



INDUSTRY INSIGHTS

in Administrative
and Support Service
Activities





INDUSTRY INSIGHTS in ADMINISTRATIVE and SUPPORT SERVICE ACTIVITIES

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MARKET DEFINITION

1.1 Scope of the Market

The Administrative Sector includes a variety of business services:

1. Rental and Leasing Activities

- Renting and leasing of motor vehicles
- Renting and leasing of personal and household goods
- Renting and leasing of other machinery, equipment and tangible goods
- Leasing of intellectual property and similar products, except copyrighted works

(SIC Code Support UK, 2007)

2. Employment Activities

- Activities of employment placement agencies
- Temporary employment agency activities
- Other human resources provision

(SIC Code Support UK, 2007)

3. Travel

- Travel agency and tour operator activities
- Other reservation service and related activities

(SIC Code Support UK, 2007)

4. Security and Investigation Activities

- Private security activities
- Security systems service activities
- Investigation activities

(SIC Code Support UK, 2007)

5. Services to Buildings and Landscape Activities

- Combined facilities support activities
- Cleaning activities
- Other building and industrial cleaning activities
- Landscape service activities

(SIC Code Support UK, 2007)

6. Office Administrative, Office Support and Other Business Support Activities

- Office administrative and support activities
- Activities of call centres
- The organisation of conventions and trade shows
- Business support service activities

(SIC Code Support UK, 2007)

1.2 Major Players

Below is a list citing the Major UK Players per subsector of the Administrative & Support Service Activities Industry.

1.2.1 Rental & Leasing Activities

Car Rental & Leasing

Industry Definition

Firms in this industry rent cars and small commercial vehicles to private users and businesses on a short-term basis. Customers can also lease cars and other vehicles from the industry on a long-term basis, usually from one to seven years, with the option to purchase the vehicle at the end of the leasing period. Operating leases are included in the industry, whereas financial leases are not. The industry does not include renting or leasing a vehicle with a driver.

(Ibis World, 2020)

Biggest Companies in the UK:

- Lex Autolease Limited
- Alphabet (GB) Ltd
- LeasePlan UK Limited
- Enterprise Rent-A-Car UK Limited
- Europcar Group UK Ltd
- Avis Budget Group Inc
- Hertz (UK) Ltd

(Ibis World, 2020)

Truck Rental & Leasing

Industry Definition

Firms in this industry rent and lease trucks and motor vehicles weighing more than 3.5 tonnes. The industry includes the renting or leasing of heavy goods vehicles or trucks with drivers.

(Ibis World, 2020)

Biggest Companies in the UK:

- Ryder Limited
- Dawsongroup Plc
- Contract Vehicles Ltd
- Fraikin Ltd
- Northgate Vehicle Hire Ltd

(Ibis World, 2020)

1.2.2 Employment Activities

Employment Placement Agencies

Industry Definition

Agencies in this industry list employment vacancies, refer applicants to jobs or directly place them in permanent employment. The individuals referred or placed are not employees of the employment agency. The operations of online placement agencies are also included in the industry.

(Ibis World, 2020)



Biggest Companies in the UK:

- Hays Plc
- Robert Walters Plc
- PageGroup Plc
- Impellam Group Plc

(Ibis World, 2020)

Temporary-Employment Placement Agencies

Industry Definition

Businesses in this industry provide their clients with workers to temporarily replace or supplement their existing labour force. The individuals are employed by the agency but supervised by the client at the worksite. The industry excludes employees outsourced on a long-term basis who are classified in other industries according to their activity.

(Ibis World, 2020)

1.2.3 Travel Agency, tour operator and other reservation services and related activities

Travel Agencies in the UK

Industry Definition

This industry is composed of agencies that provide booking, reservation and information services to UK residents travelling domestically and internationally. This includes agencies that are solely or partially online or shop-front operators. Operators generate their income from commissions.

(Ibis World, 2020)

Biggest Companies in the UK:

- TUI Travel Ltd
- Hays Travel Ltd
- Expedia.com Ltd
- Trailfinders Ltd
- Flight Centre (UK) Ltd
- Kuoni Global Travel Services (UK) Ltd
- Thomas Cook Group Plc

(Ibis World, 2020)

1.2.4 Security and Investigation Activities

Security System Services

Industry Definition

Operators in this industry install, repair, maintain and monitor electronic security alarm systems, mechanical or electronic locking devices, safes and security vaults. The industry excludes the installation of security systems without later monitoring.

