



# Global Talent Monitor 1Q19: Update on Workforce Activity

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## Overview

Each quarter, our Global Talent Monitor is sourced from over 40,000 employees in over 40 countries and regions to offer the most authoritative look at the latest global and country-level trends so HR leaders know what attracts, engages and retains talent.

### Key Findings

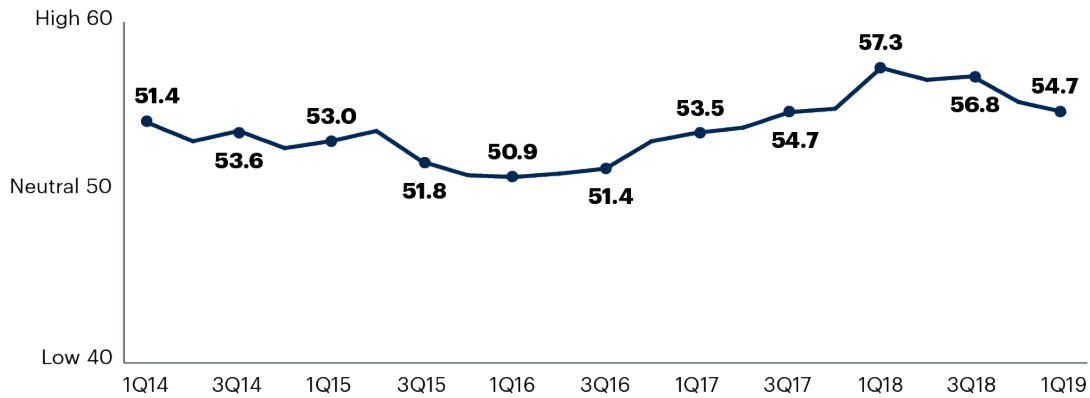
- Employees' confidence in the business outlook decreased this quarter, while employee perceptions of job opportunity increased.
- Fewer employees were actively seeking new employment in the first quarter of 2019.
- Employees' discretionary effort increased globally and in most regions. Employees' intent to stay at their current organizations increased globally yet decreased slightly in most regions.
- Compensation, work-life balance and stability remain the top job attributes employees look for in a new employer.

## Employee Business Confidence and Job Perception

Employees' confidence in business conditions decreased in the first quarter of 2019. Indexed at 54.7, this marks the lowest point in the business confidence index since the third quarter of 2017. However, it remains higher than any point from 2Q15 to 3Q17 (see Figure 1).

Figure 1: Business Confidence Index

**Business Confidence Index**  
Global Employed Labor Force



n = 40,120  
Source: 1Q14-1Q19 Gartner Global Labor Market Surveys

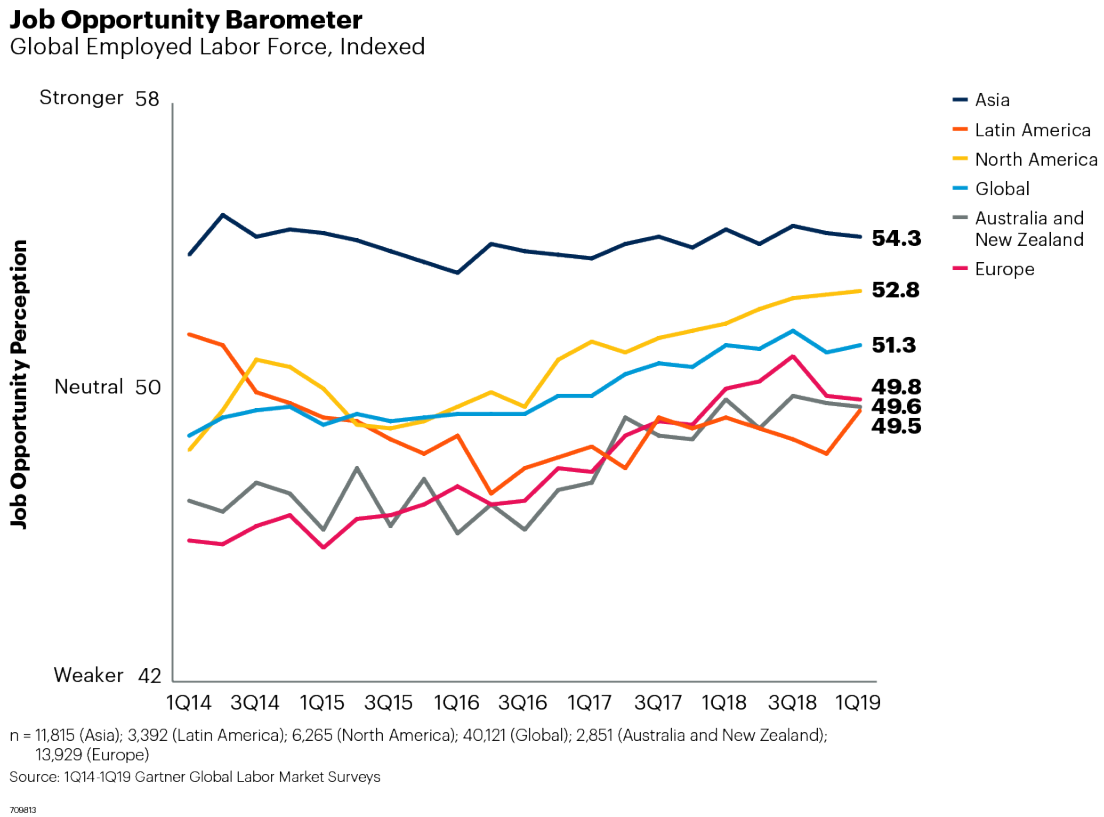
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**The business confidence index uses four survey questions to measure employees' confidence in the near-term business conditions and long-term economic prospects in their industry.**

## Global Job Perceptions Increase

According to our job opportunity barometer, employees in most regions perceived more job opportunities in the first quarter of 2019 than the last quarter of 2018. This increase demonstrates employees' increased perception of options for employment in their locations, functions and industries. In Europe, Asia, Australia and New Zealand, however, employees reported a slight decrease in their job-opportunity perceptions (see Figure 2).

