Robert Half®

insights that work

DECEMBER 2023 JOBS CONFIDENCE INDEX

Contents

FOREWORD

Matt Weston

Senior Managing Director, Robert Half

The UK labour market defying all odds

A historically low unemployment rate, vacancies above pre-pandemic levels, 33,000 more payrolled employees in October 2023 and the highest rise in inflation-adjusted pay for the past two years depict a labour market largely unaffected by the economic slowdown. Topped by steady jobs and business growth confidence, the current economic cycle feels unprecedented. And despite the many uncertainties, the UK economy is expected to grow, albeit modestly – at a year-on-year expansion rate of 0.5% in 2023 and 0.4% in 2024.

Today's labour market snapshot is the culmination of systemic factors at play in years past, such as the steady influx of workers as one such factor. Things have changed for good and access to the skilled talent businesses need to remain competitive is becoming ever more challenging. Increased post-pandemic non-student economic inactivity, innovation outpacing traditional learning routes and limited social mobility have the potential to further weaken the labour market's ability to match jobs with skilled workers.

The health of the labour market and that of the wider economy have often been linked, yet as of present they are less synced than anticipated. We have witnessed this by analysing the job market through the lens of worker sentiment against a backdrop of key macroeconomic and cultural factors through our quarterly Robert Half Jobs Confidence Index (JCI). Produced in partnership with the Centre for Economics and Business Research (Cebr), the purpose of the Robert Half JCI is to analyse worker confidence in the context of job creation, security and career progression, revealing actionable insights for business leaders into the state and stability of the labour market.

Growth confidence increases demand for skilled talent

Marketplace confidence is fundamental for a healthy economy. It influences business decisions such as investment and hiring. Businesses that are optimistic will invest more and increase aggregate demand which, in turn, produces more output and economic growth. And our latest insights paint the picture of a bullish marketplace from both jobs and business growth confidence perspective.

Research for Robert Half's 2024 Salary Guide shows that employers are firmly focused on talent recruitment for business expansion and continuity in 2024 despite the recent economic uncertainty. Over two-thirds (69%) of business leaders feel 'much more, or somewhat more confident' about their growth prospects for the next 12 months, primarily driven by increased demand and expanding business opportunities. And data from our latest JCI paints a similar picture when it comes to worker sentiment, with the index comfortably sitting in positive territory at 45.8. This is not only its second-highest reading since Q1 2022, but it also signals strong job confidence above the normal level (30 is typically considered a high reading).

FOREWORD CONTINUED

Let's just dwell on the reasons why. The labour market is fundamentally good. In a jobs market that is still tight people feel secure about their employment and confident about their career prospects.

People who want jobs can, on the whole, find employment and wages are up, even when accounting for inflation. Workers have been demonstrating their power by quitting (silently or otherwise as you might have read in the press) or striking in a volume we have not seen for decades. When people quit, they either get a higher counteroffer or leave a role behind – which usually comes with a pay rise or a promotion for those left. No wonder employee confidence has been on the rise.

Despite the many media articles pointing at the vulnerability of the UK economy, job search and progression confidence is on an upwards trajectory. Almost half (47.4%) of workers say they feel confident or very confident about their future career prospects over the coming five years, an uptick on the 41.9% from the previous quarter. However, a buoyant labour market, like all supply and demand markets, has been largely good for workers' pay and progression but not necessarily good for employers.

Skills shortages have given British workers better bargaining power

Bank of England Governor Andrew Bailey said in November 2023 that Brexit has *"…led to a reduction in the openness of the UK economy"*. With the passing of time, many economists agree that Brexit is one of several factors contributing to the absence of skilled workers and to the surprisingly strong wage growth. Other more recent factors include a wave of early retirement and an increase in long-term sickness post pandemic, both of which have led to open vacancies staying high for longer than we would have expected – to date, higher than pre-pandemic.

Robert Half's 2024 Salary Guide research shows that 47% of businesses will be seeking to add more permanent headcount in the coming months to support business growth. Nonetheless, with demand outstripping supply, 75% feel concerned about their ability to attract and retain skilled talent in 2024.

We warned at the turn of 2023 that self-assured workers were ready to jump ship. This has inevitably led to nominal wage growth outpacing inflation, yet in the current climate, businesses can only do so much when it comes to higher pay demands. Our recent data reveals the most common employer concern around recruitment is the inability to offer competitive salaries, yet 22% of businesses are not in the position to do so in the immediate future. With 63% of workers saying they'd reject a job offer due to an unsuitable salary, this is where a robust corporate culture and bottom-line friendly retention strategies could help businesses avoid talent loss in the first place.

Latest figures show labour market tightness has eased, yet economic inactivity remains a key challenge. In his Autumn statement, the chancellor announced the Back to Work Plan, aiming to support the long-term unemployed get back into work by focusing on the way people interact with the benefits system. And a further £50 million of funding over the next two years was pledged to increase apprenticeships in growth sectors experiencing skills shortages. Although such initiatives are much welcomed, more needs to be done to tackle the widespread systemic skills shortages. As already stated above with regards to the openness of the British labour market, there simply isn't enough talent to fill the nearly 1 million vacancies in the UK and this needs the participation of industry, academia and government to solve.

FOREWORD CONTINUED

Workforce transformation:
the right skills, in the right places at the right time

Limited access to skilled talent can not only jeopardise business growth, but could also expose employees to the risk of burnout when extra pressure is put on existing teams. With the emergence of concepts such as the human cloud, the gig economy, rural-sourcing and managed solutions, organisations have been finding new ways to mitigate such risks by plugging in flexible resources when needed. These workforce models can be particularly useful when businesses need to scale up quickly, experience sudden demand surges, or when faced by resource gap challenges. Our 2024 Salary Guide data shows a continued commitment to flexible hiring strategies to support core talent within the business. The majority of employers plan to maintain contract roles (43%), freelance (41%) roles, and project outsourcing (49%) in 2024.

