



IHS Markit™

Living Wage Research for KPMG

2019 Report

Contents

- 1. Introduction**
- 2. Analysis of hourly earnings**
- 3. Methodology**

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1. Introduction

The UK Living Wage is an hourly rate of pay set independently and updated annually. It is calculated according to the basic cost of living in the UK, with employers choosing to pay the Living Wage on a voluntary basis.

According to the Living Wage Foundation, the Living Wage is paid by over 6,000 UK businesses, and more than 200,000 employees have received a pay rise as a result of the Living Wage campaign.

The research herein is compiled by IHS Markit for KPMG and uses the Living Wage threshold as at October 2019, which is as follows:

- The UK Living Wage for outside of London is currently **£9.00 per hour**.
- The London Living Wage is currently **£10.55 per hour**, which covers employers based in all Greater London boroughs.

The rates are calculated annually by the Resolution Foundation and overseen by the Living Wage Commission.

- The UK minimum wage for people aged 25 and over is **£8.21 per hour** as at October 2019. The figure for people aged 21-24 is **£7.70**.

New Living Wage figures for 2019/20 will be announced on Monday 11th November 2019.

i) About the research

KPMG commissioned IHS Markit to conduct an eighth annual update of its data analysis on the Living Wage, which uses official hourly earnings figures to estimate the proportion and number of jobs paid less than the Living Wage threshold.

These figures are provided for job types and broken down across key demographics, including region, gender and part-time / full-time employees.

Our aim is to highlight the 'hot spots' where workers are earning below the UK Living Wage, using a consistent methodology each year to allow for reliable historical comparisons.

ii) Concept and data sources

The Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE 2019) was used as the data source to estimate the distribution of hourly earnings below the Living Wage, as well as the total number of jobs across employment types.

The methodology section outlines how IHS Markit used the ASHE data sources to produce the statistics contained in the main research.

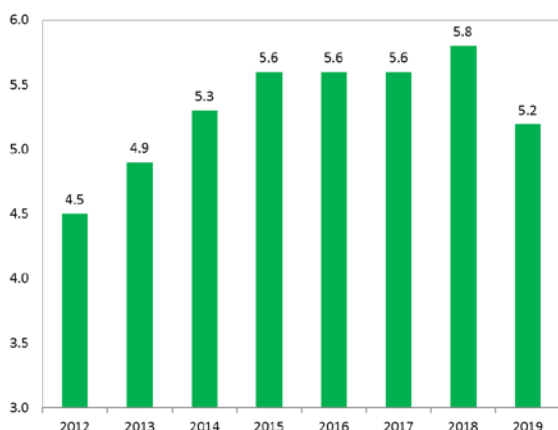
2. Analysis of ONS hourly earnings data

This section contains results from IHS Markit's analysis of the 2019 ONS Annual Survey of Hours and Earnings. It aims to provide an up-to-date insight into the prevalence of jobs earning below the Living Wage across region, gender and full-time/part-time work.

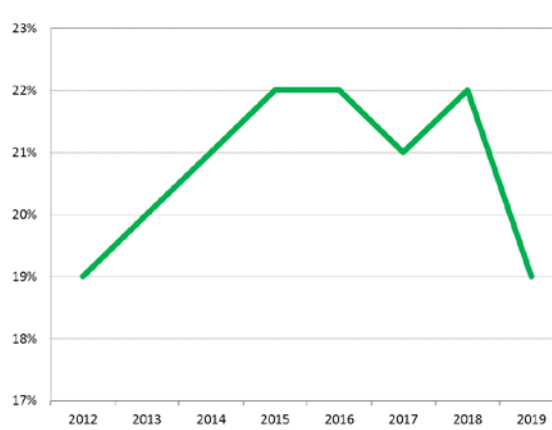
Overall trends

- We estimate that 19% of all UK employee jobs pay less than the Living Wage in 2019
- The current estimate suggests that 5.19 million jobs earn less than the Living Wage
- These figures were down from 2018, when an estimated 22% of all jobs and 5.75 million roles paid less than the Living Wage
- The proportion of jobs earning less than the Living Wage is now the lowest for seven years
- The number of employee jobs earning less than the Living Wage is down by 560,000 since last year and the lowest figure since 2013
- Part-time jobs are more than three times as likely to pay below the Living Wage than full-time roles (38% versus 12%), which represents an estimated 2.9 million part-time jobs

