



Q1 2015 Employment Confidence Survey

Overview

The Glassdoor® quarterly Employment Confidence Survey¹, conducted online by Harris Poll in March among more than 2,000 U.S. adults (ages 18+), monitors four key indicators of employee confidence: salary expectations, job market optimism/re-hire probability, business outlook optimism and job security. For purposes of reporting, employees refers to those employed full- or part-time unless otherwise indicated.

In addition to the key indicators Glassdoor measures each quarter, this quarter's survey also reveals employee sentiment and confidence around receiving skills training to advance their careers as well as how employment status and socioeconomic status impact training received.

Employment Confidence Highlights - Q1 2015

Indicator	Q1.15	% Change
Layoff concerns — self	16%	↑ 3
Layoff concerns — others	28%	↑ 5
Salary expectations — pay increase in 12 months	45%	↑ 2
Company outlook — better	47%	↑ 4
Re-hire probability (employed)	48%	-

HIGHLIGHTS

SKILLS TRAINING

Socioeconomic Skills Training Gap

- Two-thirds of men (66 percent) have received on-the-job training from their current employer in the past 12 months compared to 57 percent of women.
- Seventy-three percent of employees earning higher incomes (\$100,000+) report receiving on-the-job training in the past 12 months compared to employees who earn less: \$75,000-99,999 (57 percent), \$50,000-74,999 (58 percent), less than \$50,000 (57 percent).
- Seventy percent of employees with college degrees report receiving on-the-job training in the past 12 months compared to employees with some college (56 percent) and employees with a high school diploma or less (58 percent).
- Younger employees (aged 18-34) report receiving on-the-job training in the past 12 months more than other age groups (69 percent): 35-44 (62 percent), 45-54 (51 percent), 55-64 (63 percent).

Accessibility to Types of On-the-Job Training

- More than three in five (62 percent) employees have received on-the-job training from their current employer in the past 12 months.
- Only one in four (24 percent) of those unemployed but looking for work (and have been employed within the past 12 months) have received on-the-job training from their most recent employer in the past 12 months.

Of those employed have received on-the-job training from their current employer in the past 12 months	
Technology training	29%
Harassment training	21%
Diversity training	19%
Management training	13%
Budget Management training	4%
Other training	23%

Of those unemployed but looking for work have received on-the-job training from their most recent employer in the past 12 months	
Technology training	6%
Harassment training	8%
Diversity training	8%
Management training	9%
Budget Management training	7%
Other training	9%

Employee Confidence in Technology Skills to Advance Their Careers

- Employees (including those self-employed) are confident their technology skills (e.g., Internet research abilities, proficiency with common software tools/programs) will keep me competitive in the job market:
 - For the next two years: 18 percent
 - Three to five years: 20 percent
 - Five to 10 years: 16 percent
 - For the next 10+ years: 23 percent
 - I don't believe they'll keep me competitive at all: 14 percent
 - I don't have any technology skills: 8 percent

EMPLOYER ACTIONS DURING THE PAST SIX MONTHS

- Of employees surveyed who reported a *positive change* at their organization:
 - Half (50 percent) of employees report their organization has initiated large-scale hiring, up 23 percent since last quarter and at a high in nearly three years, since the question was first asked in Q2 2011 (46 percent).
 - Twenty-seven percent say they were awarded new stock or compensation, up 4 percentage points from last quarter.
 - Twenty-two percent report that health and dental benefits, pay and perks that had previously been cut have been restored, down 4 percentage points since last quarter and up 4 percentage points since last year (Q1 2014).
 - Half (51 percent) say they were awarded new perks (option to work remotely, casual dress, flexible work hours) or new stock or other compensation, down 14 percentage points since last quarter.
- Among employees who reported *negative changes* at their organization:
 - Half (49 percent) say they experienced changes to or reduced compensation, down 3 percentage points since last quarter and 4 percentage points since last year (Q1 2014).
 - Twenty-three percent say they saw a reduction in their individual pay or bonus amount, or were not paid a bonus for which they were eligible, down 4 percentage points since last quarter and at a low in nearly two years, since Q2 2013 (28 percent).
 - Two in five (41 percent) report employees being laid off or plans communicated to lay off employees, up 5 percentage points since last quarter.

In The Past 6 Months, What Additions Has Your Organization Made?

(Base: Employees who say their company has changed something positive in the past 6 months.)

	Q2.13 %	Q3.13 %	Q4.13 %	Q1.14 %	Q2.14 %	Q3.14 %	Q4.14 %	Q1.15 %
Awarded new perks (option to work remotely, casual dress, flexible work hours)/new stock	47	76	61	76	67	49	65	51
Awarded new stock or other compensation	21	19	15	31	28	19	23	27
Initiated large scale hiring	33	18	21	24	31	34	27	50
Restored health and dental benefits, pay and perks previously cut	40	30	42	18	42	29	26	22

In The Past 6 Months, What Negative Changes Has Your Organization Done?

