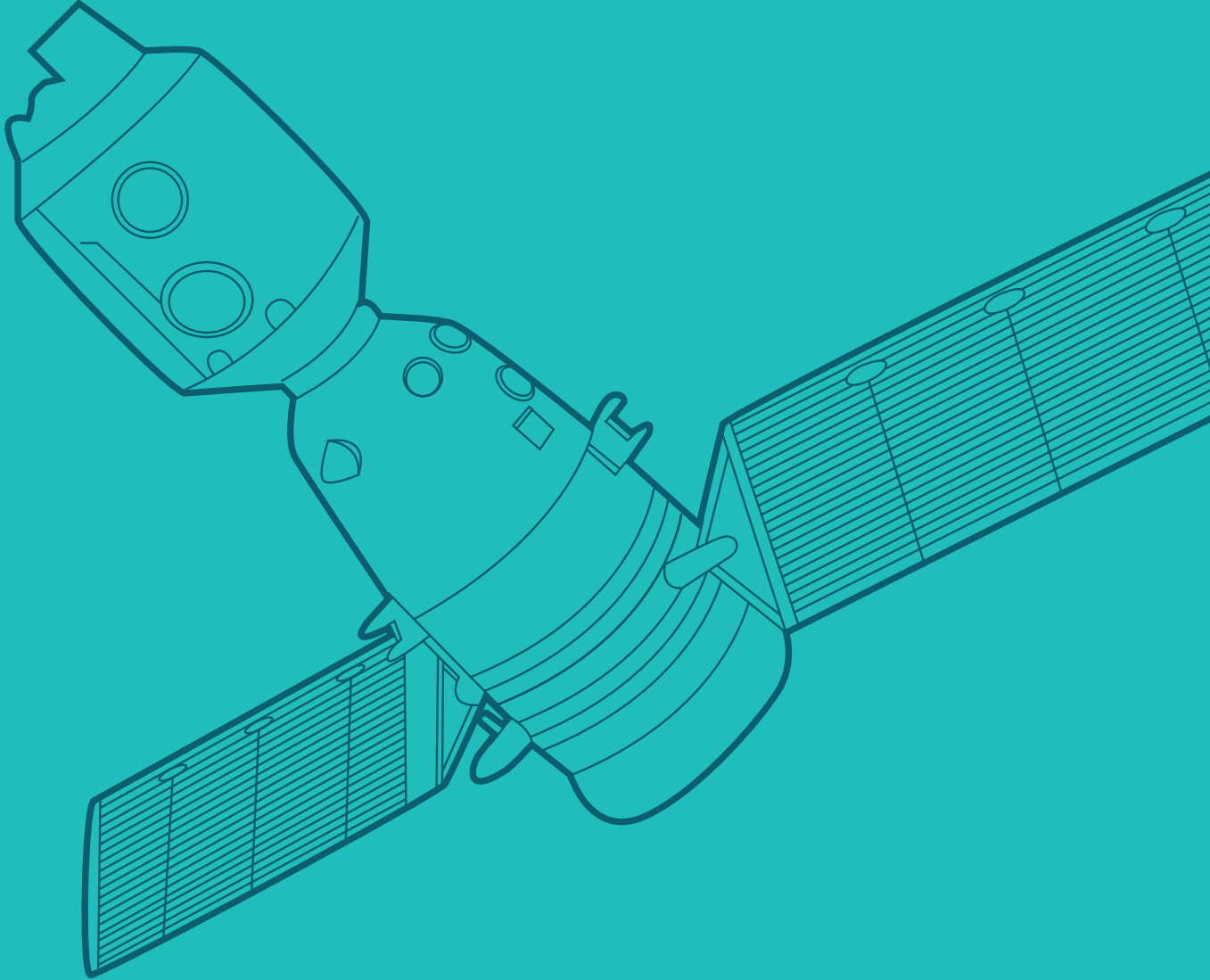


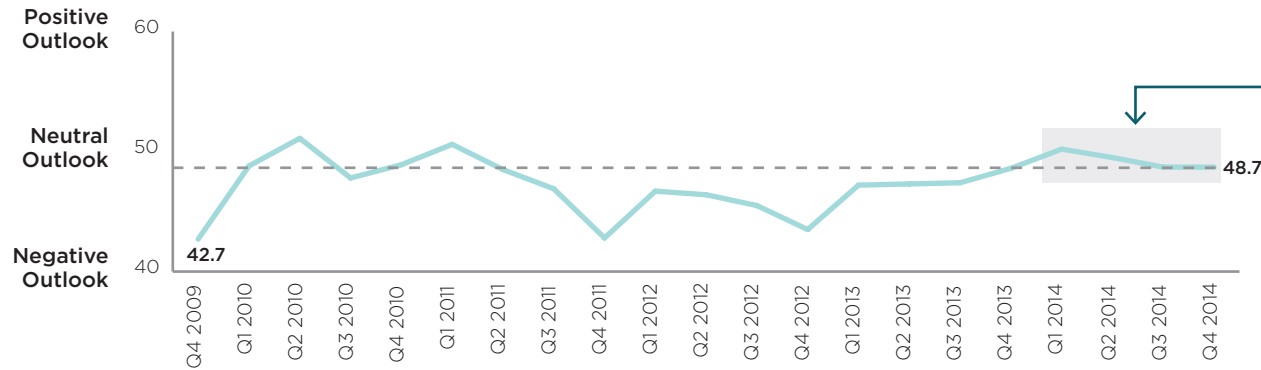
Global Workforce Insights

Your Quarterly
Resource for the Latest
Trends Affecting Your
Workforce Plan



