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KPMG AND REC, UK REPORT ON JOBS

Hiring activity remains muted in May as uncertainty lingers around the outlook

KEY FINDINGS

Modest decline in permanent staff placements

Temp billings growth at 73-month low

Demand for staff rises at historically subdued pace

KEY DATA

Permanent Placements Index

MAY
48.5
APR: 49.7

Temporary Billings Index

MAY
50.4
APR: 53.8

The KPMG and REC, UK Report on Jobs is compiled by IHS Markit from responses to questionnaires sent to a panel of around 400 UK recruitment and employment consultancies.

Commenting on the latest survey results, James Stewart, Vice Chair at KPMG, said:

"Brexit uncertainty continues to dampen the jobs market as companies kept their recruitment decisions on hold in May. Permanent staff appointments fell at a slightly faster pace than in April, while subdued confidence ensured that growth in temporary billings hit a six-year low.

"Of increasing concern is that uncertainty is feeding through to weaker growth in job vacancies, while the supply of candidates fell sharply as people are becoming more risk averse with regards to switching roles. Relatively muted trends for permanent staff vacancies were seen across the board, with retail, construction and executive/professional hit particularly badly.

"We expect the labour market to remain in stalemate over the summer as the contest for a new Prime Minister kicks off. Companies are unlikely to make any dramatic investment decisions until a new leader is in place and have more insight on the future direction of Brexit."

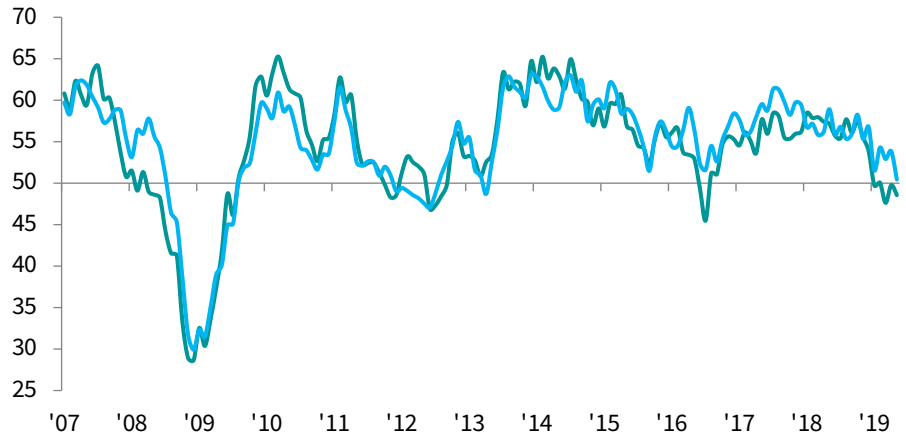
Neil Carberry, Chief Executive of the Recruitment & Employment Confederation, said:

"The jobs market is still creating opportunities for those looking for work. With vacancies rising and starting salaries going up sharply, it is worth people talking to recruiters about that next step in their career.

"Overall, though, the survey again shows what uncertainty does to hiring plans, with permanent placements dropping again."

Permanent Placements Index / Temporary Billings Index

sa, >50 = growth since previous month



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1 EXECUTIVE SUMMARY

The Report on Jobs is unique in providing the most comprehensive guide to the UK labour market, drawing on original survey data provided by recruitment consultancies and employers to provide the first indication each month of labour market trends.

The main findings for May are:

Permanent placements fall again in May

The number of people placed into permanent job roles fell for the fourth time in the past five months in May, and at a quicker pace than in April. At the same time, temp billings expanded only marginally, with growth hitting a 73-month low. There were many reports that hiring activity was dampened by uncertainty, but also mentions that demand for staff had weakened compared to earlier in the year.

Vacancy growth holds close to multi-year low

Recruitment agencies signalled a slightly stronger rise in overall vacancies during May, but growth remained close to April's 80-month low. Although both permanent and temporary job openings rose solidly, rates of increase remained notably weaker than their historical averages.

Uncertainty weighs on candidate supply

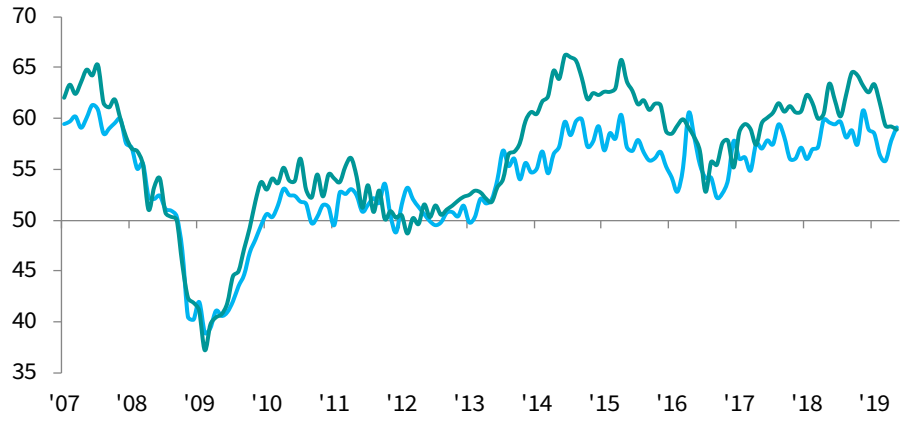
Ongoing Brexit-related uncertainty and generally tight labour market conditions were cited as key factors weighing on candidate availability during May. Furthermore, both permanent and temporary staff supply declined at faster rates than in April.