UK employee jobs earning below the Living Wage (millions)



UK employee jobs earning below the Living Wage (percentage)



Sources: KPMG, IHS Markit

Regional trends

- Earnings below the Living Wage are most prevalent in Northern Ireland (23%) and least widespread in the South East (15%)
- All 12 UK regions experienced a drop in the number of employees earning less than the Living Wage since 2018
- The West Midlands saw the fastest fall (-14.5%), followed by Wales (-13.6%) and the East Midlands (-13.1%)

Gender trends

- There are more females earning less than the Living Wage in both percentage terms (24% of females vs. 15% of males) and numerical terms (3.2 million females vs. 2 million males)
- Females working in part-time roles make up the largest demographic earning less than the Living Wage (2.1 million employees in this category)
- The largest proportion of female part-time employees earning less than the Living Wage is in London (44%), but for full-time female staff the figure is highest in the East Midlands (20%)
- Scotland and the South East have the lowest share of female part-time employees (30%)
- Proportion of female full-time staff paid less than the Living Wage is lowest in Scotland (11%)

2.1 Headline results *(IHS Markit calculations, based on ONS data)*

We estimate from the provisional 2019 ASHE results that 19% of all jobs are paid less than the Living Wage. This reveals a drop in the proportion of UK employees earning below the Living Wage, with the figure down sharply from 22% in 2018.

In numerical terms, using the ASHE estimate of total UK jobs (26.7 million), we estimate that there are at least 5.19 million employees in the UK earning less than the Living Wage. This represents around a 560,000 decrease compared to figures estimated for last year, which recorded a peak of 5.75 million jobs earning below the Living Wage.

We estimate that the proportion of employees earning less than the Living Wage is now the least widespread since 2012, but in numerical terms is the lowest for only six years.

The official data signal that UK median earnings rose by 3.9% between the 2018 and 2019 ASHE surveys, compared with a 2.9% increase in the UK Living Wage (from £8.75 per hour to £9.00) and a 3.4% uplift in the London Living Wage (from £10.20 per hour to £10.55).

Table 2.1.1: Overview of UK Living Wage statistics

Year	Total jobs (000s) ¹	UK Living Wage (£)	London Living Wage (£)	UK median wage (£)	No. below Living Wage* (millions) ¹	% below Living Wage*
2012	24,203	7.20	8.30	11.28	4.539	19%
2013	24,575	7.45	8.55	11.59	4.867	20%
2014	25,036	7.65	8.80	11.61	5.332	21%
2015	25,997	7.85	9.15	11.78	5.602	22%
2016	25,758	8.25	9.40	12.16	5.619	22%
2017	26,241	8.45	9.75	12.47	5.552	21%
2018	26,424 ^r	8.75	10.20	12.77	5.753 ^r	22%
2019	26,704	9.00	10.55	13.27	5.192	19%
% chg from 2018	1.1%	2.9%	3.4%	3.9%	-9.8%	

*IHS Markit estimates, rounded.

r = Revised since the 2018 Living Wage Report (ONS revise the provisional ASHE data each year).

¹Employee jobs; excludes self-employed, government-supported trainees and HM Forces.

Source of total employee jobs each year is the Annual Survey of Hours and Earnings

2.2 Regional analysis *(IHS Markit calculations, based on ONS data)*

All 12 UK regions have seen a fall since 2018 in the percentage of employees earning less than the Living Wage.

Estimates for 2019 indicate that the highest proportion of jobs earning below the Living Wage is in Northern Ireland (23%), followed by the East Midlands, North East and Yorkshire & Humber (22%).

The lowest proportion of employees earning less than the Living Wage is once again found in the South East (15%) and Scotland (17%).

Looking at the absolute number of employees earning less than the Living Wage, the highest totals are in London at around 785,000, followed by the North West (an estimated 584,000).

The sharpest fall in the number of jobs paying less than the Living Wage is in the West Midlands (down by 14.5%), followed by Wales (-13.6%) and the East Midlands (-13.1%).

London and Northern Ireland recorded the slowest declines in the number of employees earning less than the Living Wage (-3.5%).