Figure 2: Job Opportunity Barometer



The job opportunity barometer uses five survey questions to measure employees' perceptions of the availability and quality of other employment opportunities in their current locations, industries and functions.

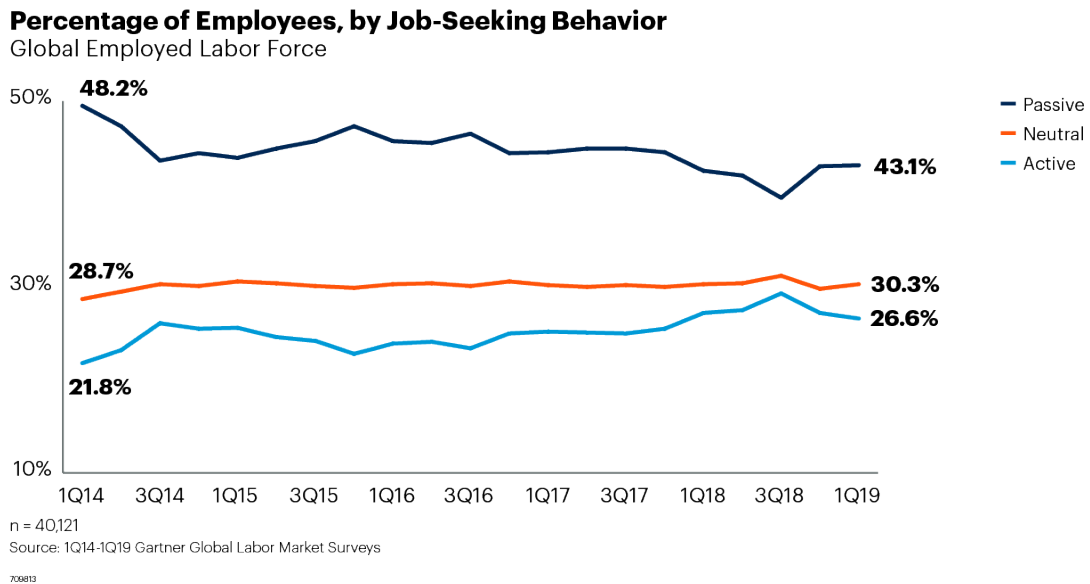
## Active Job Seeking in the Workforce

Globally, only 26.6% of the workforce actively sought a new job, a decrease from the 27.2% of employees actively searching last quarter. The percentage of neutral job seekers increased from 29.8% to 30.3%, whereas passive job seeking increased to 43.1% (see Figure 3).

Job-seeking activity by country mostly decreased. India displayed a significant decrease in the first quarter yet remains the country with the highest active-passive score (i.e., the most job-search activity), with Island Southeast Asia and Indonesia following behind. Employees in Japan, Belgium and the Netherlands, and Germany report the lowest levels of job-seeking activity (see Figure 4).

Spain, Australia, the U.S. and Switzerland were the only countries with significant increases in job seeking compared to last quarter. Employees in these countries actively sought new employment more often than in the fourth quarter of 2018. Five countries experienced significant decreases in job-seeking behavior this quarter, including India, Indonesia, China, the U.K and Belgium and the Netherlands (see Figure 5).

Figure 3: Percentage of Employees, by Job-Seeking Behavior

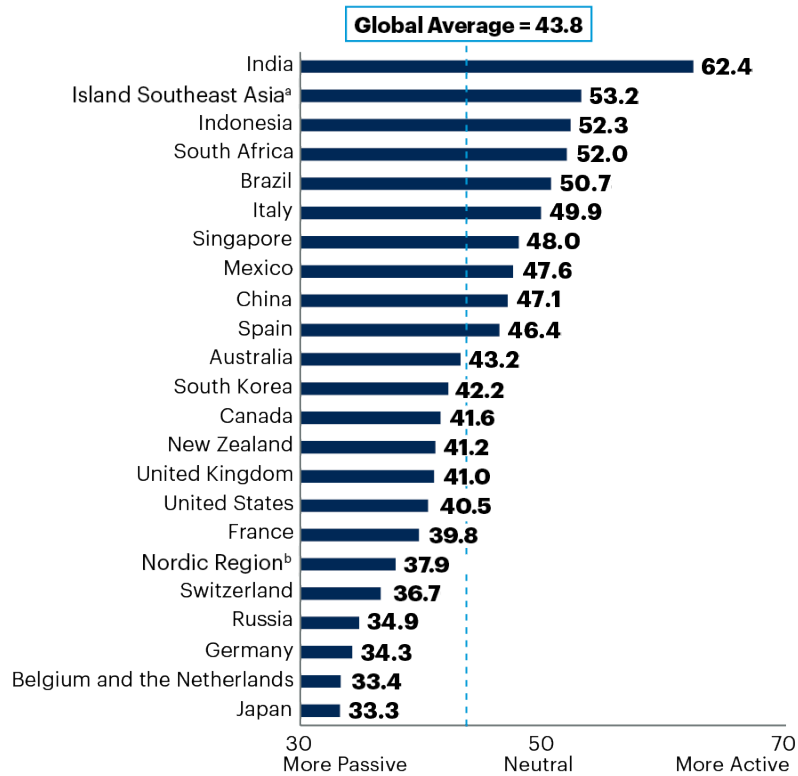


**The active, neutral and passive categories group employees according to the extent of their inclination and demonstrated effort to look for a job.**

Figure 4: Active-Passive Score

### Active-Passive Score

Global Employed Labor Force, Indexed



n = 40,121

Source: 1Q19 Gartner Gartner Global Labor Market Survey

<sup>a</sup> Island Southeast Asia includes Indonesia, Malaysia, the Philippines and Singapore.

<sup>b</sup> The Nordic region includes Denmark, Finland, Norway and Sweden.