Starting salary inflation softens to 25-month low

Although salaries awarded to permanent starters continued to grow sharply in May, the rate of inflation was the least marked for just over two years. In contrast, temp wages increased at the quickest pace for six months. Panellists commonly stated that competition for scarce workers continued to place upward pressure on pay.

Permanent Salaries Index / Temporary Wages Index

sa, >50 = inflation since previous month

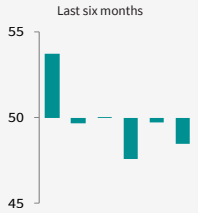


2 STAFF APPOINTMENTS

Recruitment consultancies report on the number of people placed in permanent jobs each month, and their revenues (billings) received from placing people in temporary or contract positions at employers.

An index reading above 50 signals a higher number of placements/billings than the previous month. Readings below 50 signal a decline compared with the previous month.

Permanent Placements Index



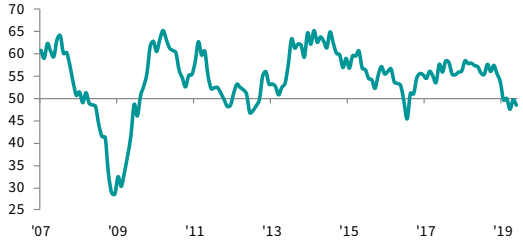
Modest fall in permanent staff appointments

Recruitment agencies in the UK signalled a further decline in the number of people placed into permanent job roles in May. Permanent placements have now fallen in four of the past five months. The pace of decline was moderate overall, despite quickening since April, and remained softer than March's recent record. The latest reduction was generally linked to Brexit-related uncertainty, which had reportedly led some firms to postpone hiring decisions, while some panellists also indicated that overall demand for staff had softened from early-2019.

Three of the four monitored English regions registered lower permanent staff appointments, with the Midlands seeing the quickest rate of decline. The North bucked the overall trend and saw a marked increase in permanent placements.

Permanent Placements Index

sa, >50 = growth since previous month

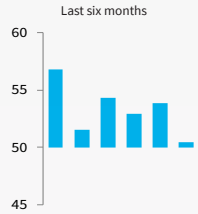


Permanent Placements Index

sa, >50 = growth since previous month

	UK	London	South	Midlands	North
Dec '18	53.7	51.9	59.0	50.2	50.8
Jan '19	49.7	49.3	52.6	48.1	46.7
Feb '19	50.0	54.0	51.7	45.4	48.6
Mar '19	47.6	47.9	48.6	42.2	52.0
Apr '19	49.7	45.1	48.6	47.7	52.0
May '19	48.5	46.4	46.9	44.1	56.9

Temporary Billings Index



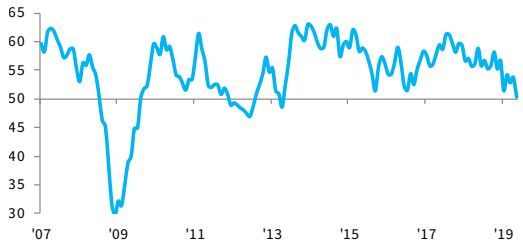
Temp billings growth weakens to 73-month low

May survey data pointed to a weaker increase in billings received from the employment of temporary/contract workers. Notably, the latest expansion was marginal and the slowest seen since the current sequence of growth began in May 2013. According to anecdotal evidence, the upturn was largely driven by relatively firm demand for temp staff. However, there were also reports that subdued vacancy growth and reduced activity at clients had restricted the upturn.

Temp billings expanded in the South of England and in London during May. However, a further decline was seen in the Midlands while the North of England registered the first reduction since January.

Temporary Billings Index

sa, >50 = growth since previous month



Temporary Billings Index

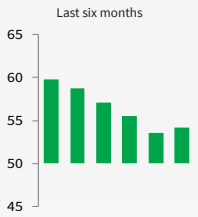
sa, >50 = growth since previous month

	UK	London	South	Midlands	North
Dec '18	56.8	56.7	57.1	54.8	55.5
Jan '19	51.5	48.9	50.5	56.5	49.2
Feb '19	54.3	54.4	52.7	54.7	52.4
Mar '19	52.9	51.8	48.7	51.5	56.7
Apr '19	53.8	52.8	55.3	48.4	55.4
May '19	50.4	53.0	56.0	44.2	46.6

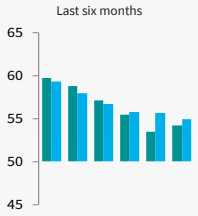
3 VACANCIES

Recruitment consultants are asked to specify whether the demand for staff from employers has changed on the previous month, thereby providing an indicator of the number of job vacancies.

Total Vacancies Index



Permanent / Temporary



Demand for staff rises at subdued pace

At 54.2 in May, the Total Vacancies Index was up slightly from April's 80-month low of 53.6, and signalled a further increase in staff vacancies. Though strong overall, the rate of expansion remained subdued compared to the historical trend.

Permanent and temporary vacancies

Growth of demand for temporary workers continued to outpace that for permanent staff.

Temp staff vacancies rose solidly, despite the rate of expansion easing to a 73-month low. Meanwhile, growth of demand for permanent workers was strong, having picked up from April's recent low.

