

2014 Organisational Agility Survey

Key Findings – Australia & New Zealand



ManpowerGroup™

About the Survey

- 18,773 employers worldwide
- 42 countries and territories
- 1,507 interviews in Australia
- 650 interviews in New Zealand
- Research conducted in Q4/2013

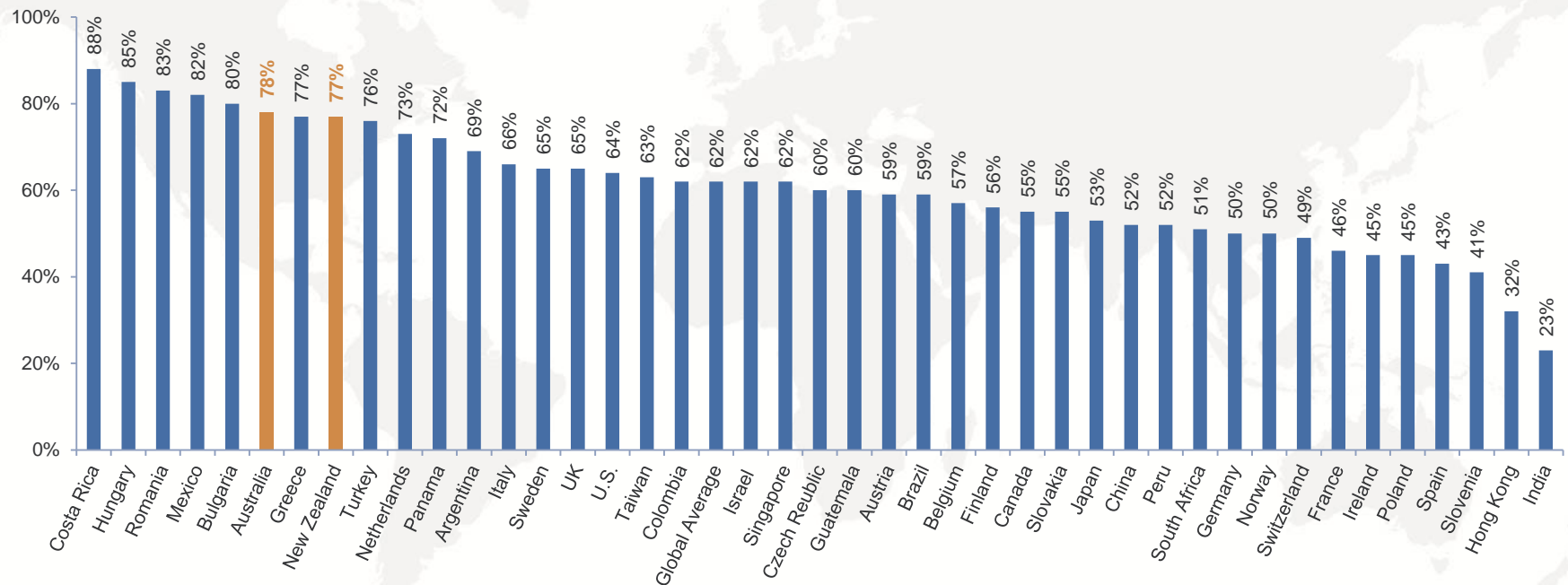
We Talked with Employers to Discover...

- The importance of organisational agility to achieving company business goals
- Top leadership views of the importance of organisational agility
- Commitment to organisational agility over past 12 months
- Internal factors driving/improving agility
- Internal barriers to achieving agility

GLOBAL RESULTS

Importance of organisational agility for next 12 months

- Regionally, Americas employers are most likely to say organisational agility is important (66%), compared with 61% in EMEA and 58% in Asia Pacific
- Organisational agility has most importance in Costa Rica (88% important), Hungary (85%), Romania (83%) and Mexico (82%); with Australia and New Zealand being part of the Top 10.
- Organisational agility is least likely to be regarded as important in India (23%) and Hong Kong (32%)

