

GLOBAL

Job Confidence Index 2021



Contents

3	About the Job Confidence Index		
4	Global Overview		
5	Economic Outlook	28	Economic Outlook
6	Regional Variations in Sentiment	29	Job Market & Job Security
7	Global Job Market & Job Security	31	Compensation & Bonus
8	Global Compensation & Bonus	32	Confidence in Future Job Market
10	Global Confidence in Employment and Future Job Market	34	Job Satisfaction
11	Global Job Satisfaction	36	Employee Motivation Factors
13	Global Employee Motivation Factors	38	Willingness to Relocate
15	Willingness to Relocate	40	Meet the European Specialist Team
16	APAC	41	United States
17	About the Respondents	42	About the Respondents
18	Economic Outlook	43	Economic Outlook
19	Job Market & Job Security	45	Job Market & Job Security
20	Compensation & Bonus	47	Compensation & Bonus
21	Confidence in Future Job Market	48	Confidence in Future Job Market
22	Job Satisfaction	49	Job Satisfaction
23	Employee Motivation Factors	51	Employee Motivation Factors
24	Willingness to Relocate	54	Willingness to Relocate
25	Meet the Asia Pacific Specialist Team	55	Meet the United States Specialist Team
26	Europe	56	Key Findings
27	About the Respondents	59	Our Offices
		60	About us

About the Job Confidence Index

The global pandemic, unprecedented in living memory, has wreaked economic and social havoc. To say the past year has been tumultuous would be an understatement. There is no silver bullet to overcome the challenges of the world health crisis, but as with all sectors, the ramifications across the Supply Chain and Procurement industry have been significant. In this chaotic context, determining precisely how existing and prospective employees are thinking and feeling is an intricate process, but one that is imperative to leverage market opportunity, gain margin stability, and redefine the modern workplace. At **DSJ Global**, we conducted a large-scale survey of over 1,000 Supply Chain and Procurement professionals, for the second year running, to shed light on these important insights.

In conducting this research, our aim was to gain a deeper understanding of the industry workforce's views on:

- Economic and Job Market Outlook
- Job Security and Satisfaction
- Compensation and Bonus Trends
- Intention to Leave
- Willingness to Relocate
- Career Motivators
- Flexible Working Preferences

Armed with intelligible data from our findings, companies operating in the wider Supply Chain industry can better navigate the evolving post-pandemic landscape; a market that is competitive and rife as it has ever been, placing the ball in the candidate's court. Understanding what's important to employees, their current feelings towards the industry, and their varied motivations and worries, will allow your organization to position itself as an attractive workplace that identifies and retains business-critical talent. After all, talent is the kingmaker to innovating, strategizing, and ensuring that your business remains at the cutting edge of the Supply Chain and Procurement sector.

For professionals and prospective job seekers alike, our comprehensive report is peppered with exclusive and revealing insights, taken from the minds of Supply Chain and Procurement professionals across the globe. Being acutely aware of the sentiments related to market confidence, compensation, and flexible working patterns, to name a few, in the ever-evolving industry is extremely valuable. Bundling all these factors together can help Supply Chain and Procurement professionals to capitalize on a buoyant job market, or simply better understand the opportunities that are readily available. ▶

1 Global Overview

Economic Outlook

At the global level, workers' feelings about the economy are increasingly positive

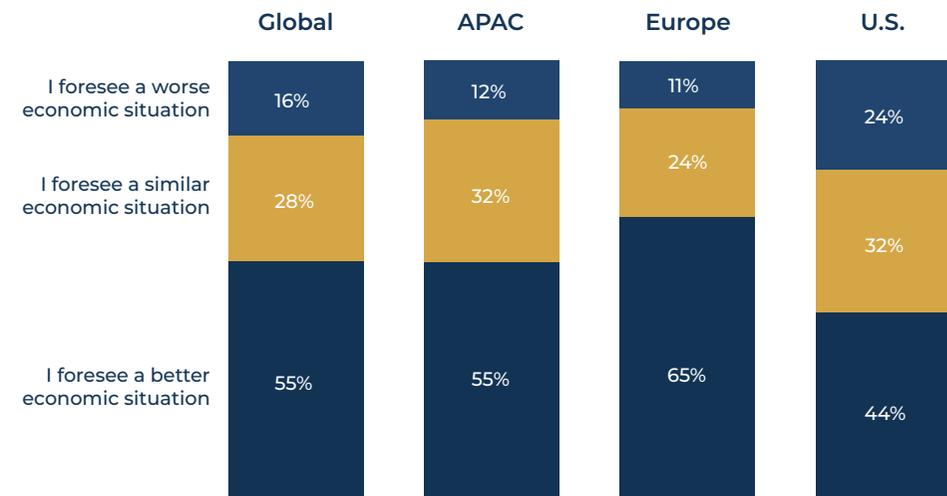
The data collected certainly gives cause for hope with palpable optimism currently characterizing the Supply Chain and Procurement discipline, despite the pandemic-induced collapse lingering in certain countries and leaving a long-enduring scar on many economies. However, the post-pandemic prospects for the market look promising against the backdrop of economic stability. The newest estimates from the World Trade Organization forecast world trade to meteorically climb to 8%¹, coupled with global manufacturing value-added output projected to rebound by 6% this year.²

The notable developments have therefore gained significant momentum in the talent community and are further resonant in the survey data. The global outlook is encouraging with the majority of workers (55%) reporting a positive economic outlook for the next 12 months. Importantly, this optimistic caliber has certainly hit the ground running and further reflects a 22% growth rate from the findings in last year's survey.

The European region had the most positive sentiments towards the economy. 65% of the workforce canvassed confidence in an economic landscape that's progressively improving.

Confidence in Economic Recovery — Global

Q. How do you think the economy will fare in the next 12 months?



By contrast, the U.S. was the least optimistic region with just 44% of respondents displaying an optimistic outlook.

Neutral sentiment remains high across the regions, with a third of professionals in both the U.S. and Asia-Pacific (APAC) regions, in addition to nearly a quarter of European workers, expecting a similar economic situation over the next year. ►

1. World trade primed for strong but uneven recovery after COVID-19 pandemic shock, World Trade Organization, 31 March 2021, https://www.wto.org/english/news_e/pres21_e/pr876_e.htm

2. Beyond COVID-19: Supply Chain Resilience Holds Key To Recovery, Baker McKenzie, <https://www.bakermckenzie.com/-/media/files/insight/publications/2020/04/covid19-global-economy.pdf?la=en>

Read the individual chapters for the full set of survey results and commentary for each region.