Table 2.2.1: Regions by number and proportion of earners below Living Wage*

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)	% below Living Wage* (2018)
1	Northern Ireland	867	11.83	3.5	14.91	3.0	202	23%	26%
2	East Midlands	1,822	12.02	4.9	15.26	4.0	405	22%	26%
3	North East	974	12.15	3.8	15.31	3.3	213	22%	24%
4	Yorkshire & Humber	2,139	12.14	4.2	15.45	3.6	465	22%	24%
5	Wales	1,142	12.19	6.4	15.09	5.0	241	21%	25%
6	West Midlands	2,158	12.50	4.5	15.90	1.5	442	21%	23%
7	North West	2,864	12.50	4.5	16.02	4.0	584	20%	23%
8	South West	2,278	12.42	3.7	15.75	3.1	456	20%	22%
9	London	4,087	17.72	3.5	23.08	2.6	785	19%	20%
10	East	2,415	12.98	5.0	16.58	3.7	448	19%	22%
11	Scotland	2,267	13.37	3.7	16.56	2.5	380	17%	19%
12	South East	3,691	14.00	4.4	17.87	4.6	572	15%	18%
	United Kingdom	26,704	13.27	3.9	17.25	3.2	5,192	19%	22%

* IHS Markit estimates. Note that IHS Markit's regional estimate for London differs from the estimate compiled by the Greater London Authority. See methodology section for full details of IHS Markit's calculations.

Table 2.2.2: Regions by change in number below Living Wage since 2018

Rank	Region	2019 No. below LW* (thousands)	2018 No. below LW* (thousands)	Change vs. 2018 (thousands)	Percentage change (vs. 2018)
1	West Midlands	442	517	-75	-14.5%
2	Wales	241	278	-38	-13.6%
3	East Midlands	405	466	-61	-13.1%
4	Scotland	380	437	-57	-13.0%
5	South East	572	650	-78	-12.0%
6	North East	213	239	-27	-11.2%
7	North West	584	656	-71	-10.9%
8	East	448	500	-52	-10.5%
9	Yorkshire & Humber	465	506	-41	-8.1%
10	South West	456	481	-26	-5.4%
11	Northern Ireland	202	209	-7	-3.5%
12	London	785	814	-28	-3.5%
	United Kingdom	5,192	5,753	-561	-9.8%

2.3 Full-time / part-time analysis (IHS Markit calculations, based on ONS data)

The proportion of sub-Living Wage earners is much higher among part-time than full-time workers, at 38% and 12% respectively in 2019. Of particular note, the percentage of part-time staff is down sharply from 43% in 2018. This works out at an estimated 2.9 million part-time jobs paying less than the Living Wage compared to 2.3 million full-time jobs in 2019.

London recorded the highest proportion of part-time jobs earning less than the Living Wage in 2019 (46%), while the lowest percentages were in Scotland and the South East (32%).

Northern Ireland (15%) and the East Midlands (14%) are the main regional hotspots for full-time jobs with hourly wages below the Living Wage.

Table 3.3.1: Full-time / part-time jobs by number and proportion below Living Wage

Type of work	Total jobs (millions)	Median wage (£)	Annual % chg	Mean wage (£)	Annual % chg	% below Living Wage*	No. below LW (millions)*
Full-time	19.1	14.9	3.6	18.0	3.0	12%	2.3
Part-time	7.6	9.9	6.5	13.1	5.0	38%	2.9

*IHS Markit estimates, rounded

Table 3.3.2: Full-time jobs by region earning below Living Wage

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)
1	Northern Ireland	607	13.1	2.8	15.52	2.9	94	15%
2	East Midlands	1,298	13.4	4.5	15.86	3.9	184	14%
3	Yorkshire & Humber	1,498	13.5	3.9	16.01	2.9	200	13%
4	North East	687	13.6	4.9	15.90	3.4	91	13%
5	West Midlands	1,544	13.9	3.8	16.48	1.1	203	13%
6	North West	2,057	13.9	3.3	16.56	3.2	267	13%
7	Wales	799	13.5	6.0	15.70	5.0	101	13%
8	South West	1,522	13.9	3.3	16.36	2.6	182	12%
9	London	3,228	19.3	3.3	23.98	2.6	383	12%
10	East	1,668	14.5	4.2	17.29	3.7	188	11%
11	Scotland	1,596	14.9	3.9	17.31	2.0	160	10%
12	South East	2,640	15.7	4.7	18.68	4.7	239	9%
	United Kingdom	19,144	14.9	3.6	18.00	3.0	2,300	12%