(Base: Employees who say their company has changed something negative in the past 6 months.)

	Q2.13 %	Q3.13 %	Q4.13 %	Q1.14 %	Q2.14 %	Q3.14 %	Q4.14 %	Q1.15 %
Made changes or reduced compensation (net)	47	56	46	53	52	54	52	49
Reduced individual's pay/bonus amount/didn't pay bonus	28	32	25	25	30	33	27	23
Initiated or communicated bonus reductions or eliminations	8	13	8	11	3	9	8	8
Laid off employees and/or communicated plans to lay off employees	47	40	39	42	36	39	36	41
Reduced health and/or dental benefits	20	18	20	23	16	23	23	20
Initiated or communicated hiring freezes	21	22	24	17	14	18	12	15
Restructured job/created redundancy	15	15	18	22	15	7	15	19
Initiated furloughs, unpaid leave, mandatory vacation	20	12	13	16	12	14	11	9

EMPLOYMENT CONFIDENCE MEASURES

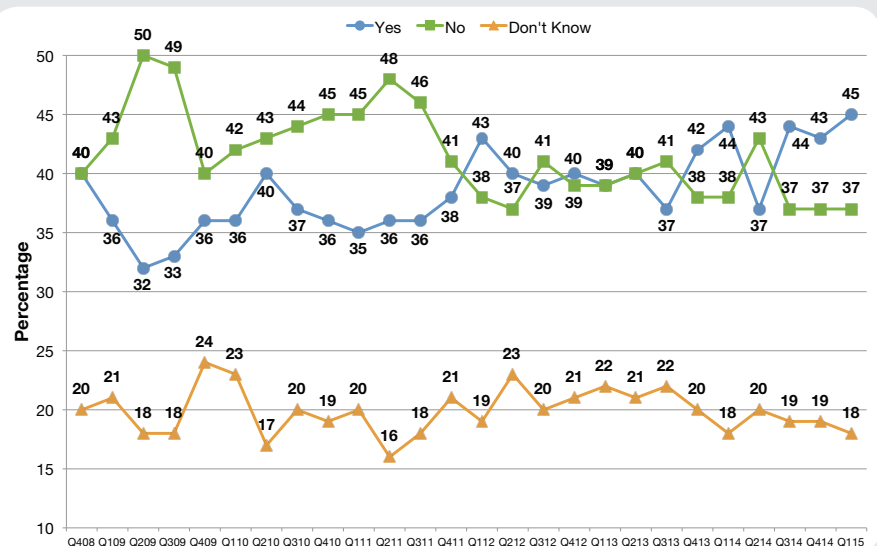
Salary Expectation

In The Next 12 Months

- Forty-five percent of employees expect to receive a pay raise or cost-of-living increase in the next 12 months, up 2 percentage points from last quarter (43 percent), and a new more than six-year high, since this question was first asked in Q4 2008 (40 percent).
- Thirty-seven percent do not expect a pay raise, unchanged over the past two quarters, while 18 percent don't know.
- Pay raise confidence continues to be higher among men (50 percent), compared to women (40 percent).
- Employees with a college degree or more are significantly more optimistic (53 percent) in receiving a pay raise, when compared to those a high school diploma or less education (36 percent).

Salary Expectation: Expect Pay or Cost-of-Living Increase in Next 12 Months

(Base: Employed full/part-time)



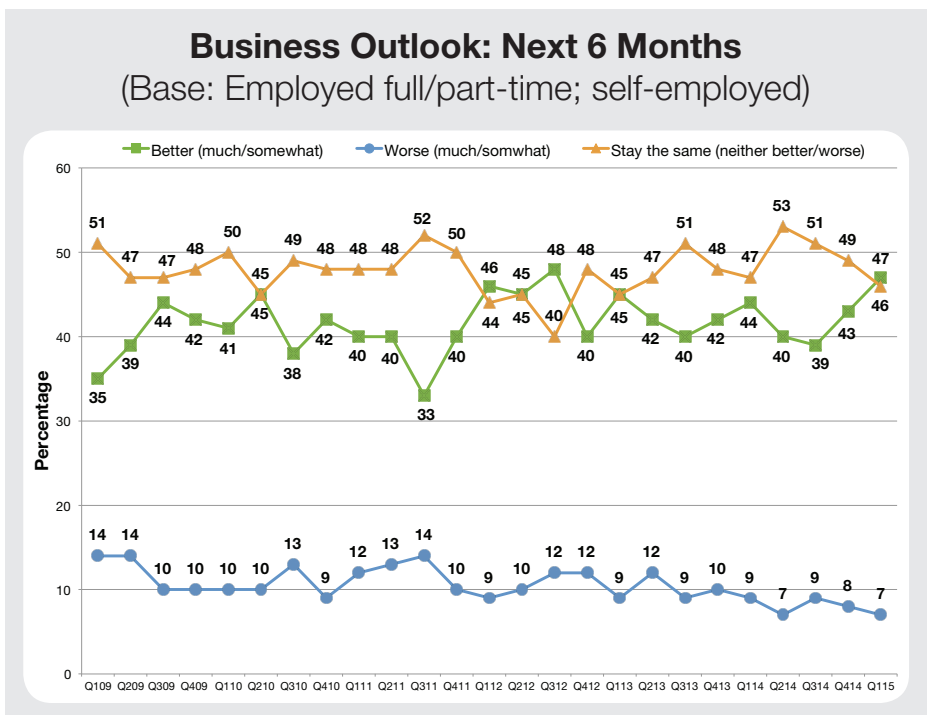
Job Market: Rehire Probability In The Next 12 Months