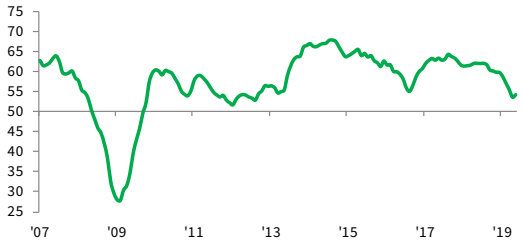
Public & private sector vacancies

Vacancy growth continued to be largely driven by the private sector, according to the latest data.

Sharp increases in demand were seen for both permanent and temporary workers in the private sector during May. In the public sector, temp vacancies rose at a steeper pace, but demand for permanent staff fell for the third month in a row.

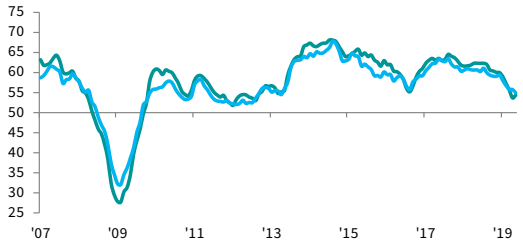
Total Vacancies Index

sa, >50 = growth since previous month



Permanent / Temporary

sa, >50 = growth since previous month



Vacancy Index summary

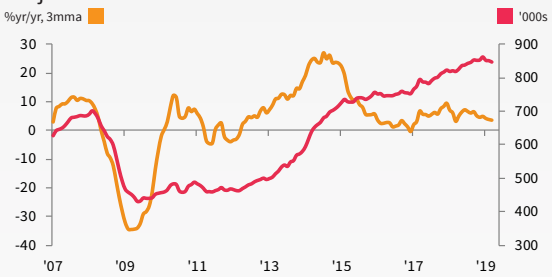
sa, >50 = growth since previous month. *Not seasonally adjusted.

		Permanent			Temporary		
	Total	Total	Private*	Public*	Total	Private*	Public*
Dec '18	59.7	59.8	60.7	56.2	59.3	60.8	53.4
Jan '19	58.7	58.7	59.6	49.1	58.0	53.6	49.2
Feb '19	57.1	57.1	58.9	52.4	56.7	58.5	52.2
Mar '19	55.5	55.5	55.9	45.0	55.8	55.9	50.8
Apr '19	53.6	53.5	54.3	49.4	55.7	56.7	50.8
May '19	54.2	54.2	55.5	49.1	54.9	56.6	53.7

OFFICIAL DATA: UK JOB VACANCIES

Latest official data from the Office for National Statistics (ONS) signalled that the number of job vacancies increased by 3.4% on the year to stand at 846,000 in the three months to April. Although the total number of vacancies remained close to a record high (861,000), there had been falls in each of the past three survey periods.

UK job vacancies



Source: Office for National Statistics.

4 VACANCIES BY SECTOR

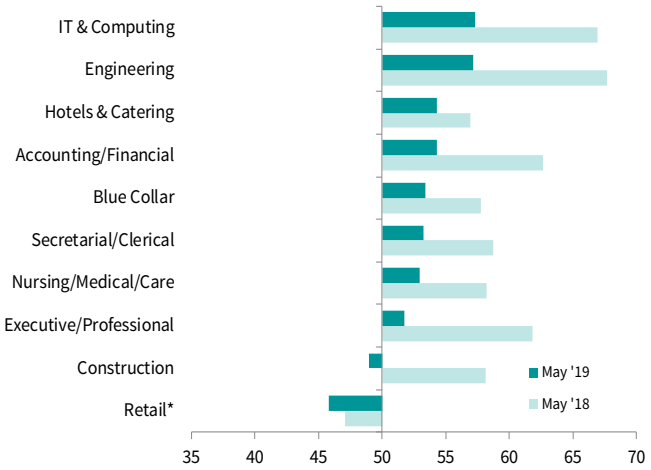
Recruitment consultancies are requested to compare the demand for staff according to sector with the situation one month ago.

Permanent vacancies

Demand for permanent staff remained strongest in IT & Computing in May, closely followed by Engineering. The only two monitored sectors to register lower permanent job vacancies were Construction and Retail.

Permanent Vacancies Index

sa, >50 = growth since previous month. *Not seasonally adjusted.

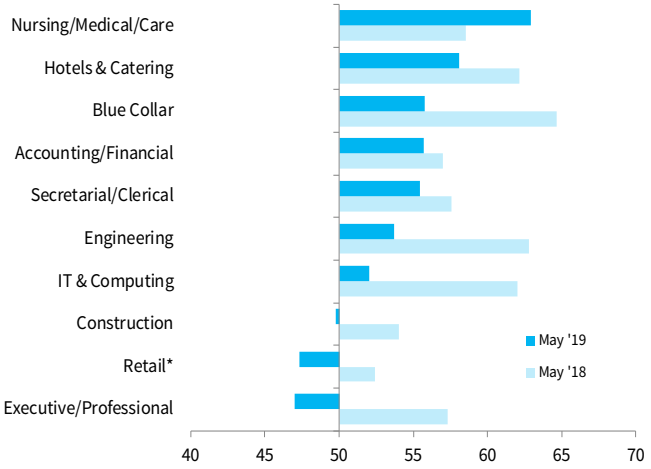


Temporary vacancies

Nursing/Medical/Care saw the sharpest increase in temporary staff demand during May. A marked expansion in vacancies was also seen for Hotels & Catering. In contrast, demand for temp workers fell in Construction, Retail and Executive/Professional.

