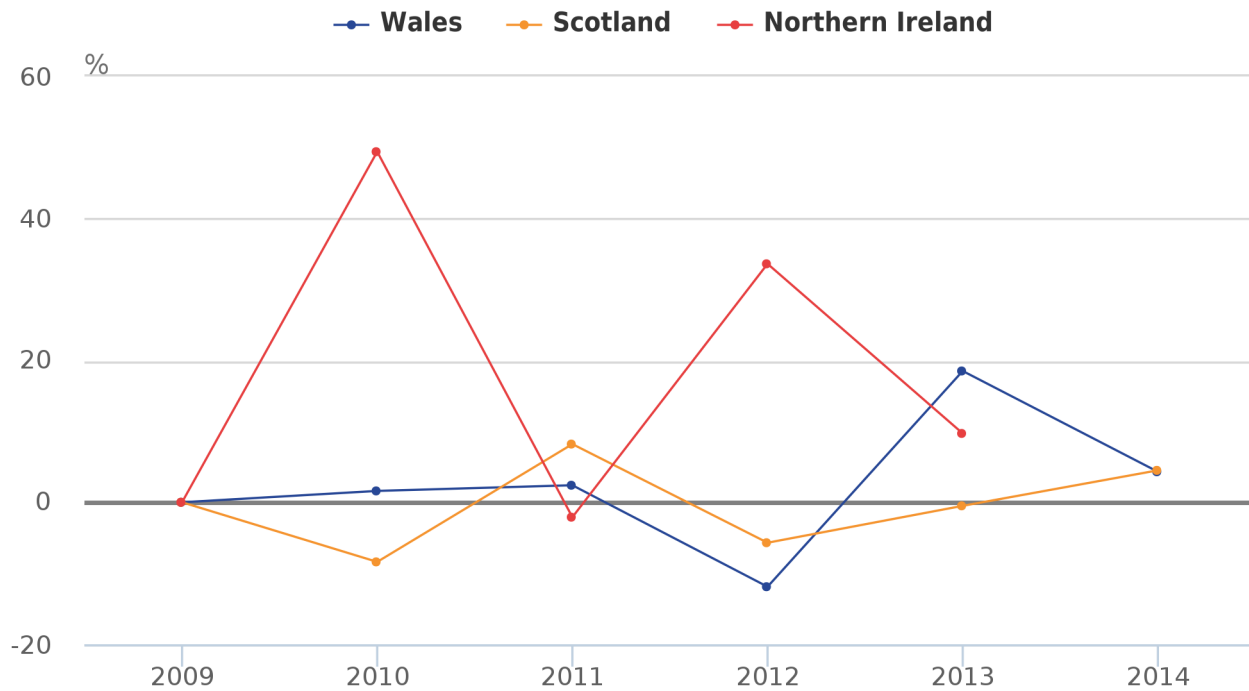
UK - South



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 13d: Growth relative to 2009 in the professional, scientific and technical industry by region**