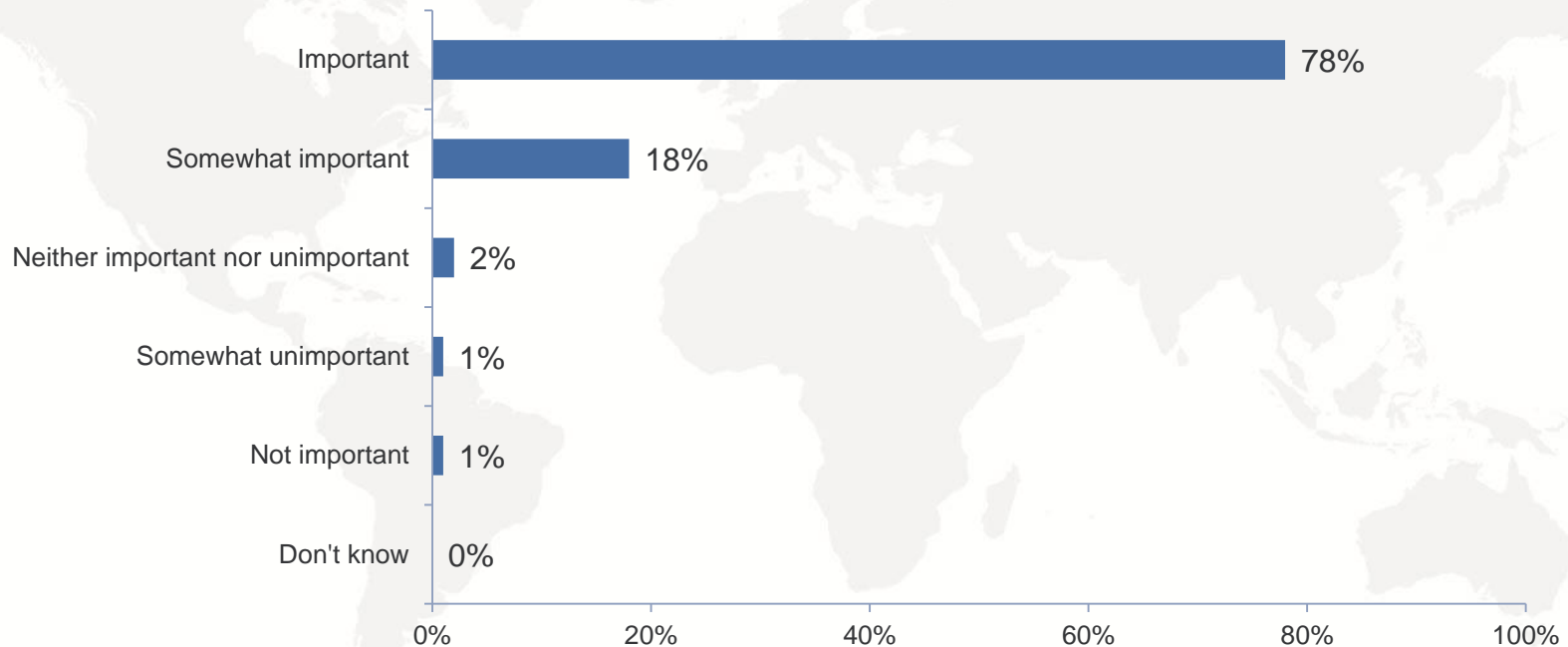


Q: In your opinion, how important is organisational agility—the ability to respond rapidly to changing business conditions—to achieving your company's business goals over the next 12 months?

AUSTRALIA

Importance of organisational agility for next 12 months

- Across Australia, nearly four out of five employers say that organisational agility is important to achieving business goals in the next 12 months, and a further 18% say it is somewhat important.
- In total 4%, feel non-committal about the importance of organisational agility (2%) or say it is somewhat unimportant/not important (2%).

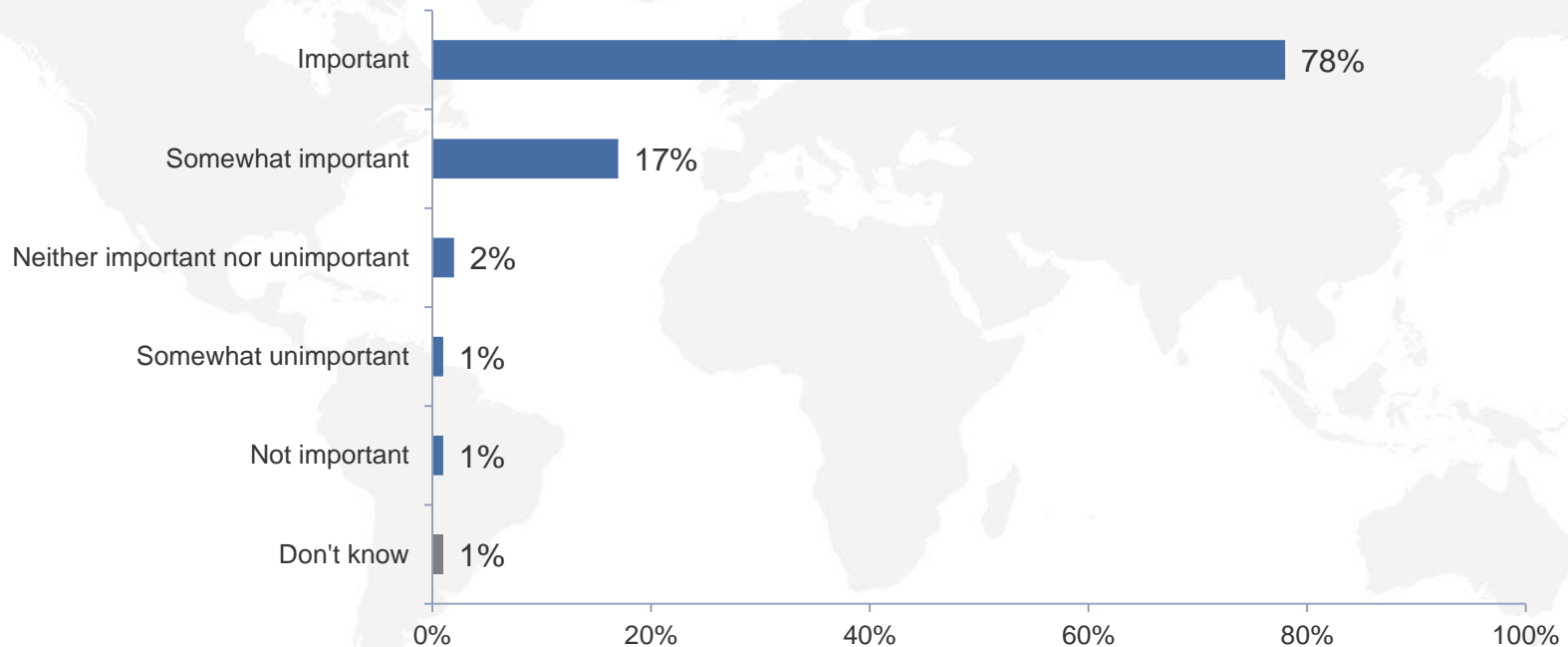


Q: In your opinion, how important is organisational agility—the ability to respond rapidly to changing business conditions—to achieving your company's business goals over the next 12 months?