The tech perspective

Globally, 2023 has been a better year for technology, with the S&P 500 stock market index up 18% since January after a 20% dip in 2022, largely driven by the performance of the magnificent seven. And with the UK tech sector's combined market value of $1 trillion, the opportunities for job creation in the IT industry are expected to be abundant going forward.

As per recent data, the revenue in UK's IT Services market alone is expected to reach $86.44bn by the end of 2023 with an expected annual growth rate of 6.26%, resulting in a market volume of $117.10bn by 2028. This is great news for the sector. And despite the recent downsizing, the tech market is still healthy and has overwhelmingly positive prospects, especially in fields like cybersecurity and AI.

Hiring intentions in the sector are also strong. Our latest research shows that 50% of businesses will be adding permanent headcount in 2024, while 35% will be employing contract talent to help scale and grow. And with total average weekly earnings up for a fifth consecutive quarter, recording 11.3% on the year in Q3 2023, a career in the tech sector holds the potential to be particularly rewarding.

Views for the year ahead

Despite marginal changes in the readings for some of the economic indicators, 2024 is expected to follow the same unprecedented trajectory. Our research shows job and business growth confidence are on the rise, yet the widespread skills shortages and economic inactivity will take much longer to tackle, jeopardising hiring intentions and making it harder to predict who will be in the driving seat in 2024.

Matt Weston

Senior Managing Director, Robert Half

Executive Summary

Jobs Confidence Index (JCI) Q3 2023– key findings

- The Jobs Confidence Index (JCI) declined to 45.8 in Q3 2023, down by 1.4 points from the previous quarter's reading of 47.2. However, it remains at its second-highest level since Q1 2022, indicating high job confidence.
- Of the JCI's four pillars, the strongest Q3 2023 reading was seen in job security confidence, a trend which has persisted for eight consecutive quarters. Over half (58.4%) of surveyed employees said they feel confident about their job looking ahead to the next six months.
- The job search and progression confidence pillar was the only pillar to improve in Q3 2023, to stand at 46.8 (from 32.4). Overall, 47.4% of survey respondents for the latest wave of the JCI said that they feel confident or very confident about their future career prospects and ability to progress in their career over the coming five years, an improvement from 41.9% last quarter.
- The pay confidence pillar declined in Q3 2023 but remains firmly in positive territory (28.5 from 33.5). This aligns with the Cebr view that real wage growth will remain positive in the coming months but has likely peaked.
- The macroeconomic confidence pillar displayed the most weakness, falling by 2.2 points to 0.8, indicative of the tough economic headwinds currently facing the UK economy.

Technology industry snapshot

- In the technology sector, the average number of unfilled vacancies fell by 29.7% annually in Q3 2023, decreasing to a level in line with the pre-pandemic 2019 average.
- Meanwhile, the latest data shows that average weekly earnings in the IT sector were up by 11.3% on the year in Q3, marking a fifth consecutive quarter of acceleration in pay growth. Earnings in the sector were 70.3% higher than average pay across all industries.

Forward-looking commentary

- The UK economy is estimated to have shown no growth in Q3 2023 when compared to the previous quarter, highlighting the UK's poor growth trajectory.
- Looking ahead, this weak growth trajectory is set to persist. Indeed, Cebr expects the economy to experience a technical recession across Q4 2023 and Q1 2024. In annual terms, Cebr projects weak growth rates of just 0.5% and 0.4% across 2023 and 2024, respectively.

SECTION 01

How we built the Robert Half Jobs Confidence Index

How to interpret the indicators

- The Jobs Confidence Index (JCI) is made up of four equally weighted pillars, outlined in the following slides, that each measure a factor which contributes to jobs confidence. These are:
    1. Job security confidence
    2. Pay confidence
    3. Job search and progression confidence
    4. Macroeconomic confidence
- The JCI takes a positive or negative number, where numbers above zero signal that jobs confidence is higher than the long-term average, and numbers below zero show it is lower.
- The JCI can take any number, but it usually stands between -30 and 30, showing that confidence is close to a normal level when it is within this range.
- In times of very high jobs confidence, such as in mid-2021 when the UK economy was bouncing back from the pandemic, the JCI can take much higher readings of above 30. Alternatively, in periods of much lower confidence, such as in the aftermath of the global financial crisis, it can fall below the typical range to stand lower than -30.
- So far, the JCI has never taken a value outside of -80 to 80, showing that values outside of this range would represent an extreme score.

The most authoritative source of UK labour confidence insights

The Robert Half Jobs Confidence Index (JCI) is uniquely comprised of four pillars that point to the economic health of the UK labour market and the confidence of its participants from a number of perspectives.

- The first pillar is job security. This pillar is driven by the UK unemployment rate, the ratio of vacancies to unemployment, the degree of temporary work, and the self-reported confidence of employees with regard to their job security.
- The second pillar, pay confidence, takes the temperature of the outlook for remuneration. This captures the rate of real (inflation-adjusted) wage growth alongside growth in productivity, which enables long-run wage growth. The pillar also draws on data on the average variance in pay and the share of workers with variable take-home pay.

INDICATOR	DESCRIPTION	SOURCE
Pillar 1. Job security confidence		
Unemployment rate**	Share of the labour force who are out of work and are looking for work	ONS
Labour market tightness**	Total number of reported vacancies in the UK as a share of the total number of unemployed people	ONS
Levels of temporary work***	Share of employees in temporary work	ONS
Future employment confidence	Share of workers who feel confident about their job security looking ahead to the next six months	Opinium survey of 2,000 UK adults
Pillar 2. Pay confidence		
Real wage growth	Average annual increase in earnings, adjusted for inflation	ONS
Productivity growth*	Annual growth in output per hour worked	ONS
Pay gaps*	Average variance in pay for a given occupational level	Quarterly Labour Force Survey
Job earnings security*	Share of employees whose take-home pay fluctuates from month-to-month	Quarterly Labour Force Survey

* Data availability lagged by one quarter compared to other variables.
** Uses experimental ONS unemployment data.
*** The last available data covers the three-month period to July.