*IHS Markit estimates, rounded

Table 3.3.3: Part-time jobs by region earning below Living Wage

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)
1	London	859	11.0	6.2	15.78	2.5	392	46%
2	North East	287	9.4	5.4	12.35	2.7	122	42%
3	Wales	343	9.5	6.1	12.12	6.1	140	41%
4	East Midlands	524	9.5	6.3	11.97	3.9	212	40%
5	Yorkshire & Humber	641	9.5	5.8	12.67	7.9	258	40%
6	North West	808	9.6	6.5	13.10	9.6	323	40%
7	West Midlands	614	9.6	5.0	12.75	4.6	246	40%
8	Northern Ireland	260	9.6	8.2	11.86	5.1	104	40%
9	South West	756	10.0	6.6	13.03	6.5	268	35%
10	East	747	10.0	7.8	13.02	4.3	255	34%
11	Scotland	671	10.2	5.4	12.85	5.0	216	32%
12	South East	1,051	10.2	5.0	13.43	3.4	332	32%
	United Kingdom	7,561	9.9	6.5	13.14	5.0	2,900	38%

*IHS Markit estimates, rounded

2.4 Gender analysis (IHS Markit calculations, based on ONS data)

The proportion of female employees earning less than the Living Wage is estimated at 24% and around 3.2 million roles, which is much higher than for male employees (15% and 2 million respectively).

Compared to 2018, the proportions are down from 27% for female employees and 17% among male employees. Moreover, the latest estimates signal a decline of approximately 275,000 males and 290,000 female jobs earning less than the Living Wage threshold.

Estimates for 2019 show that the proportion of females earning less than the Living Wage is considerably higher than among males in full-time roles. An estimated 15% of females earn less than the benchmark for full-time roles, compared with 10% of males.

The proportion of males earning less than the Living Wage in part-time jobs is 42% while around 37% of females in part-time roles earn less than the Living Wage benchmark.

However, in numerical terms, jobs earning less than the Living Wage are much higher for female part-time workers at approximately 2.1 million jobs (down from 2.3 million in 2018) compared to around 850,000 male part-time employees (down from 950,000 in 2018).

Table 2.4.1: Male employee jobs below Living Wage

Type of work	Total jobs (000s)	Median wage (£)	Annual % chg	Mean wage (£)	Annual % chg	No. below LW (000s)*	% below Living Wage*
Full-time	11,386	15.48	3.8	18.96	2.7	1,150	10%
Part-time	1,946	9.69	7.5	13.71	5.0	850	42%
All jobs	13,331	14.67	4.2	18.60	2.9	2,000	15%

*IHS Markit estimates, rounded

Table 2.4.2: Female employee jobs below Living Wage

Type of work	Total jobs (000s)	Median wage (£)	Annual % chg	Mean wage (£)	Annual % chg	No. below LW (000s)*	% below Living Wage*
Full-time	7,758	13.99	3.3	16.50	3.8	1,100	15%
Part-time	5,615	10.00	5.9	12.96	5.1	2,100	37%
All jobs	13,373	12.02	4.5	15.57	4.1	3,200	24%

*IHS Markit estimates, rounded

Table 2.4.3: Male employee jobs by region below Living Wage

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)
1	Northern Ireland	427	12.40	3.3	15.50	3.6	84	20%
2	Wales	552	13.19	7.1	15.87	4.2	88	16%
3	North East	469	13.46	4.1	16.17	2.3	74	16%
4	North West	1417	13.73	4.6	17.14	3.9	223	16%
5	Yorkshire & Humber	1078	13.42	4.7	16.47	2.8	167	16%
6	London	2112	19.47	3.6	25.55	2.9	327	15%
7	East Midlands	941	13.37	4.9	16.32	4.0	146	15%
8	South West	1121	13.79	3.4	16.91	2.2	171	15%
9	West Midlands	1101	13.84	5.1	17.00	0.6	166	15%
10	East	1192	14.45	5.0	17.86	3.2	164	14%
11	Scotland	1065	14.63	4.7	17.67	2.2	139	13%
12	South East	1857	15.75	5.7	19.50	4.9	218	12%
	United Kingdom	13331	14.67	4.2	18.60	2.9	2,000	15%