AUSTRALIA

Top leadership view of organisational agility

- When asked how top management regard the importance of organisational agility to achieving company business goals, employers give similar answers to their own personal views, with again 78% saying important and 17% somewhat important
- Meanwhile only 4% feel top managers regard organisational agility as somewhat unimportant or not important

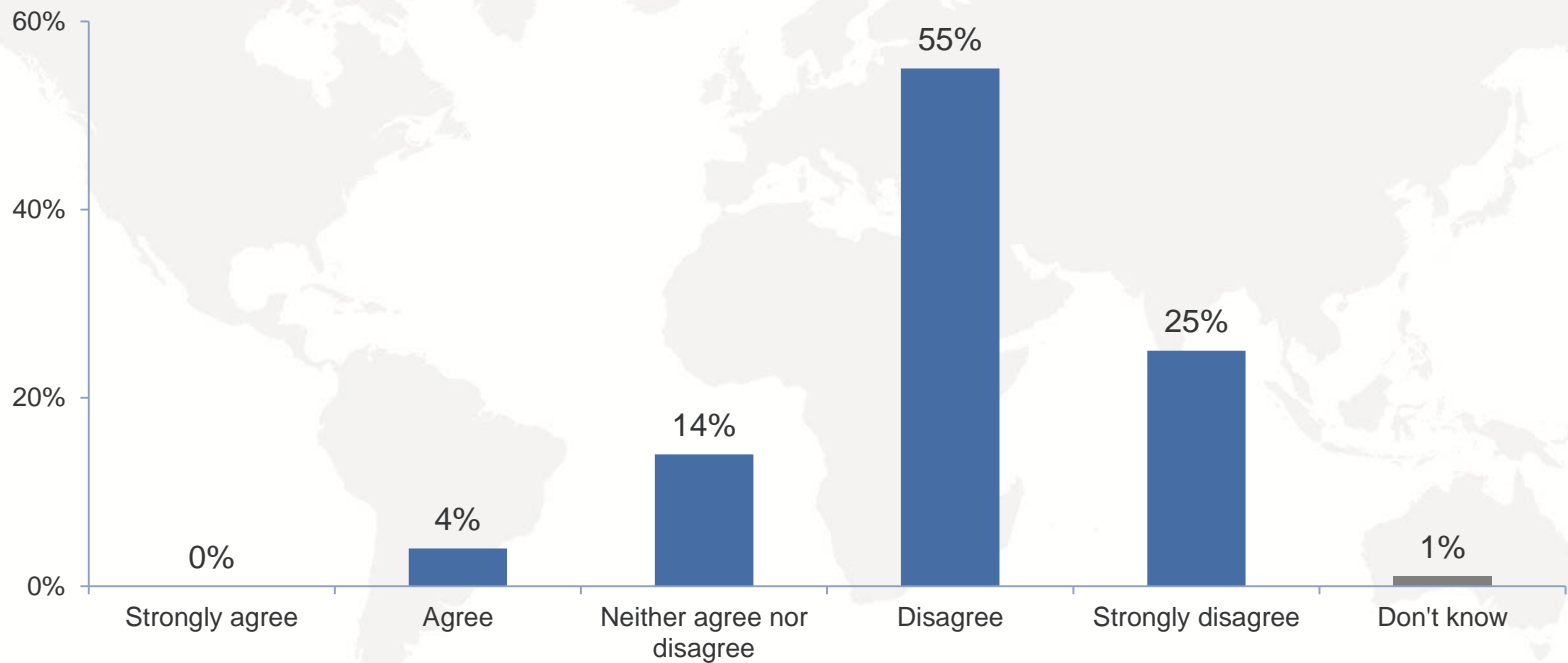


Q: How important does your top leadership believe organisational agility is to achieving your company's business goals over the next 12 months.