(Ibis World, 2020)

Biggest companies in the UK:

- ADT Fire & Security Plc
- Securitas Security Services (UK) Ltd
- G4S Secure Solutions (UK) Limited
- MITIE Security Limited
- Chubb Fire & Security Ltd

(Ibis World, 2020)



1.2.5 Services to Buildings and Landscape Activities

Combined Facilities Support Activities

Industry Definition

Companies operating in this industry provide a combination of support services in a client's facilities. These include general interior cleaning, maintenance, rubbish disposal, security, post distribution, reception, laundry and related services. These support activities are performed by staff not involved with or responsible for the client's core business or activities.

(Ibis World, 2020)

Biggest Companies in the UK:

- MITIE Group Plc
- Interserve Group Ltd
- ISS Facility Services Ltd
- Engie Services Holding UK Ltd
- Emcor Group (UK) Plc
- Kier Group Plc
- CBRE Ltd
- Carillion Plc

(Ibis World, 2020)

General Building Cleaning

Industry Definition

This industry focuses on the provision of general cleaning services for residential and commercial buildings. These services mainly include interior cleaning services. Industrial cleaning and other specialised cleaning services are not covered.

(Ibis World, 2019)

Biggest Companies in the UK:

- Ideal Cleaning Services Ltd
- Molly Maid UK Ltd
- Swift Office Cleaning Services Ltd
- The Cleaning Services Group Ltd

(Ibis World, 2019)

Landscaping Services

Industry Definition

Firms in this industry care for and maintain the gardens and green spaces of residential properties, public and semi-public buildings, municipal grounds, sports grounds, industrial and commercial buildings and roads.

(Ibis World, 2020)

Biggest Companies in the UK:

- Ground Control Ltd
- Idverde Ltd
- MITIE Landscapes Ltd
- Glendale Managed Services Ltd
- Continental Landscapes Ltd

(Ibis World, 2020)



1.2.6 Office Administrative, Office Support and Other Business Support Activities

Document Preparation Services

Industry Definition

Companies in this industry provide a variety of copying, document preparation and specialised office support operations. These include photocopying, document preparation and secretarial support services.

(Ibis World, 2019)

Biggest companies in the UK:

- Xerox (UK) Ltd
- Capita Translation and Interpreting Ltd

(Ibis World, 2019)

Call Centres

Industry Definition

Call centres provide in- and outbound telecommunication services to improve client relations, provide technical assistance, market goods or conduct opinion polls. The industry only includes outsourced work. (Ibis World, 2020)

Biggest Companies in the UK:

- Synnex Corporation Inc
- Sitel UK Ltd
- Teleperformance Ltd
- Capita Customer Management Ltd

(Ibis World, 2020)

Document Management Services

Industry Definition

Companies in this industry provide document management services to other businesses and government clients. Industry services include document storage, record management and secure document destruction.

(Ibis World, 2020)

Biggest Companies in the UK:

- Iron Mountain (UK) Plc
- Restore Plc
- Shred-it Ltd
- EDM Group Ltd
- Box-it Data Management Ltd

(Ibis World, 2020)