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**The active-passive score uses eight survey questions to measure the extent to which employees are inclined and demonstrate effort to look for new jobs.**

Figure 5: Changes in Active Job Seeking, by Country

**Changes in Active Job Seeking, by Country**  
Global Labor Force, Indexed

	Quarter-Over-Quarter Change <sup>a</sup>	Year-Over-Year Change <sup>a</sup>		
India	-6.5%	↓	-7.7%	↓
Island Southeast Asia <sup>b</sup>	-1.0%	↓	2.5%	↑
Indonesia	-5.6%	↓	1.0%	↑
South Africa	5.5%	↑	4.9%	↑
Brazil	1.7%	↑	-1.2%	↓
Italy	1.0%	↑	-2.9%	↓
Singapore	1.5%	↑	-6.1%	↓
Mexico	-0.2%	↓	-2.1%	↓
China	-14.6%	↓	19.2%	↑
Spain	12.8%	↑	3.6%	↑
Australia	10.3%	↑	16.3%	↑
South Korea	-1.0%	↓	-4.8%	↓
Canada	2.9%	↑	1.8%	↑
New Zealand	3.8%	↑	-2.9%	↓
United Kingdom	-9.6%	↓	-13.0%	↓
United States	10.2%	↑	10.8%	↑
France	-4.4%	↓	-3.1%	↓
Nordic Region <sup>c</sup>	0.7%	↑	-1.1%	↓
Switzerland	10.4%	↑	6.8%	↑
Russia	1.5%	↑	-7.9%	↓
Germany	-4.8%	↓	-12.3%	↓
Belgium and the Netherlands	1.5%	↑	3.1%	↑
Japan	-0.1%	↓	-2.5%	↓

 Statistically Significant Increase  
 Insignificant Increase  
 Statistically Significant Decrease  
 Insignificant Decrease

n = 40,121

Source: 1Q19 Gartner Global Labor Market Survey

<sup>a</sup> Confidence level is 95%. This value is determined by response count and standard deviation; therefore, the solid arrows will not always be the highest or lowest absolute scores.

<sup>b</sup> Island Southeast Asia includes Indonesia, Malaysia, the Philippines and Singapore.

<sup>c</sup> The Nordic region includes Denmark, Finland, Norway and Sweden.

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## Top Job Attributes Attracting Talent

This quarter's data provides three primary take-aways on what factors drive an employee's decision when considering a new job:

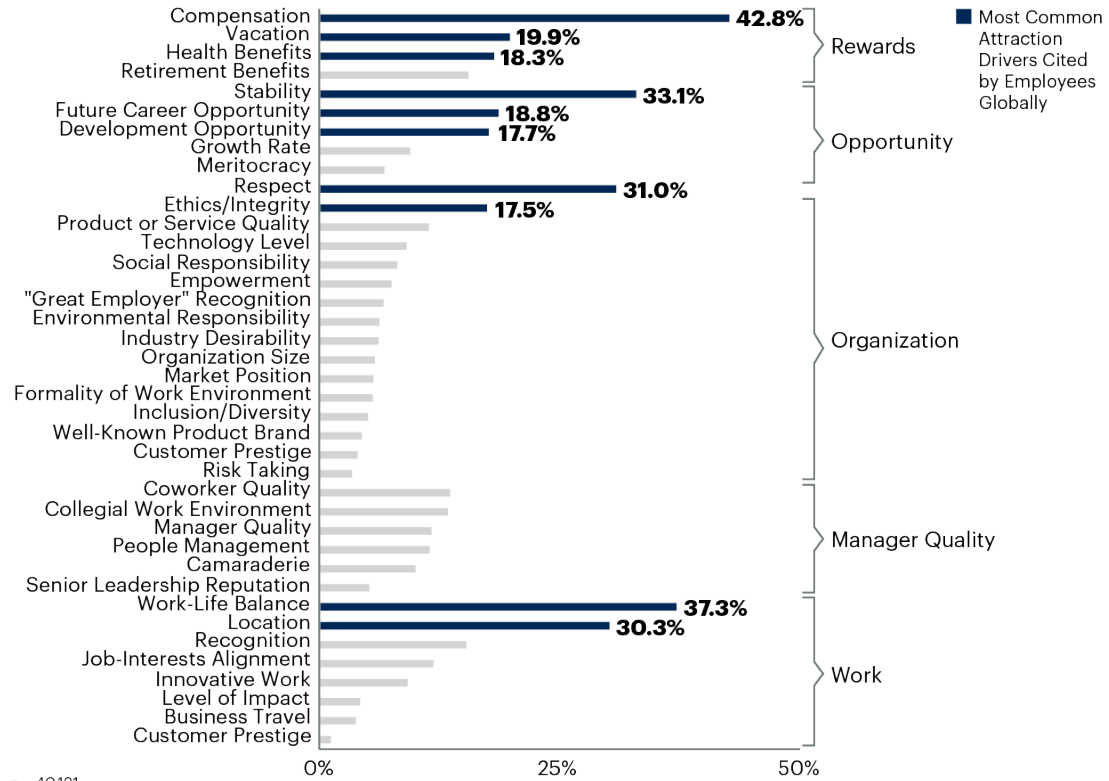
- Globally, the top three drivers of attraction have remained the same for three quarters, since the third quarter of 2018: compensation, work-life balance and stability in the workplace (see Figure 6).
- Location is the second most important factor driving an employee's decision when considering a job in Australia, the U.K. and the U.S. (see Figure 7).
- Future career opportunity increased in rank globally in Australia, China, India and the U.K.

For more information on these attributes, please refer to the [EVP Model Attributes](#).

