

MICHAEL PAGE GLOBAL **HR BAROMETER 2013**

The HR roadmap – a shared strategic goal, yet different regional priorities

CHANGING HR LANDSCAPE EDITORIAL

Welcome to this report.

More than ever before, leaders in Human Resources face a host of challenges in all aspects of their business. At Michael Page, we observe this daily in our work with HR departments around the world.

To provide a deeper understanding of these challenges and to explore the most pressing HR priorities, we conducted a global survey in the fourth quarter of 2012. Drawing on our experience in specialist recruitment, we designed this survey to provide an informed perspective on some of the priorities and challenges you may have to address in your own organisation in 2013.

Our thanks go to all participants in the survey. Their contribution has been invaluable in helping us to gather extremely useful insights into the roles of HR leaders from those who 'walk the walk' every day.

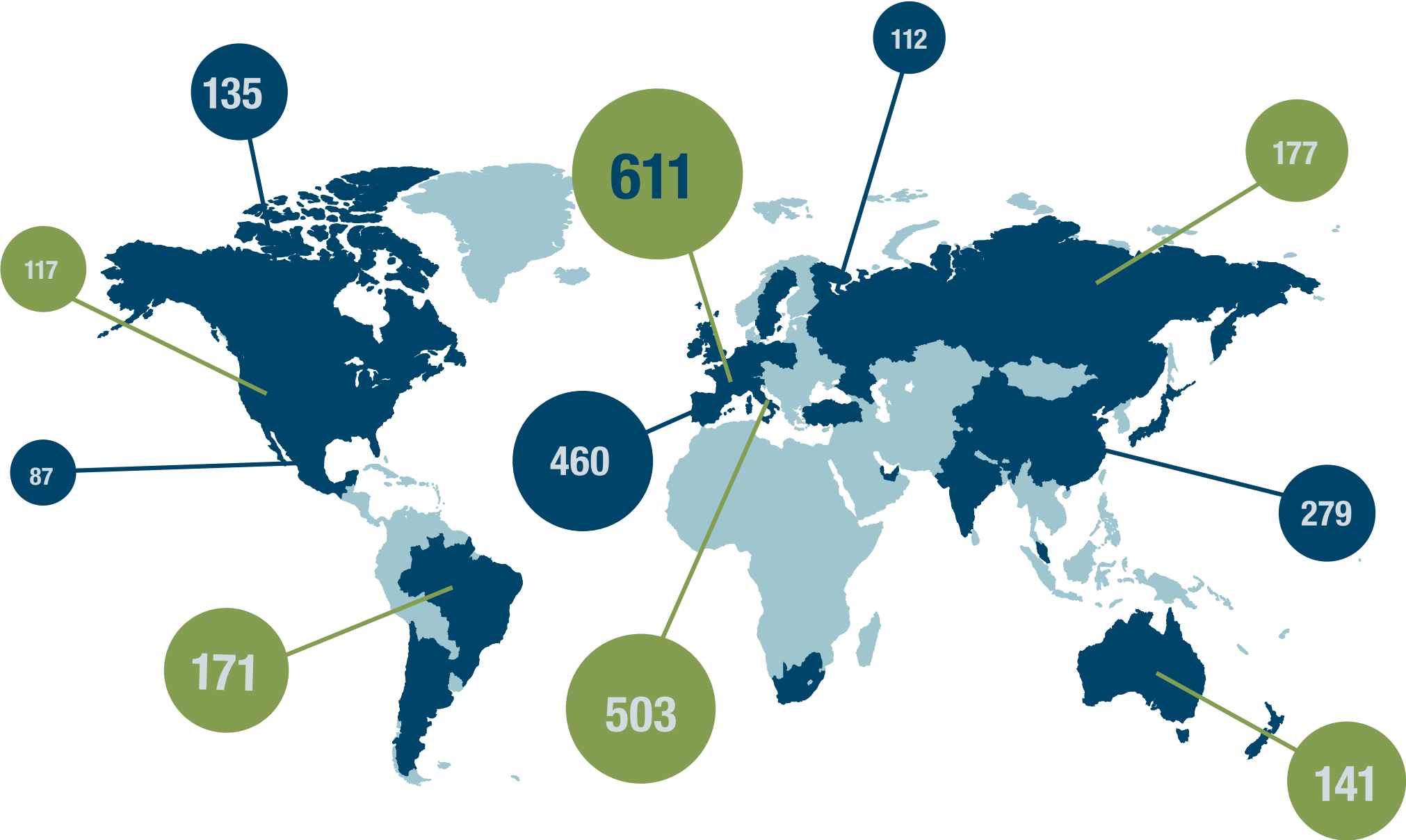
We hope you agree that the survey makes interesting reading. It confirms that HR is about both attracting and recruiting the best talent and driving staff engagement.

It also reveals a multi-faceted HR community across the world, having to deal with a complex, changing landscape comprising diversified economic settings and market conditions.

GLOBAL HR BAROMETER CONTENT

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More than 4,300 HR leaders around the world shared their opinions with us *(main countries)*



METHODOLOGY & THANKS

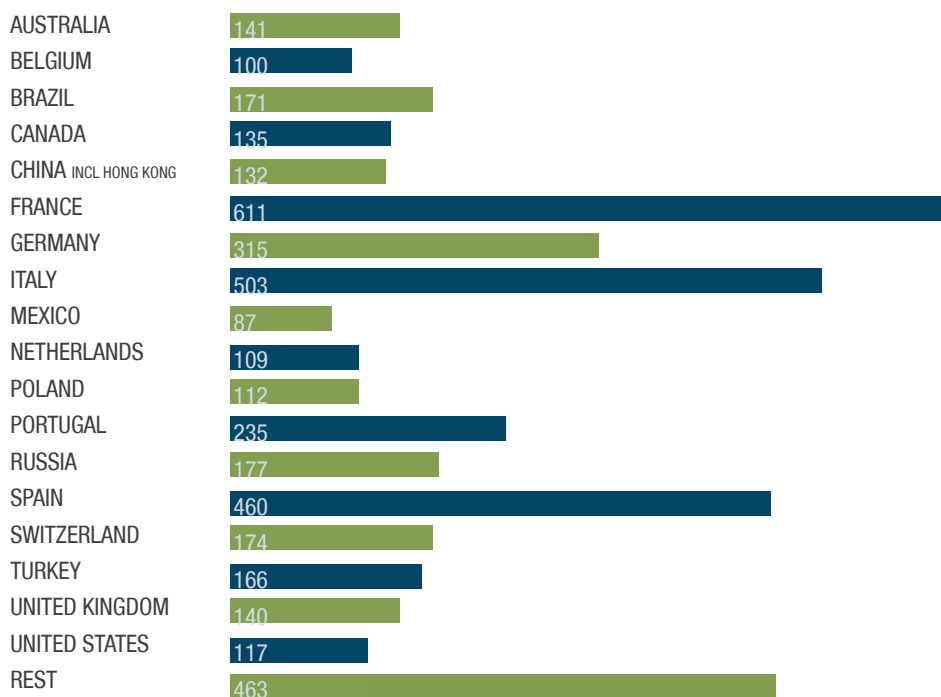
Michael Page conducted a comprehensive online survey among HR managers and directors from September to November 2012.