Regional Variations in Sentiment

Whilst overall global confidence paints a more optimistic picture than 2020, our survey has also highlighted some important regional differences in the end-to-end Supply Chain employee sentiment. These differences may be explained by the multiple ways that individual countries have responded to the global health crisis, the timings of interventions such as the lifting of travel restrictions, and the macro-economic conditions, which exist in each country.

Respondents in APAC tend to be:

- Most confident in receiving a salary increase (57%).
- Most unconfident in their own job security (34%) and least confident in finding a new job (43%).
- Most likely to leave (72%) and most willing to relocate (79%).
- Most motivated by the opportunity to progress their career (69%).
- Most enthusiastic about working fully remote 24%.

Respondents in Europe tend to be:

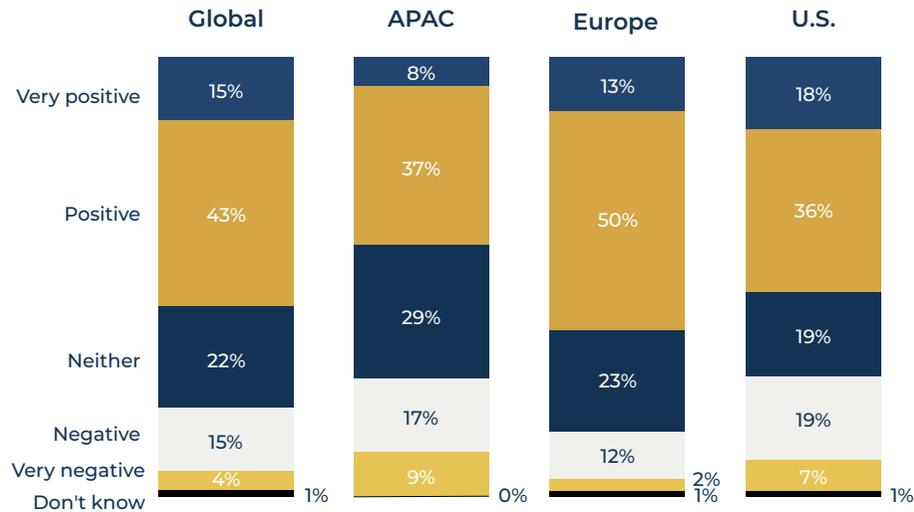
- Most positive about economic outlook (65%).
- Most confident in current job market (63%) and own job security (69%).
- Most satisfied in their jobs (55%) and least likely to leave (61%).
- Most motivated by a new challenge (60%).
- Least enthusiastic about full time remote work 6%.

Respondents in the United States tend to be:

- Most likely to be pessimistic (24%) about economic recovery.
- Least likely to have received a bonus (48%).
- Least satisfied in current role (44%).
- 70% open to new opportunities in the next 6 months, with highest certainty at 45% very likely to leave.
- Most motivated by Higher Salary (62%).

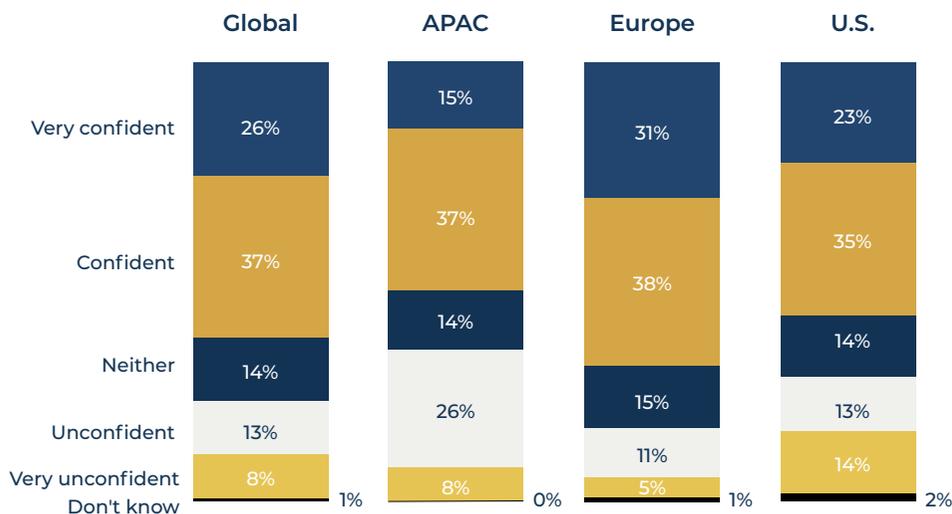
Job Market Confidence — Global

Q. How positive are you about the current job market?



Job Security Confidence — Global

Q. How confident do you feel about your job security in the next 6 months?



Global Job Market & Job Security

Confidence in Job Market Parallels the Reawakening of Global Economies

The findings show that confidence in the current job market is at an all-time high across the globe. On aggregate, 58% of professionals felt positive about the current market; a substantial increase from the 36% of respondents who gave this answer in last year's report.

Reflecting the growth in overall economic confidence, the European region markedly stands out with 63% of professionals feeling positive about the current job market. This is a shift from last year when Europe's level of confidence plummeted somewhere in between the sentiments expressed by the other areas. The U.S. now occupies this middle space, with 54% of respondents expressing confidence. APAC rounds out the list as the most pessimistic region, with only 45% reporting a positive outlook on the current market.

The generally positive feelings about the current job market reflect similar sentiments that workers have about their job security. On the whole, high levels of job security were observed globally, with 63% of respondents stating that they were confident in keeping their current jobs. Once more, European Supply Chain and Procurement professionals displayed the most job security confidence with 69%. The U.S. was next, totaling in at 58%, followed by the APAC region with 52%.