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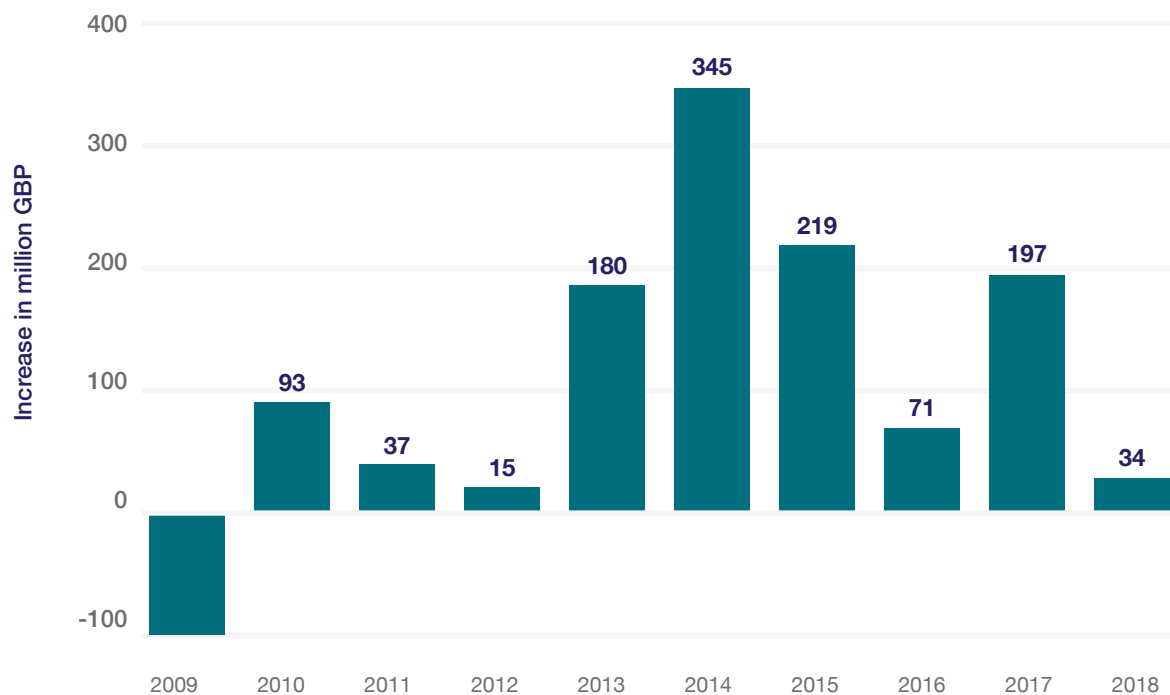
MARKET INSIGHTS

2.1 Current Market Scenario

From 2009 to 2018, the value of stocks and work in progress in the administrative and support sector generally increased each year. During 2009, stocks and work decreased by 100 million British pounds, while in 2018, stocks and work increased by 34 million British pounds.

(Statista, 2020)

Increase in value to stocks and work in progress during the year within the administrative and support services activities sector in the United Kingdom from 2009 to 2018:



Statista 2020

Current Market State of Key Industry Areas:

Temporary-Employment Placement Agencies

Industry performance generally hinges on economic conditions, in particular the unemployment rate and business confidence. Under COVID-19 circumstances, industry demand has been affected by workplace closures as the majority of employers hire fewer temporary workers. The economic slowdown and stay at home order have led to many firms postponing expansion plans, and the cancellation of events has reduced demand for industry services.

(Ibis World, 2020)





Market Size:
£50bn

(Ibis World, 2020)



Number of Businesses:
16,713



Industry Employment:
872,262



Average industry
growth 2015–2020
4.6%

Employment Placement Agencies

The industry has benefited from high demand as the economy expanded over much of the past five-year period, with unemployment falling year-on-year through 2019-20. However, the economic slowdown in the current year following the COVID-19 (coronavirus) outbreak is expected to result in a rapid decline in demand and a sharp fall in revenue of 42%. This has skewed otherwise strong revenue growth over the period, with revenue now expected to fall at a compound annual rate of 5.6% over the five years through 2020-21 to £8.2 billion.

(Ibis World, 2020)



Market Size:
£14bn

(Ibis World, 2020)



Number of Businesses:
18,635



Industry Employment:
204,282



Average industry
growth 2015–2020
7.2%

Travel Agencies

The industry performed well over the first half of the past five-year period (2015-2020). People continued to prioritise holidays, despite consumer confidence dipping and the pound falling in value following the EU referendum in June 2016.

However, the COVID-19 (coronavirus) outbreak and subsequent travel bans are expected to lead to falling revenue over the final two years of the period. Despite this, revenue is expected to rise at a compound annual rate of 0.9% over the five years through 2020-21 to reach £33.1 billion, with current-year revenue anticipated to fall by 4.1%.