* IHS Markit estimates, rounded

Table 2.4.4: Female employee jobs by region below Living Wage

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)
1	East Midlands	881	10.76	5.4	13.80	4.0	256	29%
2	Yorkshire & Humber	1061	10.91	5.1	14.11	5.1	295	28%
3	North East	505	10.97	3.1	14.31	4.3	138	27%
4	Northern Ireland	440	11.10	3.7	14.17	2.4	118	27%
5	Wales	590	11.21	6.5	14.17	6.3	154	26%
6	West Midlands	1057	11.25	5.4	14.45	3.7	275	26%
7	North West	1448	11.46	5.3	14.67	4.4	364	25%
8	South West	1156	11.29	5.1	14.29	4.7	287	25%
9	East	1222	11.65	6.7	14.96	4.7	280	23%
10	London	1976	16.01	2.5	20.08	3.0	445	23%
11	South East	1833	12.45	4.2	15.83	4.8	367	20%
12	Scotland	1202	12.40	5.0	15.33	3.1	237	20%
	United Kingdom	13,373	12.02	4.5	15.57	4.1	3,200	24%

* IHS Markit estimates, rounded

Table 2.4.5: Full-time male employee jobs by region below Living Wage

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)
1	Northern Ireland	362	13.0	2.7	15.76	3.1	52	14%
2	East Midlands	809	14.0	4.0	16.61	3.9	92	11%
3	North West	1,207	14.5	3.6	17.33	2.9	134	11%
4	West Midlands	944	14.5	3.5	17.25	0.2	104	11%
5	Yorkshire & Humber	920	14.1	4.0	16.70	2.2	99	11%
6	London	1,839	20.8	3.9	26.20	3.0	193	11%
7	Wales	467	14.0	6.4	16.14	3.9	49	10%
8	North East	401	14.1	4.6	16.39	2.6	40	10%
9	South West	929	14.5	3.0	17.18	1.9	93	10%
10	East	1,012	15.2	4.7	18.20	3.5	93	9%
11	Scotland	909	15.4	4.0	18.05	2.0	76	8%
12	South East	1,587	16.7	5.2	19.91	5.1	117	7%
	United Kingdom	11,386	15.5	3.8	18.96	2.7	1,142	10%

* IHS Markit estimates, rounded

Table 2.4.6: Full-time female employee jobs by region below Living Wage

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)
1	East Midlands	489	12.3	4.8	14.54	3.9	97	20%
2	Yorkshire & Humber	578	12.5	2.9	14.83	4.5	100	17%
3	Northern Ireland	245	13.1	2.6	15.13	2.5	42	17%
4	North East	285	12.8	4.7	15.15	4.6	49	17%
5	West Midlands	600	12.9	3.6	15.19	3.8	97	16%
6	North West	850	13.2	4.0	15.40	3.9	130	15%
7	Wales	332	13.0	7.5	15.03	6.9	50	15%
8	South West	593	12.9	4.0	14.99	4.2	88	15%
9	East	656	13.4	3.3	15.78	4.3	93	14%
10	London	1,389	17.9	3.5	20.93	2.8	189	14%
11	South East	1,053	14.3	3.2	16.72	4.5	125	12%
12	Scotland	688	14.2	1.8	16.26	2.2	77	11%
	United Kingdom	7,758	14.0	3.3	16.50	3.8	1,137	15%

* IHS Markit estimates, rounded

Table 2.4.7: Part-time male employee jobs by region below Living Wage

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)
1	London	273	10.5	5.2	15.59	-1.3	137	50%
2	North East	67	9.1	5.9	13.04	-1.4	32	48%
3	Northern Ireland	65	9.5	13.7	12.13	10.1	30	46%
4	Yorkshire & Humber	158	9.4	7.2	13.47	12.5	70	44%
5	East Midlands	132	9.4	7.8	12.20	4.7	58	44%
6	Wales	85	9.4	8.7	12.55	8.7	37	43%
7	North West	210	9.6	9.3	14.66	20.3	86	41%
8	West Midlands	157	9.6	7.0	13.66	8.4	64	41%
9	South West	192	9.6	8.1	13.88	8.5	77	40%
10	Scotland	157	9.5	5.2	12.59	4.2	63	40%
11	East	180	9.7	7.2	13.32	-1.0	71	40%
12	South East	270	9.9	5.4	13.76	-1.7	101	37%
	United Kingdom	1,946	9.7	7.5	13.71	5.0	825	42%