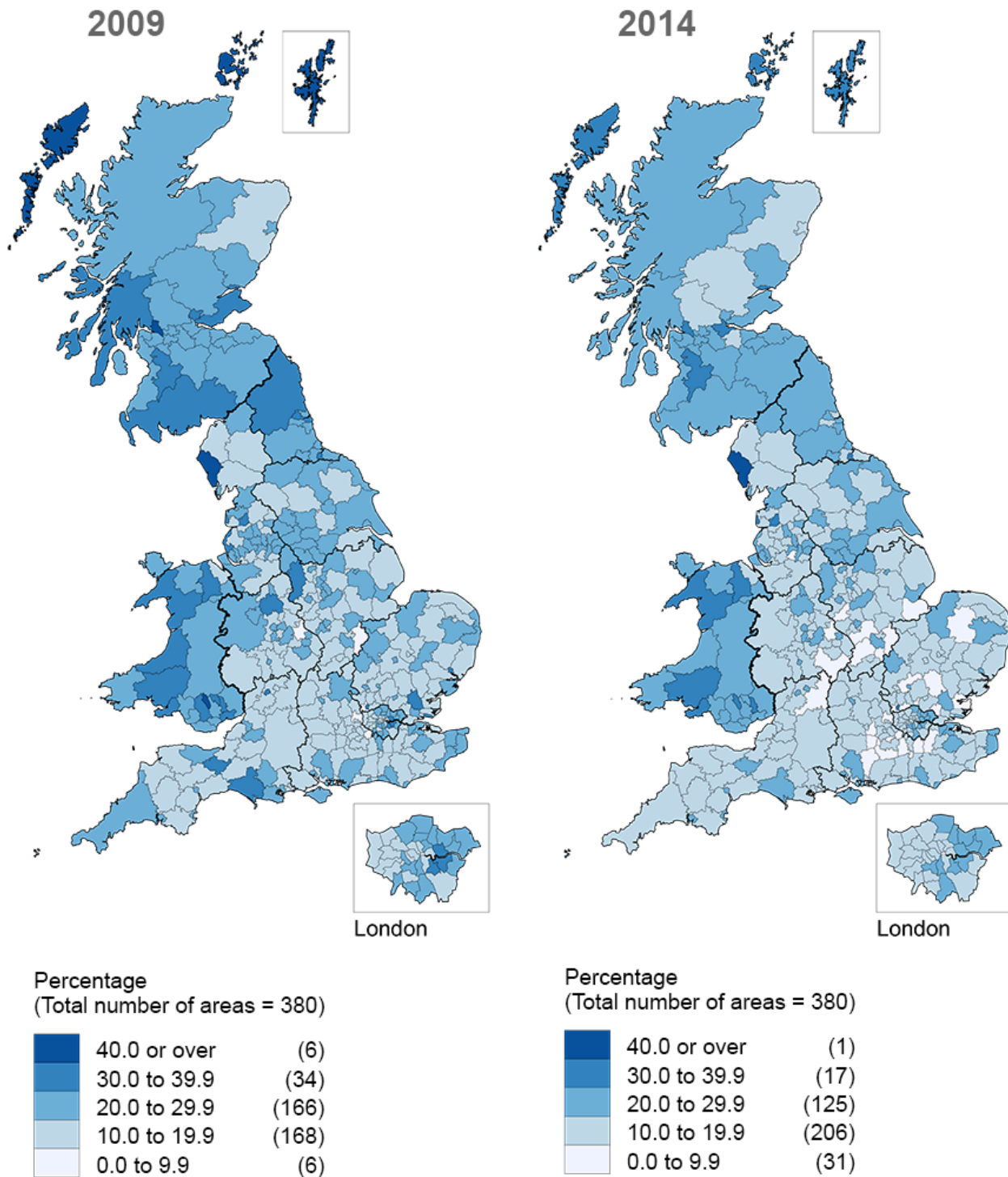
UK - Devolved administrations



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

## 7. Public and private sector estimates

**Figure 14: Percentage of public sector employees in local authority districts; 2009 and 2014**

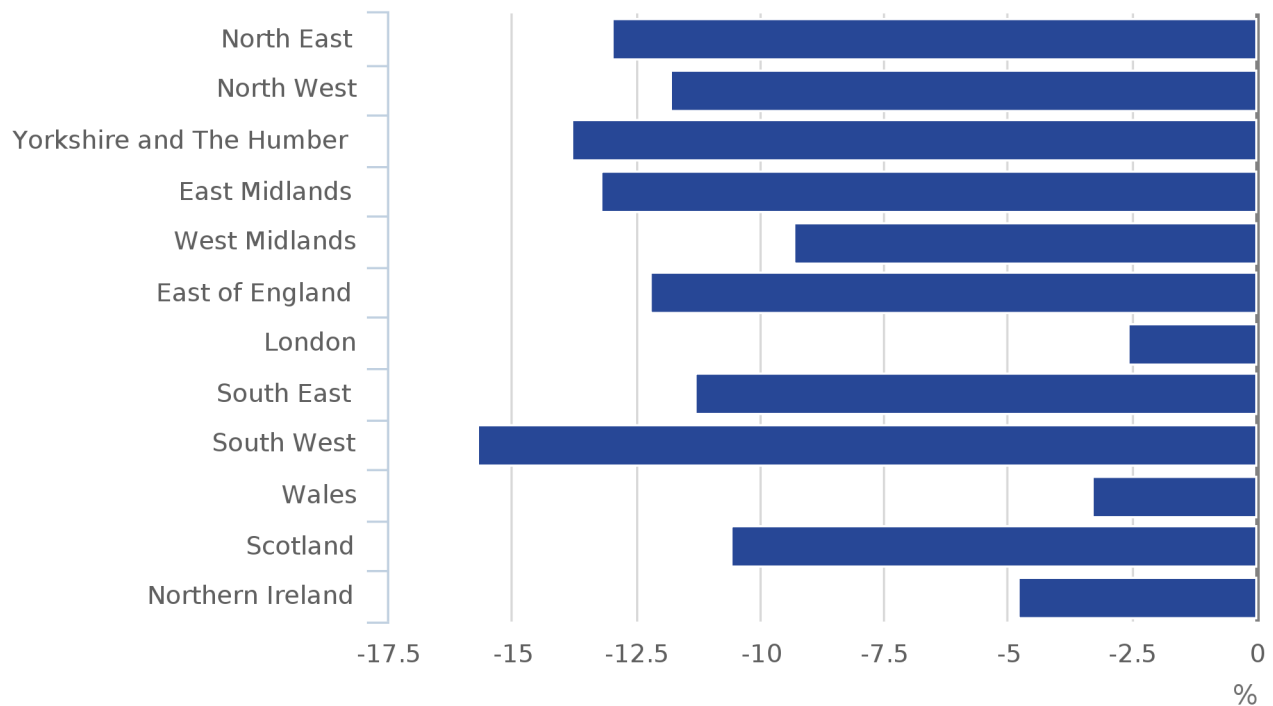


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Figure 14 shows the number of public sector employees as a percentage of total employees by local authority for 2009 and 2014. This clearly shows that there has been a