AUSTRALIA

Commitment to organisational agility in past 12 months

- Overall, only two out of five (4%) agree to some extent that their organisation has demonstrated a commitment to pursuing more organisational agility over the past 12 months.
- That's significantly lower than the same share in overall Asia Pacific (64%) and Global (71%)

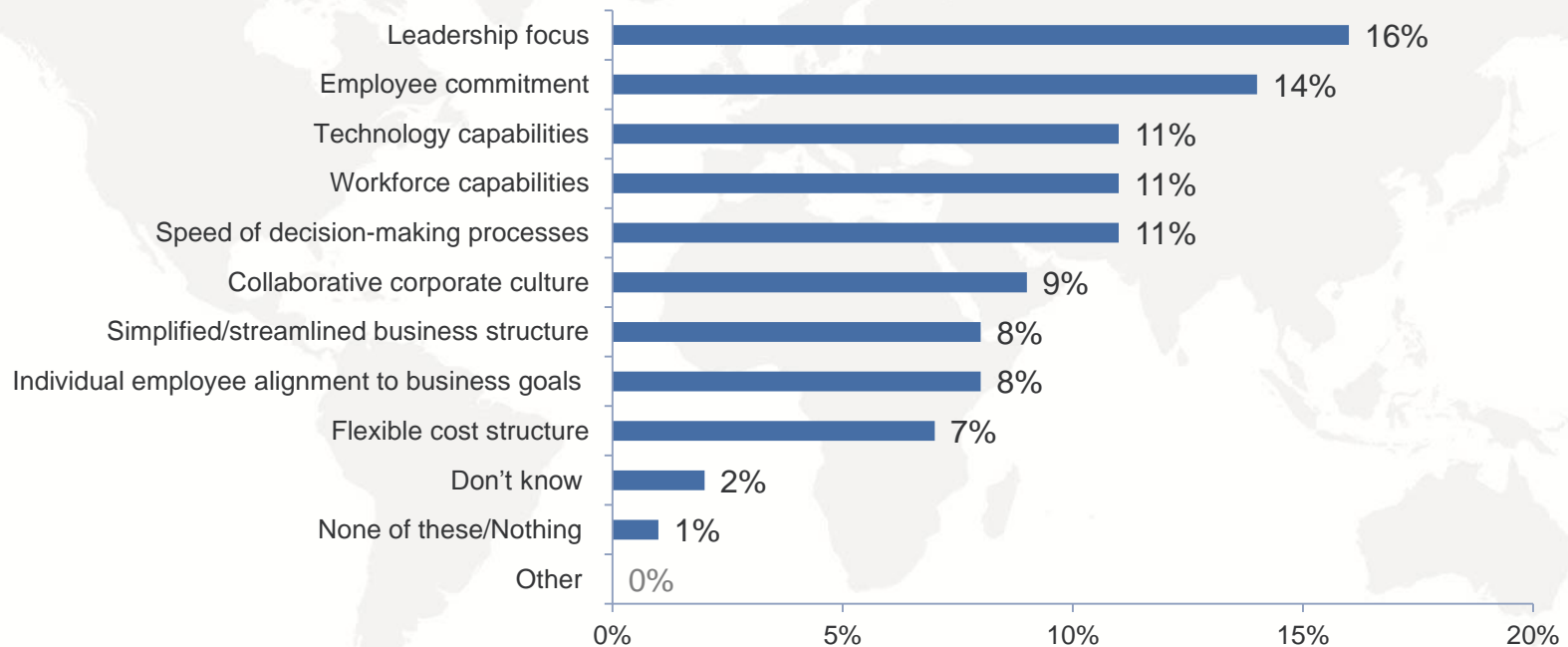


Q: Please state your level of agreement with the following statement... "Over the past 12 months my company has demonstrated a commitment to pursuing more organisational agility."

AUSTRALIA

Top 3 internal factors driving / improving agility

- Two internal factors stand out as drivers which are improving organisational agility –leadership focus and employee commitment– selected by 16% of employers and 14% of employers respectively as one of the top three drivers
- In addition, 11% each say technology capabilities, workforce and capabilities as well as speed of decision making processes are seen to improve agility.