Temporary Vacancies Index

sa, >50 = growth since previous month. *Not seasonally adjusted.

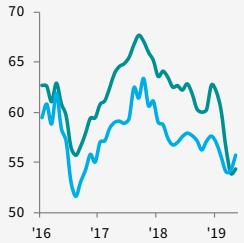


VACANCY INDEX BY SECTOR

sa, >50 = growth since previous month

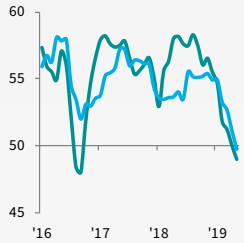
Permanent / Temporary

Accounting & Financial

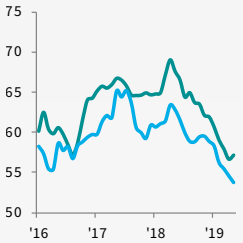


Blue Collar

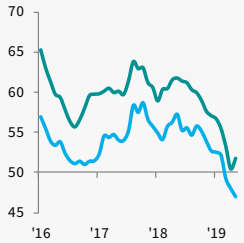
Construction



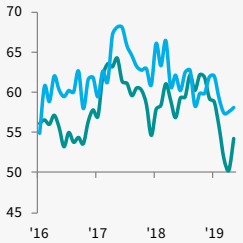
Engineering



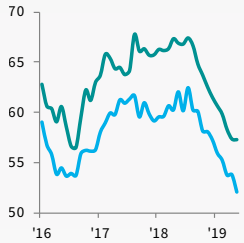
Executive & Professional



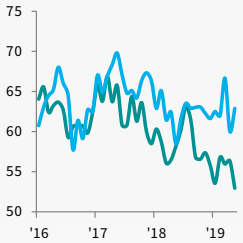
Hotels & Catering



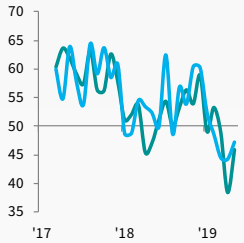
IT & Computing



Nursing, Medical & Care



Retail (unadjusted)

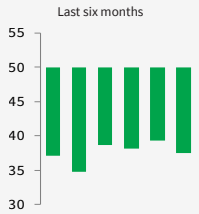


Secretarial & Clerical

5 STAFF AVAILABILITY

Recruitment consultants are asked to report whether availability of permanent and temporary staff has changed on the previous month. An overall indicator of staff availability is also calculated.

Total Staff Availability Index



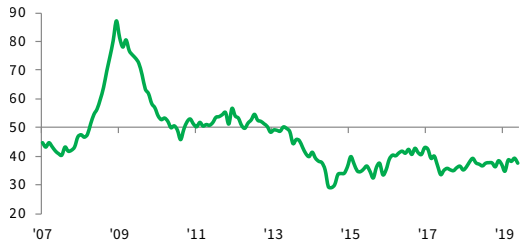
Sharpest drop in candidate availability for four months

The overall availability of candidates across the UK continued to decline sharply in May. Notably, the rate of reduction quickened to the steepest since January.

Broken down by candidate type, the number of people available for permanent work continued to contract at a quicker pace than that seen for temporary staff. Nonetheless, respective rates of decline remained much stronger than seen on average over the survey history.

Total Staff Availability Index

sa, >50 = improvement since previous month



Permanent Staff Availability Index

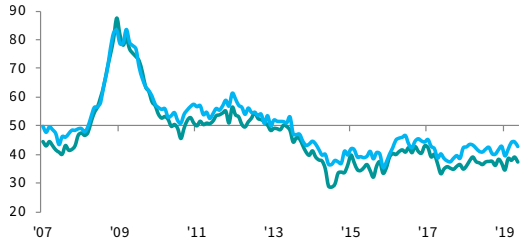
Faster decline in permanent candidate supply

As has been the case for just over six years, the availability of candidates to fill permanent job roles declined in May. Furthermore, the rate of contraction was the sharpest since January and remained much quicker than seen on average over the series history. Panellists frequently linked lower candidate numbers to increased uncertainty regarding the outlook, while generally tight labour market conditions were also cited.

All four monitored English regions registered marked reductions in permanent candidate supply, led by the South of England.

Permanent / Temporary

sa, >50 = improvement since previous month

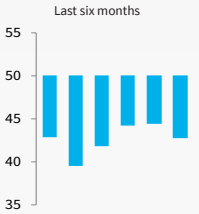


Permanent Staff Availability Index

sa, >50 = improvement since previous month

	UK	London	South	Midlands	North
Dec '18	36.8	43.8	35.7	35.1	37.0
Jan '19	34.5	34.4	36.2	35.8	35.9
Feb '19	38.5	35.1	39.1	40.8	37.6
Mar '19	37.8	38.4	35.4	40.9	37.2
Apr '19	39.0	40.2	36.0	43.9	38.0
May '19	37.3	37.9	36.4	39.6	38.3

Temporary Staff Availability Index



Temp candidate numbers fall at quickest rate for three months

Recruitment agencies signalled a further decline in the supply of temporary staff during May. The pace of contraction was the sharpest for three months and notably quicker than the long-run series trend. A generally low unemployment rate and widespread skill shortages were mentioned by a number of panel members, while there were also reports of fewer EU candidates.