Executives Worry About Business Conditions in 2015

Business Executive Sentiment Index

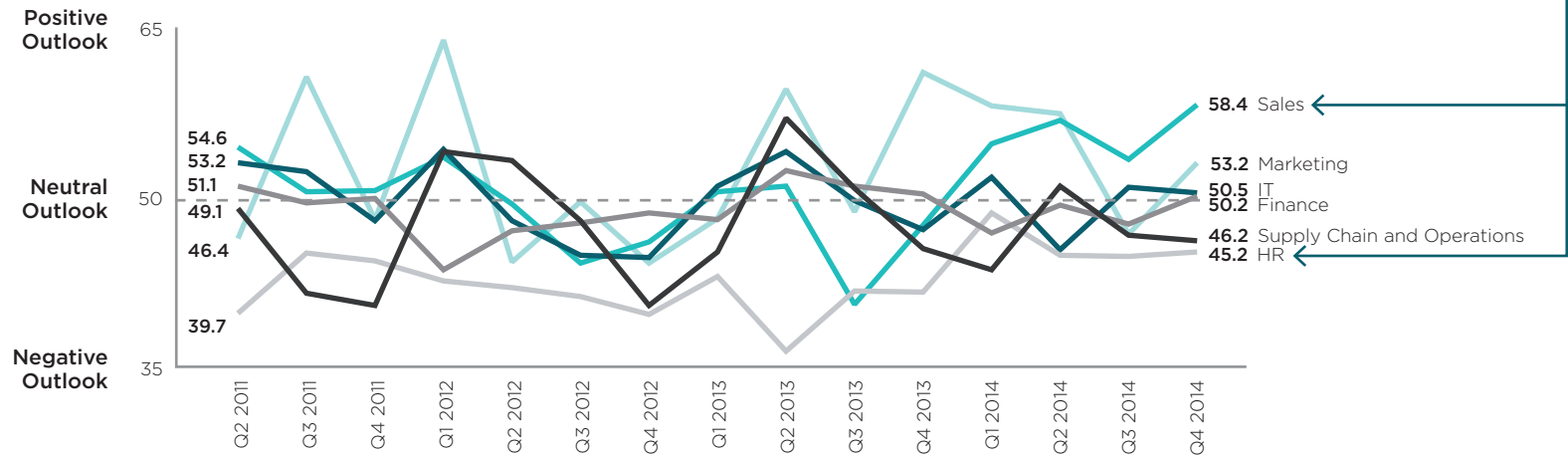


Q4 2014 *n* = 1,938 executives.
Source: CEB 2009–2014 Business Barometer Surveys.