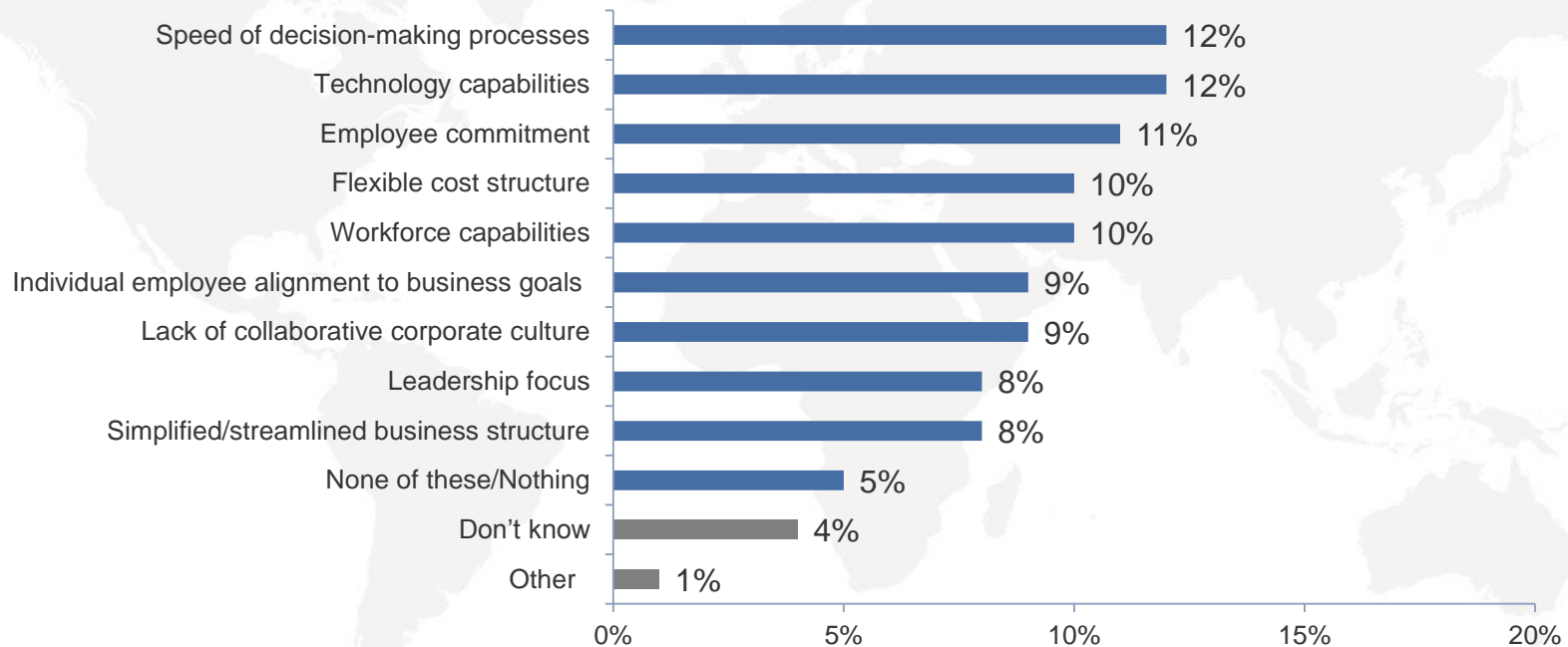


Q: What are the top 3 internal factors that you believe will drive or improve agility in your company?

AUSTRALIA

Top 3 internal barriers to achieving agility

- Speed of decision making processes as well as technology capabilities are seen as the biggest internal barrier to achieving organisational agility, and is selected by 12% each of employers in Australia.
- Employee commitment has been selected by 11% of employers – followed by flexible cost structure and workforce capabilities which each was selected by 10% of all employers.

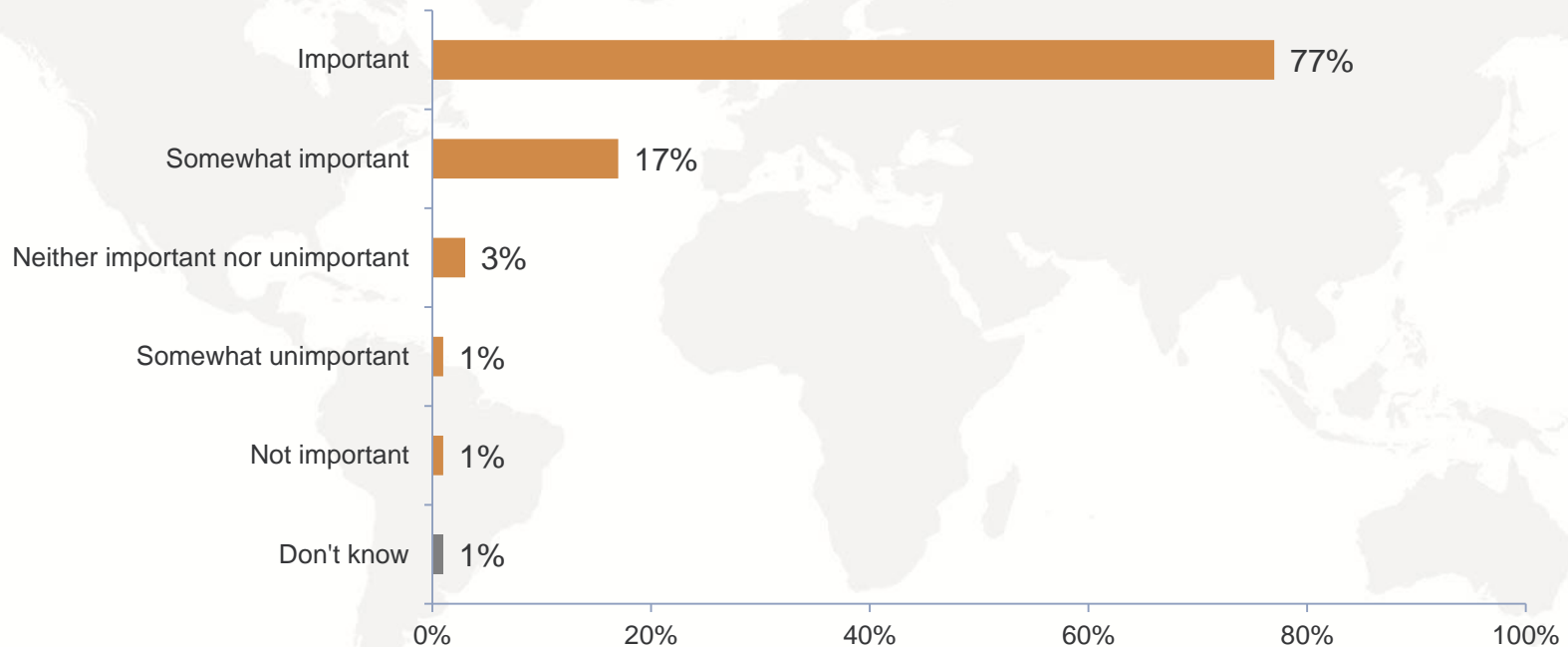


Q: What are the top 3 internal factors that you believe are your company's biggest barriers to achieving agility?