A total of 4,348 of these HR leaders from around the world answered the same questions, constituting a sufficient sample from which to draw valid comparisons and identify cross-regional and cross-country differences.

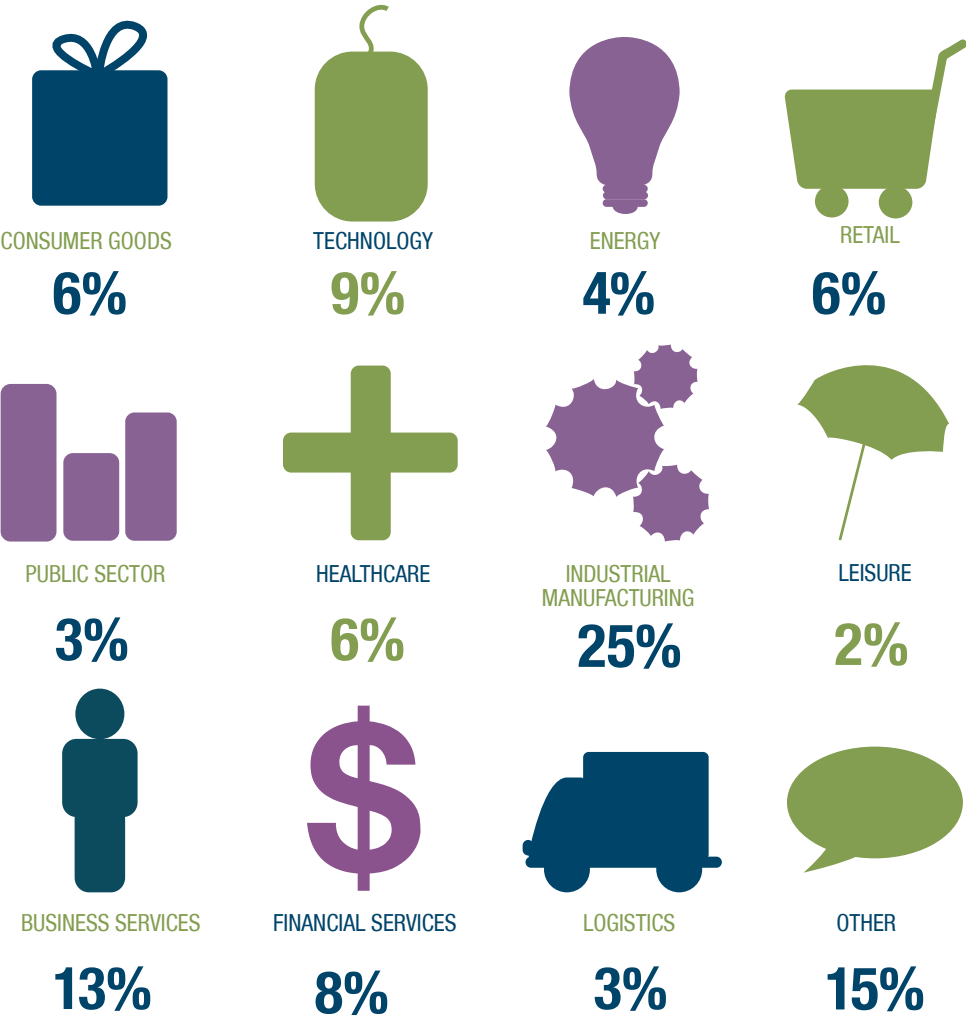
Respondents work in a broad range of companies of all sizes and in an entire spectrum of industries.

To create a truly global picture with meaningful regional representation in the results, the data has been weighted based on GDP per region.

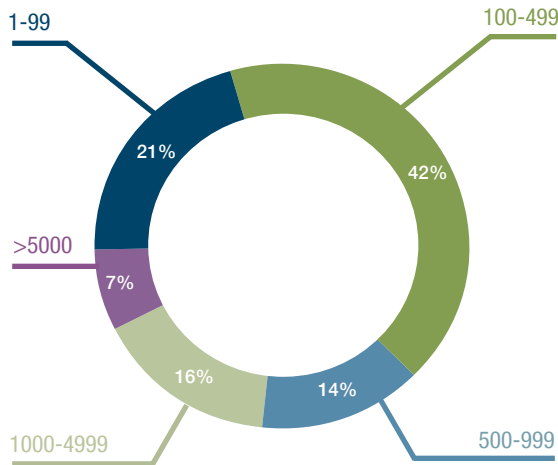
COUNTRIES WHERE RESPONDENTS WORK (number of HR leaders surveyed by region or country)



INDUSTRIES IN WHICH RESPONDENTS WORK
(in % of respondents)



LOCAL COMPANY SIZE
(in % of respondents)



Source: Michael Page

EXECUTIVE SUMMARY

Key findings

HR leaders face a two-fold challenge: to deliver on corporate goals while maximising staff engagement on a global basis. This places HR firmly at the centre of corporate business in 2013.

Despite the global economic crisis, 86% of companies surveyed are ready to hire new employees. However, a good half of respondents report that the search for suitable candidates is 'very difficult' or 'difficult'.

In the current tough climate for talent acquisition, HR leaders are now ready to capitalise on all available options for sourcing talent and there is a trend toward multi-channel talent sourcing. However, there is still heavy reliance on agencies, with the vast majority of respondents stating that recruitment consultancies remain one of the best routes to finding and recruiting employees in general, and the best route to recruiting at managerial level and above.

Employee retention at the heart of company strategy

Employee retention is just as important as recruitment: 93% of companies surveyed have a strategy for improving employee satisfaction. The traditional solutions of offering training and development and increasing compensation and benefits are still the main options for engaging staff commitment, despite the latter being the most challenging to achieve, according to the survey. In Europe and in North America especially, the capacity of organisations to play the 'reward inflation game' has become much more limited.