The most authoritative source of UK labour confidence insights

- The third pillar, job search and progression confidence captures a measure of underemployment (involuntary part-time work) and the educational background of workers in the two highest socioeconomic levels. In addition, it is driven by the self-reported confidence of employees regarding their longer-term career and progression prospects and the rate of non-student economic inactivity.
- The fourth pillar, macroeconomic confidence, takes a broader look at confidence across the economy. This draws from two Cebr compiled confidence indices from the perspective of both households (consumers) and businesses.

INDICATOR	DESCRIPTION	SOURCE
Pillar 3. Job search and progression confidence		
Involuntary part-time work* **	Share of workers in part-time work who want to be in full time work	ONS
Social mobility measured by access to the professions*	Share of workers in the top socioeconomic levels who do not have a degree	Quarterly Labour Force Survey
Career progression confidence	Share of workers who are confident in their future career prospects and progression over the next five years	Opinium survey of 2,000 UK adults
Non-student economic inactivity* **	Share of the working age population who are economically inactive for reasons other than education	ONS
Pillar 4. UK macroeconomic confidence		
Consumer confidence	How confident consumers are in the economy	YouGov/Cebr Consumer Confidence Index
Business confidence	How confident business leaders feel	BDO/Cebr Business Trends

* Data availability lagged by one quarter compared to other variables.
** Uses experimental ONS unemployment data.
*** The last available data covers the three-month period to July.

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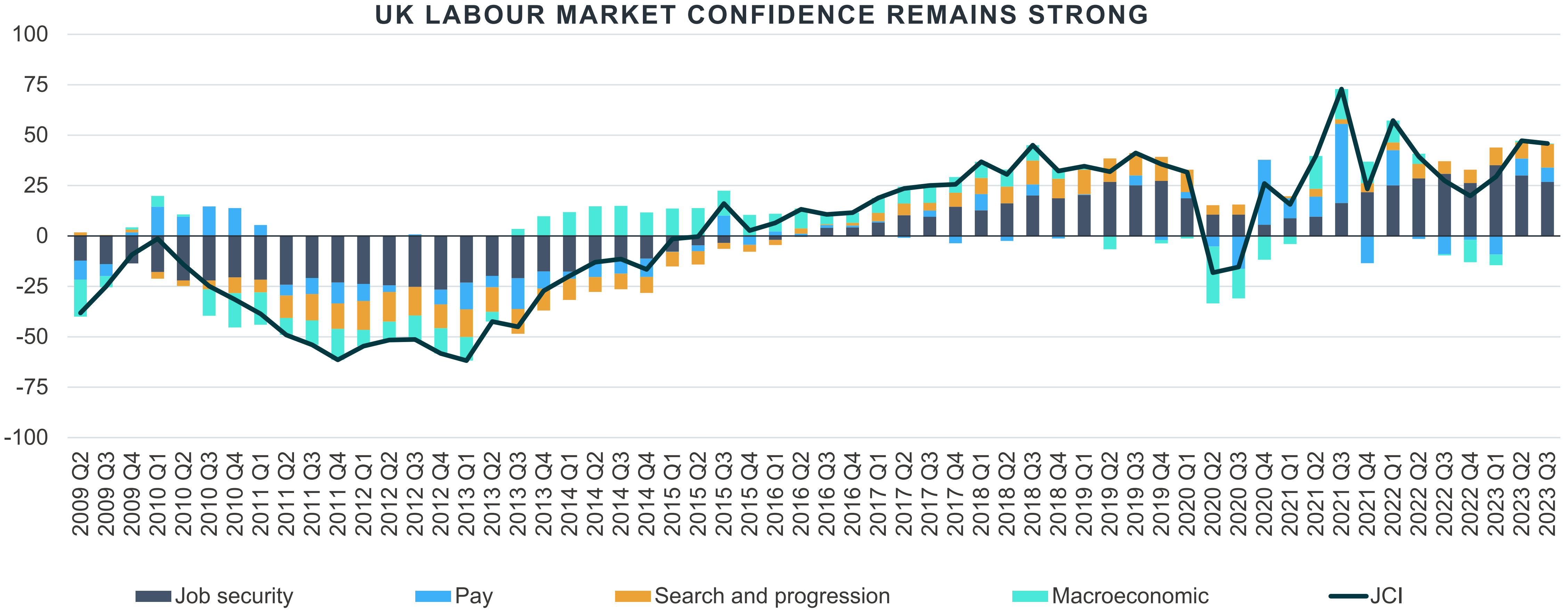
SECTION 02

Robert Half Jobs Confidence Index: Q3 2023

The Jobs Confidence Index & the contributions of its four pillars



The Jobs Confidence Index decreased slightly during the third quarter, to 45.8.

