

KNOW GREATER TALENT®



2018 Workers Confidence Index™

A leading indicator of economic health

BECAUSE THE WORLD NEEDS MORE GREAT TALENT.

HRO Today Magazine and Yoh

HRO TODAY Baker's Dozen
Customer Satisfaction Ratings
MANAGED SERVICE PROGRAMS
2018 Winner



**HCM Marketplace Reach
Research Capability
Trends and Analysis**



**Talent Acquisition,
Total Talent Solution,
Managed Services, RPO**

**Provide Value for our Customers
Thought Leadership for the Market**

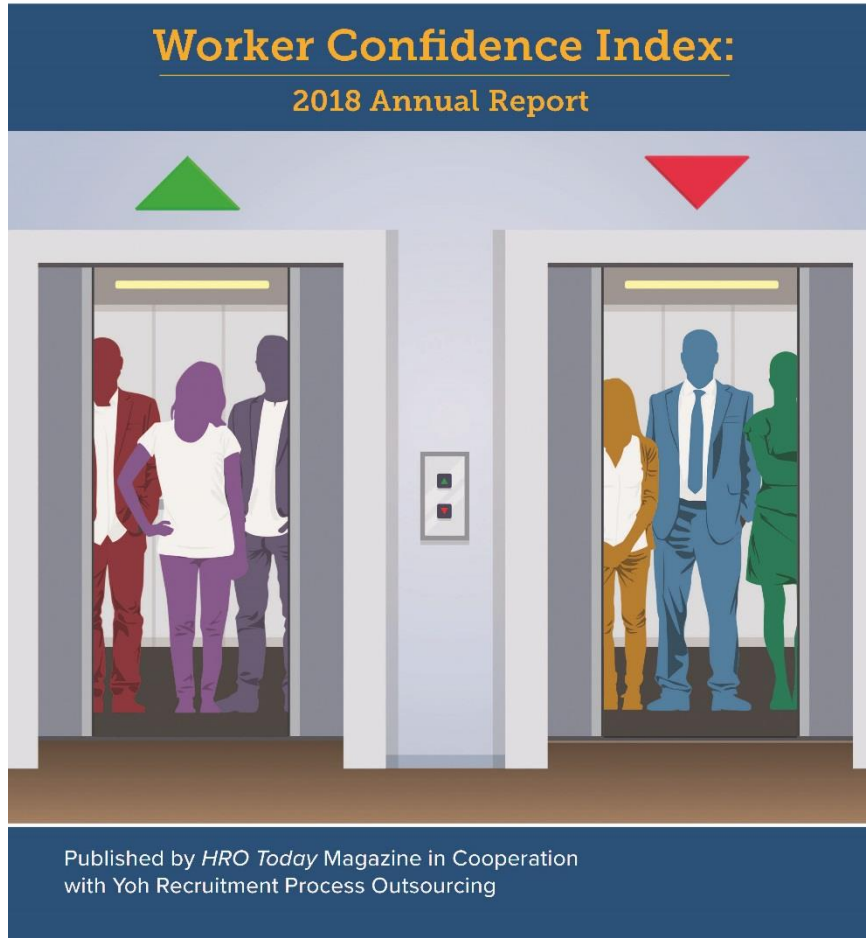
Worker Confidence Index™ (WCI)

- 18+ who are working full-time in the U.S.
- Quarterly reports are issued based on 1,000 responses per quarter.
- Respondents are asked a series of four questions.
- Each question uses a Likert-type scale where respondents rate each question on a 1-5 scale, with one being “Very poor” and 5 being “Very favorable.”
- The four questions asked:
 - Involuntary Job Loss Possibility
 - Likelihood of Promotion
 - Anticipation of a Raise of at least 3%
 - Trust in Company Leadership.