Figure 6: Percentage of Employees Ranking Drivers Among the Top 5 Attributes Influencing Employer Selection

### Percentage of Employees Ranking Drivers Among the Top 5 Attributes Influencing Employer Selection

Global Employed Labor Force



n = 40,121  
 Source: Gartner 1Q19 Global Labor Market Survey  
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Figure 7: Top 10 Attraction Drivers for Select Countries and Regions

**Top 10 Attraction Drivers for Select Countries and Regions**  
Change in Rank Compared to Previous Quarter<sup>a</sup>

Rank	Global	Australia	China	India	Island Southeast Asia <sup>b</sup>	United Kingdom	United States
1	Compensation	Work-Life Balance	Compensation	Work-Life Balance	Work-Life Balance	Work-Life Balance	Compensation
2	Work-Life Balance	Location	Development Opportunity +2	Growth Rate	Respect	Location	Location +2
3	Stability	Stability +1	Future Career Opportunity +2	Respect +2	Stability +1	Stability	Health Benefits -1
4	Respect +1	Respect +1	Stability -2	Stability	Ethics/ Integrity +4	Respect	Work-Life Balance -1
5	Location -1	Compensation -2	Work-Life Balance -2	Future Career Opportunity +1	Compensation	Vacation +1	Stability
6	Vacation	Ethics/ Integrity	Respect +2	Technology Level -3	Health Benefits -3	Compensation -1	Respect +2
7	Future Career Opportunity +1	Future Career Opportunity +2	Health Benefits -1	Innovative Work +1	Future Career Opportunity -1	Retirement Benefits	Retirement Benefits
8	Health Benefits -1	Coworker Quality +2	Retirement Benefits -1	Development Opportunity +1	Location -1	Recognition	Vacation -2
9	Development Opportunity	Recognition -1	Ethics/ Integrity +8	Location +1	Development Opportunity +1	Manager Quality +3	Ethics/ Integrity
10	Ethics/ Integrity	Manager Quality -3	Vacation -1	Compensation -3	People Management -1	Future Career Opportunity +1	Manager Quality +3

n = 40,120 (Global); 1,909 (Australia); 2,030 (China); 1,938 (India); 1,889 (Southeast Asia); 2,826 (U.K.); 4,336 (U.S.)

Source: 4Q18-1Q19 Gartner Global Labor Market Surveys

Note: The top attraction drivers by country are calculated by asking survey respondents to indicate the five attributes in our EVP framework they consider most important when evaluating a new job. The attributes selected most frequently by respondents are considered the top attraction drivers in that country or region.

<sup>a</sup> A positive number indicates an increase in rank from 4Q18; a negative number indicates a decrease in rank from 4Q18.

<sup>b</sup> Southeast Asia includes Indonesia, Malaysia, the Philippines and Singapore.

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## Discretionary Effort and Intent to Stay

Employees' discretionary effort and intent to stay increased for the third consecutive quarter. Employees with high intent to stay rose to 32.8%, and employees exhibiting high levels of discretionary effort increased to 15% (see Figure 8).

Discretionary effort increased across all geographies except Australia and New Zealand. Following notable decreases last year, discretionary effort increased the most in Latin America and Asia (see Figure 9).

While employees' intent to stay increased globally, it decreased in most regions – most significantly in North America and Australia and New Zealand (see Figure 10).

These global increases in employees' discretionary effort and intent to stay indicate more employees are engaged in their work compared to last quarter. Our first quarter data shows 15% of employees display high discretionary effort, and 55% of these

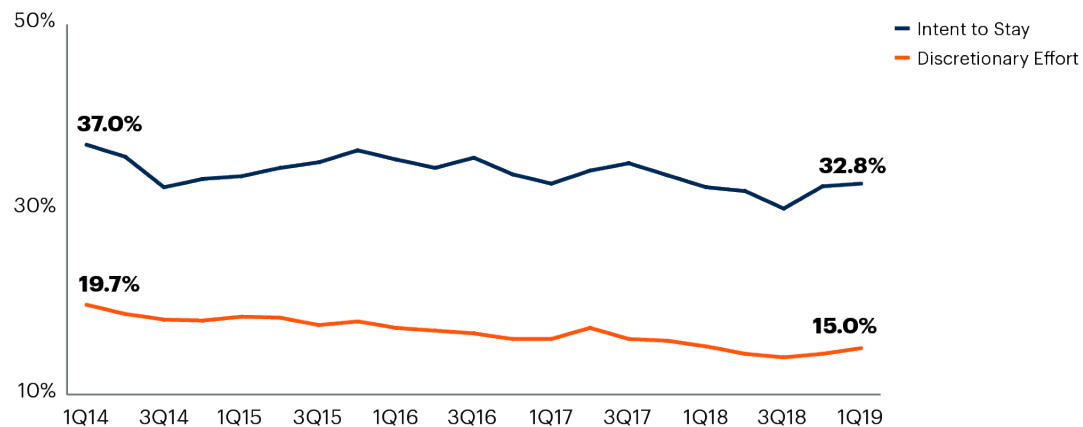


employees also report high intent to stay. The engaged workforce grew in the first quarter of 2019, increasing to 8.2% (see Figure 11).

Figure 8: Percentage of Employees Reporting High Levels of Intent to Stay and Discretionary Effort, Overall

### Percentage of Employees Reporting High Levels of Intent to Stay and Discretionary Effort, Overall

Global Employed Labor Force



n = 40,121

Source: 1Q14-1Q19 Gartner Global Labor Market Surveys

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**Intent to stay refers to employees' desire to stay with the organization based on whether they intend to look for a new job within a year, frequently think of quitting, have actively been looking for a new job or have taken steps, such as placing phone calls and sending out resumes.**

**Discretionary effort refers to employees' willingness to go above and beyond the call of duty, such as helping others with heavy workloads, volunteering for additional duties and looking for ways to perform the job more efficiently.**

Figure 9: Percentage of Employees Reporting High Levels of Discretionary Effort, by Region