Both Europe and the U.S. experienced increases to job security confidence in stark contrast to last year, by 14% and 21% respectively. APAC also witnessed the only drop-off compared to the previous year with a reduction of 6% in the region. ▶

Global Compensation & Bonus

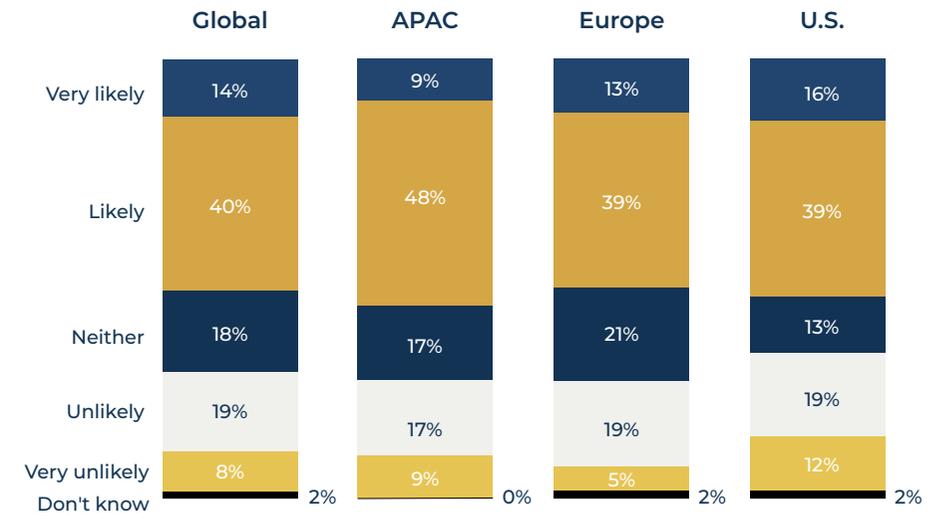
Time To Be Bold

From a global footing, a healthy majority (54%) of respondents are anticipating a higher paycheck in the next 12 months. This is a profound 11% increase from the 43% brandished by respondents last year.

Despite scoring highest on economic and job market positivity, the professionals in Europe report lower expectations for more compensation (52%) than those in the U.S. (55%) and APAC (57%). Nevertheless, these regional contrasts show that more than half of professionals overall expect a higher salary in the coming year. Supply Chain and Procurement corporations should perhaps take note here. Failure to award incentives to high-performing talent could be a significant pitfall – one that may subsequently result in leading visionaries exiting the workforce entirely and pursuing greener pastures. ▶

Compensation Increase — Global

Q. How likely is it that your compensation will increase in the next 12 months?



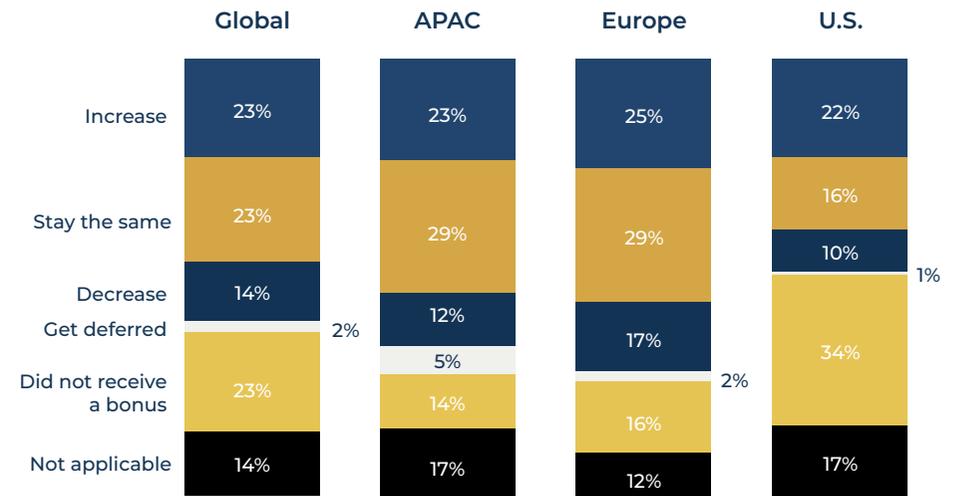
Cashing In

The research revealed some mixed results regarding bonus payments. Compared to the previous year, 23% of respondents received a higher bonus, 23% received the same bonus, and 14% received a reduced bonus. Nonetheless, this demonstrates that well over half of the Procurement and Supply Chain talent pool is still receiving bonus payments, even amidst the economic headwinds and international disruptions of the past year.

From a regional perspective, workers in the U.S. were the least likely to receive a bonus compared to the other areas. Perhaps unsurprisingly, given the higher levels of confidence and positivity reported in the region, the European workforce was the most likely to receive the same or an increased bonus (29% and 25% respectively). APAC was next with 29% and 23% of respondents likely to get the same or an increased bonus. Our latest findings might point towards a newfound importance for Supply Chain and Procurement corporations to proactively retain key decision-makers and therefore mitigate high employee turnover problems from incurring. ▶

Annual Bonus — Global

Q. Have you received a bonus this year? If so, did it:



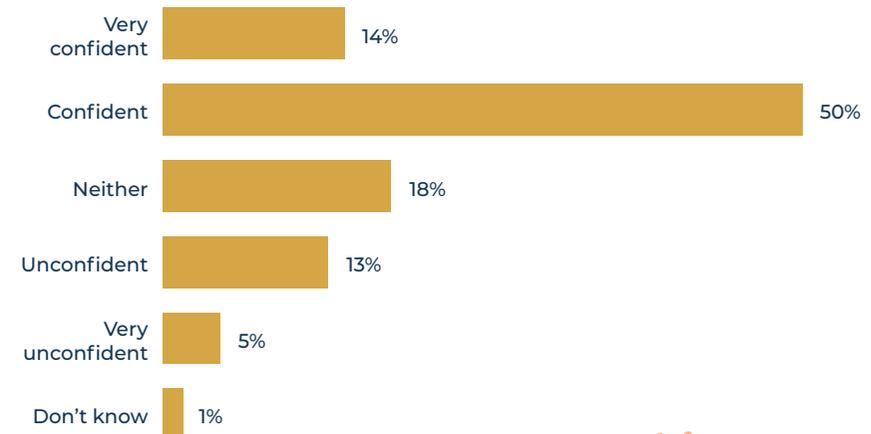
Global Confidence in Employment and Future Job Market