Executives fail to return to the same optimism they had early in 2014.

HR executives have driven the pessimism of 2014, whereas their counterparts in Sales exude the most optimism.

Business Executive Sentiment Index by Corporate Function



Q4 2014 *n* = 285 (Sales); 251 (Marketing); 562 (IT); 503 (Finance); 332 (Supply Chain and Operations); 561 (HR).
Source: CEB 2011–2014 Business Barometer Surveys.

What You Can Do

Build leaders who are prepared to succeed in any business climate, as [McDonald's](#) did.

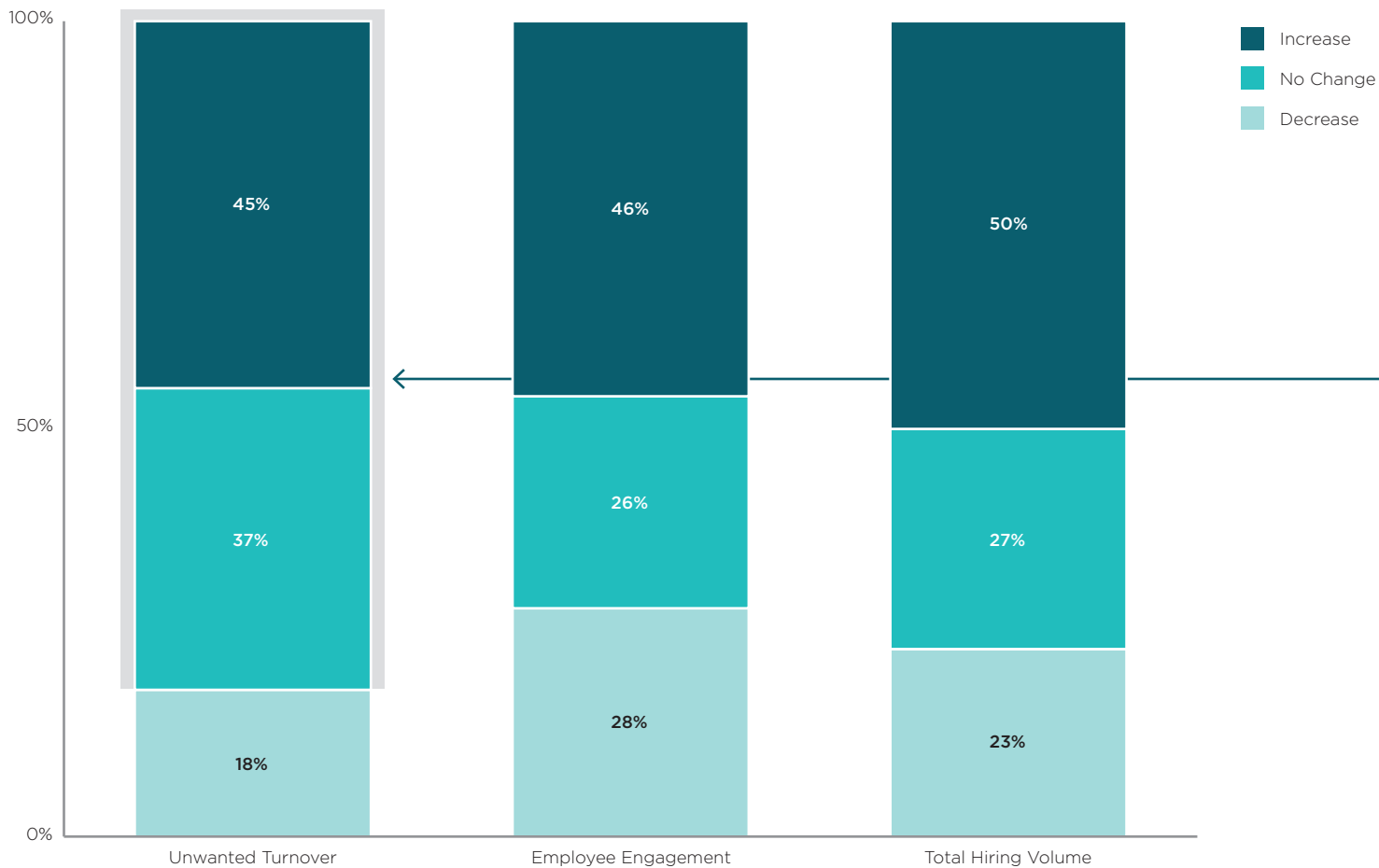
In this conversation, Rich Floersch, who is responsible for McDonald's HR function, shares insights on topics ranging from preparing the next generation of HR leaders to creating a high-relationship, high-performance culture.