NEW ZEALAND

Importance of organisational agility for next 12 months

- Across New Zealand, nearly four out of five employers say that organisational agility is important to achieving business goals in the next 12 months, and a further 17% say it is somewhat important.
- In total 4%, feel non-committal about the importance of organisational agility (2%) or say it is somewhat unimportant/not important (2%).

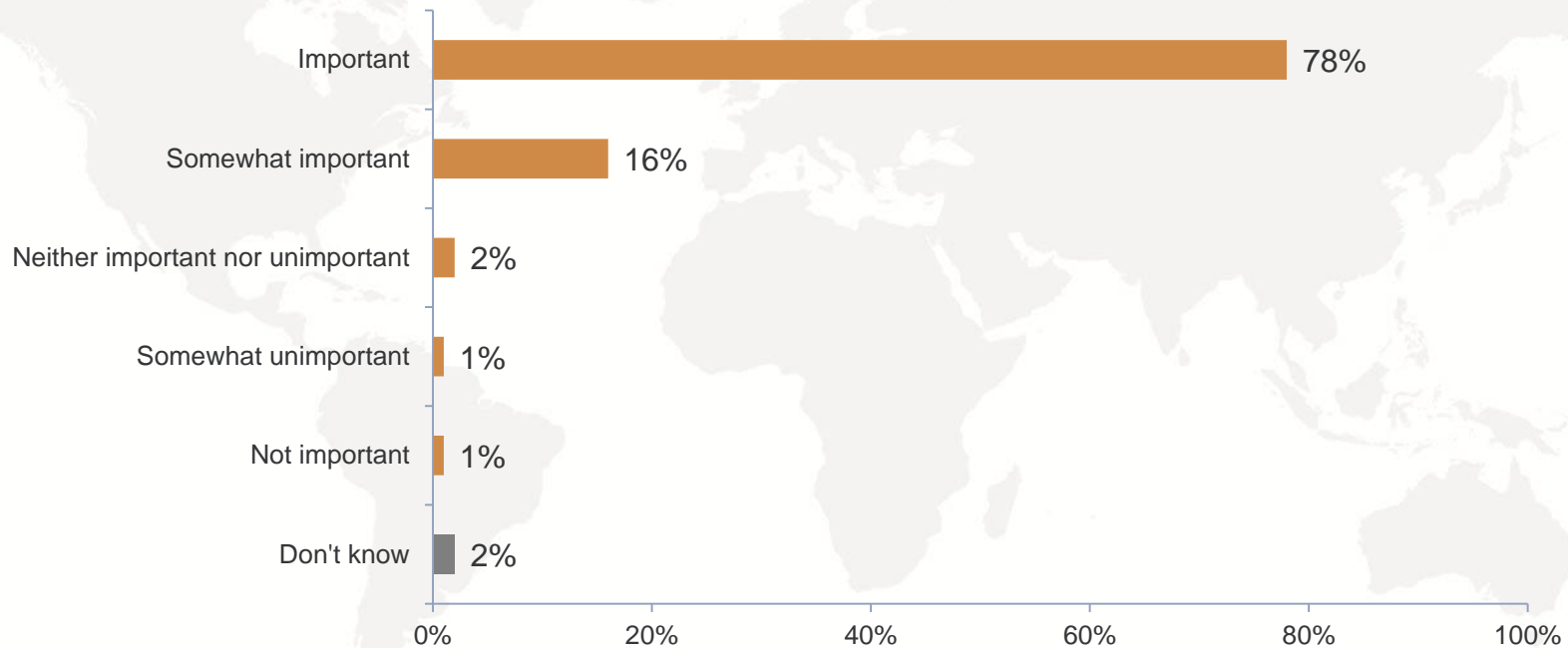


Q: In your opinion, how important is organisational agility—the ability to respond rapidly to changing business conditions—to achieving your company's business goals over the next 12 months?

NEW ZEALAND

Top leadership view of organisational agility

- When asked how top management regard the importance of organisational agility to achieving company business goals, employers give similar answers to their own personal views, with again 78% saying important and 16% somewhat important
- Meanwhile only 4% feel top managers regard organisational agility as somewhat unimportant or not important