Bright Spots

Overall, global respondents displayed confidence in the future job market, with 64% of the sample saying they were either confident (50%) or very confident (14%). Only a small segment (18%) of the global workforce reported feeling either unconfident (13%) or very unconfident (5%). At **DSJ Global**, it is promising to observe that this optimistic memorandum is a direct reversal from the pessimism that was canvassed by respondents in the 2020 survey. This positive narrative may highlight a shared global sentiment to shrug off the difficulties from the past year, perhaps spurred by vaccine roll out programs or an acceleration in consumer spending, and leap forwards to shape long-term operational resiliency. ▶

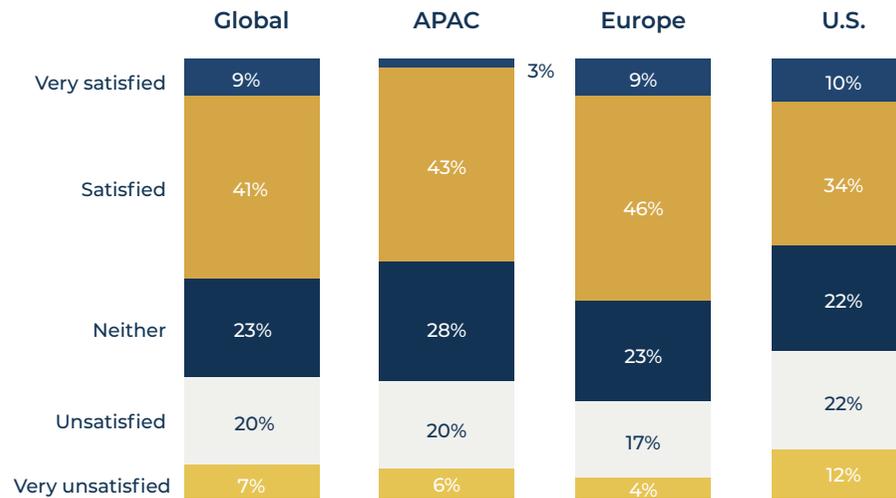
Confidence in Future Job Market — Global

Q. Over the next 12 months, how confident are you that the job market will get better?



Job Satisfaction — Global

Q. Overall, how satisfied are you with your current job?



Global Job Satisfaction

When asked about how satisfied they were in their roles, 50% of respondents across the U.S., APAC, and Europe replied that they were either highly satisfied (9%) or satisfied (41%). 28% of respondents said they were either unsatisfied (20%) or highly unsatisfied (8%). With over a quarter of the talent pool currently unfulfilled in their roles, employers will need to acutely acknowledge these sentiments and then look to implement strategies that specifically mitigate staff retention problems. In a highly mobile job market that is deeply driven and navigated by candidates, many might have multiple offers on the table, risk their job security, or develop an appetite to explore new career prospects, even if they are satisfied with their current role. In this competitive landscape that is ripe with opportunity, the innumerable retention challenges are sure to set the cornerstone on the backend of 2021. ►



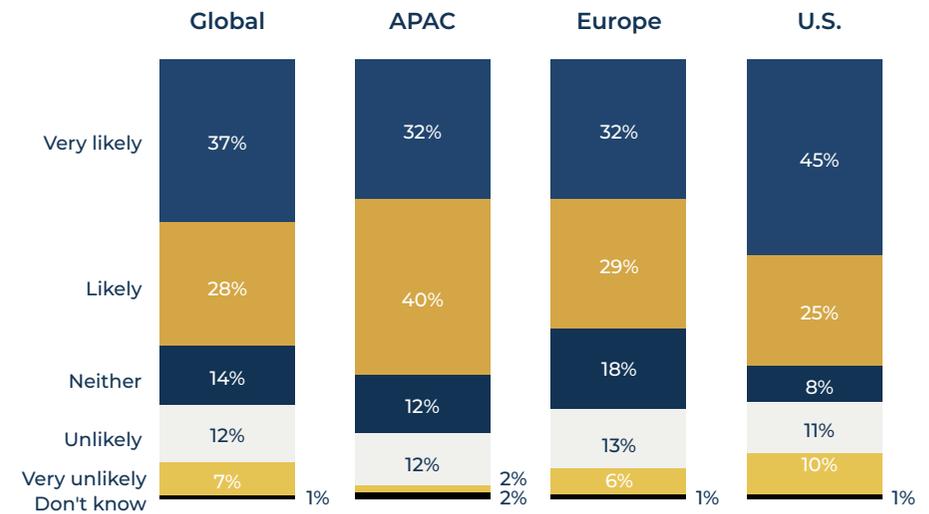
Sheltering or Buckling Up for Departure?

According to our survey, the data reveals a widely felt desire amongst the global talent pool to leave their current jobs and embark on a new chapter. Two thirds (66%) of respondents said they were either very likely (38%) or likely (28%) to leave their current position. This is driven by growing confidence in the economy and job market. Enterprise leaders and HR managers should take stock – talent may be on the move. Fuelled by opportunity and an allure to re-evaluate their possibilities, employees might be more likely to jump ship, as there is no better time to orient a new position than in a candidate driven market.

These compelling findings also highlight two different sides of the coin. For companies that are eager to retain their top talent, this should serve as a notice to provide a myriad of reasons for them to stay, including but not limited to, better end-to-end working conditions, specific incentives, and a beneficial work-life structure, among others. For employers looking to fill open vacancies, it's an ample opportunity to capitalize on an active, mercurial market and hire business-nuanced professionals who want to expand both their geographical parameters and employment options. ►