Definition

The Business Executive Sentiment Index (BESI) measures senior executives' sentiment on revenue growth and cost pressure for the next 12 months in light of macroeconomic events.

Few Heads of HR Think Unwanted Turnover Will Lessen

HR Executive Sentiment on Workforce Activity, Q4 2014
 Percentage of Heads of HR Indicating Expected Change in the Next 12 Months



Nearly all heads of HR (83%) predict their unwanted turnover will stay the same or worsen.

What You Can Do

Identify ways to share your unique insight on retaining top talent with fellow business leaders. Become an Enterprise Leader who excels not only as an individual leader but also as a network leader so you can influence the C-Suite.

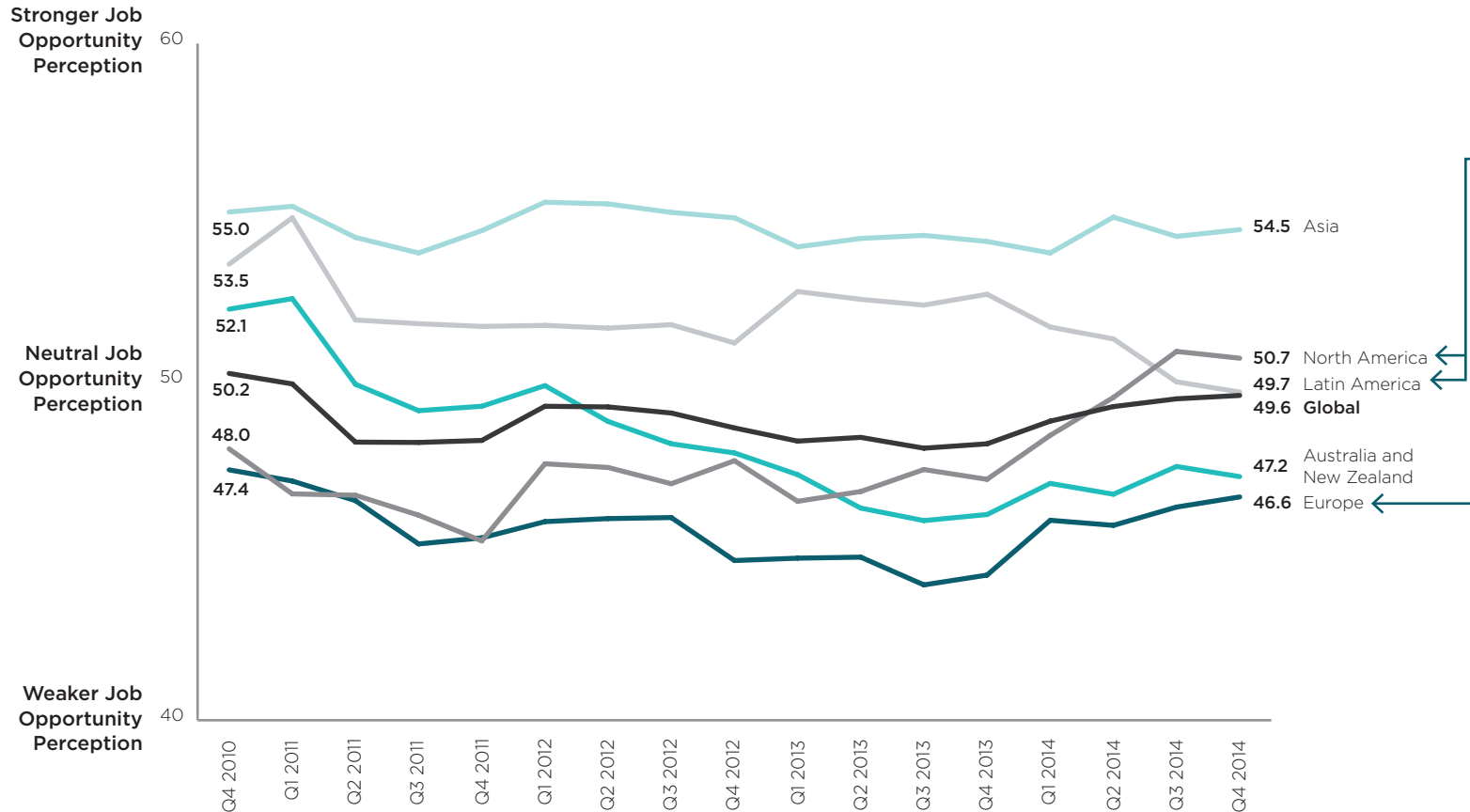
Right now, only 12% of leaders act as Enterprise Leaders. [Learn](#) about the three behaviors that distinguish enterprise leaders.