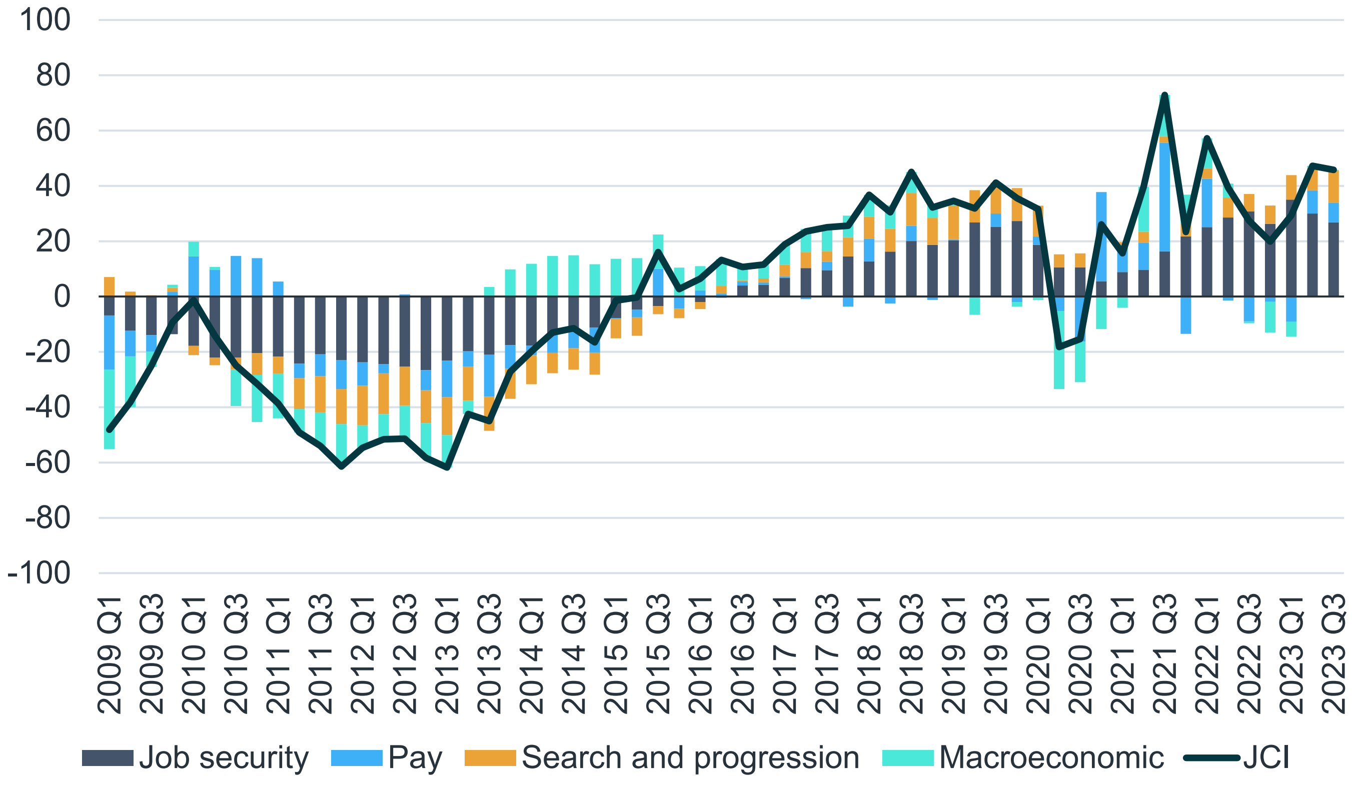
Source: ONS, Opinium survey, YouGov, BDO, Cebr analysis

What does the Jobs Confidence Index reveal?

The Jobs Confidence Index (JCI) decreased to 45.8 in Q3 2023, though it remains high by historical standards. It was down by 1.4 points from the previous quarter's reading of 47.2.

- This downtick follows two consecutive quarters of improvement. However, it is worth noting that the JCI remains firmly in positive territory, indicating job confidence remains high.
- Of its four constituent pillars:
  - All four stood in positive territory in Q3 2023, with the job security and search and progression pillars recording the highest levels.
  - Three recorded lower readings than the previous quarter, with only the search and progression pillar recording an improvement.

THE JOBS CONFIDENCE INDEX AND THE CONTRIBUTIONS OF ITS FOUR PILLARS



Source: ONS, Opinium survey, YouGov, BDO, Cebr analysis

How have the pillars changed over time?

- Of the JCI's four pillars, search and progression confidence experienced the only gain. At 46.8, the pillar was up by 14.4 points on the quarter, **rising to its highest reading since Q4 2019.**
- The job security pillar posted the strongest Q3 2023 reading at 107.3. This comes despite the pillar falling by 12.8 points on the quarter, the most among the JCI's four constituent measures.
- Pay confidence also saw a quarterly fall in its reading, declining by 5.0 points to 28.5. However, it remains firmly above long-term average levels, indicating employees are still confident in their pay.
- The macroeconomic confidence pillar recorded the weakest reading, falling by 2.2 points to 0.8. This is indicative of the difficult economic conditions currently facing the wider economy.

	Q3 2023	Q2 2023	CHANGE
Job security confidence	107.3	120.1	-12.8 ▼
Pay confidence	28.5	33.5	-5.0 ▼
Search and progression confidence	46.8	32.4	14.4 ▲
Macroeconomic confidence	0.8	3.0	-2.2 ▼
Jobs Confidence Index	**45.8**	**47.2**	-1.4 ▼

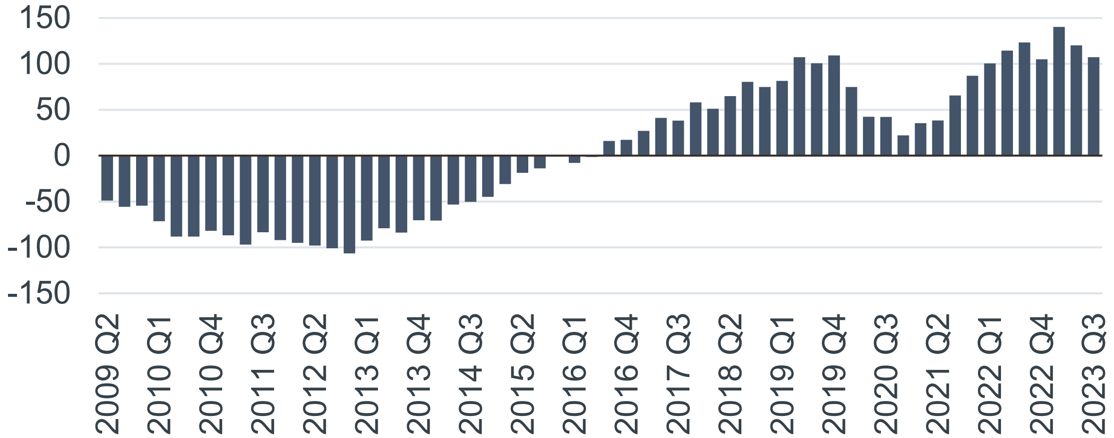
Source: ONS, Opinium survey, YouGov, BDO, Cebr analysis