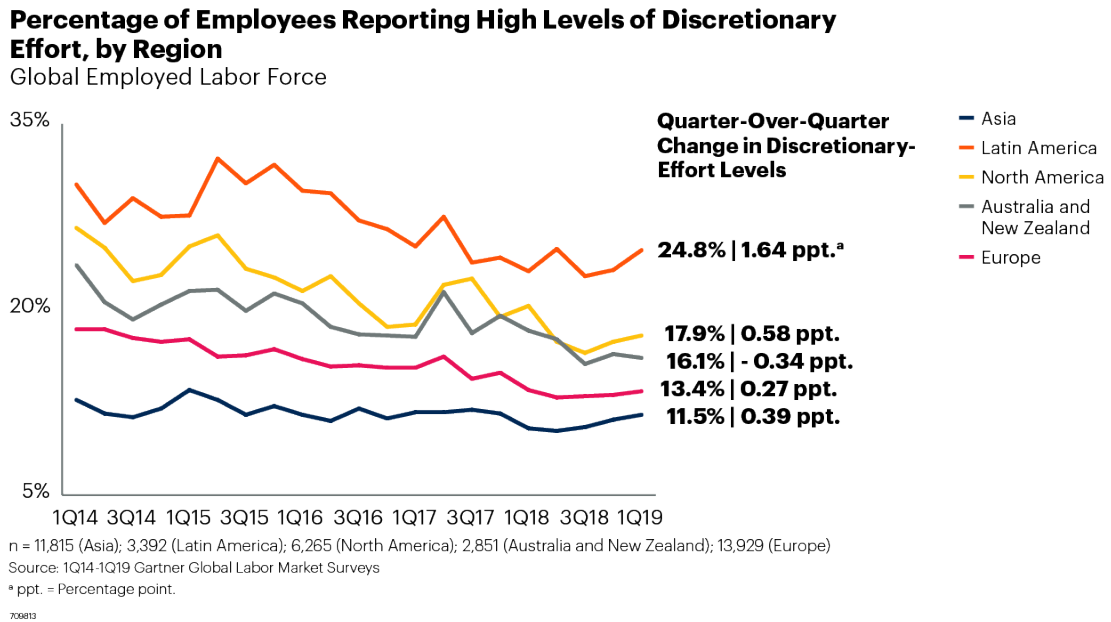


Figure 10: Percentage of Employees Reporting High Levels of Intent to Stay, by Region

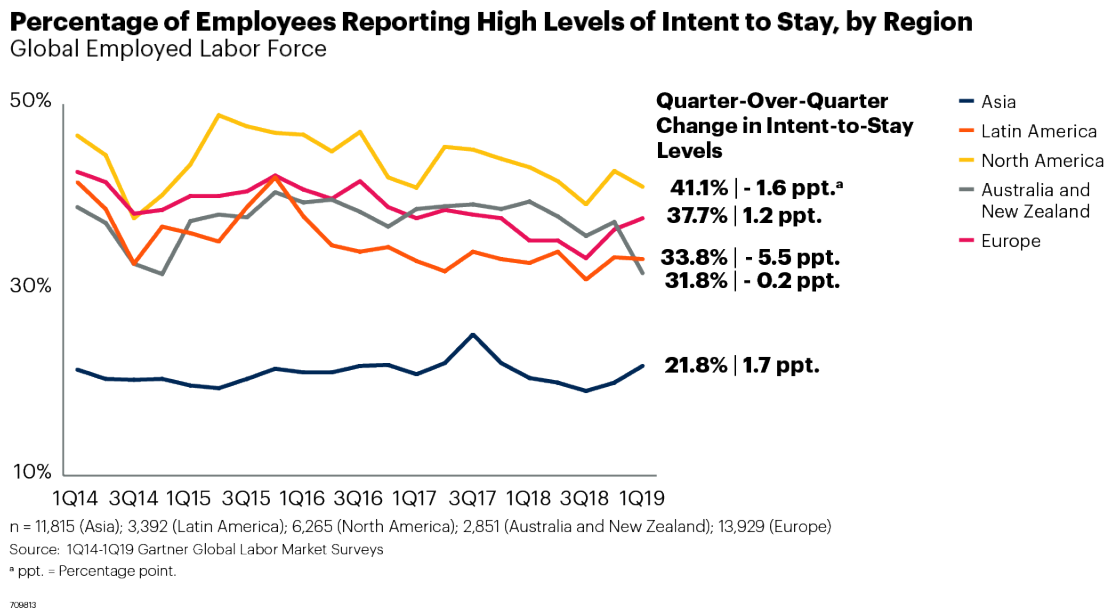
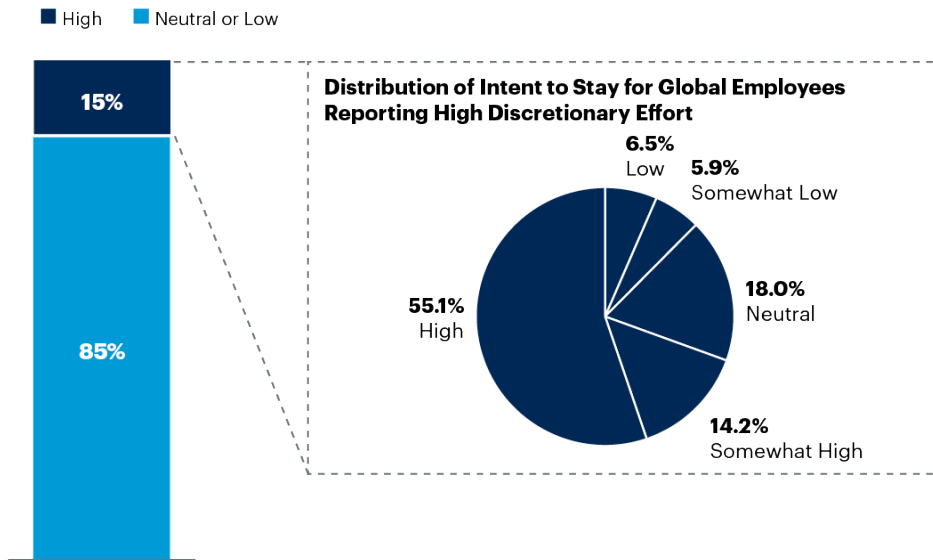


Figure 11: Percentage of Employees Reporting High Levels of Discretionary Effort

**Percentage of Employees Reporting High Levels of Discretionary Effort**  
Global Employed Labor Force



Discretionary Effort

n = 40,121

Source: 1Q19 Gartner Global Labor Market Survey

Note: Percentages may not add up to 100% because of rounding.