The reduction was broad-based across all four monitored English regions, with the Midlands noting the steepest drop in temp labour supply.

Temporary Staff Availability Index

sa, >50 = improvement since previous month

	UK	London	South	Midlands	North
Dec '18	42.8	47.3	43.9	39.8	43.7
Jan '19	39.5	41.2	42.5	39.5	42.1
Feb '19	41.8	37.4	44.6	41.9	43.6
Mar '19	44.2	43.3	45.2	46.3	42.6
Apr '19	44.4	46.5	42.7	44.8	44.9
May '19	42.8	42.6	44.1	41.2	45.0

6 DEMAND FOR SKILLS

Recruitment consultancies are invited to specify any areas in which they have encountered skill shortages during the latest month.

Skills in short supply: Permanent staff

Accounting/Financial
Accountants
Accounts
Auditors
Book Keepers
Commercial Cost Managers
Credit Controllers
Estimators
Finance
Pensions Admin
Risk
Tax Accountants

Blue Collar
Forklift Drivers
HGV Drivers
Industrial
Manufacturing
Mechanics
Production
Semi-Skilled Workers
Skilled Workers
Warehouse
Welders

Construction
Architectural Technicians
Construction Sales
Construction Workers
Quantity Surveyors
Town Planner

Engineering
CCTV Engineers
Design Engineers
Engineers
General Engineering
HVAC Engineers
Mechanical Engineers
Senior Electronic Engineers
Service Engineers
Technicians

Executive/Professional
Compliance
Human Resources
Law
Legal Secretaries
Litigation
Management
Marketing
Operations Managers
Portal Fee
PR
Procurement
Project Managers
Recruitment Consultants
Regulatory Professionals

Hotel/Catering
Baristas
Catering
Chefs
Hospitality
Kitchen Porters
Waiting Staff

IT/Computing
Automation Testers
CAD
Cisco Networking
CNC
Cyber
Cyber Security
Data Analysts
Data Science
Developers
DevOps
Digital
Gaming
Information Security
IT
IT Developers
Java
PHP Developers
Python
Software Developers
Technology

Nursing/Medical/Care
Chemists
Childcare
Clinical Research Staff
Dispensing Opticians
Nurses
Optometrists
Support Workers

Secretarial/Clerical
Administration
Office Staff
Personal Assistant
Receptionist
Team Assistants

Other
B2B Sales
Buyers
Customer Service
Dutch Speakers
German Speakers
Sales
Scandinavian Speakers
Technical Sales
Telecomms

Skills in short supply: Temporary staff

Accounting/Financial
Accountants
Accounts
Credit Controllers
Finance
Finance Directors
Payroll
Pensions Admin

Blue Collar
Blue Collar
Class 2 Drivers
Drivers
Factory
Forklift Drivers
HGV Drivers
Industrial
Labour
LGV Drivers
Manufacturing
Packers
Pickers
Production
Warehouse
Welders

Construction
Bricklayers
Construction Workers

Engineering
Electronic Design Engineers
Engineering Trades
Engineers
Mechanical Engineers
System Engineers

Executive/Professional
Legal
Legal Secretaries
Litigation
Marketing
Portal Fee
Regulatory Professionals

Hotel/Catering
Baristas
Catering
Chefs
Hospitality
Kitchen Porters

IT/Computing
CAD
Cloud Engineers
CNC
Data Analysts
Developers
Digital
Gaming
IT
Java
Oracle Fusion
Technology

Nursing/Medical/Care
Carers
Childcare
Clinical Research Staff
NHS
Optometrists

Secretarial/Clerical
Administration
Clerical
Office Staff
Receptionist
Secretary

Other
B2B Telesales
Buyers
Commercial
Customer Service
Dutch Speakers
German Speakers
Sales
Security
Teachers

Skills in excess supply: Permanent staff

Blue Collar
Blue Collar
Packers
Pickers
Semi-Skilled Workers
Unskilled Workers
Warehouse

Engineering
Maintenance Engineers

Executive/Professional
Digital Marketing
Human Resources
Law
Marketing
Project Managers

Hotel & Catering
Waiting Staff

IT/Computing
Digital
IT Managers
Microsoft Helpdesk

Retail
Retail Staff

Secretarial/Clerical
Administration
Clerical
Office Staff
Personal Assistant

Other
Customer Service
Graduates
Interior Designers
Sales
Testers

Skills in excess supply: Temporary staff

Blue Collar
Drivers
Industrial
Mechanical Fitters
Unskilled Workers
Warehouse

Construction
Construction Workers

Executive/Professional
Management
Project Managers

Hotel/Catering
Waiting Staff

Retail
Retail Staff

Secretarial/Clerical
Administration
Clerical
Personal Assistant

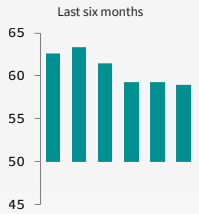
Other
Customer Service
Juniors
Purchasing Managers

Note : Skills can be reported as being both in short supply and excess supply as we survey various recruitment agencies across the country, so there is geographical variation as well as the possibility of candidates with particular skills being concentrated in certain areas.