(Ibis World, 2020)



Market Size:
£35bn

(Ibis World, 2020)



Number of Businesses:
7,435



Industry Employment:
59,367



Average industry
growth 2015–2020
2.3%

Security System Services

Over the past five years (2015-2020), public concern over terrorism and crime has increased, supporting demand for industry services. To ease the public's fears regarding security and improve efficiency, government authorities have been outsourcing security services to specialist contractors. Additionally, consumers have sought industry products to lower insurance premiums. However, the UK government's stay-at-home order due to COVID-19 has led to the closure of several businesses, limiting demand for security services.

(Ibis World, 2020)



Market Size:

£2bn

(Ibis World, 2020)



Number of Businesses:

2,638



Industry Employment:

10,859



Average industry growth 2015–2020

12.5%

Call Centres

Economic uncertainty following the EU referendum led to a significant fall in revenue in 2016-17, as businesses cut back on spending. Increased regulation related to consumer data privacy has increased administration costs for industry operators over the past five years (2015-2020). On top of that, the reality of the pandemic calls that need to be recorded creates difficulty, from a regulatory perspective, in allowing call centre employees to work from home.

(Ibis World, 2020)



Market Size:

£3bn

(Ibis World, 2020)



Number of Businesses:

926



Industry Employment:

68,187



Average industry growth 2015–2020

1.1%

Document Management Services

This subcategory's strong performance has been driven largely by strict data protection regulations and a growing preference shown by downstream operators to outsource document management services amid rising cost pressures. This trend has been most prominent within the public sector, where departmental budget cuts have forced government departments to downsize their estates and pursue space saving endeavours.



Market Size:

£1bn

(Ibis World, 2020)



Number of Businesses:

1,849



Industry Employment:

12,770



Average industry growth 2015–2020

3.1%



2.2 Technological Innovations

Top 5 Smart Office Technologies:

Digital Voice Assistants

With a connection to IoT devices, you can ask a voice assistant to “make ten copies of a file” and have it ready on the printer in no time. Or just skip the paper altogether and ask your automated assistant to email it out to the appropriate people. Voice assistants at work bring with them increased efficiency and time savings.

Virtual Desktops

Now that most offices are used to working with cloud applications, the next step is to virtualise workstations completely. Desktop virtualisation allows you to have your entire operating system and computer interface hosted virtually on a cloud server so you can access it anytime, anywhere, and from any device.

This greatly increases employee flexibility and mobility and can reduce hardware costs for physical workstations.

Team Communication Apps Replacing Internal Email

Email has become a place where real messages get lost in between spam and phishing. It's become a major time consumer for many offices and no longer an efficient way to communicate with colleagues.

Programs like Microsoft Teams and Slack are being adopted at a rapid pace and offer multiple benefits over email, including:

- Instant text, voice, or video communication
- Ability to separate channels by department, project, or something else
- Easy file sharing without worrying about file size rejections
- Notifications preferences to keep important things at the top
- It can be used on any device
- Keeps all your communication trails safely stored in one space
- Easily searchable for files and conversations
- Integrates with multiple cloud-based platforms

Cloud-based Smart Locks

Companies find that tracking who left the equipment shed unlocked or who accessed the petty cash box last is much easier to do when you use smart locks. While these devices may not be as flashy as some of the other tech, they are incredibly useful.

These IoT devices can be programmed remotely, removing the need to keep track of multiple physical keys. They also have full reporting on when something was accessed and the ability to engage the lock remotely if someone forgot to lock up after a long workday.

AI and Automation

Artificial intelligence and complex automation can make workflows much faster by automating tasks that were previously done manually. They can also reduce error rates, help sales teams follow up with leads, and basically offer an extra set of hands to just about every department.

(Technology Visionaries, 2019)

2.3 Government Regulations & Initiatives

Offices and Contact Centres Guidance

Objective: To reduce risk to the lowest reasonably practicable level by taking preventative measures in order of priority.

Employers have a duty to reduce workplace risk to the lowest reasonably practicable level by taking preventative measures. Employers must work with any other employers or contractors sharing the workplace so that everybody's health and safety is protected.