In the area of training and development, the focus continues to be on training for hard skills. However, retention needs to be about recruiting the right managers and developing their soft skills. After all, these fine-tuned leadership skills have a trickle-down effect on the entire workforce. Therefore, retention is a goal that forward-thinking HR leaders should anticipate, especially when hiring managers into their business.

Key findings (continued)

HR strategy on course toward culture and performance

Corporate culture and performance management are the top HR priorities influencing corporate strategy. They are particularly strong in more developed economies such as Europe, Australia and North America.

By contrast, in Latin America compensation and benefits are more relevant. This is also true of Asia, which adds talent acquisition and recruitment to the list of priorities.

HR and the business environment

If we take willingness to stay put as an indicator, HR leaders seem fairly happy with their jobs: globally 34% have been in their current position for over ten years, which means there are very high reserves of experience on the HR scene.

But HR is evolving. Cutting-edge tools are transforming HR functions into knowledge centres that have to strengthen their understanding of the best way to manage change, retain employees, create a better corporate culture... there's a seemingly endless list of challenges. Increasingly, HR leaders are expected to drive corporate strategy with their knowledge. Efficient tools are the essential engine for achieving this.

- According to HR leaders, recruitment consultancies and multi-channel talent sourcing are highly popular when it comes to winning over the best talent.
- When employees smile, the whole company smiles with them – this makes it essential to retain good managers and develop their leadership skills.
- It's vital for HR leaders to keep pace with changing times and develop knowledge in order to drive corporate strategy.

86%

of the surveyed companies are planning to hire in 2013

93%

of the surveyed companies plan to work on employee retention

95%

of HR leaders are using information systems to handle HR tasks



HOW DIFFERENT MARKET REALITIES **DRIVE DIFFERENT PRIORITIES**

HR ROADMAP

A SHARED STRATEGIC GOAL, YET DIFFERENT REGIONAL PRIORITIES

Michael Page's global HR survey brings to light a number of key insights, one of which is particularly fascinating. Within an overarching strategy of delivering on the business objectives, HR leaders are faced with several poles of priorities: winning over talent, engaging employees, recruiting the right managers... The list goes on. The ranking of these priorities, in turn, is based on region: is the country of operation an emerging market or a mature economy in crisis or a recovering mature economy?

'Talent acquisition & recruitment' is the top priority in Asia, Australia and New Zealand (ANZ) and North America, while 'Corporate culture', in the sense of employee relations and change management and performance management, steals the show in Europe.

Looking at Europe and North America:

- Within Europe, Germany concentrates mainly on 'Talent acquisition & recruitment'. France, Poland, Italy and Germany all focus on 'Corporate culture', while 'Compensation & benefits' is highly relevant in Portugal.
- In North America, four priorities are equally relevant: 'Talent acquisition & recruitment', 'Compensation & benefits', 'Corporate culture' and 'Training & development'.
- The main differences between North America and Europe can be explained by stronger economic growth in the United States. Europe's crisis continues, and this can clearly be seen in the low number of hires in Southern Europe.

By focusing on improving performance, Europe is clearly fighting to maintain its economic strength.

Looking at ANZ, Asia and Latin America:

- In Australia, 'Talent acquisition & recruitment' is highly relevant, together with 'Corporate culture'.
- The Asian agenda also has 'Talent acquisition & recruitment' at the top, which is explained by this region's escalating need for management skills.
- Top priorities in Latin America are 'Training & development', followed by 'Compensation & benefits'. However, the survey results show that HR leaders in Brazil place a high value on 'Talent acquisition & recruitment'.

«Clearly the economic crisis is currently affecting most developed countries. Regardless, the search for talent is always the no.1 goal in organisations with great optimism and which have a vision of developing a fully universalized and global economy.»

Didier Guillot, HR Director
L'OREAL ESPAÑA, Spain

TOP PRIORITIES PER REGION

(in % of respondents; multiple responses possible)

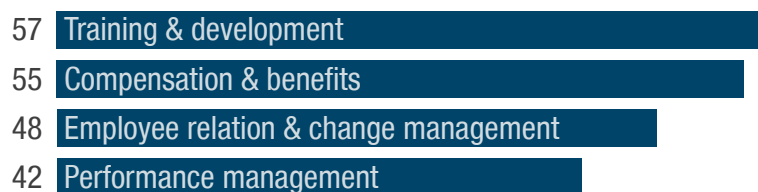
ASIA



EUROPE



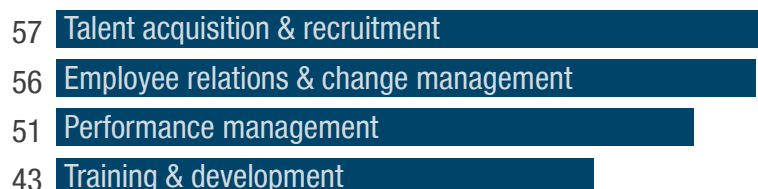
LATIN AMERICA



NORTH AMERICA



ANZ (Australia and New Zealand)



TALENT ACQUISITION

A VITAL NEED BUT ALWAYS A TOUGH CHALLENGE

One major HR challenge remains constant throughout the world: the process of finding talented employees and winning them over to the company continues to be an inherent task for HR departments, putting talent acquisition high on the HR leader's agenda.

Even if the task of talent acquisition and recruitment does not rank first in all countries, most companies will proceed with recruitment plans in 2013 – with 90% of companies outside Europe hiring.

The picture within Europe is mixed, with only 76% of companies planning to hire and marked differences between countries. Dismal economic growth in southern Europe is reflected in low hiring intentions in Italy, Spain and Portugal.

Higher hiring intentions in the UK, Germany, France and Benelux could be both an indication of a replacement strategy for ageing employees and a sign of preparation for growth.

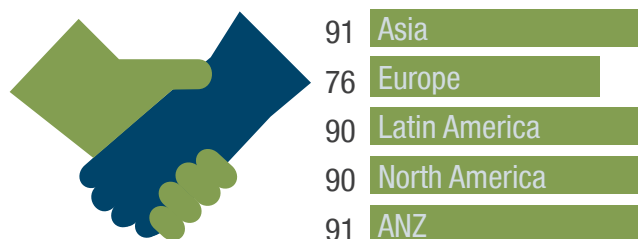
- In Europe, the highest hiring levels (around 68%) will be for permanent positions, with Russia leading, closely followed by Turkey (95%), UK (91%) and Germany (91%).
- North America is definitely preparing for growth that is already taking place: there are fewer planned hires for temporary positions (around 30%) and interim projects (around 20%).