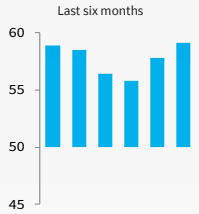
7 PAY PRESSURES

The recruitment industry survey tracks both the average salaries awarded to people placed in permanent jobs each month, as well as average hourly rates of pay for temp/contract staff.

Permanent Salaries Index



Temporary Wages Index



Starting salary inflation edges down to 25-month low

The seasonally adjusted Permanent Salaries Index signalled a further increase in starting pay for permanent workers in May. Though sharp overall, the rate of inflation was the softest seen for just over two years. Candidate shortages and greater competition for staff were commonly linked by panellists to the latest increase in salaries.

The North or England recorded the steepest increase in starting pay, while the softest was seen in London.

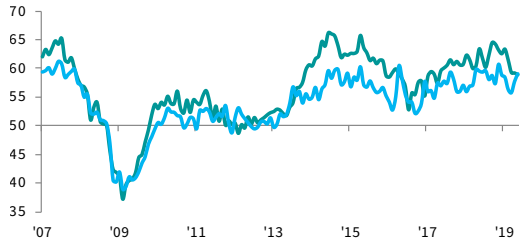
Strongest increase in temp pay for six months

Recruitment agencies pointed to a further increase in average wages awarded to temporary workers in May. Reports from panellists commonly linked the rise to low candidate availability. Notably, the rate of pay growth quickened for the second month in a row and was the fastest seen since last November.

Sharp increases in temp pay were seen across all four monitored English regions, with the South seeing the quickest rate of wage inflation.

Permanent Salaries / Temporary Wages

sa, >50 = inflation since previous month



Permanent Salaries Index

sa, >50 = inflation since previous month

	UK	London	South	Midlands	North
Dec '18	62.6	65.2	60.4	59.3	63.0
Jan '19	63.4	64.0	63.7	62.0	60.5
Feb '19	61.5	62.1	61.9	58.7	61.5
Mar '19	59.3	56.6	59.9	56.1	61.3
Apr '19	59.2	56.3	60.8	59.7	58.3
May '19	58.9	54.0	59.9	60.5	61.5

Temporary Wages Index

sa, >50 = inflation since previous month

	UK	London	South	Midlands	North
Dec '18	58.9	58.1	59.8	60.3	58.3
Jan '19	58.5	57.4	60.4	58.4	55.8
Feb '19	56.4	52.2	54.6	59.2	60.4
Mar '19	55.8	49.9	57.6	59.8	55.2
Apr '19	57.8	53.6	59.0	57.8	61.0
May '19	59.1	59.0	61.7	58.6	58.8

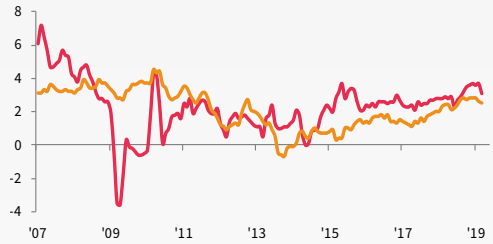
OFFICIAL DATA: UK AVERAGE WEEKLY EARNINGS

Latest data from the Office for National Statistics indicated that employee earnings (including bonuses) increased by 3.2% year-on-year over the first quarter of 2019. This was down slightly from the 3.5% growth rates seen over the last three periods. Nonetheless, the rise remained among the strongest seen over the past 10 years.

In the private sector, annual growth of earnings softened from 3.7% to 3.1% in the latest period, which was the slowest expansion seen since the three months to August 2018. Meanwhile, public sector pay rose by 2.5% year-on-year, to mark the softest rate of growth since the three months to July 2018.

UK average weekly earnings (private / public)

%yr/yr, 3mma



Source: Office for National Statistics.

8 FEATURE: FLEXIBLE WORKING

This section features data from the Recruitment and Employment Confederation's surveys of employers and recruiters

FLEXIBLE WORKING SUPPORTS PRODUCTIVITY AND BUSINESS GROWTH

Employee needs and expectations are evolving. From freelancers and contractors to temporary and agency workers, the number of atypical workers has increased significantly in the last decade and working in this way is an integral part of many people's career paths. In the OECD, one in three workers is now in non-standard employment, including one in nine who are on a temporary contract . In the UK, the REC estimates that there are over a million temporary and contract workers on assignment on any given day across the year.