Q4 2014 n = 561 HR executives.
 Source: CEB 2014 Business Barometer Survey.

Additional Insight
 HR executives who participate in the BES1 receive a quarterly report with more than 50 metrics capturing business executives' expectations. To participate, please contact Oleg Polishchuk at polishco@executiveboard.com.

Employees Report North America and Asia Are Ripe with Job Opportunities

Job Opportunity Barometer^a
Global Employed Labor Force



North America and Latin America continue to contrast one another. Optimism drops in the south but continues in the north.

Despite the European Union's economic woes, opportunity perception reported in the region increased this quarter.

What You Can Do

Expect total STEM (science, technology, engineering, and math) roles to grow 19% by 2018. As such, organizations will be prioritizing their STEM attraction strategies. On average, organizations spend US\$11,225 per individual to recruit top STEM talent.

Find out how your organization can prepare to find these candidates who are:

- Harder to attract,
- More difficult to engage, and
- Less effective at enterprise contribution.

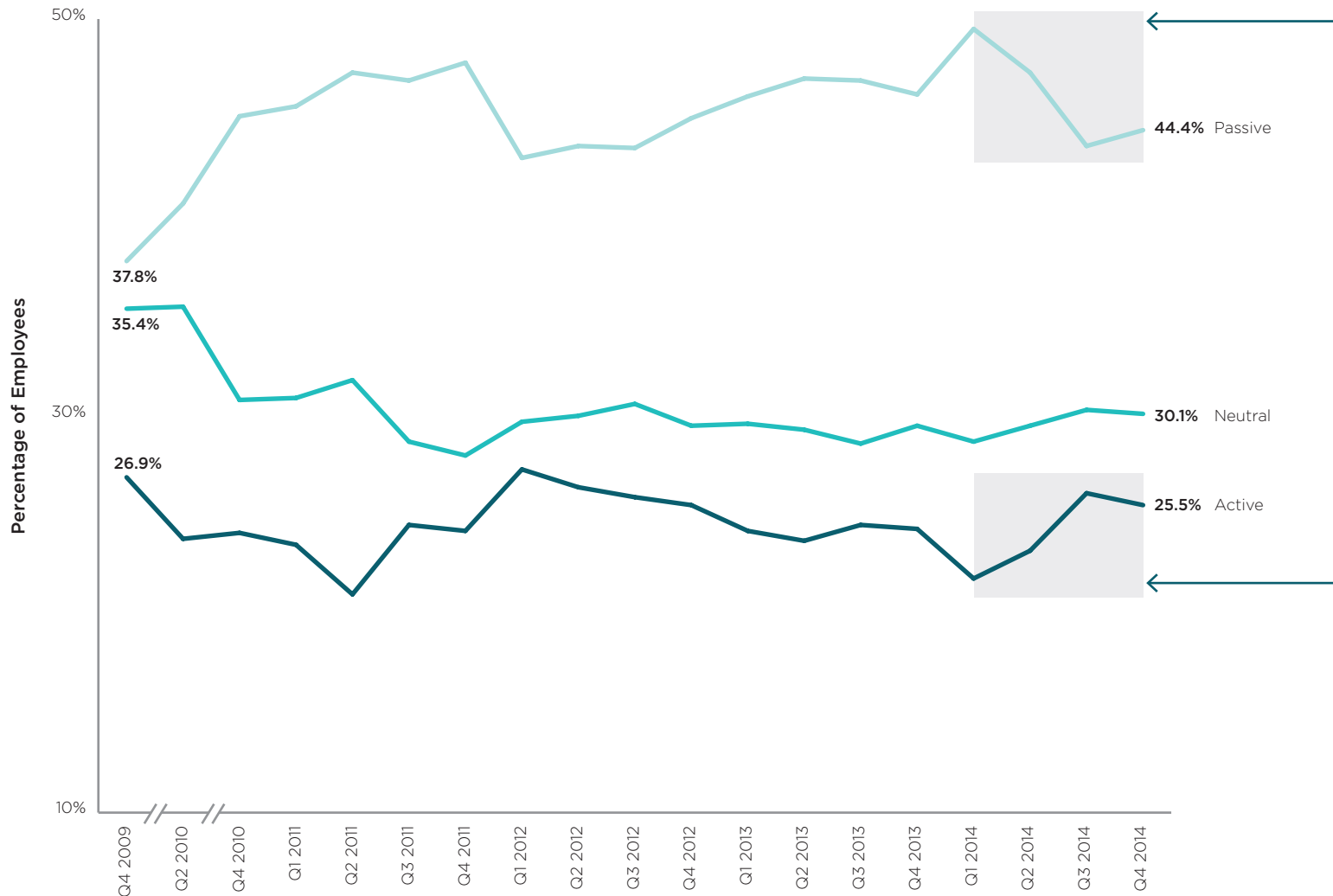
Q4 2014 n = 4,461 (Asia); 3,295 (North America); 1,198 (Latin America); 17,887 (Global); 1,503 (Australia and New Zealand); 6,438 (Europe).
Source: CEB 2010–2014 Global Labor Market Surveys.

^a The global Job Opportunity Barometer is an indexed score calculated from a battery of five questions posed to survey respondents. These answers are combined and converted to a 100-point scale, with higher values indicating stronger perceptions of job opportunities.

Definition
The Job Opportunity Barometer measures employed individuals' perceptions of the availability and quality of other employment opportunities in their current locations, industries, and functions.

Fewer Employees Are Looking for New Jobs

Percentage of Employees by Degree of Job-Seeking Behavior^a
Global Employed Labor Force



After looking for new jobs throughout 2014, employees slowed their search as the year ended.

What You Can Do

Use our [Recruiting Effectiveness Dashboard](#) to ensure your recruiters effectively bring the best talent to your organization. (Requires a CEB Recruiting Leadership Council membership).

Only a CEB Corporate Leadership Council™ member? See how you can customize your [candidate sourcing strategy](#).