substantial decrease in the proportion of public sector jobs for many local authorities. This is due to a combination of a decrease in the number of public sector employees over this period, along with an increase in the number of private sector employees.

**Figure 15a: Percentage change in employees by region for the public sector, 2009 - 2014**

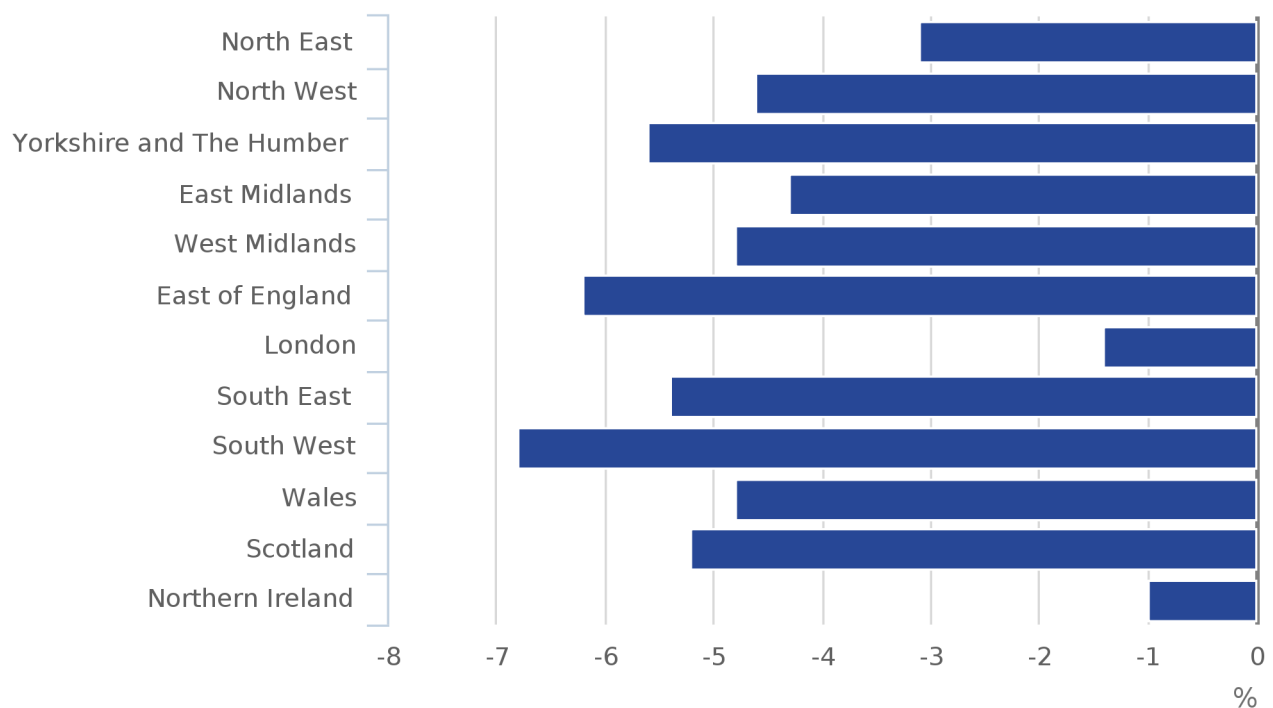
UK



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 15b: Percentage change in employees by region for the public sector, 2013 - 2014**