Pillar 1: Job security confidence

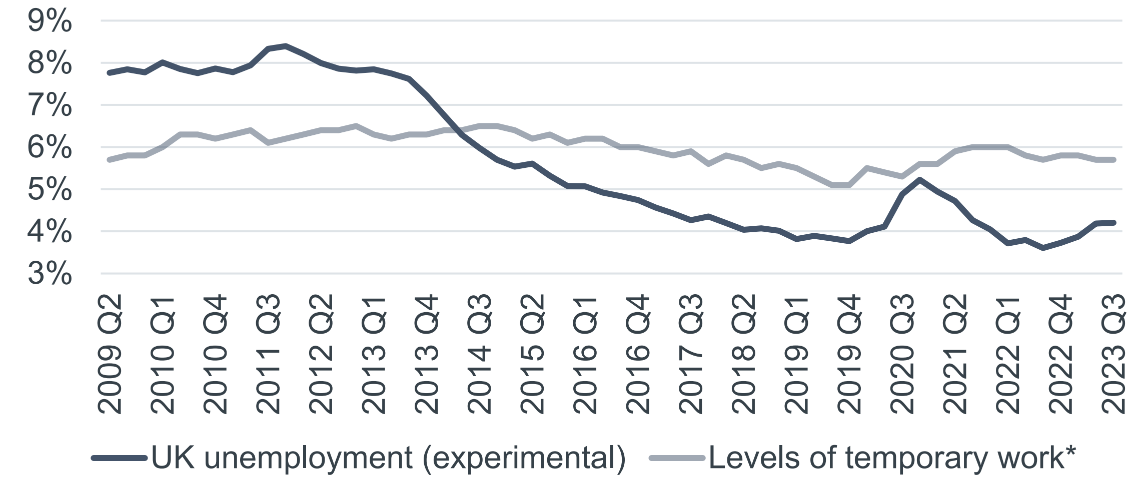
The job security confidence pillar declined but remained high after recording the strongest reading of the JCI's four pillars for an eighth consecutive quarter. The future employment confidence indicator was the strongest contributor to the pillar's high score.

- Over half (58.4%) of employees said they feel confident about their job looking ahead to the next six months, marginally lower than the 60.0% recorded in the previous quarter.
- Following methodological difficulties with the Labour Force Survey (LFS), the Office for National Statistics (ONS) released experimental unemployment data in November. At 4.2%, the unemployment rate for October is unchanged on the quarter but up on the year by 0.6 percentage points.
- The uncertainty surrounding official statistics highlights the importance of judging the labour market using a range of data sources, which the JCI does. Nonetheless, the degree of uncertainty regarding the current picture is greater than usual.
- The number of vacancies per unemployed individual eased in Q3 (using the experimental dataset), with the overall number of vacancies falling by 43,000 on the quarter to 981,000.

JOB SECURITY CONFIDENCE PILLAR SCORES



UNEMPLOYMENT AND TEMPORARY WORK



*Only one data point available for Q3 2023

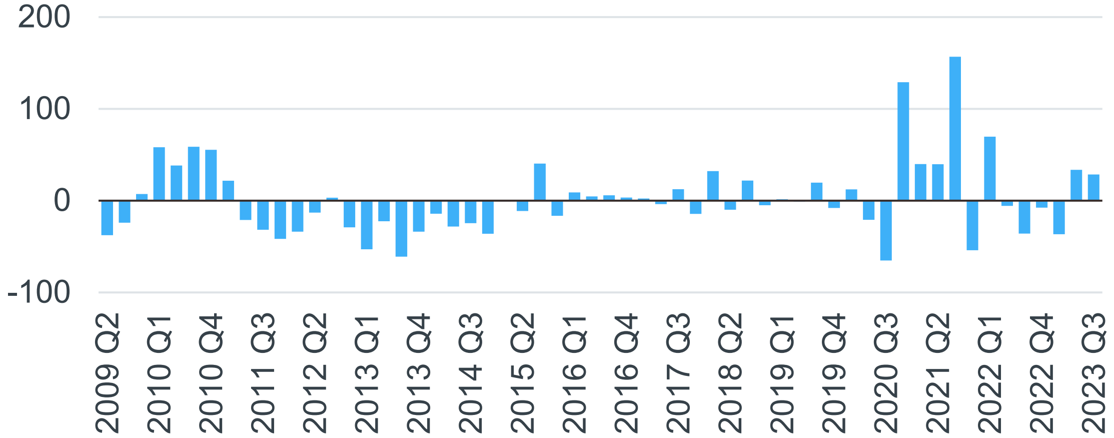
Source: ONS, Opinium survey, Cebr analysis

Pillar 2: Pay confidence

Real earnings rose for the second consecutive quarter following four quarters of falling pay in real terms. Consequently, the pay confidence pillar remains above long-term average levels.

- Real wage growth accelerated in Q3 to 1.4% in annual terms, 0.7 percentage points higher than in the previous quarter. This improvement is a result of a sharp deceleration in inflation.
- Labour productivity, measured by output per hour worked, grew by 0.3% in Q2, following a 0.6% decline in the previous quarter.
- Despite the upward trend in real earnings, the pay confidence pillar fell on the quarter. The largest contributor to the decline was job earnings security, which worsened compared to the previous quarter. This indicates that a larger share of workers reported having unpredictable wages.
- Poor figures for pay variance across comparable occupations also contributed to the slight downtick in pay confidence. This indicator stood in a notably weaker position than its long-term average.