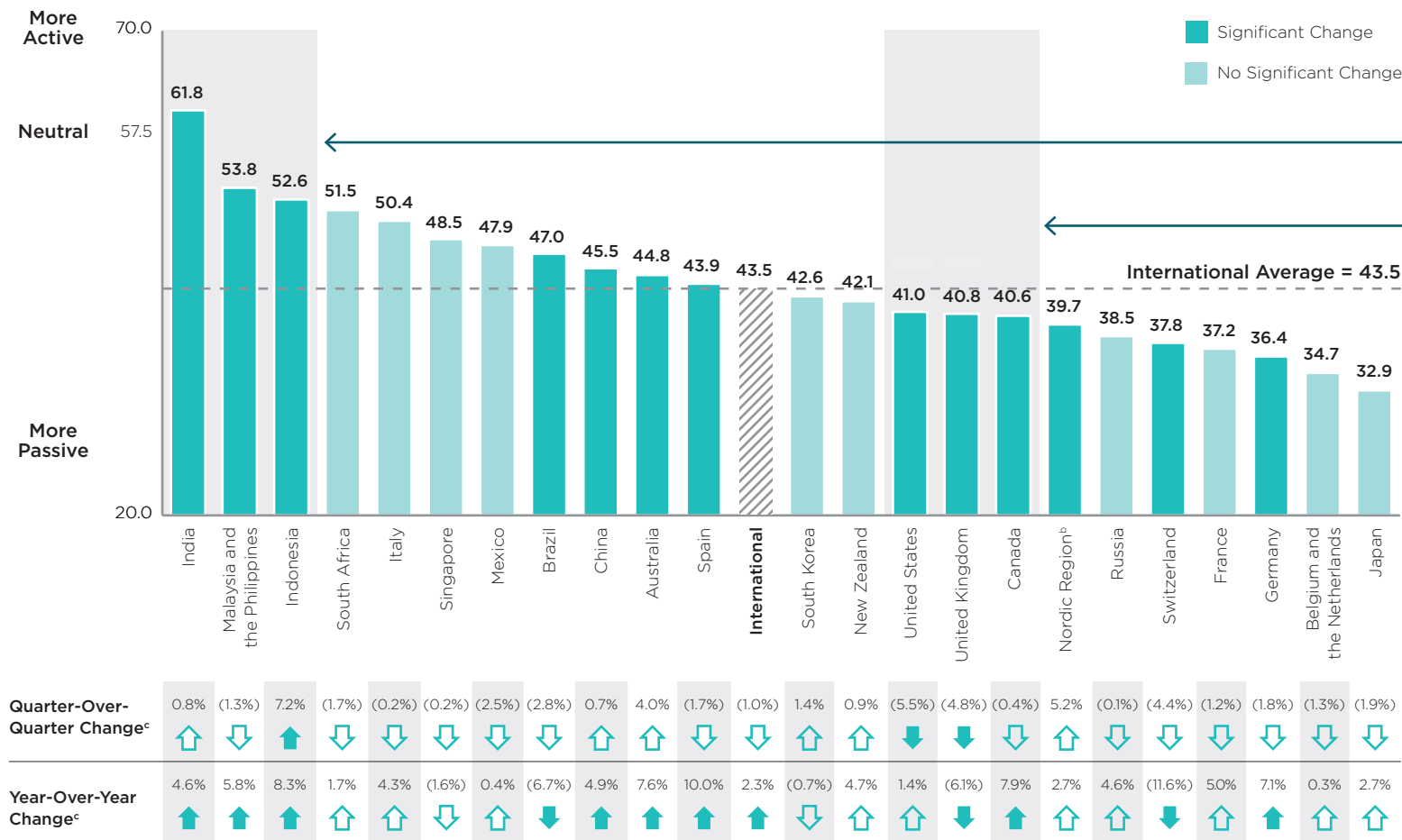
Q4 2014 n = 17,887.

Source: CEB 2009-2014 Global Labor Market Surveys.

^a Active, neutral, and passive job-search behaviors are quantified based on the Active–Passive Score detailed on page 12.

Perceptions of Job Availability Strongest in Asia

Active-Passive Score: Q4 2014^a



Already active, job seekers in growing Asian economies are even more active than they were in 2013.

Although still below the international average, job-seeking activity significantly fluctuated throughout 2014.

Q4 2014 *n* = 17,887.

Source: CEB 2013-2014 Global Labor Market Surveys.

^a The global Active-Passive Score is an index calculated from a battery of eight questions posed to survey respondents. These answers are combined and converted to a 100-point scale, with higher values indicating more active job-search activity.

^b The Nordic Region includes Denmark, Finland, Norway, and Sweden.

^c Solid arrows indicate a statistically significant change at the 95% confidence level, whereas an outlined arrow indicates the change was not significant. This value is determined by response count and standard deviation; therefore, the solid arrows will not always be the highest or lowest absolute scores.

Definition
The Active-Passive Score measures the extent to which employed individuals are inclined and demonstrate effort to look for new jobs.