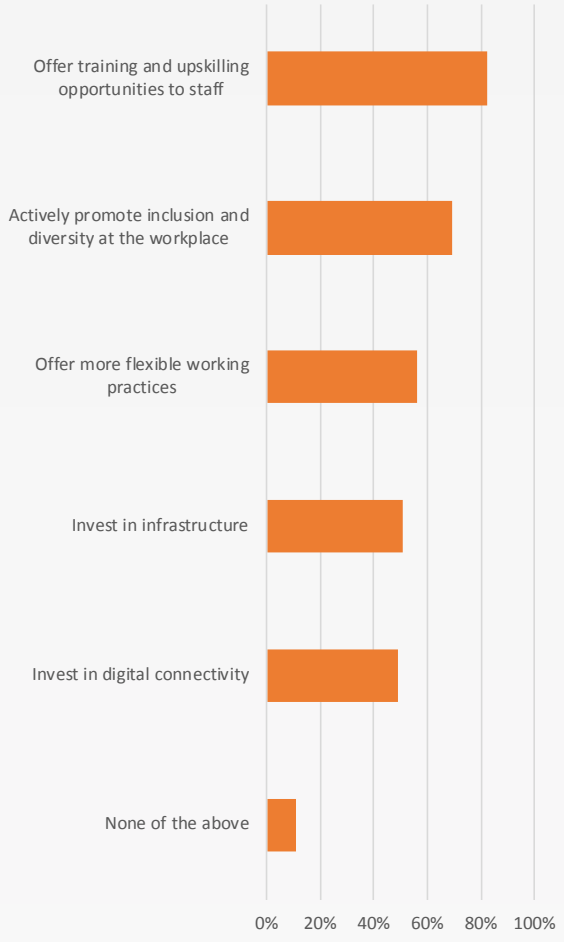
Meanwhile, the ongoing feedback from REC members is that there is growing demand for flexibility amongst candidates. While pay and progression opportunities remain key factors, there has been a marked increase in the number of individuals asking about the working patterns and organisational culture. Flexi-time is the most sought-after way of working as it gives the individual the absolute flexibility on the hours and place of work. Part-time working, job-share, shifts, staggered hours and compressed hours are some of the other ways in which employers can provide flexibility to their staff.

Nonetheless, according to the Timewise flexible jobs index[1], the proportion of jobs with an annual FTE salary of £20,000 or higher that were advertised as being open to flexibility stood at 11.1% in 2018. This was inversely proportionate to the nine in 10 employees that demand flexible work.

Encouragingly, UK business leaders are increasingly recognising the importance of flexibility at the workplace as a means to boost productivity. In a survey of 400 employers conducted in March and April 2019, more than half of respondents (56%) reported their business plans to offer more flexible working practices in 2019 in order to increase productivity. This, combined with plans to offer training and upskilling opportunities to staff (82% intend to implement) and to actively promote inclusion and diversity at the workplace (69%), highlights the significant number of business leaders who recognise the importance of investing in their workforce.

Amid mounting skills shortages, good recruitment practices will help unlock the potential of talented people who wish to work flexibly. Offering flexible working helps attract and retain the best and brightest talent. In turn, building a flexible and agile workforce leads to higher levels of productivity.

Which of the following measures, if any, does your business plan to implement in 2019 in order to increase productivity?



Based on a panel of 400 UK employers/HR decision-makers
Source: REC.

[1] *Timewise (2018). The Timewise flexible jobs index 2018. https://timewise.co.uk/wp-content/uploads/2018/07/Timewise_Flexible_Jobs_-Index_2018.pdf*

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Methodology

The KPMG and REC, UK Report on Jobs is compiled by IHS Markit from responses to questionnaires sent to a panel of around 400 UK recruitment and employment consultancies.

Survey responses are collected in the second half of each month and indicate the direction of change compared to the previous month. A diffusion index is calculated for each survey variable. The index is the sum of the percentage of 'higher' responses and half the percentage of 'unchanged' responses. The indices vary between 0 and 100, with a reading above 50 indicating an overall increase compared to the previous month, and below 50 an overall decrease. The indices are then seasonally adjusted.

Underlying survey data are not revised after publication, but seasonal adjustment factors may be revised from time to time as appropriate which will affect the seasonally adjusted data series.

For further information on the survey methodology, please contact economics@ihsmarkit.com.

About IHS Markit

IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 business and government customers, including 80 percent of the Fortune Global 500 and the world's leading financial institutions.

About KPMG

KPMG LLP, a UK limited liability partnership, operates from 22 offices across the UK with approximately 16,300 partners and staff. The UK firm recorded a revenue of £2.338 billion in the year ended 30 September 2018. KPMG is a global network of professional firms providing Audit, Tax, and Advisory services. It operates in 154 countries and has 200,000 professionals working in member firms around the world. The independent member firms of the KPMG network are affiliated with KPMG International Cooperative ("KPMG International"), a Swiss entity. Each KPMG firm is a legally distinct and separate entity and describes itself as such.

About REC

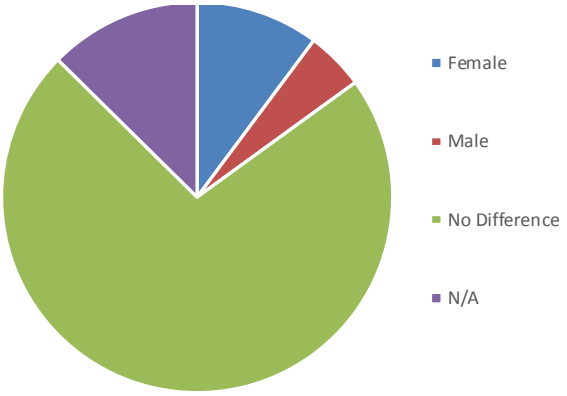
The REC is all about brilliant recruitment, which drives our economy and delivers opportunity to millions. As the voice of the recruitment industry, we champion high standards, speak up for great recruiters, and help them grow. Recruitment is a powerful tool for companies and candidates to build better futures for themselves and a strong economy for the UK. Find out more about the Recruitment & Employment Confederation at www.rec.uk.com.

Disclaimer

Special Feature Questions: May 2019

In May 2019, UK recruitment agencies were asked two questions around persuading candidates to leave and important factors for females to switch roles.