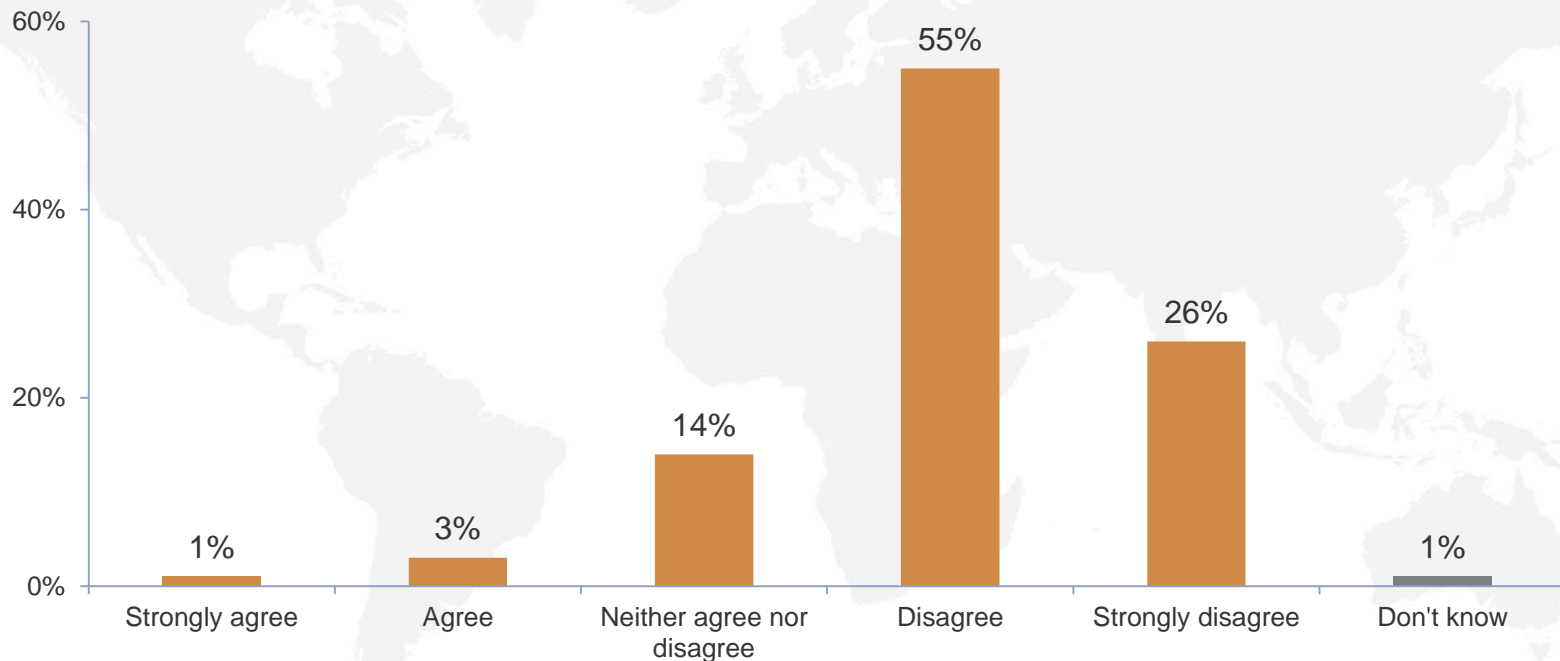


Q: How important does your top leadership believe organisational agility is to achieving your company's business goals over the next 12 months.

NEW ZEALAND

Commitment to organisational agility in past 12 months

- Overall, only 4% agree to some extent that their organisation has demonstrated a commitment to pursuing more organisational agility over the past 12 months.
- That's significantly lower than the same share in overall Asia Pacific (64%) and Global (71%)