« Talent acquisition is a key priority for Alliance Boots with the key driver being business expansion/ growth. »

Carmelo Spinella, Divisional
Director of Human Resources,
Alliance Healthcare - Alliance
Boots Group, Italy

PLANNING TO HIRE IN 2013

(in % of respondents)



KPIs MEASURED TO ASSESS RECRUITMENT EFFICIENCY

(in % of respondents; multiple responses possible)

ASIA



EUROPE



LATIN AMERICA



NORTH AMERICA



ANZ



90%

of the companies outside Europe
are planning to hire in 2013

TALENT ACQUISITION

A VITAL NEED BUT ALWAYS A TOUGH CHALLENGE

The challenge: recruitment

According to the survey, half of the organisations find the search for qualified candidates 'Very difficult' or 'Difficult'. Only a minuscule 1% find it 'Very easy'. This general pattern applies to most regions and sectors, with the exception being Australia.

Despite the challenges in recruiting talent, many organisations lack key performance indicators (KPIs) to assess recruitment efficiency.

Furthermore, around 23% do not measure recruitment efficiency at all; more specifically 30% in Europe and 14% in Latin America and Asia. Lack of measurement is more likely to be found in companies with over 5,000 employees.

Those companies that do leverage KPIs mainly focus on:

- 'Time needed to fill a position'; this is the main KPI to assess recruitment efficiency
- This is followed by 'Number of hires' and 'Number of vacancies'

The most popular solution: recruitment consultancies

The increasing difficulty of finding and recruiting good managers is leading to the adoption of multiple channel sourcing, with the top three solutions being: online job boards (used by 91% of HR leaders surveyed); own company website (84%); and recruitment consultancies (83%).

Moreover, according to HR leaders, recruitment consultancies are the best route to finding and recruiting at managerial levels and above. This is true globally across all regions and is consistently found at a country level.

As the table shows, use of recruitment agencies far outstrips methods such as referral incentives and print media. Perhaps surprisingly given their growing popularity, social media platforms lag far behind. We can surmise that HR leaders find that working with recruitment professionals brings a guarantee of service, quality and results that can offset the risks associated with recruiting the best managerial talent.

« The search for talent and the difficulty of finding it is a global concern. It shows me also that the world is demanding more professionals than it has capacity to offer, and the global economy has been trying to run faster based on this expectation. »

Marco Antonio Gomes,
Fototica, Human Resources
Director – Brazil

MEANS USED TO RECRUIT

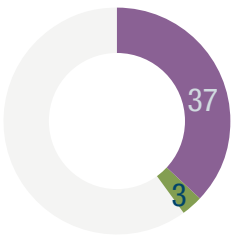
(in % of respondents; multiple responses possible)



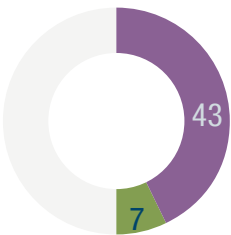
HOW WOULD YOU RATE THE SEARCH FOR QUALIFIED CANDIDATES?

(in % of respondents)

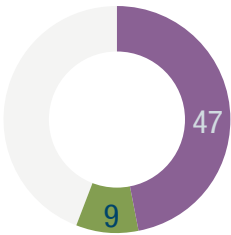
ASIA



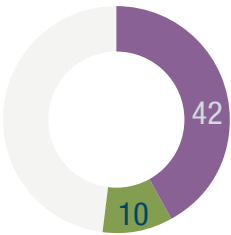
EUROPE



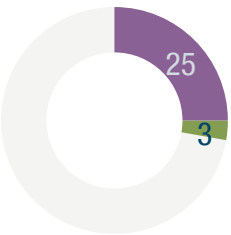
LATIN AMERICA



NORTH AMERICA



ANZ



■ Difficult ■ Very difficult

Source: Michael Page

45%

Proportion of HR leaders using recruitment consultancies to source managers

47%

of HR leaders qualify the search for candidates Difficult or Very difficult

23%

of companies have no KPIs to track recruitment efficiencies

RETAINING EMPLOYEES

IS IT TIME FOR A FRESH APPROACH?

HR leaders know it isn't easy to keep employees satisfied with their current working environment, to support their personal goals, sustain a positive and informed working environment and keep motivation levels high.

93% of HR leaders search for ways to keep employees happy within the company.

'Training & development' and 'Compensation & benefits' are the main instruments being leveraged for employee retention:

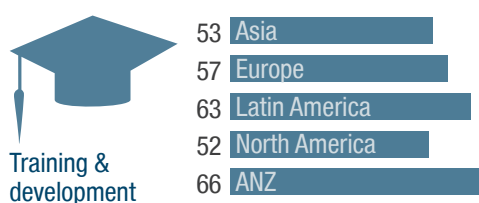
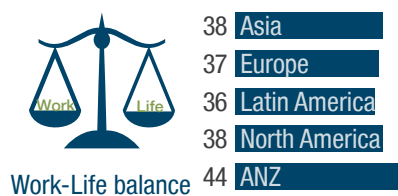
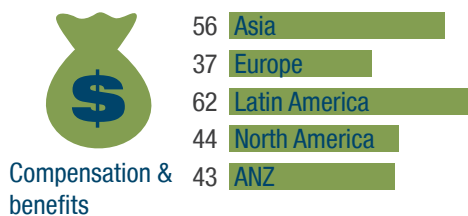
- **'Training & development'**: over 50% of HR leaders in Europe, Asia and North America and more than 60% in ANZ and Latin American countries plan to increase employee retention in 2013 through training and development, especially in the leisure industry, which plans to step up staff training. The survey shows, however, that training is still focused on employees' hard skills rather than on developing soft skills such as leadership and management training that would actually help to retain managers.
- **'Compensation & benefits'**: perhaps because offering improved compensation and benefits is the most difficult to implement, only 47% of companies plan to make it part of their strategy. However, there are strong regional differences. In the young Latin American and Asian economies, over half of the companies plan to use improved compensation and benefits. This could be because they have more scope to increase remuneration or due to the rewards battle already being waged between competing organisations.
- **'Internal communication'**, 'Internal mobility' and 'Employer branding': these aids to retaining employees round out the rankings and are more prevalent in big companies, within the financial services, retail, technology and consumer goods sectors.