Intention to Leave — Global

Q. How likely are you to look for a new role in the next 6 months?



Global Employee Motivation Factors

Higher Salaries, Career Progression, and New Challenges Make the Grade

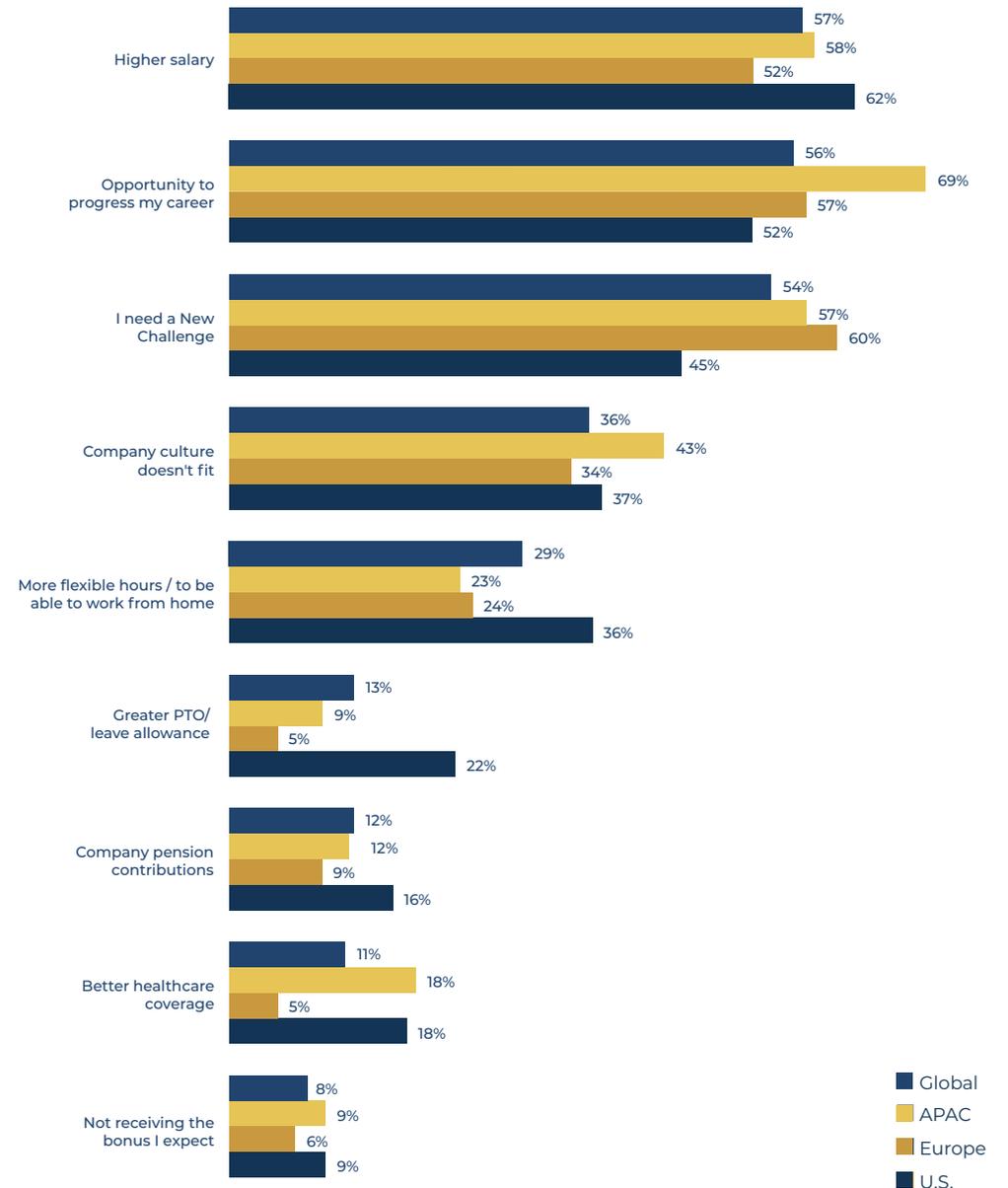
At the global level, the most important motivating factor is a higher salary. However, this requires some contextualization. Upon delving deeper into the regional results, this only holds true for U.S. respondents. In the Europe and APAC regions the top motivating factors were the need for a new challenge, and opportunities for career progression, correspondingly.

Nevertheless, global respondents listed higher salaries (57%), career progression (56%), and novel challenges (54%) as the most important factors. Even when disaggregating this data to the regional standpoint, the same three factors are always the most important (even if the order of importance changes).

Moreover, these scores are significantly higher than the next most important factors. Only 36% of all respondents registered the company’s culture as an important issue (the fourth highest listed factor), while only 29% stated that flexible working was a key motivating factor. ▶

Motivation Factors — Global

Q. What reason would attract you to seek new employment? (Select all that apply.)

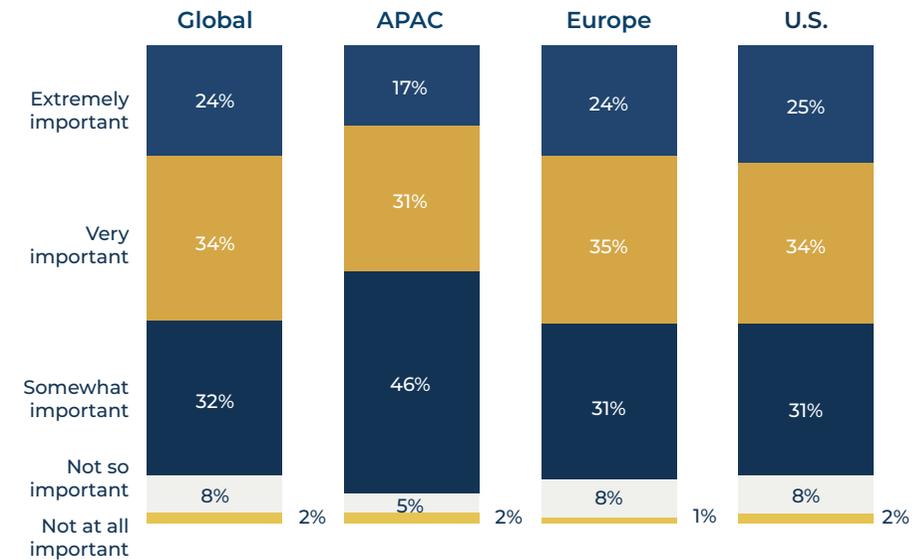


Flexibility for the Future

It should also be noted that this data belies the true significance of flexible working arrangements in the global talent pool. While this issue may not be a primary career motivator in relative terms, 90% of respondents stated that it was critical when asked directly about the importance of flexible work. Furthermore, 58% answered that it was very or extremely important. So, while it is not necessarily a main motivating determinant, it's essential that the flexible working paradigm is an available option. The improved work-life balance that this structure affords has certainly gained currency in the talent community – with agile technologies potentially replacing the now-bygone commute. The survey results are therefore the clearest indicator that organizations should work hard to understand specific employee drivers, not only to create a competitive package, but to also usher in a wave of mission-critical talent and further motivate them to stay put. ▶