1) **When talking to candidates about leaving their current employer, in general which do you find are more reluctant to leave?**



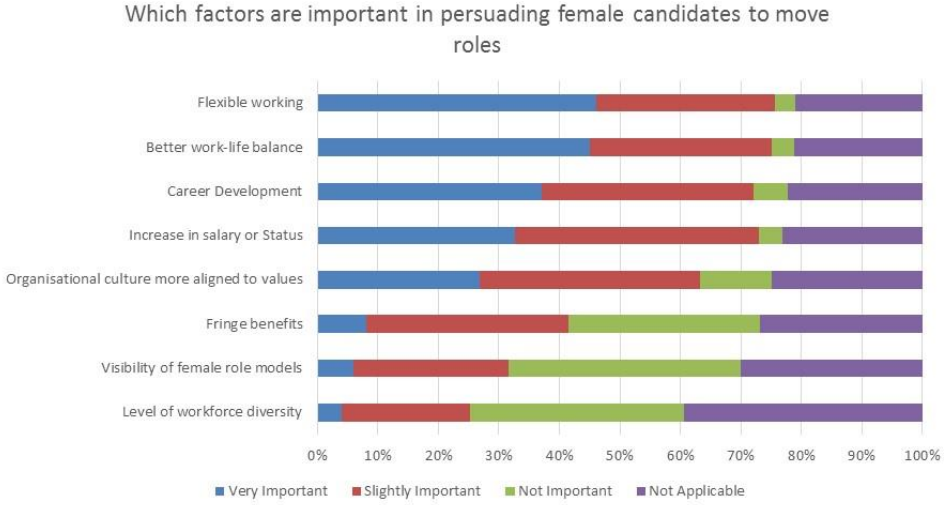
Female	10%
Male	5%
No Difference	72%
N/A	13%

Sources: KPMG, REC, IHS Markit

Nearly three out of four recruiters (72%) noted that there was no difference in persuading female candidates or male candidates to leave their current employer. While 10% perceived females were more reluctant to leave their current employer, 5% indicated that males were.

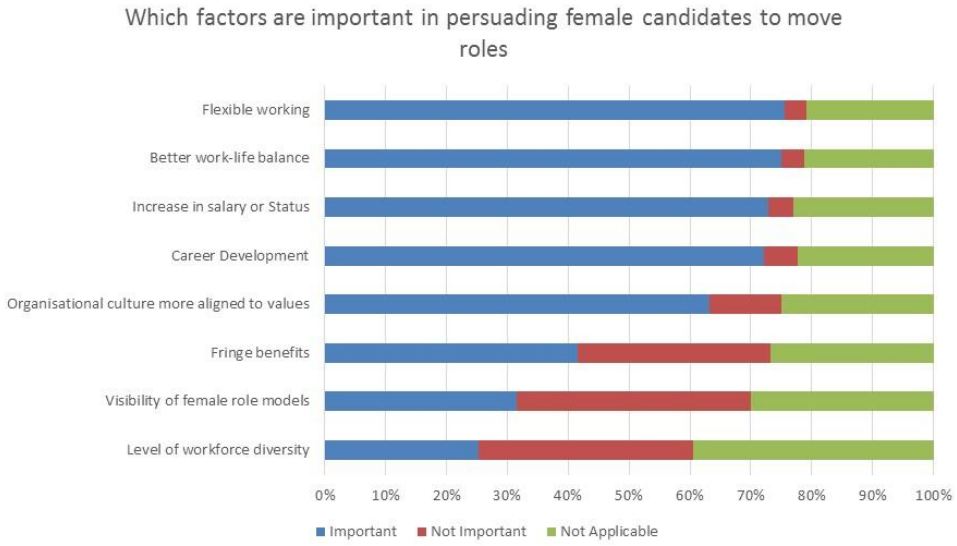
2) **Which factors are important in persuading female candidates to move roles?**

	Very Important	Slightly Important	Not Important	Not Applicable
Level of workforce diversity	4%	21%	35%	39%
Visibility of female role models	6%	26%	38%	30%
Fringe benefits	8%	34%	32%	27%
Organisational culture more aligned to values	27%	36%	12%	25%
Increase in salary or Status	33%	40%	4%	23%
Career Development	37%	35%	6%	22%
Better work-life balance	45%	30%	4%	21%
Flexible working	46%	29%	3%	21%



	Important	Not Important	Not Applicable
Level of workforce diversity	25%	35%	39%
Visibility of female role models	32%	38%	30%
Fringe benefits	42%	32%	27%
Organisational culture more aligned to values	63%	12%	25%
Career Development	72%	6%	22%
Increase in salary or Status	73%	4%	23%
Better work-life balance	75%	4%	21%
Flexible working	76%	3%	21%

Important = Very Important + Slightly Important



Sources: KPMG, REC, IHS Markit

Flexible working topped the rankings for what was perceived as the most important factor for persuading female candidates to move roles, with 76% of recruiters stating this as Very or Slightly Important. A better work-life balance (75%) and an increase in salary or status (73%) came in as a close second and third. At the other end of the table, the level of workforce diversity was perceived to be the least important factor in the rankings, with just 25% of recruitment agencies indicating that this was important to female candidates.

Other mentions included:

- Job security
- Travel Time
- Company reputation
- Transport links/car parking
- Professional development rather than just career
- Location
- Recognition and assignment of projects
- Pension schemes