« Managers are at the heart of our retention strategy. They are requested to push both team performance and well-being. Managers are provided with training to support their goals, and we have put in place a bonus system based on these personal objectives. »

Stéphane Fayol, Human
Resources Director, Terreal,
France

MEANS TO INCREASE EMPLOYEE RETENTION IN 2013

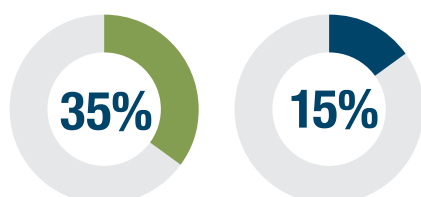
(in % of respondents, multiple responses possible)



THE TWO MOST CHALLENGING POLICIES TO IMPLEMENT

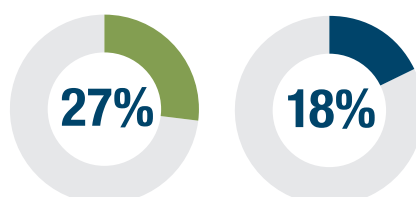
(in % of respondents)

ASIA



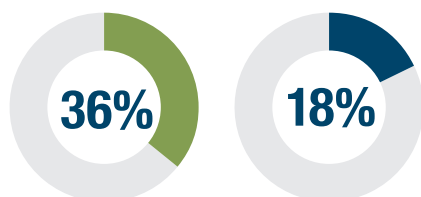
Compensations & benefits Work-life balance

EUROPE



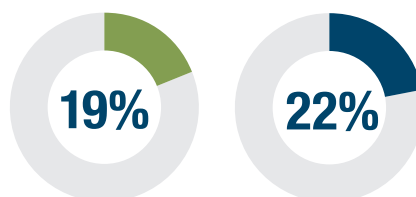
Compensations & benefits Work-life balance

LATIN AMERICA



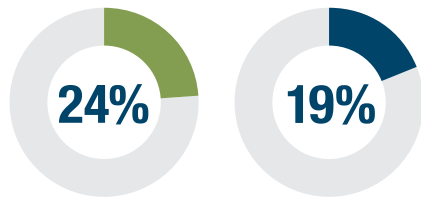
Compensations & benefits Work-life balance

NORTH AMERICA



Compensations & benefits Work-life balance

ANZ



Compensations & benefits Work-life balance

55%

of companies plan to offer training to increase employee retention

28%

of HR leaders declare that Compensation & Benefits will be the most challenging measure to implement

RETAINING EMPLOYEES

TIME TO THINK DIFFERENTLY

Supporting work–life balance as an employee retention practice

The value of time is on the rise

81% of companies provide their staff with options to improve their work–life balance. Compared with other regions, ANZ do more for their employees in terms of offering a wider range of solutions. At the country level, the same is true for Germany. From an industry perspective, retail lags behind in the number of solutions offered.

Taken as a global average, 57% of the companies in the survey are trying to support employees' work–life balance by compensating overtime with time off.

Following time compensation, organisations are offering:

- 'Health and wellness programmes' – with ANZ, South and North America leading the way. In Europe, these programmes are significantly under-represented.
- 'Home office' – letting staff work from home is a valid means for a third of the companies especially in ANZ and in Germany, within the technology, healthcare and consumer goods sectors.
- 'Time-management training' is provided by only a quarter of the companies surveyed, while nursery provision or parental leave is offered by only a fifth.

The low ranking of 'Home office' and 'Nursery/Parental leave' indicates that working conditions are not yet as flexible as they need to be in some markets.

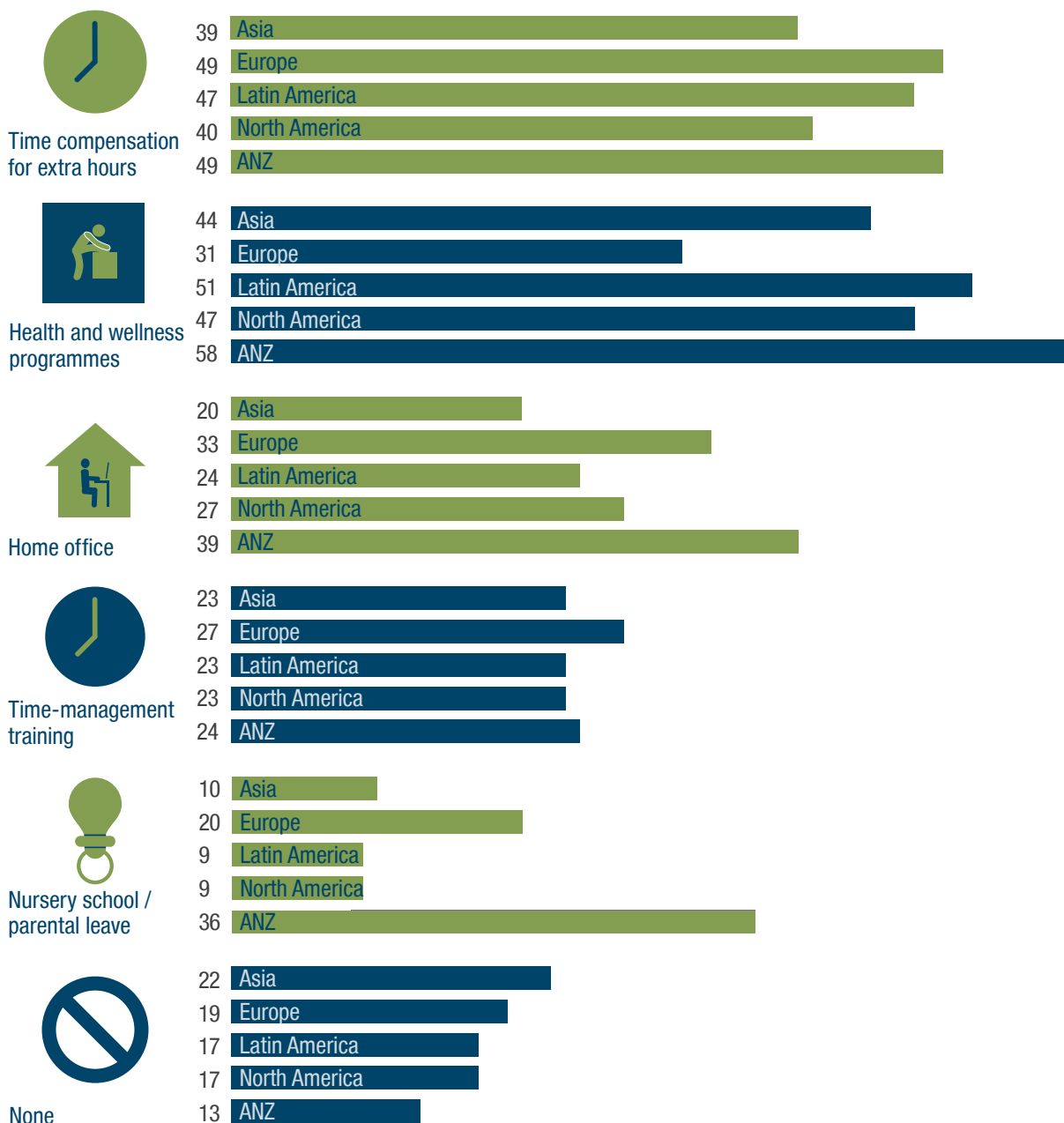
Companies are finally starting to understand just how valuable time is to their employees and to utilise the positive effect this has in keeping staff satisfied and motivated.