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Worker Confidence Index: 2018 Annual Report



WCI IS A *Leading* Indicator



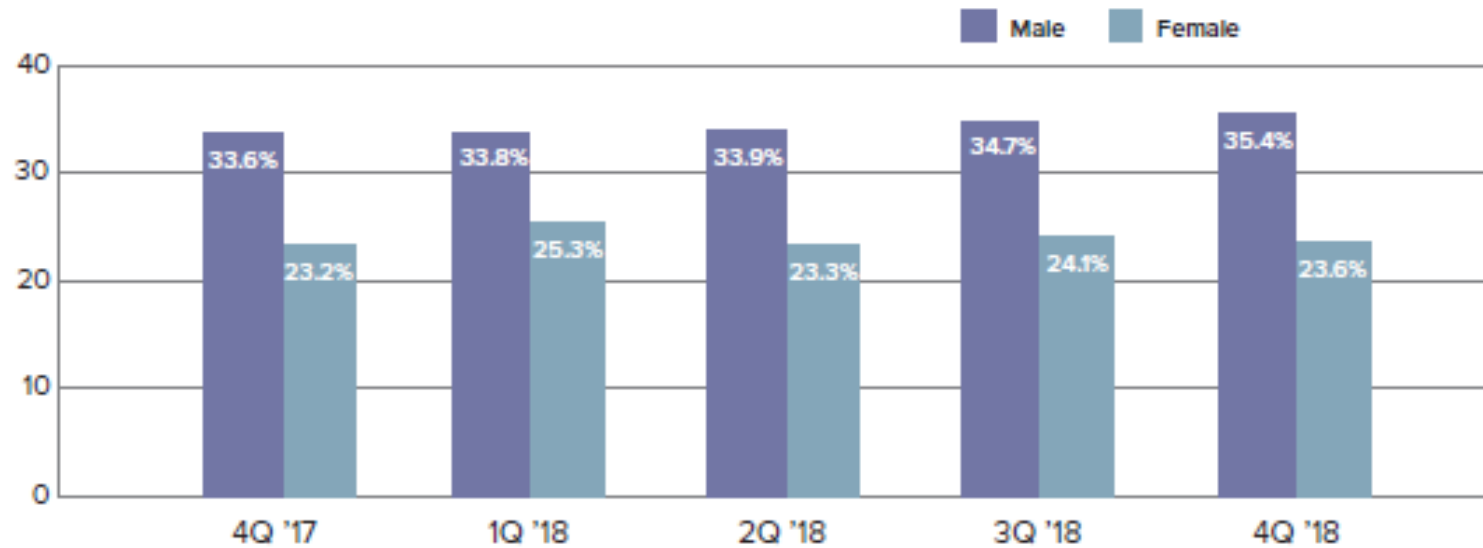
Workers Confidence impacts talent acquisition, employee retention, employee engagement, compensation and benefits.

- WCI measures perceived employment security amongst full time working employees.
- According to BLS, 71% of U.S. produced goods are for personal consumption.
- Perception of job security strongly influences purchasing behavior.
- This appears to be a more accurate predictor of economic health and U.S. spending power than traditional unemployment rates.