PAY CONFIDENCE PILLAR SCORE



ANNUAL REAL WAGE AND LABOUR PRODUCTIVITY GROWTH

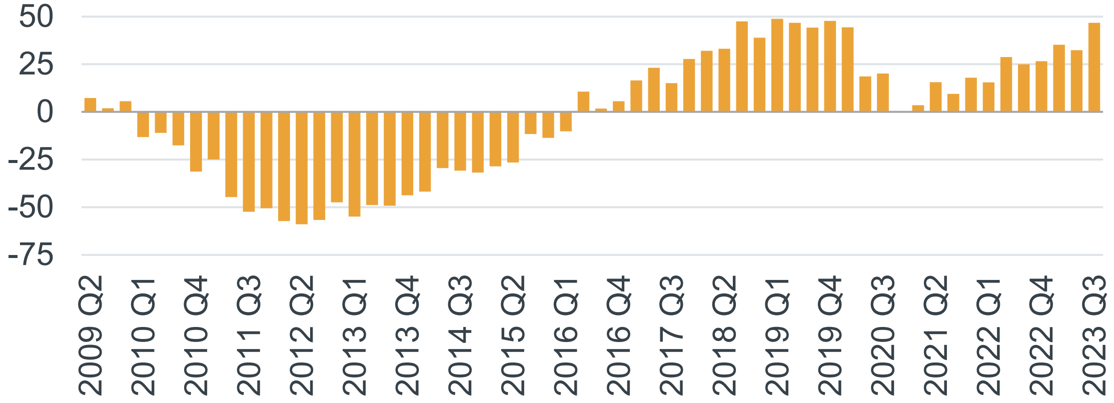
Source: ONS, Cebr analysis

Pillar 3: Job search and progression confidence

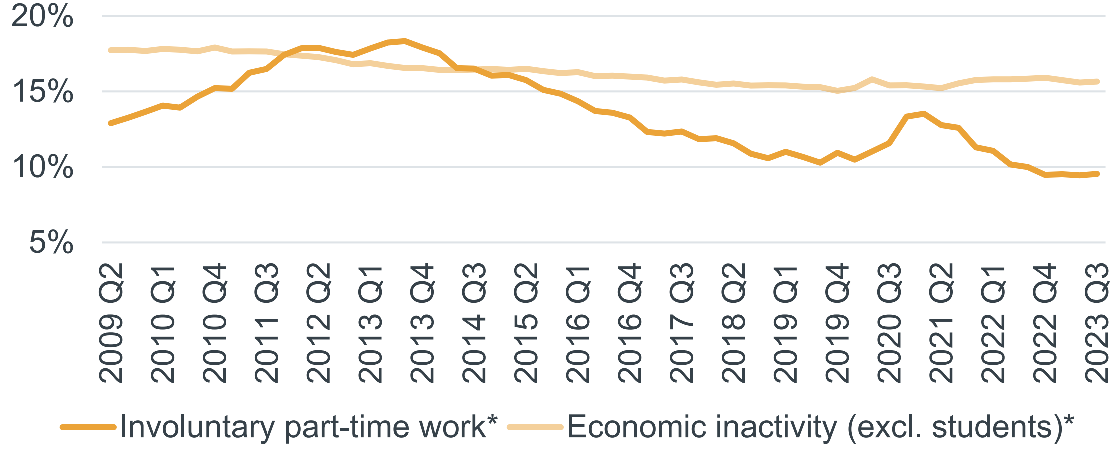
The job search and progression confidence pillar is the only major JCI constituent to improve in Q3 2023. The pillar climbed by 14.4 points on the quarter to reach 46.8, rising to its highest reading since Q4 2019.

- The core driver of this latest rise was an improvement in career progression confidence, measured through a survey of workers.
- Overall, 47.4% of respondents for the latest wave of the JCI said that they feel confident or very confident about their future career prospects and ability to progress in their career over the coming five years, with 14.6% feeling very confident. Just under a third felt neutral, meaning only 17.1% felt unconfident. In the Q2 2023 report, 41.9% felt confident or very confident about their career progression.
- More limited social mobility (measured by access to higher professions by education) worsened, holding back a larger improvement in the index.
- Meanwhile, levels of economic inactivity and involuntary part-time work both increased marginally, according to the latest data. However, due to ONS difficulties with the LFS, both values are only updated up to July.

JOB SEARCH AND PROGRESSION CONFIDENCE PILLAR SCORE



INVOLUNTARY PART-TIME WORK AND NON-STUDENT INACTIVITY



*Only one data point available for Q3 2023

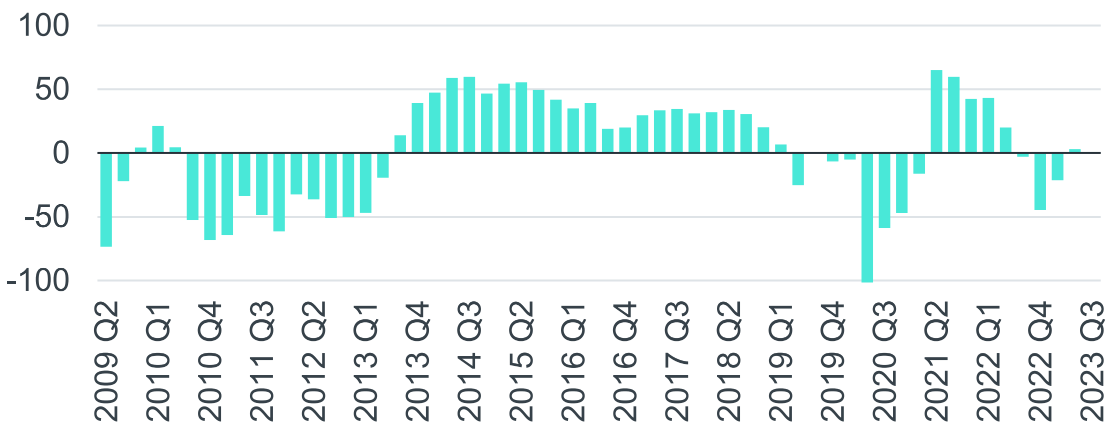
Source: ONS, Opinium survey, Cebr analysis