- Half (48 percent) of employees (including those self-employed) report confidence that they would be able to find a job matched to their experience and current compensation levels in the next six months, consistent with last quarter's six-year high since this survey question was first asked in Q1 2009 (39 percent). Thirty percent are uncertain and 21 percent think it is unlikely they could find a job that matched their experience and current compensation levels in the next six months.
- Of those unemployed but looking, rehire confidence increased 4 percentage points to 47 percent from last quarter and is at a new six-year high since the question was first asked in Q1 2009 (35 percent).
- Men are slightly more confident they would be able to find a job matched to their experience and current compensation (51 percent) than women (44 percent).
- Younger employees (including those self-employed) (18-34 years old) are significantly more optimistic in their ability to find a job in the next six months that matches their experience and current compensation (54 percent; down 6 percentage points since last quarter), when compared to employees aged 45-54 years old (42 percent).



Business Outlook In The Next Six Months

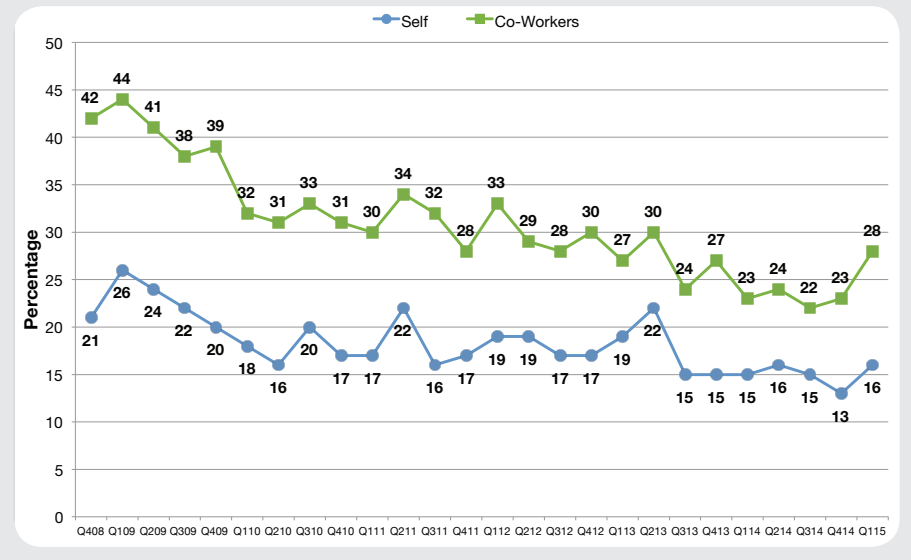
- Forty-seven percent of employees (including those self-employed) believe their company's business outlook will improve in the next six months, up 4 percentage points since last quarter and a high in more than two years, since Q4 2012 (40 percent). Forty-six percent believe it will stay the same, down 3 percentage points since last quarter. Seven percent believe it will get worse.
- Men are significantly more optimistic (52 percent) that business will get better in the next six months when compared to women (40 percent).
- Employees (including those self-employed) aged 35-44 (38 percent) and those 45-54 years old (42 percent) are less optimistic that their company's business will get better in the next six months compared to those age 18-34 years old (55 percent).



Job Security In The Next Six Months

- Sixteen percent of employees report concern of being laid off in the next six months, up 3 percentage points from last quarter and down 3 percentage points from two years ago in Q1 2013 (19 percent).
- Twenty-eight percent of employees report concern about co-workers being laid off in the next six months, which is up 5 percentage points since last quarter.
- Employees in the Northeast are significantly more concerned about being laid off in the next six months (24 percent) compared to employees in other regions of the country: South (13 percent), Midwest (13 percent) and West (13 percent).
- Employees who earn between \$75,000-99,999 are more concerned about being laid off in the next six months (22 percent) compared to those with an income of \$100,000+ (11 percent).

Employees Concerned About Layoffs in Next 6 Months (Base: Employed full/part-time)



Methodology

¹ This survey was conducted online within the United States by Harris Poll on behalf of Glassdoor from March 19-23, 2015 among 2,024 adults ages 18 and older. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. For complete survey methodology, including weighting variables, please contact pr@glassdoor.com.