« 2012 saw Reduction in Force activity globally as well within EMEA resulting in more work with less resources – it is certainly putting a strain on work–life balance – enacting technology enablers, relooking at shared service centres and keeping the communication channels open »

Brian Kiel, HR Director
Europe, Middle East & Africa,
Boart Longyear, Switzerland

MEASURES TAKEN TO ENSURE WORK-LIFE BALANCE

(in % of respondents; multiple responses possible)



Source: Michael Page



THE PEOPLE BEHIND THE PEOPLE **HR LEADERS**

THE HR JOB DESCRIPTION

From a comprehensive list, respondents selected the following as the five main functions that fall within HR leaders' scope of work:

1. 'Talent acquisition & recruitment' ranks first across all regions.
2. 'Corporate culture' (includes employee relations and change management).
3. 'Training & development'.
4. 'Defining HR standards & policies'.
5. 'Compensation & benefits'.

Corporate social responsibility

(CSR) is often cited as another role for HR leaders. However, the number of planned campaigns varies from region to region. In Latin America, Asia and ANZ, over 70% of the companies are planning CSR campaigns, while this share is below 60% in Europe and North America.

The top three campaign topics focus on:

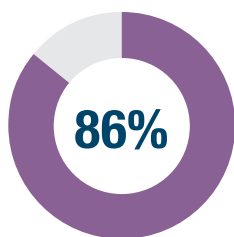
1. 'Sustainable development', which is especially important in Latin America.
2. 'Charity', which is a main focus in Asia.
3. 'Diversity', which is emphasised in ANZ.

Within Europe, 'Sustainable development' campaigns are more frequently planned in the Netherlands, Belgium and France, and are an important focus in Canada too. Campaigns around 'Diversity' are mostly planned in Spain, with this country having put a strong focus on diversity in recent years.

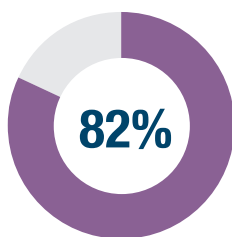
FUNCTIONS WITHIN THE SCOPE OF THE HR DEPARTMENT'S WORK

(in % of respondents; multiple responses possible)

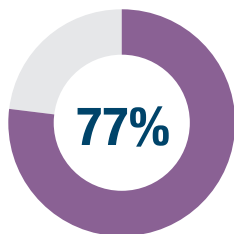
TALENT ACQUISITION & RECRUITMENT



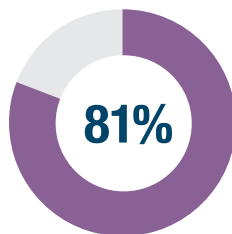
EMPLOYEE RELATIONS & CHANGE MANAGEMENT



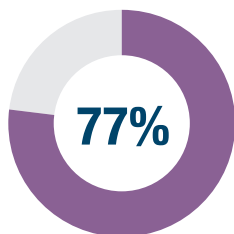
TRAINING & DEVELOPMENT



DEFINITION OF HR STANDARDS & POLICIES



COMPENSATION & BENEFITS



86%

of surveyed HR leaders
manage Talent Acquisition

64%

of companies are planning CSR
campaigns in 2013

Source: Michael Page

HR LEADER

DESCRIPTION

The question of compensation

The numbers are quite compelling from region to region... In Europe and Asia, more than one third of HR leaders take home less than EUR 60,000/USD 75,000 per annum.

In the other regions, HR leaders earn more:

- Income levels of EUR 150,000/USD 185,000 and above are achieved in ANZ (26% in total) and in Latin America (23% in total).
- Asia and North America are both in the middle of the high-compensation road at 18% in total.
- Surprisingly, Europe has fewer than one in ten high-earning HR leaders.

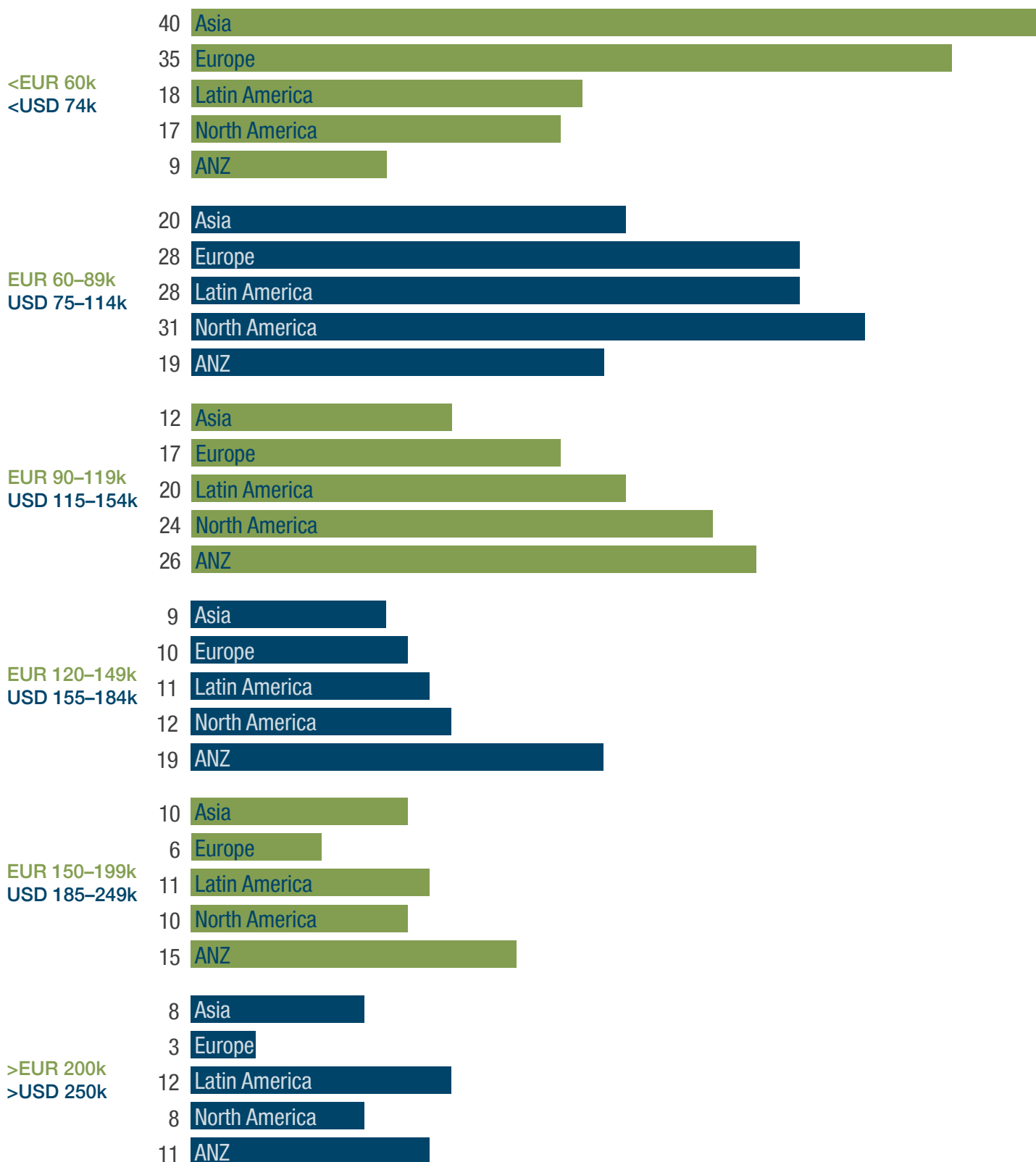
As expected, the highest income levels in Europe are attained in Switzerland, Germany and the Netherlands. However, the weaker European compensation level is mostly influenced by Portugal, Russia, Poland, Turkey and France, partly due to the younger age structure in these countries.