Importance of Flexible Working — Global

Q. How important is flexible working when considering a new opportunity?



Willingness to Relocate

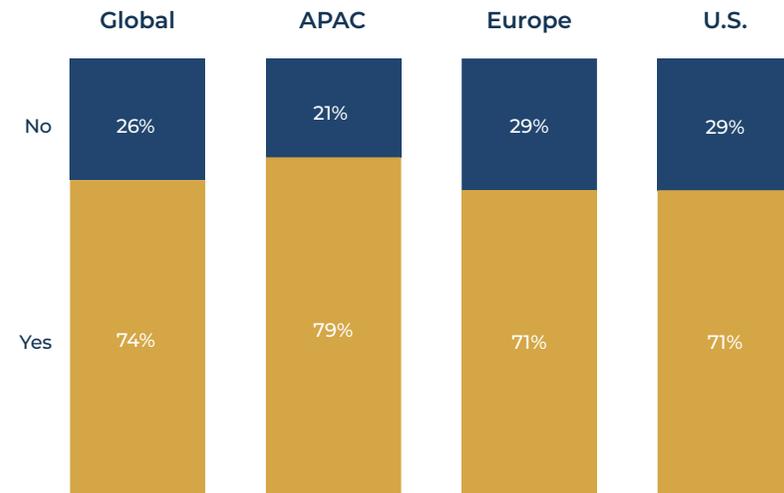
Supply Chain Talent is on the Move

In what might come as welcome news to many recruiters, the global workforce reports high willingness to relocate for work. On the whole, 74% of the transatlantic sample indicated they would move for the right job. Interestingly, APAC workers were the most keen in this respect, with 79% of them expressing a willingness to relocate. The Europe and U.S. workforces had a slightly lower proportion of respondents giving this answer, but at 71% in both regions this is still a significant amount. This demonstrates an increasingly mobile talent pool, indicating that organizations may benefit from considering talent outside local geographies in their recruitment strategy.

In a world where global supply chains are disrupted and labor markets continue to evolve, having the right people in place is critical for navigating choppy waters. Procurement and Supply Chain verticals are currently facing a talent war; demand is surplus, but supply is not so forthcoming. To attract and retain top talent in this highly competitive market, employers must gauge the needs, desires, and motivations of their workforce. This is crucial for organizations to face whatever challenges, operational efficiencies, and future growth strategies lie ahead. In order to succeed in this uncertain business climate, corporations that look to retain and secure mission-critical talent will need to move fast – offering exciting reasons to join and working hard to learn what factors drive professionals in the supply chain talent landscape. ►

Willingness to Relocate — Global

Q. Would you consider relocating for a role?



2 APAC



About the Respondents

Factor	% of respondents
Seniority	APAC
Entry-level	2%
Associate	3%
Mid-Senior	51%
Director	34%
Executive	11%
Sector	APAC
Procurement	39%
Supply Chain	24%
Logistics	6%
Technical Operations	31%

Economic Outlook

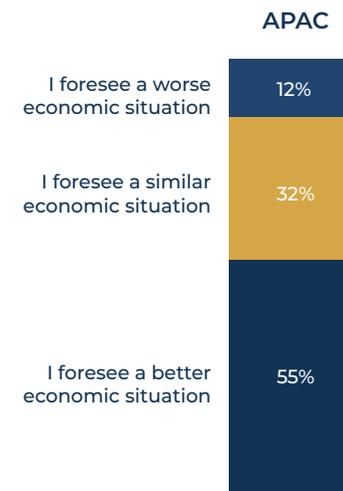
Cautiously Optimistic About Economic Growth

In late 2019, China was ground-zero for the COVID-19 outbreak. Additionally, socio-economic disruptions and political strife cast a far-ranging cloud on many countries, most hardly felt in places such as Hong Kong and Thailand. These factors combined to produce a highly pessimistic sentiment across Asia Pacific, against a backdrop of economic, cultural, and geo-political issues, which continue to plague certain countries. It is no surprise that in our 2020 report, a plurality of respondents (44%) stated that they foresaw a worse economic situation in the next 12 months.

However, a confluence of factors has resulted in a stark change of attitudes this year. This is no doubt largely due to the highly effective anti-COVID measures introduced by countries such as Australia and Singapore, as well as the strong economic performance of China. As a result, our survey elucidates over half the respondents (55%) foresee a better economic situation across the next 12 months. Comparably, 32% report that the economic situation will be similar, while only 12% were of the opinion that it is going to get worse. ▶

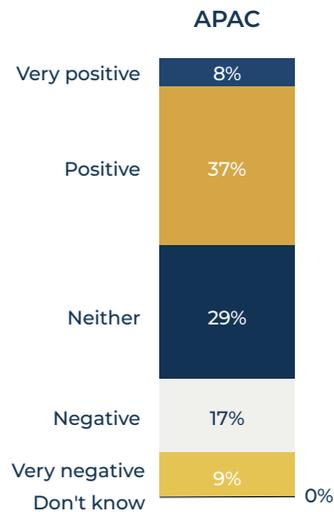
Confidence in Economic Recovery — APAC

Q. How do you think the economy will fare in the next 12 months?



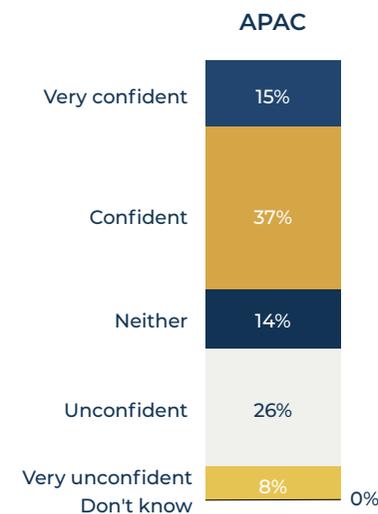
Job Market Confidence — APAC

Q. How positive are you about the current job market?



Job Security Confidence — APAC

Q. How confident do you feel about your job security in the next 6 months?



Job Market & Job Security

Tentatively Progressing

Respondents in the APAC region were generally more positive than negative in their sentiments regarding the current job market. In total, 45% had either positive (37%) or very positive (8%) feelings about the current state of affairs. This is a marginal 1% increase compared to last year. By contrast, 9% of the same cohort shared very negative sentiments and 17% had negative sentiments — adding up to a total of 26% reporting pessimism towards the current job market this year. This is a drop of 5% compared to the 31% who reported negative sentiments towards the job market in 2020.