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## Top Dissatisfying Job Attributes Reported by Departing Talent

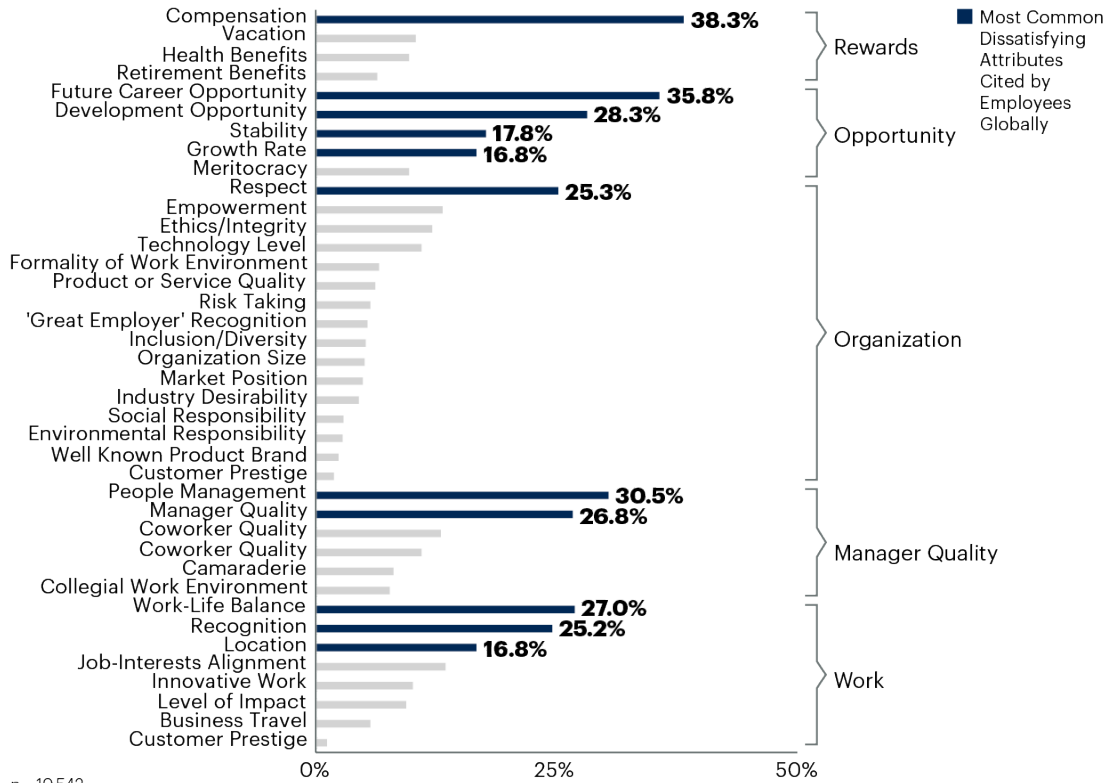
This quarter's data on what factors drive an employee's decision to leave an employer provides three primary take-aways:

- Compensation, future career opportunity and people management maintain their rank as the top attrition drivers for employees globally; however, compensation replaces future career opportunity as the top driver (see Figure 12).
- Work-life balance increased in rank in Australia, India, Southeast Asia and the U.K., remaining the fifth driver globally and decreasing from fifth to seventh in rank in the U.S (see Figure 13).
- Future career opportunity decreased in rank in Australia, Southeast Asia and the U.K, decreasing to the second driver of attrition globally, but maintaining its position in India and the U.S.

For more information on these attributes, please download EVP Model Attributes cited earlier.

Figure 12: Percentage of Departing Employees Ranking Drivers Among the 5 Most Dissatisfying Attributes at a Previous Job

**Percentage of Departing Employees Ranking Drivers Among the 5 Most Dissatisfying Attributes at a Previous Job**  
Global Employed Labor Force, 1Q19



n = 10,543  
Source: 1Q19 Gartner Departure View Exit Survey, Gartner 1Q19 Global Labor Market Survey  
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Figure 13: Top 10 Attrition Drivers for Select Countries and Regions

**Top 10 Attrition Drivers for Select Countries and Regions**  
Change in Rank Compared to Previous Quarter<sup>a</sup>

Rank	Global	Australia	India	Southeast Asia <sup>b</sup>	U.K.	U.S.
1	Compensation <b>+1</b>	Respect <b>+7</b>	Future Career Opportunity	Work-Life Balance <b>+3</b>	Manager Quality <b>+5</b>	Compensation
2	Future Career Opportunity <b>-1</b>	Manager Quality <b>+2</b>	Growth Rate	People Management <b>+1</b>	Future Career Opportunity <b>-1</b>	Future Career Opportunity
3	People Management	Work-Life Balance <b>+4</b>	Compensation <b>+2</b>	Compensation <b>-2</b>	People Management <b>+2</b>	People Management
4	Development Opportunity	People Management <b>-2</b>	Recognition <b>-1</b>	Future Career Opportunity <b>-2</b>	Recognition <b>-1</b>	Manager Quality
5	Work-Life Balance	Future Career Opportunity <b>-4</b>	People Management <b>+1</b>	Manager Quality	Work-Life Balance <b>+2</b>	Development Opportunity <b>+1</b>
6	Manager Quality	Recognition <b>-1</b>	Manager Quality <b>+1</b>	Coworker Quality <b>+5</b>	Development Opportunity <b>-4</b>	Respect <b>+1</b>
7	Respect <b>+1</b>	Compensation <b>-4</b>	Work-Life Balance <b>+1</b>	Respect	Respect <b>+2</b>	Work-Life Balance <b>-2</b>
8	Recognition <b>-1</b>	Development Opportunity <b>-2</b>	Development Opportunity <b>-4</b>	Location <b>+7</b>	Compensation <b>-4</b>	Recognition
9	Stability <b>+1</b>	Stability <b>+2</b>	Technology Level <b>+1</b>	Recognition <b>-3</b>	Coworker Quality <b>+6</b>	Growth Rate
10	Location <b>+1</b>	Location <b>+3</b>	Job-Interests Alignment <b>-1</b>	Growth Rate <b>-2</b>	Location <b>-2</b>	Stability <b>+1</b>

n = 10,543 (Global); 417 (Australia); 434 (India); 371 (Southeast Asia); 325 (U.K.); 5,110 (U.S.)