UK

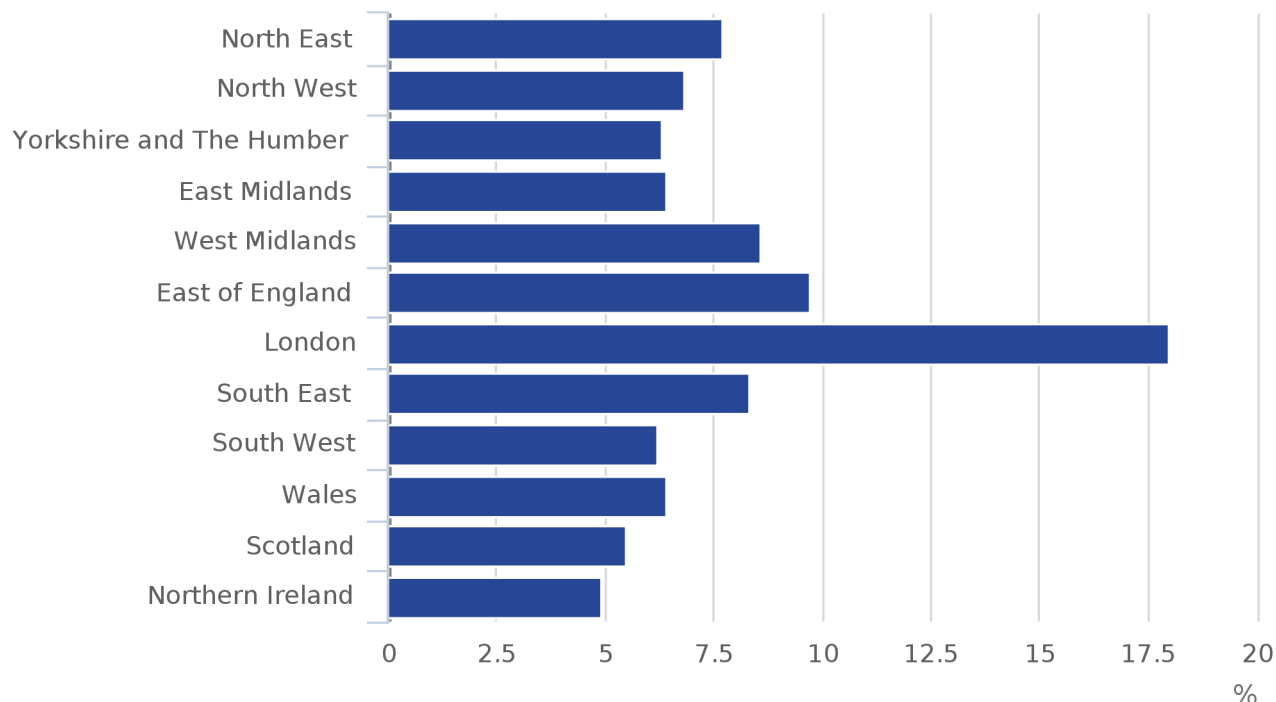


Source: Business Register and Employment Survey (BRES) - Office for National Statistics