When asked about job security, answers similarly reflected provisional positivity. In the talent space, 37% felt confident in their job security, and 15% were very confident. This means that over half the APAC sample (52%) felt that their job was safe. However, it should also be borne in mind that the respondents who were either very unconfident (8%) or unconfident (26%) represented 34% of the sample. So while there is cause for positivity due to the majority of workers feeling safe in their employment, this should be tempered with the knowledge that over a third of workers do not. ►

Compensation & Bonus

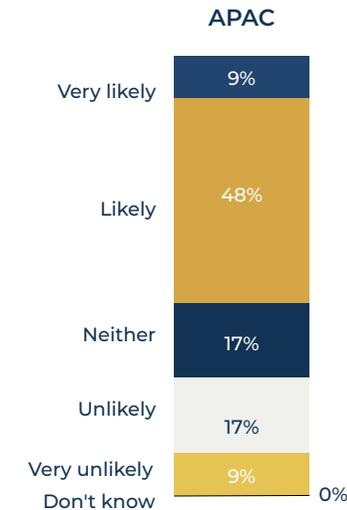
APAC more positive about compensation than other regions

The incidence of the global pandemic has done nothing to dampen the optimism of APAC professionals with regards to their compensation. Under half, (48%) of respondents stated that they were likely to receive a pay increase over the next 12 months. This accumulative number was higher than in any other region, and 8% higher than the global average. Additionally, when combined with the 9% of people who felt they were very likely to receive a pay increase, this demonstrates that 57% of employees were laden with positivity – an incremental 3% increase over the previous year. This snapshot of Asia Pacific may reflect an upturn and growing confidence in Supply Chain and Procurement firms to up the ante with their year-end incentive payments in a bid to put retention contingency plans in place.

Another factor helping to anchor APAC professionals' confidence in their compensation may well be the consistency of the bonuses awarded. With 29% of professionals continuing to receive the same bonuses that they did the previous year and 23% obtaining greater amounts, many no doubt had their fears assuaged. When analyzing the numerical data, perhaps this is a strong insight that, on the back of a buoyant bonus and compensation pool, the end-to-end Supply Chain sector is primed for future measurable growth and robust recovery in 2021. ►

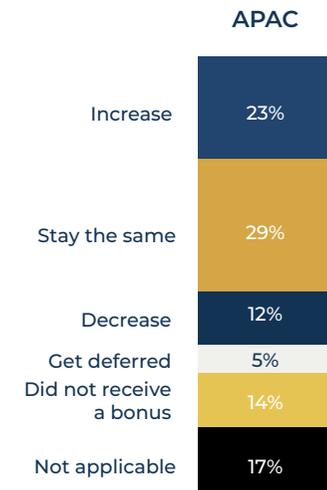
Compensation Increase — APAC

Q. How likely is it that your compensation will increase in the next 12 months?



Annual Bonus — APAC

Q. Have you received a bonus this year? If so, did it:



Confidence in Future Job Market

An Inflation in Confidence

There are generally high levels of confidence in the future job market prospects amongst APAC professionals. Over half, 52% of respondents reported that they felt confident (2% higher than the global average), and 9% were very confident. By contrast, a minor segment (14% to be precise) of respondents were unconfident and just 6% felt very unconfident.

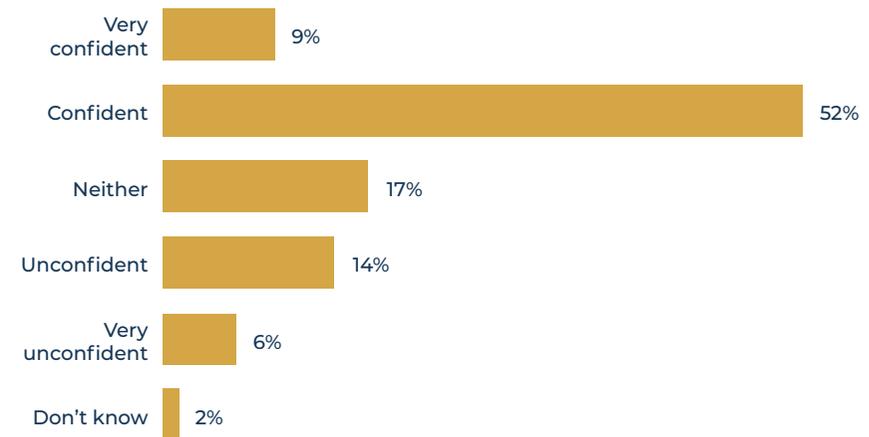
Importantly, this demonstrates a dynamic growth rate of 10% from last year regarding respondents who felt positive about the future job market. Similarly, the sum total of professionals feeling negatively about the future job market this year (20%) was 11% lower than those reporting a pessimistic view in 2020.

As previously mentioned, the positive trends are likely to be in large part due to the effective handling of COVID-19 by nations across Asia Pacific, including remarkable economic growth in places such as China.³ Having seemingly weathered the storm of the global pandemic, and already making great strides towards economic and industrial expansion, the region's economies seem to have alleviated many of their workers' fears about the future of the job market.