Pillar 4: Macroeconomic confidence

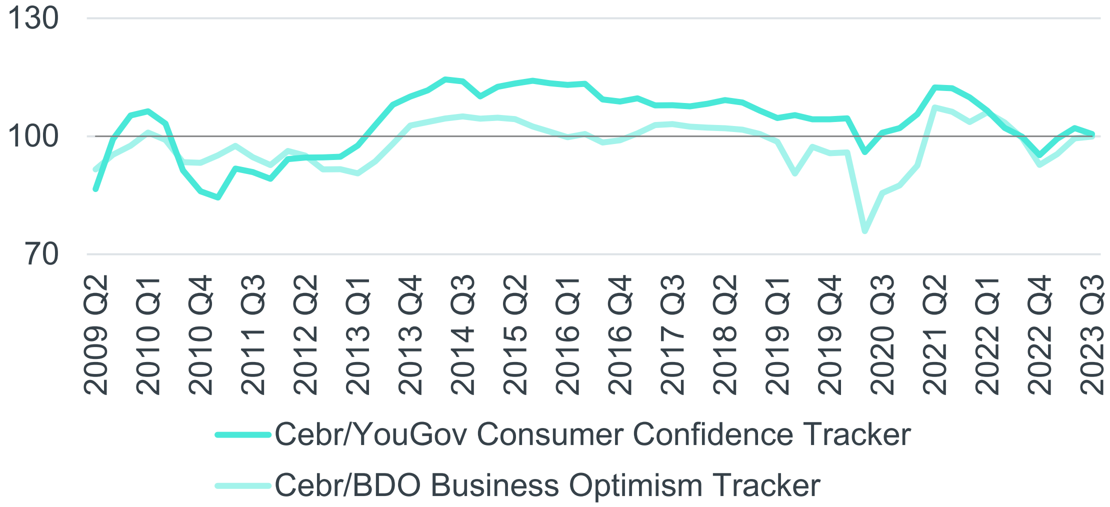
Macroeconomic confidence became broadly neutral in Q3, indicative of the tough economic headwinds currently facing the UK economy. Although there has been some relief in the form of easing inflation, the economic growth outlook for the UK remains weak.

- The macroeconomic confidence pillar dropped slightly in Q3, falling by 2.2 points to 0.8. Consequently, it recorded the weakest reading amongst the JCI's four constituent measures.
- The Cebr/YouGov Consumer Confidence Tracker averaged 100.6 in Q3 2023, falling by 1.5 points from last quarter. A score of 100 reflects a historically neutral outlook.
- The Cebr/BDO Business Optimism Tracker also remains largely unchanged, increasing by just 0.4 points on the quarter and 0.3 points on the year. Despite weak economic activity, the Optimism Index remains in positive territory (above 95) at 99.9.

MACROECONOMIC CONFIDENCE PILLAR SCORE



CONSUMER AND BUSINESS CONFIDENCE



Source: YouGov, BDO, Cebr analysis

SECTION 03

Tech industry snapshot

Tech industry snapshot

Total average weekly earnings growth in the IT sector accelerated for a fifth consecutive quarter, recording 11.3% on the year in Q3 2023. This is notably higher than the 7.4% growth witnessed across the wider economy. Meanwhile, at 45,000, the average number of vacancies in the sector has now fallen to a level closely aligned with the pre-pandemic 2019 average of 44,000.

- Despite declining vacancies from a very high level, tech businesses continue to advertise jobs, albeit at a pace more consistent with pre-pandemic norms.
- Average weekly earnings in the IT sector were up by 11.3% on the year in Q3, to £1,131. This marks an acceleration from 11.1% in Q2. Additionally, earnings in the sector were 70.3% higher than average pay across all industries.
- Annual labour productivity growth was also robust, improving by 0.2 percentage points to 0.9% in Q2. This is notably higher than the wider economy, which witnessed productivity growth of 0.3%.
- However, the share of employees with a temporary work arrangement rose by 1.1 percentage points on the quarter in Q2 to stand at 5.5%, while the share of IT workers reporting fluctuating pay in Q2 increased to 7.7%. This indicates that while pay growth in the IT sector remains strong, job uncertainty has picked up somewhat.

	Q3 2023	Q2 2023	CHANGE (% points)
Annual growth in vacancies	-29.7%	-40.5%	10.8 ▲
Annual earnings growth	11.3%	11.0%	0.3 ▲

	Q2 2023	Q1 2023	CHANGE (% points)
Temporary worker share*	5.5%	4.4%	1.1 ▲
Annual labour productivity growth*	0.9%	0.7%	0.2 ▲
Fluctuating pay share*	7.7%	5.3%	2.4 ▲