Source: 1Q19 Gartner Departure View Exit Survey, 1Q19 Gartner Global Labor Market Survey

Note: The top attrition drivers by country are calculated by asking survey respondents to indicate the five attributes in our EVP framework they consider most dissatisfying at a previous job. The attributes selected most frequently by respondents are considered the top attrition drivers in that country or region.

<sup>a</sup> A positive number indicates an increase in rank from 4Q18; a negative number indicates a decrease in rank from 4Q18.

<sup>b</sup> Southeast Asia includes Indonesia, Malaysia, the Philippines and Singapore.

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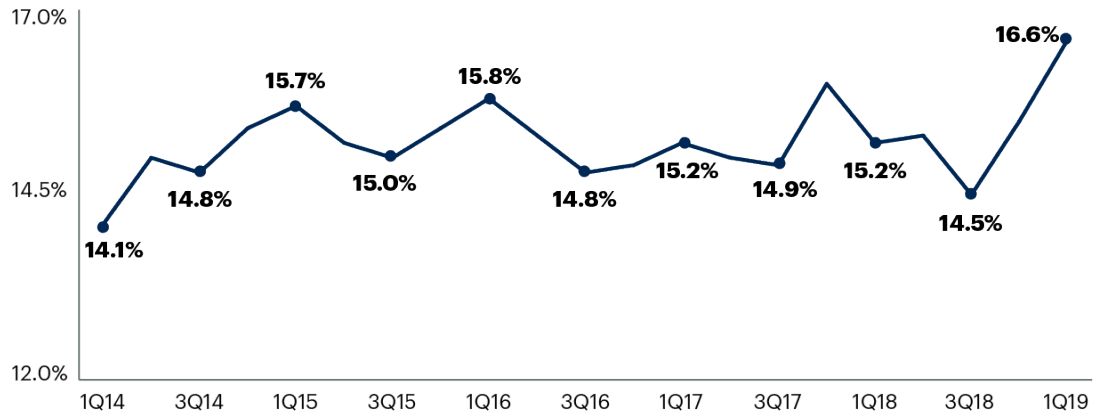
## Merit-Pay Expectation Trends

This quarter’s data on compensation expectation trends provides three primary take-aways:

- The compensation switching premium increased this quarter to 16.6%, its highest level since 2011 (see Figure 14).
- Merit-pay expectations remain the highest in India, Brazil and Island Southeast Asia (see Figure 15).
- Only employees in the U.K. show a significant decrease in merit-pay expectations this quarter. Employees in Australia expect a lower change in base pay compared to last quarter (see Figure 16).

Figure 14: Global Compensation Switching Premium

**Global Compensation Switching Premium**  
Percent Change Expected in Total Compensation for New Job



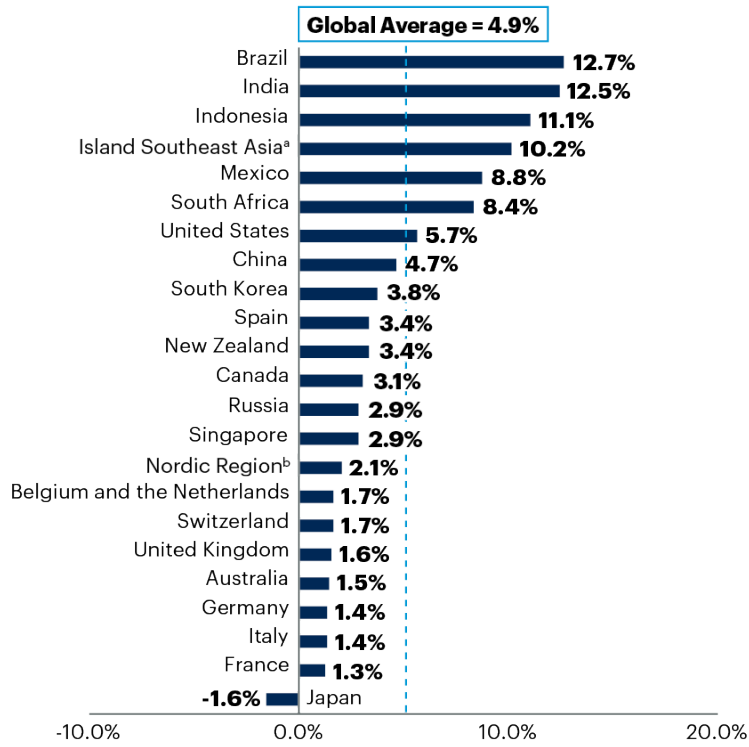
n = 3,700  
Source: 1Q14-1Q19 Gartner Departure View Exit Surveys

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**The compensation switching premium measures departed employees' anticipated compensation changes at their new organizations.**

Figure 15: Merit-Pay Expectations, by Country

**Merit-Pay Change Expectations, by Country**  
Global Employed Labor Force



n = 35,013

Source: 1Q19 Gartner Departure View Exit Survey

<sup>a</sup> Island Southeast Asia includes Indonesia, Malaysia, the Philippines and Singapore.

<sup>b</sup> The Nordic region includes Denmark, Finland, Norway and Sweden.