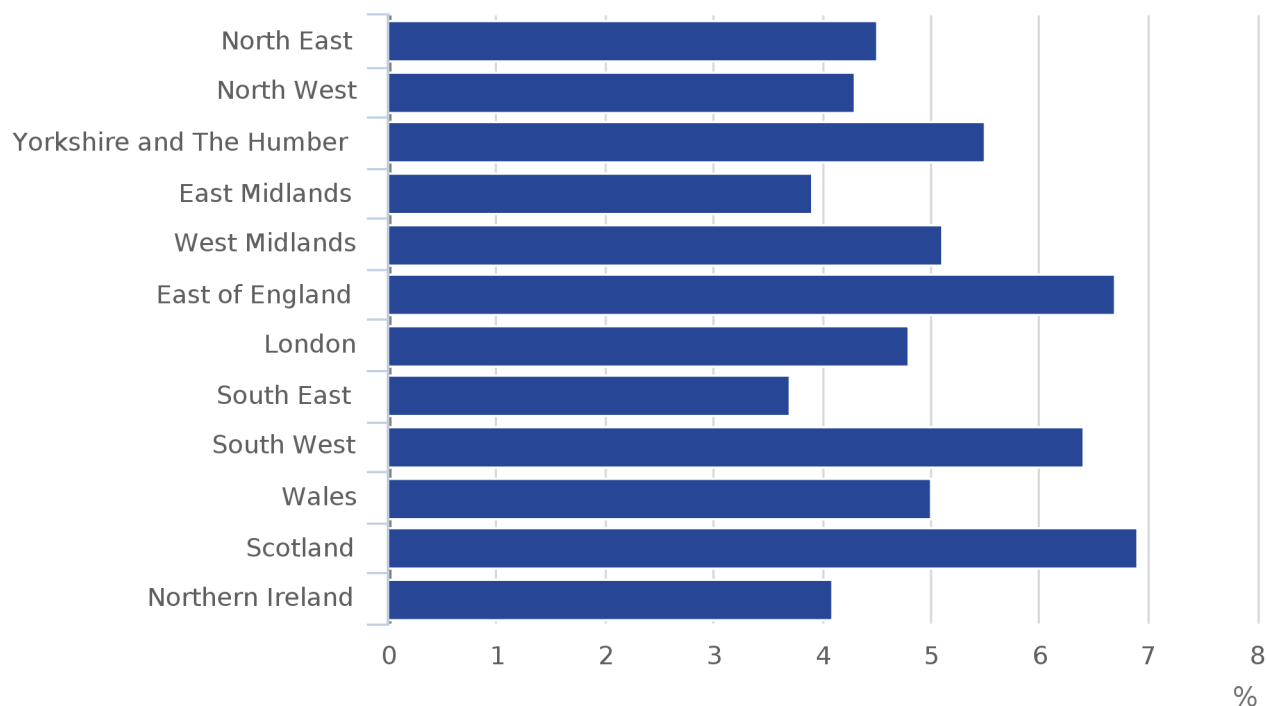
During the 2013 to 2014 period, every region has continued to see a fall in public sector employees, with the South West, the East of England and Yorkshire and The Humber showing the largest percentage falls. Since 2009, London and Wales have shown the smallest percentage decreases in the number of employees in the public sector.

**Figure 16a: Percentage change in employees by region for the private sector, 2009 to 2014**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

**Figure 16b: Percentage change in employees by region for the private sector, 2013 to 2014**



Source: Business Register and Employment Survey (BRES) - Office for National Statistics

In contrast, employees in the private sector have grown in every region between 2013 and 2014, with strong percentage growth in Scotland, East of England and the South West. In fact, the growth in employees in the private sector has grown more than the fall in employees in the public sector in every region, resulting in a net increase in employees in every region.

Between 2013 and 2014, 80% of local authority districts saw a decrease in the number of public sector employees, with 84% showing a decrease between 2009 and 2014. In contrast, 94% of local authority districts saw an increase in the number of private sector employees, with 88% growing between 2009 and 2014.

When looking at changes in the number of employees in the public and private sectors, it is worth noting that these estimates can be distorted as a result of changes to the public or private designation of large businesses. For example, the transport and storage (including postal) industry in the public sector declined in 2014 due to the re-privatisation of the Royal Mail. Similarly, the finance and insurance industry in the public sector declined in 2014 due to the privatisation of one of the big banks. Excluding these industries from the regional figures showed that the public sector grew in London between 2013 and 2014 with everywhere else decreasing.