Nearly One Third of Americans Expect a Raise

Likelihood of a Raise by Gender

Fig. 17

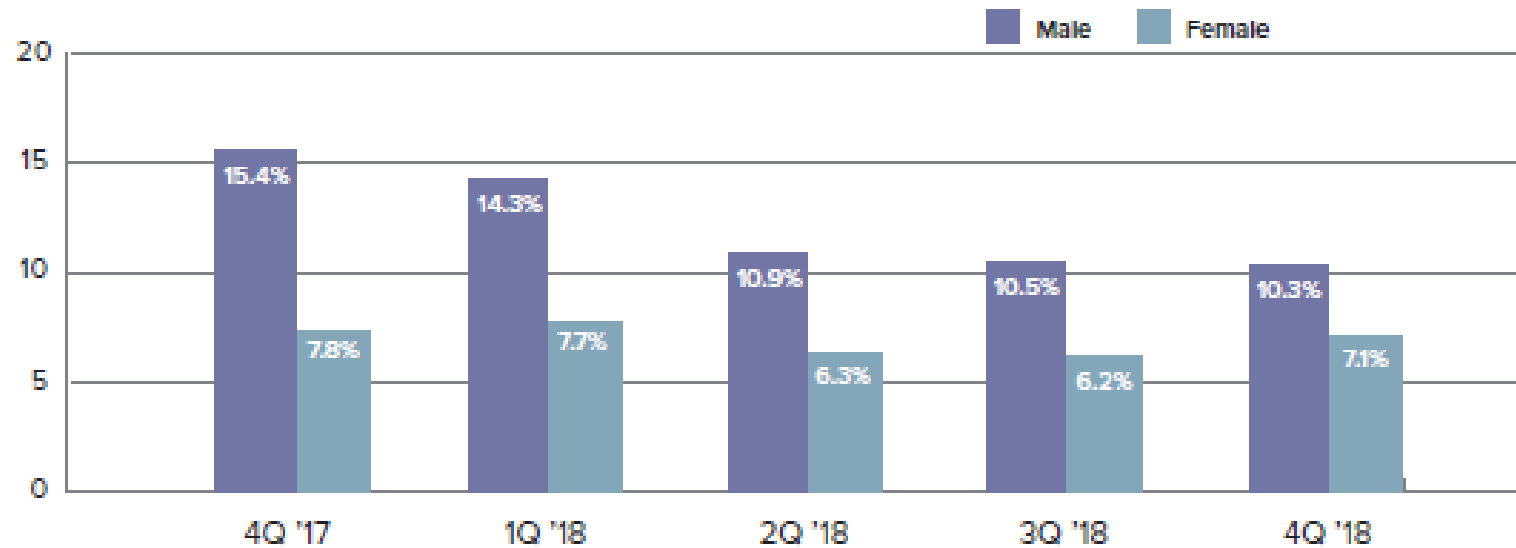


- **29.3%** of the full time working population anticipate a raise of at least 3 percent at their next review
- Female respondents confidence remain behind their male counterparts at **11.8%**.