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**Merit-pay change expectations measures the percent change in base pay an employee expects in the coming year.**

Figure 16: Changes in Merit-Pay Expectations, by Country

**Changes in Merit-Pay Expectations, by Country**  
Global Employed Labor Force

	Quarter-Over-Quarter Change <sup>a</sup>	Year-Over-Year Change <sup>a</sup>		
India	-1.5%	↓	-0.2%	↓
Brazil	1.9%	↑	1.9%	↑
Island Southeast Asia <sup>b</sup>	0.7%	↑	2.4%	↑
Indonesia	1.0%	↑	3.4%	↑
South Africa	2.1%	↑	1.3%	↑
Mexico	2.9%	↑	0.8%	↑
United Kingdom	-2.6%	↓	-0.7%	↓
United States	1.9%	↑	3.2%	↑
China	0.9%	↑	-0.8%	↓
Spain	-0.5%	↓	0.6%	↑
New Zealand	0.2%	↑	0.4%	↑
France	-1.0%	↓	-0.7%	↓
Canada	1.1%	↑	0.7%	↑
Belgium and the Netherlands	0.7%	↑	0.6%	↑
Nordic Region <sup>c</sup>	1.5%	↑	0.1%	↑
Russia	0.5%	↑	-1.7%	↓
South Korea	2.6%	↑	0.5%	↑
Germany	0.2%	↑	-0.1%	↓
Switzerland	0.7%	↑	0.1%	↑
Singapore	1.8%	↑	1.6%	↑
Australia	-1.0%	↓	-0.2%	↓
Italy	-0.5%	↓	-0.8%	↓
Japan	-0.3%	↓	-1.1%	↓

- ↑ Statistically Significant Increase
- ↑ Insignificant Increase
- ↓ Statistically Significant Decrease
- ↓ Insignificant Decrease

n = 35,013

Source: 1Q19 Gartner Global Labor Market Survey

<sup>a</sup> Confidence level is 95%. This value is determined by response count and standard deviation; therefore, the solid arrows will not always be the highest or lowest absolute scores.

<sup>b</sup> Island Southeast Asia includes Indonesia, Malaysia, the Philippines and Singapore.

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## Conclusion

While employees' confidence in the business environment decreased this quarter, they are more invested in their work. Continuing the trend from the fourth quarter of 2018, the increase in employees' discretionary effort and intent to stay demonstrates, globally, employees continue to become more engaged. Employees perceive more available job opportunities, yet fewer employees are actively seeking new employment globally.

Organizations looking to attract talent should note fewer employees globally are seeking new opportunities. The top drivers for attracting talent remain the same as the previous quarter: compensation, work-life balance and stability. Employees switching jobs expect a higher switching premium this quarter than in previous years.



## Recommended by the Authors

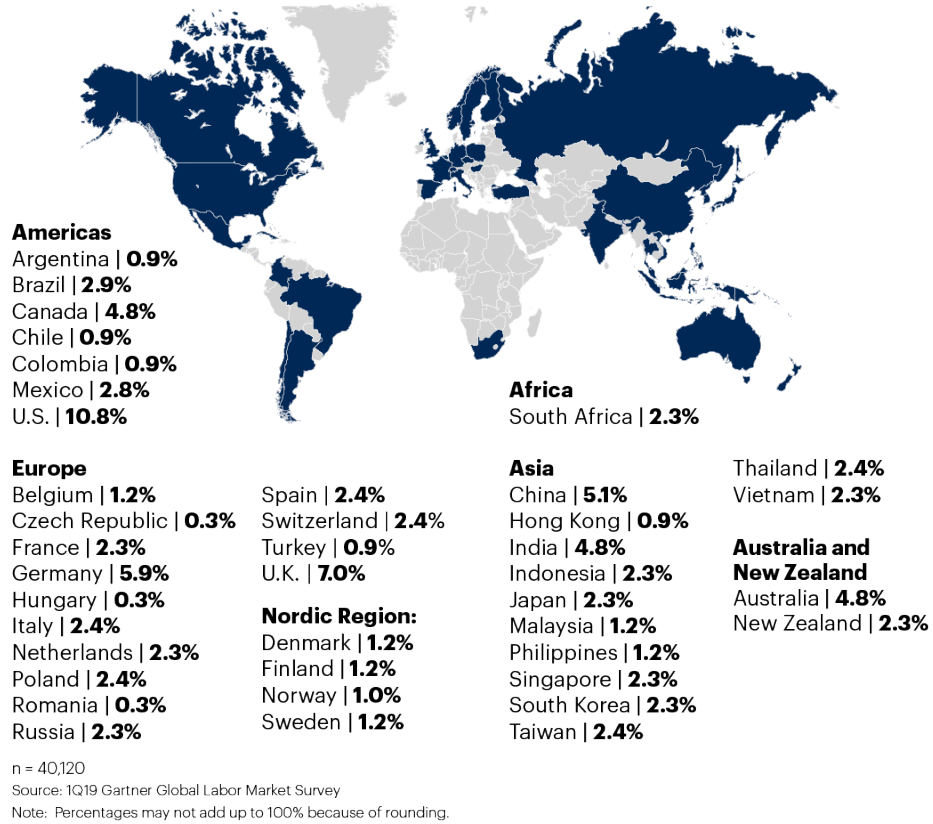
- [“Employee Engagement Benchmarks”](#)  
This interactive platform helps you assess how your organization’s engagement levels compare to the benchmark; use it to evaluate your current engagement levels.
- [“Ignition Guide to Designing a Compelling EVP”](#)  
This guide is designed to help HR leaders create a compelling employment value proposition (EVP) that will help their organizations attract and retain top talent and choose the core EVP attributes to inform HR strategy and employment branding.
- [“Compensation Watch September 2018”](#)  
Organizations can use this report to benchmark their anticipated 2019 short-term incentive payout and salary or merit increases against those of their peers.
- [“Engagement Strategy Playbook”](#)  
This playbook provides guidance, tools and templates for planning and executing an engagement and retention strategy, from making the business case for employee engagement to supporting the line in driving engagement and retention.
- [“Open-Source Change: Making Change Management Work”](#)  
Research highlights from our webinar capture how the best organizations use the workforce’s frontline expertise to make decisions that improve business outcomes.

## About This Research

Each quarter, our Global Talent Monitor is sourced from over 40,000 employees in 40 countries and regions (see Figure 17).

Figure 17: Demographics

## Demographics



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