## 8. Background notes

1. To support this release a set of tables providing greater geographical and industrial detail is available on our website
2. Estimates presented in this release and associated published tables are rounded to prevent disclosure. Differences may exist in totals across tables due to rounding of estimates and disclosure methods used
3. For 2014, employee job numbers are estimated as at 12 September
4. Sub-regional estimates are based on the county and district geography boundaries at the time the survey sample was selected (August 2014)
5. Although this bulletin focuses on employees, BRES collects information on employees and employment (employees plus working owners). BRES therefore includes self-employed workers (within the employment estimates) as long as they are registered for VAT or Pay-As-You-Earn (PAYE) schemes. Self-employed people who are not registered for these, along with HM Forces and government-supported trainees are not included
6. Employee jobs are allocated to the area in which the businesses completing the survey questionnaire say the employee works. Therefore, geographic estimates are on a workplace basis, and do not reflect where the person lives. Jobs at local hospitals, for example, may be situated in one local authority while the employees or people may reside in another
7. The public sector comprises central government, local government and public corporations. The private sector comprises companies, sole proprietors, partnerships and non-profit bodies
8. An employee is defined as anyone aged 16 years or over that is paid directly from the payroll, in return for carrying out a full-time or part-time job or being on a training scheme. Employment includes employees plus the number of working owners who receive drawings or a share of the profits. Full-time is defined as working more than 30 hours per week with part-time defined as working 30 hours or less per week
9. Farm agriculture data are either provided or taken from existing publications by the Department for Environment, Food and Rural Affairs, the Scottish Government, the Welsh Government and the Department for Agriculture and Rural Development Northern Ireland. These figures are not available for all sub-regions so for consistency they have not been included in estimates below Region level. The figures have only been included at a 2-digit Standard Industrial Classification (SIC) level and above. Where employment in farm agriculture has been included in estimates it has been included within the private sector
10. Alternative employment estimates are available from the Labour Force Survey (LFS) and Workforce Jobs (WFJ). BRES is the primary source for employee estimates at a detailed regional and industrial level. Workforce Jobs benchmarks the private sector employee component to the BRES private sector employee estimates on an annual basis. The WFJ series, which is compiled mainly from surveys of businesses, is the

preferred source of statistics when comparing changes in employment over time. The LFS, which collects information mainly from residents of private households, is the preferred source of statistics on employment at the whole economy level. The concept of employment (measured by the LFS as the number of people working at least 1 hour during the survey reference week) differs from the concept of jobs, since a person can have more than 1 job, and some jobs may be shared by more than 1 person. The LFS can also be used to produce estimates of the total number of jobs in the UK, by adding together the headline employment figures (which are equivalent to main jobs) and those for workers with a second job

11. The public sector employee job figures from BRES aggregated to regional or national level will not match those produced from the Public Sector Employment release, which is the recommended source for public sector employment figures. For example, in 2014 the BRES estimates that there were 5.31 million employee jobs in the public sector in the UK. The public sector employment estimates for the UK in the comparable period (Quarter 3 July to September 2014) indicate that public sector employment was 5.40 million, a difference of 96,000. The Public Sector Employment figures include HM Forces, whereas BRES does not
12. On 31 May 2012, we announced the reclassification of English further education corporations and sixth form colleges to the private sector, as Non-Profit Institutions Serving Households, effective from 1 April 2012. As such, employee estimates for English further education colleges and sixth form college corporations are included in our estimates of public sector employment for 2011 and earlier years. From 2012 onwards, English further education corporations and English sixth form college employment estimates were included in the private sector
13. A further breakdown of the number of employees, by region and industry, is provided on the [Nomis website](#). Employee estimates from BRES can only be viewed on Nomis by applying for access, details of which can be found on the Nomis website
14. Figures are classified to the 2007 revision to the Standard Industrial Classification (SIC). BRES includes breakdowns by public and private sector according to the legal status of employees for National Accounts classification purposes
15. We apply statistical methods to the survey returns to ensure that the estimates derived are as representative of the population as possible. Nevertheless, there is still some error associated with these estimates, and we measure this by calculating coefficients of variation, which are defined as the ratio of the standard error of an estimate to the estimate itself

For example, an estimate with a CV of 5% will have a standard error that is 5% of the estimate. The smaller the coefficient of variation, the greater the accuracy of the estimate. CVs that are greater than or equal to 20% should be used with caution

CVs are provided within the published tables that accompany this release

16. Quality Methodology Information for BRES is available on the ONS website
17. BRES is a sample survey. For the 2014 survey period, approximately 80,000 businesses were sampled for Great Britain. Further details of the sample design can be found in the BRES QMI to be published before the end of November 2015. The response rate for the 2014 BRES survey was 87%. Northern Ireland data was collected independently by the Northern Ireland Statistical and Research Agency
18. Details of the policy governing the release of new data are available by visiting [www.statisticsauthority.gov.uk/assessment/code-of-practice/index.html](http://www.statisticsauthority.gov.uk/assessment/code-of-practice/index.html) or from the Media Relations Office email: [media.relations@ons.gsi.gov.uk](mailto:media.relations@ons.gsi.gov.uk)

These National Statistics are produced to high professional standards and released according to the arrangements approved by the UK Statistics Authority