* IHS Markit estimates, rounded

Table 2.4.8: Part-time female employee jobs by region below Living Wage

Rank	Region	Jobs (000s)	Median wage	Annual % chg	Average wage	Annual % chg	No. below Living Wage* (000s)	% below Living Wage* (2019)
1	London	587	11.2	4.5	15.86	4.3	256	44%
2	North East	220	9.5	5.6	12.15	4.0	89	40%
3	Wales	258	9.5	5.6	11.98	5.2	104	40%
4	North West	598	9.6	5.6	12.59	6.0	239	40%
5	Yorkshire & Humber	483	9.5	5.4	12.42	6.4	193	40%
6	East Midlands	392	9.5	5.6	11.89	3.7	157	40%
7	Northern Ireland	195	9.6	6.6	11.77	3.5	78	40%
8	West Midlands	457	9.6	4.4	12.45	3.4	180	39%
9	South West	564	10.0	5.6	12.75	5.7	190	34%
10	East	567	10.0	7.5	12.93	6.1	181	32%
11	South East	781	10.3	5.8	13.33	5.4	234	30%
12	Scotland	515	10.3	6.0	12.92	5.2	155	30%
	United Kingdom	5,615	10.0	5.9	12.96	5.1	2,055	37%

* IHS Markit estimates, rounded

3. Methodology

i) ONS hourly earnings data analysis

The structural information on Living Wages is based on data from the provisional 2019 Annual Survey of Hours and Earnings (ASHE) conducted by the Office for National Statistics (ONS). This survey provides a detailed breakdown of hourly earnings across occupations, with results published on both a national and UK regional basis. ASHE does not cover the self-employed nor does it cover employees not paid during the reference period (April 2019).

We take the Gross Hourly Pay measure for all employees on adult rates whose pay for the survey pay period was not affected by absence, using a workplace-based definition for regional figures. This approach has been consistently applied since the first publication of the KPMG Living Wage Report in 2012 and is designed to provide a reliable historical comparison of earnings below the Living Wage threshold.

Office for National Statistics: Annual Survey of Hours and Earnings

The Annual Survey of Hours and Earnings (ASHE) is based on a 1 per cent sample of employee jobs taken from HM Revenue & Customs (HMRC) PAYE records. Information on earnings and hours is obtained from employers and treated confidentially. ASHE does not cover the self-employed nor does it cover employees not paid during the reference period.

The ASHE includes percentile wage bands for each occupation, to illustrate the broad distribution of earnings within a particular grouping. This highlights patterns of hourly earnings below the Living Wage for a given occupation (and within a particular UK region).

However, the limitation of the data set is a lack of more detailed information on the distribution of wages *within* percentile bands (and the width of each band is at least five percentage points). Therefore, no official figure is published for either the *exact* percentage or number of jobs that are below the Living Wage within each occupation type and region. We have sought to overcome this limitation by generating our own estimates, thereby providing greater detail around the structure of hourly pay patterns across the UK.

The estimates are derived from a simple calculation, and give our best assessment of the exact number and percentage of workers in each occupational category that are earning below the Living Wage. The first step for estimating these proportions was an assumption that the distribution of earnings follows a linear trend between the percentile bands that are published by the ONS.

We then identify the percentile band within which the Living Wage falls for each occupation in the dataset, and interpolate the exact percentage of employees that fall either side of the threshold (assuming a linear trend in the distribution). Because the ONS publish the total number of jobs within each occupational category, it is then a simple calculation to obtain an estimate of the actual number of workers above and below the Living Wage threshold.

Having run this analysis over the dataset, lists of 'hotspots' by various demographics were created detailing where the highest or lowest proportions of people are earning less than the Living Wage. Estimates have been rounded where appropriate.

Due to the difference in the Living Wage between London and the rest of the UK, the estimate for the number of people below the Living Wage at the overall UK level is derived from aggregating the regional estimates (i.e. a 'bottom up' approach).

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