Annual compensation is strongly dependent on company size.

The bigger the company and the HR department, the better its HR leaders are paid. The type of industry also plays a role: HR leaders are best paid in the traditional sectors of financial services, energy and consumer goods. At the other extreme, the lowest incomes are found in the service sector (business and retail).

COMPENSATION & BENEFITS

(in % of respondents; optional indications)



Source: Michael Page

HR LEADER

DESCRIPTION

There are also some significant differences in the proportion of compensation that is variable:

- In Europe, North America and ANZ, about 40% of HR leaders have very low variable compensation, which is a much higher percentage than in Latin America and Asia.
- When the regions are compared, Latin America is in pole position. One out of four HR leaders enjoys the region's high variable share of more than 20%.
- In line with the general compensation structure previously mentioned, the variable share is lowest in smaller companies and highest in big companies.
- In the public sector, the variable element is extremely low, while it is higher in the financial services, consumer goods and energy sectors.

VARIABLE SHARE

(in % of respondents)

<5%



5-9%



10-14%



>20%



15-20%



Source: Michael Page

NEW TOOLS

SHAPING TOMORROW'S HR

Cutting-edge tools are key to success and the use of external and internal software continues to be common practice in HR, showing an increase in all areas over the last decade.

The survey results also show that Human Resources Information Systems (HRISs) have been widely adopted by HR departments:

- 'Payroll' – over 95% of HR leaders surveyed report using a payroll system.
- 'Staff administration' – used by 88% in Latin America, 79% of HR departments globally.
- 'Appraisal' and 'Recruitment' – systems for these functions are used to a lesser extent but are still used by a majority (63% and 60% respectively).
- 'Assessment' – at 51%, this ranks bottom of the list of systems used.

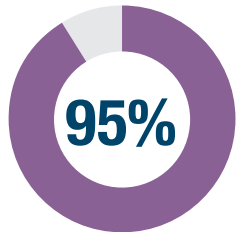
While HR is a provider of staff data on-demand for management, it is also undertaking the transformation to becoming a knowledge centre, linking people to business objectives and answering crucial questions.

HR has great potential to add corporate value, in addition to its existing knowledge base of traditional legal expertise, for instance, and compensation and benefits. To fulfil this role, HR leaders need to adapt to changes and develop ongoing training for HR teams in using new tools.

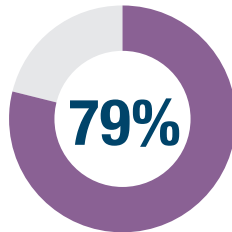
USE OF SOFTWARE IN HR FIELDS

(in % of respondents; multiple responses possible)

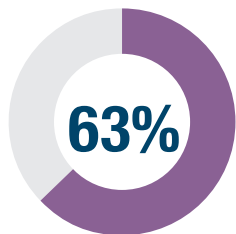
PAYROLL



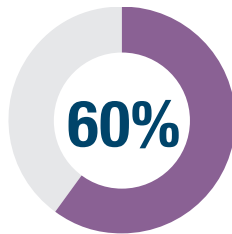
STAFF ADMINISTRATION



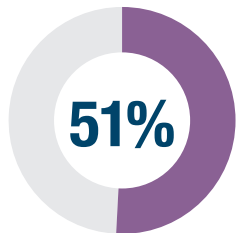
APPRAISAL



RECRUITMENT



ASSESSMENT



Source: Michael Page

95%

of HR leaders are using information systems to handle tasks

NEW TOOLS

SHAPING TOMORROW'S HR

One of the major developments that HR leaders have to take on board in day-to-day business is the deployment of outsourcing. The HR areas that are typically outsourced are varied, starting with 'Payroll' and ending with 'HR communication & event management'.

The use of outsourcing strongly depends on the region. Latin America (Brazil) has a higher tendency to outsource HR services, while ANZ are at the opposite end of the scale.

In Europe, there are some country-specific differences: Belgium, Turkey, Italy and Portugal have a higher tendency to outsource. In contrast, France, Germany, Switzerland, the UK and Russia have comparatively low overall outsourcing scores.

Of course, company size and sector also have to be taken into account:

- Small companies (1–99 employees) are more likely to outsource more areas – especially 'Payroll', 'Training' and 'Temp operations'.
- Big businesses (1,000+) outsource 'Assessment' and plan to include 'Payroll', 'HR information' and 'Temp operations'.
- 'Payroll' is outsourced more (50%) in financial services, healthcare and technology.
- 'Temp operations' are outsourced more in consumer goods and energy, with the latter sector also outsourcing 'Talent acquisition & recruitment'.

Assessments are used by 80% of the companies in the survey.

The culture of assessing employees varies among European countries: with as many as 90% of employers from Belgium, France and Russia undertaking assessments, and only between 60% and 70% in Germany, Italy and Spain. Bigger companies and the financial services and retail sectors place a greater emphasis on assessments.