Stock Market Volatility Raises Job Loss Concerns

Likelihood of Job Loss by Gender

Fig. 5

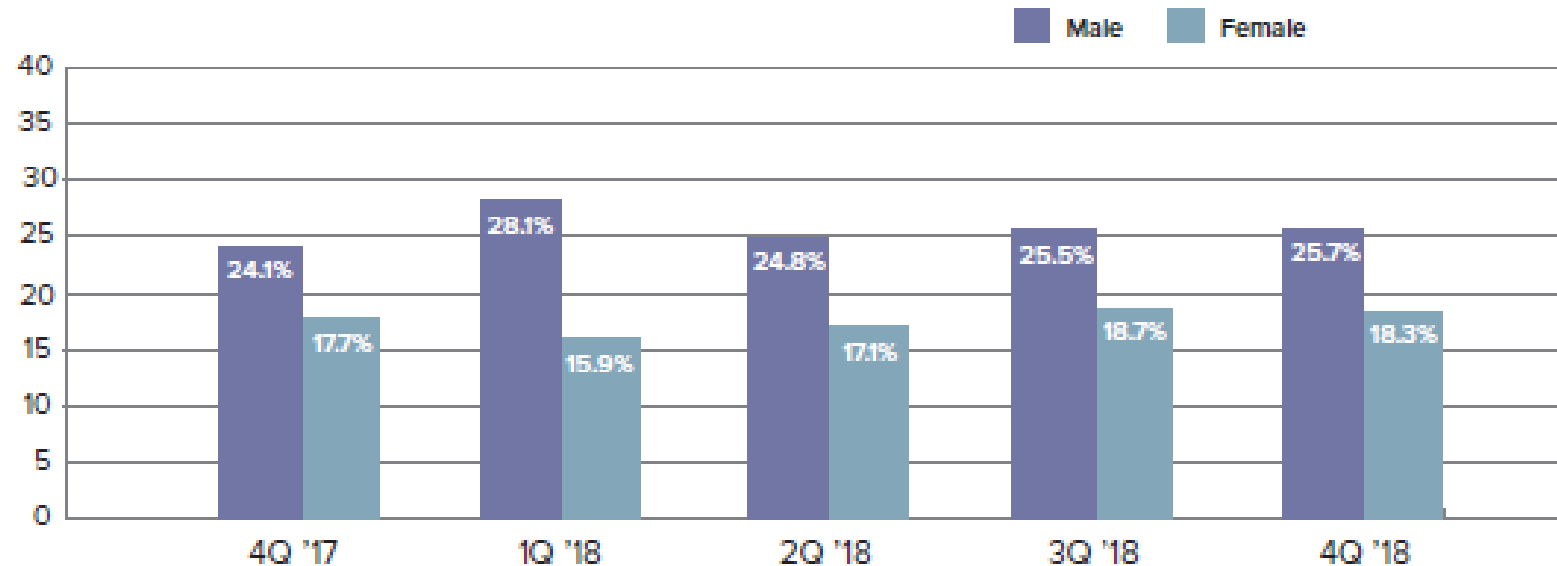


- **Women continue to be less concerned than men** with a gap of 3.2%.
- Millennials aged 25 to 34 were the **most concerned** about a job loss at 13.9%.

Optimism Increases on Likelihood of a Promotion

Likelihood of a Promotion by Gender

Fig. 11



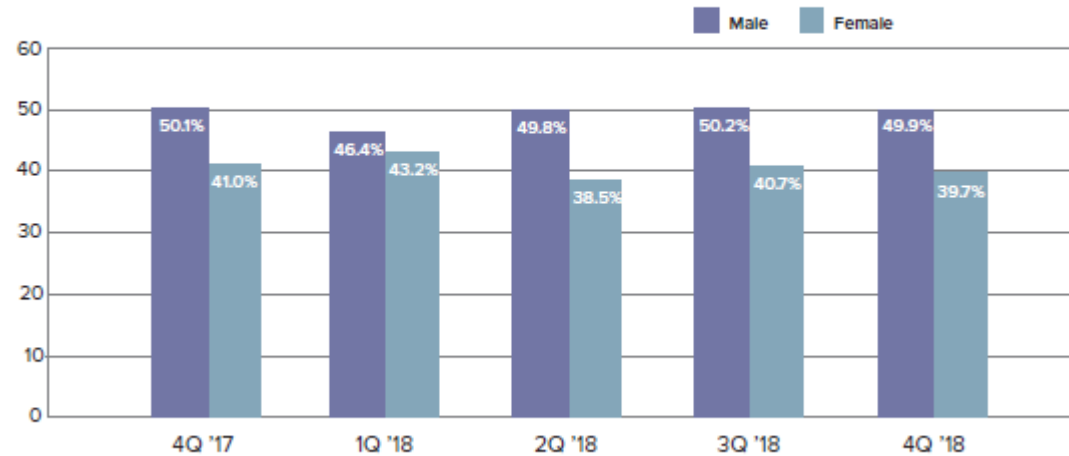
- Respondents making between **\$75,000 to \$100,000** were the most optimistic group about receiving a promotion.
- Over one-third of Millennials report a **promotion was likely**.

Trust in Leadership Declines in Q4 2018

- Overall trust continues to decline (**down 1.8 points from 4Q 2017**).
- Males continue to trust leadership more than females.
- More than one-half of the respondents aged **44 and younger trust leadership** (which contrasts sharply with those over age 45).

Trust in Company Leadership by Gender

Fig. 23



Trust in Company's Leadership by Age	4Q '17	1Q '18	2Q '18	3Q '18	4Q '18
18-24	64.0%	55.8%	58.2%	62.2%	59.2%
25-34	57.6%	61.0%	58.7%	59.4%	58.7%
35-44	53.6%	50.3%	50.2%	52.1%	53.2%
45-54	44.4%	49.7%	42.5%	43.5%	45.5%
55-64	35.0%	35.4%	35.1%	37.9%	34.9%
65+	25.6%	22.5%	25.8%	24.6%	23.4%

For more information, and to download the Workers Confidence Index Report:



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