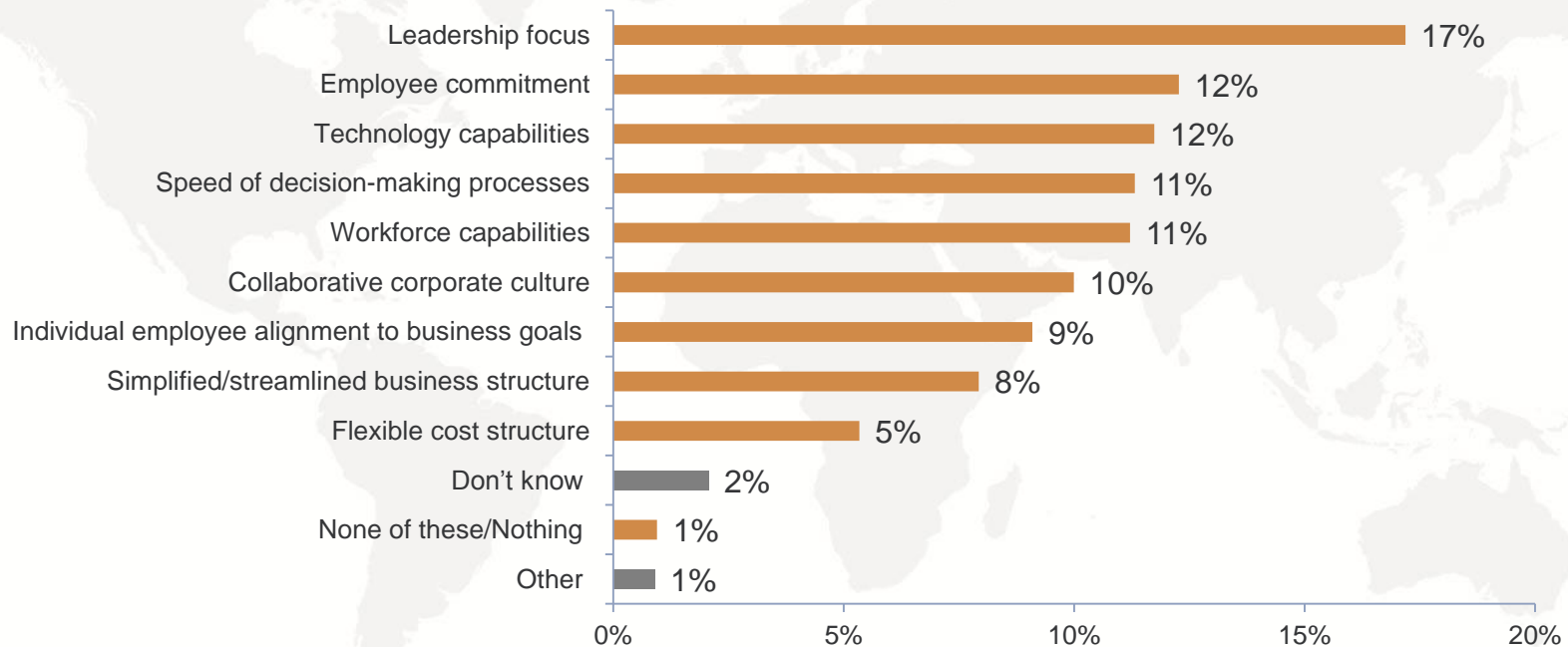


Q: Please state your level of agreement with the following statement... "Over the past 12 months my company has demonstrated a commitment to pursuing more organisational agility."

NEW ZEALAND

Top 3 internal factors driving / improving agility

- Three internal factors stand out as drivers which are improving organisational agility – leadership focus, employee commitment and Technology capabilities – selected by 17% of employers and 12% of employers respectively as one of the top three drivers
- In addition, 11% each say speed of decision-making processes, as well as workforce capabilities are seen as driving agility.

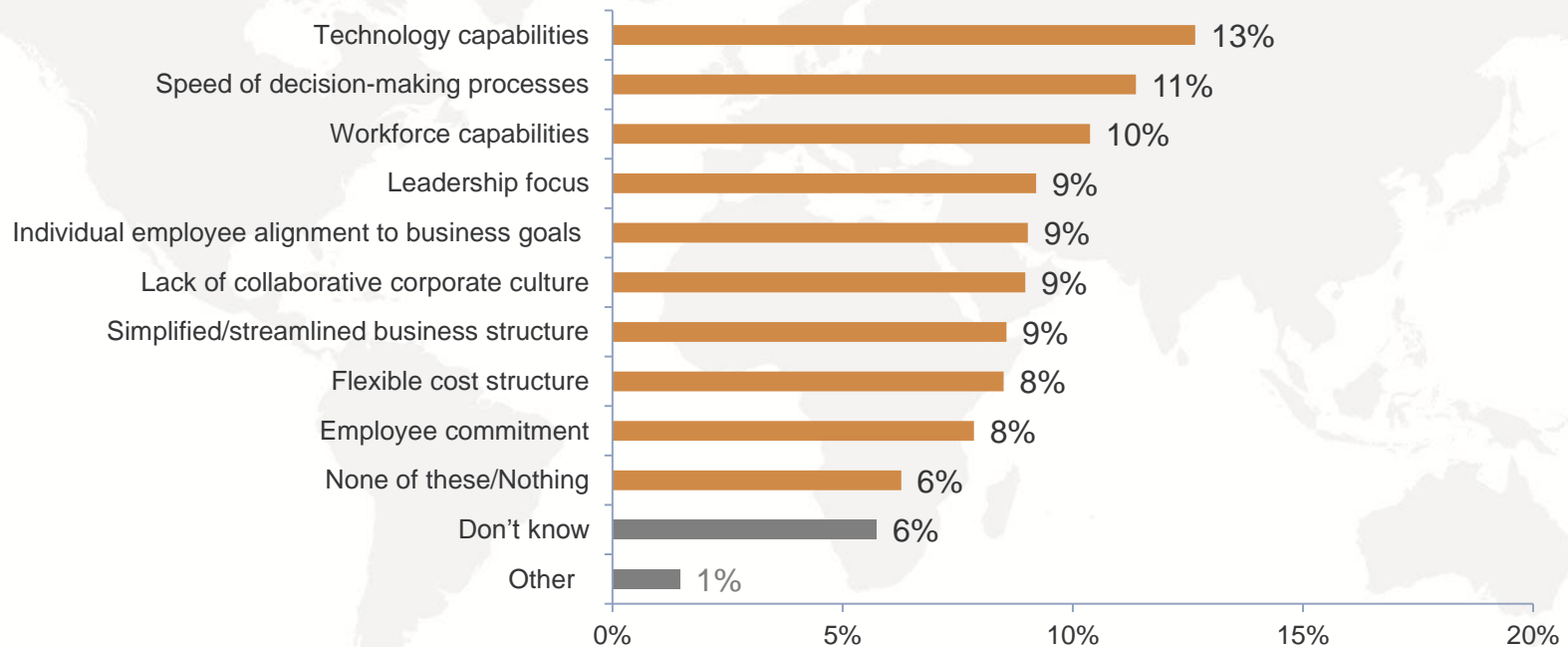


Q: What are the top 3 internal factors that you believe will drive or improve agility in your company?

NEW ZEALAND

Top 3 internal barriers to achieving agility

- Technology capabilities as well as speed of decision making processes are seen as the biggest internal barrier to achieving organisational agility, and is selected by 13% and 11% respectively of all employers.
- Workforce capabilities has been selected by 10% of employers.



Q: What are the top 3 internal factors that you believe are your company's biggest barriers to achieving agility?