« In bigger HR structures, the ongoing demand for better quality and fulfilment of additional tasks (e.g. war for talents) and the desired cost reductions (e.g. payroll, appraisal) will change the roles dramatically. To achieve these targets, a better software technology is an indispensable condition. »

Roland Jüttner,
Director Human Resources,
Business Group Conductors
& Copper Solutions, LEONI
Draht GmbH, Germany

OUTSOURCED HR AREAS
(in % of respondents)

PAYROLL



ASSESSMENT



TEMP OPERATIONS



HR INFORMATION



TRAINING



TALENT ACQUISITION & RECRUITMENT



Source: Michael Page

HR PEOPLE

EXPERIENCED & INTERNATIONAL

When it comes to age, 60% of HR leaders are between 35 and 49 years across all regions. Younger HR leaders have a better chance of reaching a managerial position in Asia compared to the other regions. Within Europe, there are slight differences between the countries: Poland, Portugal, Russia and Turkey have a younger age structure.

Likewise, in small and medium-sized companies, HR leaders tend to be slightly younger.

34% of HR leaders – as high as 42% in North America – are very experienced, having clocked up more than ten years in their current position.

In the Latin America region, Brazil has more experienced HR leaders than Mexico. Within Europe, the share of very experienced HR leaders is highest in Germany, Italy and Turkey. France, Switzerland and the UK have a higher share of less experienced HR leaders. In companies with 5,000+ employees, the share of leaders with short-term experience is higher than in smaller companies.

58% of HR leaders have experience of working abroad.

Think globally, act regionally

As an effect of globalisation and the fact that we are seeing stronger and sharper regional differences, HR leaders must be able not only to design global processes but to implement them in a regionally differentiated manner.

A career path for women

Globally, 59% of HR leaders are women. However, there are regional differences. Company size also has a bearing: whereas in small and medium-sized companies, the share of women is around 60%, in companies of 1,000+ employees it is only 45%.

Interestingly, industries do not differ very much in this area, apart from the manufacturing sector. Here, stronger male representation is to be found in the HR department, and also in the company as a whole.

The share of women at the senior level is above the men's share in the higher echelons, such as HR director or HR vice president, with women forming 52%, according to survey findings, with ANZ and North America leading the way (70% and 64% respectively).

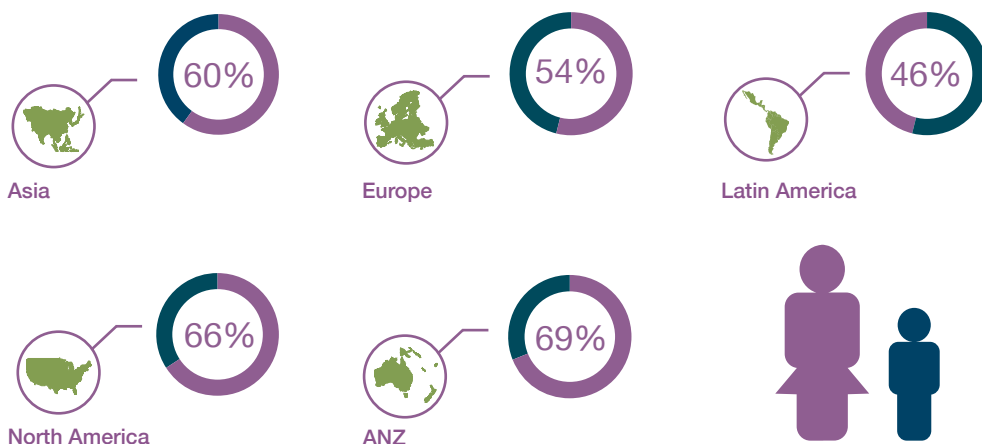
When it comes to moving up the career ladder, women in HR have the edge over their female counterparts in other company functions. Taking finance as an example, the Michael Page CFO Global Barometer report showed that fewer than 15% were female, with a very low 5% in Latin America.

« It is also important to get the right balance between HR business partners & functional HR people. One has to support the other. »

Ricky Long, Regional Senior
HR Director of Atmel,
Hong Kong

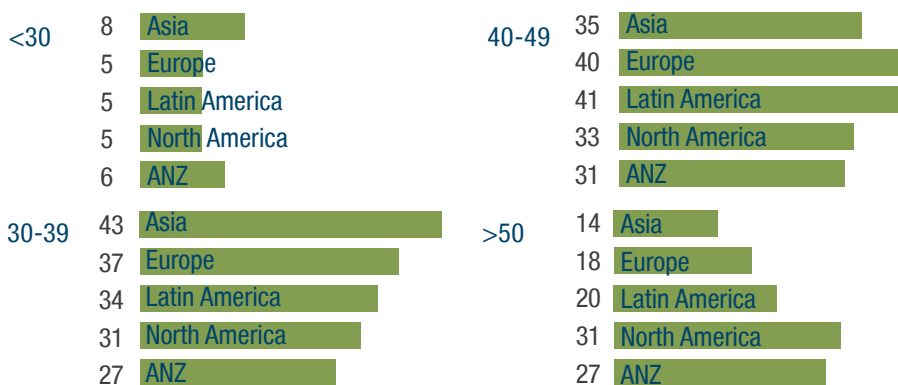
GENDER OF HR LEADERS SURVEYED

(in % of respondents)



AGE OF HR LEADERS

(in % of respondents)



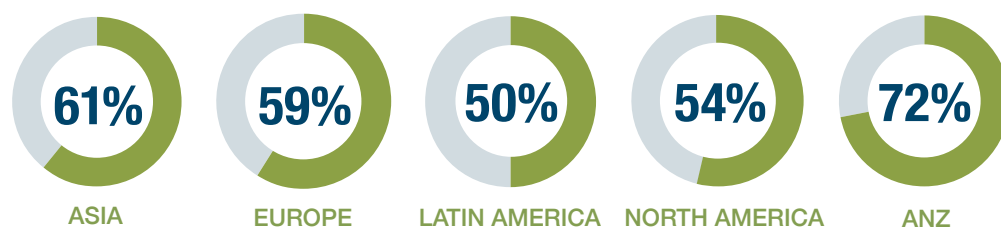
EXPERIENCE OF HR LEADERS

(in % of respondents)



HR LEADERS WITH EXPERIENCE OF WORKING ABROAD

(in % of respondents)



59%

of HR leaders are women

52%

of HR Directors are women

33%

of HR leaders have held their position for over 10 years

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Contact us for a conversation about your regional requirements and the ways in which we can add value to your business.

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