Necessary Steps for Managing COVID-19 risk:

- Ensuring both workers and visitors who feel unwell stay at home and do not attend the premises.
- In every workplace, increasing the frequency of handwashing and surface cleaning.
- Businesses and workplaces should make every reasonable effort to enable working from home as a first option. Where working from home is not possible; workplaces should make every reasonable effort to comply with the social distancing guidelines set out by the government (2m, or 1m with risk mitigation, where 2m is not viable, is acceptable. You should consider and set out the mitigations you will introduce in your risk assessments).
- Where the social distancing guidelines cannot be followed in full, in relation to a particular activity, businesses should consider whether that activity can be redesigned to maintain a 2m distance or 1m with risk mitigations where 2m is not viable.

Further mitigating actions include:

- Further increasing the frequency of handwashing and surface cleaning.
- Keeping the activity time involved as short as possible.
- Using screens or barriers to separate people from each other.
- Using back-to-back or side-to-side working (rather than face-to-face) whenever possible.
- Reducing the number of people each person has contact with by using 'fixed teams or partnering' (so each person works with only a few others).
- Where the social distancing guidelines cannot be followed in full, even through redesigning a particular activity, businesses should consider whether that activity needs to continue for the business to operate, and if so, take all the mitigating actions possible to reduce the risk of transmission between their staff.

(HM Government UK, 2020)

UK Business Support Mechanisms

The UK government and devolved administrations have been developing and announcing a range of measures to support the economy, businesses and workers through the COVID-19 crisis.

(Pinsent Masons, 2020)

The list of the Business Support Mechanisms is cited below:

- [COVID-19 Corporate Financing Facility \(CCFF\)](#)
- [Coronavirus Business Interruption Loan Scheme \(CBILS\)](#)
- [Coronavirus Large Business Interruption Loan Scheme \(CLBILS\)](#)
- [Coronavirus job retention scheme](#)
- [Term Funding Scheme with additional incentives for SMEs \(TFSME\)](#)
- [Small Business Grant Fund \(SBGF\)](#)
- [Coronavirus Business Support Grants \(Scottish Scheme\)](#)
- [Future Fund](#)
- [ESFA post-16 provider relief scheme](#)
- [Bounce Back Loans scheme](#)
- [Trade Credit Insurance](#)
- [Statutory Sick Pay](#)
- [General Taxation - Time to Pay](#)
- [Insurance](#)
- [Companies House](#)
- [Mortgage Holidays](#)
- [Deferred VAT payments](#)
- [Self Employed Income Support Scheme](#)
- [Reform of Insolvency law](#)



3

MARKET DYNAMICS

3.1 Restraints/Industry Challenges

Post-Brexit Workforce

UK businesses rely on EU-national workers. A no-deal Brexit throws up new concerns and might mean that key staff members will lose their EU-derived rights to live and work in the UK. Employers should already be thinking about contingency planning to protect their workforce and be ready to adapt to any new rules that come into play.

(Represent Communications UK, 2020)

Call Centres

It is key that call centres don't simply send their teams home with a laptop and headphones and expect service to be maintained. They must adopt new ways of working, rapidly adapting their infrastructure, management systems and processes to support an effective remote workforce and culture.

(Capita, 2020)

Security System Services

Commercial customers have paused expansion plans due to the pandemic, which is anticipated to reduce new establishments and thereby reduce demand for security services.

(Ibis World, 2020)

3.2 Opportunities and Investments

Digitisation of Call Centres

The crisis has permitted call centres to innovate. The truth is, the pandemic has simply accelerated trends that most of the people in the industry were expecting to emerge slowly over the coming decade. Instead, they happened seemingly overnight.

Growth of Conversational Artificial Intelligence (AI)

Conversational AI is the first line of defence. It is a rapidly deployed solution that allows you to scale fast and ensure business as usual service levels. It can ensure that call centres can reprioritise and focus on customer support for the most vulnerable. The most critical needs are addressed first, with non-critical contacts deflected to digital and self-serve.

(Capita, 2020)

Virtual Security Demand

The increasing cost of manned guarding will further boost the demand for virtual security systems, especially from small businesses, for deterring and reducing criminal activities. They are cost-effective, and their adoption is expected to impact the overall market growth positively.

(Market Watch, 2020)



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COMPETITIVE LANDSCAPE

Providers of business support services may face competition from customers or potential customers, as these services, in many cases, can be undertaken in-house.