*Latest data available for Q2 2023

Source: ONS, Cebr analysis

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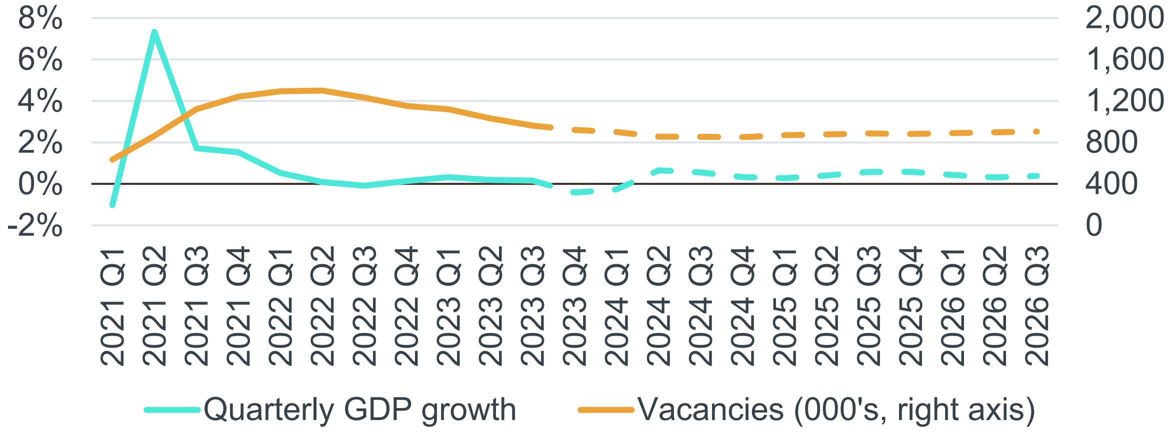
SECTION 04

Forward-looking commentary

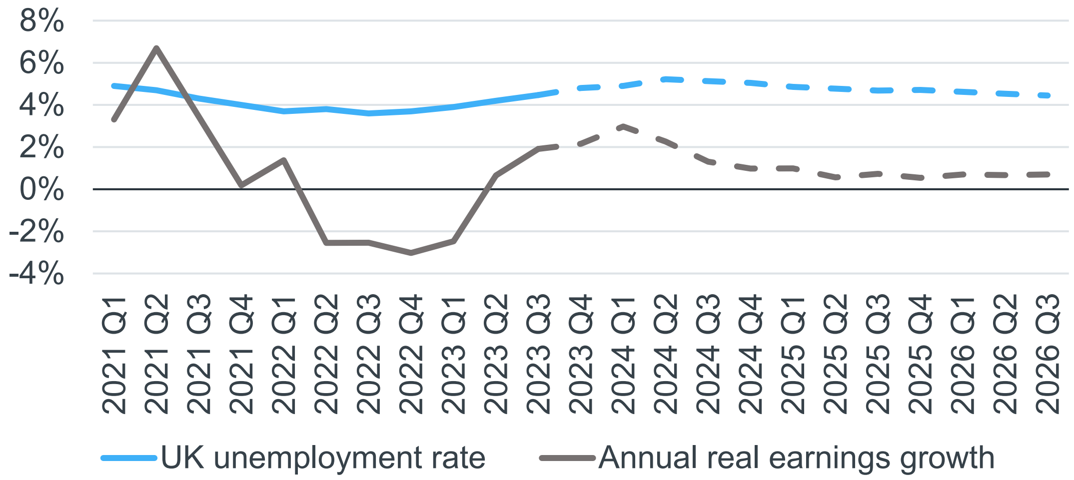
Forward-looking commentary

- The UK economy is estimated to have shown no growth in Q3 2023 compared to the previous quarter, according to the ONS, highlighting the UK's poor growth trajectory. Meanwhile, on an annual basis, GDP is estimated to have increased by 0.6% in Q3.
- The economy has exhibited little growth since the initial resurgence in demand once pandemic-related restrictions were eased. This has been the result of several headwinds, including pressures on consumers from the cost-of-living crisis, as well as supply chain difficulties and the tighter monetary policy environment. The latter has been implemented to reduce the extent of price growth across the economy by exerting downward pressure on activity by increasing the cost of borrowing.
- Looking ahead, this weak growth trajectory is set to persist. Indeed, Cebr expects the economy to experience a technical recession across Q4 2023 and Q1 2024. In annual terms, Cebr projects weak growth rates of just 0.5% and 0.4% across 2023 and 2024, respectively.
- In light of these economic pressures, Cebr expects a loosening of the labour market and an uptick in the unemployment rate. We forecast a peak in the rate of unemployment of 5.2% in Q2 2024.
- Developments in vacancy numbers are expected to reflect this. The number of unfilled vacancies is set to fall back from the peak of 1.3 million seen in the first half of 2022, stabilising at around 900,000, though this still represents a level elevated above pre-pandemic norms.

GDP AND VACANCIES



UNEMPLOYMENT AND REAL EARNINGS



Source: ONS, Opinium survey, Cebr analysis

SECTION 05

Appendices

Appendix: Methodology

- This report has been produced by Cebr, an independent economics and business research consultancy established in 1992.
- Each of the JCI's 14 indicators is standardised to a normal distribution, using the back history for each. This centres variables around their historical mean and assigns scores based on their standard deviation difference from this mean.
- After assigning a positive and negative direction for each variable, the scores are scaled by 100 and pillar scores are determined by the average of the respective sub-indicators. This typically provides pillar scores that vary between -100 and +100, though it is possible for scores to fall outside this range.
- A pillar score of greater than zero implies a historically positive degree of economic health from the particular perspective that the indicator measures.
- The four pillars are then weighted equally to arrive at a final JCI index score, which also tends to vary between -100 and +100.
- Technology Industry Snapshot: defined as the information and communication sector as per national statistics.

Founded in 1948, Robert Half has a long history of connecting opportunities at great companies with highly skilled job seekers. Bolstered by the strength of our brand, our people, our technology and our professional business model, we find meaningful and exciting employment for the people we place and provide clients access to the specialised talent they need to help grow their businesses.

We pioneered the idea of professional talent solutions over 70 years ago and, as the needs of businesses have evolved, so have we. In 1986, when current leadership acquired the Robert Half business from founder Bob Half, the staffing industry was much different than it is today. And in 2002, we again saw opportunity and introduced Protiviti, a global business consultancy, to support companies face the future with confidence.

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 Authorship and acknowledgements: This report has been produced by Cebr, an independent economics and business research consultancy established in 1992. The views expressed herein are those of the authors only and are based upon independent research by them.

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