(Fit Research, 2020)



5 | RECRUITMENT CHALLENGES & FACTS

Key Facts:

Total Employment

2,889,800

(2018 in the United Kingdom) **(Stats Wales, 2018)**

Gig Workers

Administrative, accounting and IT support are the positions most commonly filled by gig workers.

(Cities Peak, 2019)

A gig worker is an independent contractor (also known as a freelancer. Essentially, a gig worker is someone that does short-term work for one or more clients.

(Thimble, 2020)

Average salary

£17,863 for Admin Assistant jobs in the UK **(Pay Scale)**

Pay Difference by Experience

According to Pay Scale, an entry-level Administrative Assistant with less than one year of experience can expect to earn an average total compensation (includes tips, bonus, and overtime pay) of £17,314 based on 242 salaries.

An early career Administrative Assistant with 1-4 years of experience earns an average total compensation of £17,863 based on 1,775 salaries.

(Pay Scale)

A mid-career Administrative Assistant with 5-9 years of experience earns an average total compensation of £18,280 based on 478 salaries.

(Pay Scale)

An experienced Administrative Assistant with 10-19 years of experience earns an average total compensation of £18,986 based on 439 salaries. In their late-career (20 years and higher), employees earn an average total compensation of £19,096.

(Pay Scale)

Pay Difference by Location Related to the National Average

London, England: London	▲ 20%
Bristol, England: Bristol	▲ 3%
Leicester, England: Leicestershire	0%
Birmingham, England: Birmingham	▼ 3%
Manchester, England: Manchester	▼ 4%
Glasgow, Scotland: Glasgow	▼ 5%
Edinburgh, Scotland: Edinburgh	▼ 5%

Employees with Administrative Assistant in their job title in London, England earn an average of 19.7% more than the national average.

(Pay Scale)

These job titles also find higher than average salaries in Bristol, England:

- Bristol (3.3% more)
- Leicester, England: Leicestershire (0.5% more) **(Pay Scale)**

The lowest salaries can be found in Edinburgh, Scotland:

- Edinburgh (4.8% less)
- Glasgow (4.7% less)
- Manchester (3.9% less) **(Pay Scale)**

More Women in Part-Time Jobs

It is widely known that more women than men work part-time in administrative and secretarial occupations and in caring, leisure and other service occupations.

(Social Mobility Commission UK, 2019)

Challenges

Low Future Demand for Administrative Roles

Demand for administrative and manual roles could decline steeply in 2030.

(McKinsey, 2019)

Employee's vs Employer's "Hybrid Working" Expectations

UK employees worry that their employer's expectations of what hybrid-working should look like after the pandemic will not match their own. They think their company will expect them to work from their office more than two thirds (66 %) of the time, when employees would rather have an even split – working from their home and office 49% and 48% of the time, respectively.

(Workplace Insight, 2020)



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KEY FINDINGS SUMMARY

The Administrative Sector includes a variety of business services:

- Rental and Leasing Activities
- Employment Activities
- Travel Agency, tour operator and other reservation service and related activities
- Security and Investigation Activities
- Services to Buildings and landscape activities
- Office Administrative, office support and other business support activities

(SIC Code Support UK, 2007)

Restraints/ Industry Challenges:

- Post-Brexit workforce. **(Represent Communications UK, 2020)**
- Call centres managing remote workforces. **(Capita, 2020)**
- Reduced demand from commercial customers in the Security System Services industry. **(Ibis World, 2020)**

Opportunities and Investments:

- COVID-19 as a push for the digitisation of call centres.
- Growth of Conversational Artificial Intelligence (AI). **(Capita, 2020)**
- The increasing costs of manned guarding will boost the demand for virtual security. **(Market Watch, 2020)**

Recruitment: Challenges & Facts:

Facts:

Total Employment: 2,889,800 (2018 in the United Kingdom)
(Stats Wales, 2018)

Average salary: £17,863 for Admin Assistant jobs in the UK
(Pay Scale)

Challenges:

Low future demand for Administrative roles.

(McKinsey, 2019)

Employee's vs employer's "hybrid working" expectations.

(Workplace Insight, 2020)

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