When questioned about their feelings on finding new employment, the responses from professionals in the APAC region were not quite as hopeful, however. Here, a total 43% of respondents gave negative responses of either unconfident (28%) or very unconfident (15%). Those who felt more optimistic about their prospects of finding another job also constituted 43% of the sample, with 37% feeling confident and 6% feeling very confident. ▶

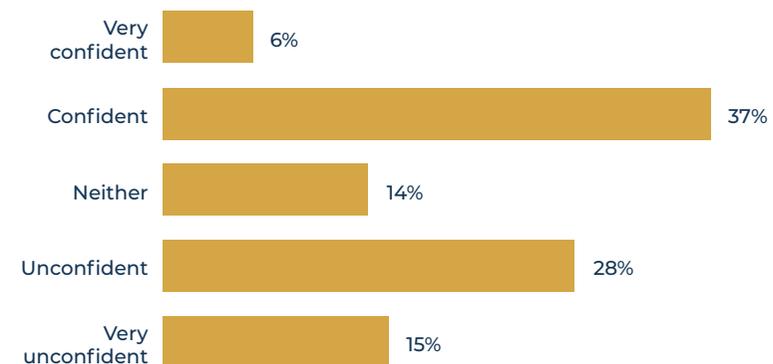
Confidence in Future Job Market — APAC

Q. Over the next 12 months, how confident are you that the job market will get better?



Employment Confidence — APAC

Q. If you become unemployed, how confident would you feel in finding another job in the next 3 months?



3. Kollwe, J. Rise in China's imports and exports eases fears over global growth, *The Guardian*, 13 July 2021, <https://www.theguardian.com/world/2021/jul/13/rise-in-chinas-imports-and-exports-eases-fears-over-global-growth>

Job Satisfaction

Less than half of employees are satisfied with their jobs

Only 46% of respondents reported job satisfaction, with 3% stating that they were very satisfied and 43% saying they were satisfied. This is a 9% reduction in positive responses regarding job satisfaction when compared to the 2020 report. Moreover, 26% of respondents gave negative responses: 20% were unsatisfied while 6% were very unsatisfied. This demonstrates an increase of 5% in job dissatisfaction over the past year.

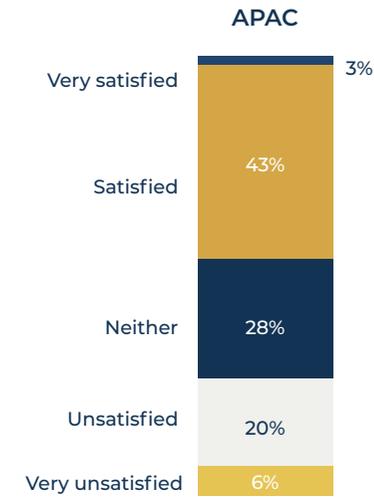
High numbers of workers are comparatively eager to leave their current jobs

APAC employees reported a greater willingness to leave their current position than those working elsewhere. With 32% of the sample stating that they were very likely to leave their job, and 40% answering that they were likely to, a total of 72% of workers can be expected to seek new employment. This translates to nearly three quarters of the workforce possibly looking for new jobs – a staggering statistic.

On the other end of the spectrum, as little as 2% were very unlikely to leave their job, and only 12% reported that they were unlikely to. This data should serve as a stark warning to employers in the APAC region. These numbers highlight the need to identify the root causes of this trend and to intervene accordingly with the appropriate measures. ▶

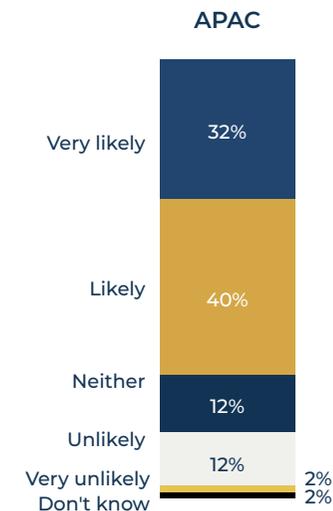
Job Satisfaction — APAC

Q. Overall, how satisfied are you with your current job?



Intention to Leave — APAC

Q. How likely are you to look for a new role in the next 6 months?



Employee Motivation Factors

APAC employees are chiefly opportunities for career progression

When asked about their career motivations, the opportunity to progress their career was by far the most important factor for APAC professionals. 69% of respondents listed this as a motivating factor. This is an important observation – one that Supply Chain employers would be wise to pay attention to. It is often assumed that a higher salary is the most important incentive, yet for APAC professionals, this is less important than a clear route for professional advancement.

Interestingly, although a higher salary was the second most important motivating factor for this sample, it was only marginally more important than the next important factor. Higher salaries were reported as important by 58% of the sample, while 57% highlighted needing a new challenge as the key motivational factor.

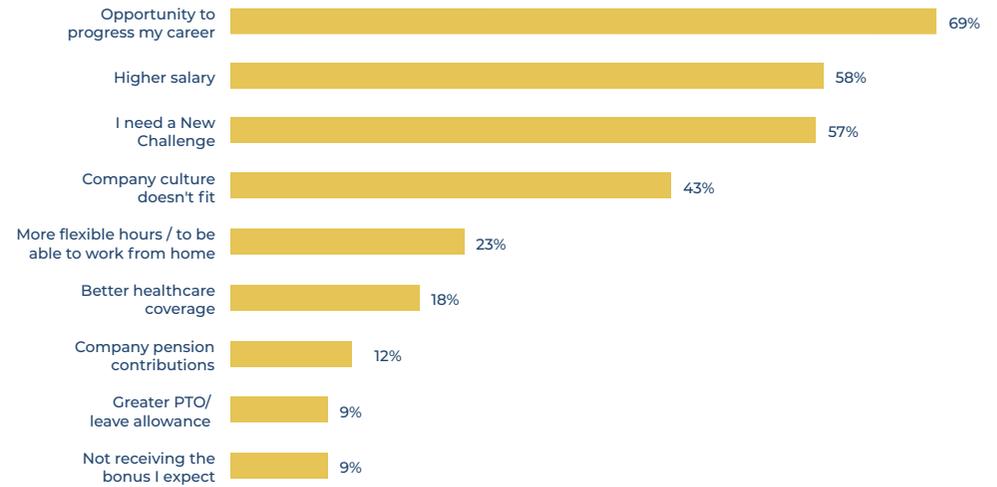
Clearly then, many APAC professionals seek a balance between career progression opportunities and new challenges in addition to healthy compensation. These results demonstrate the importance of understanding the full range of factors that motivate employees, above and beyond money. It reinforces the point that you cannot put a price on job contentment.

Flexible working arrangements are important to most employees

Respondents were also asked to reflect specifically on the importance of flexible work. An overwhelming majority of APAC professionals stated that this was of some importance to them. A total of 94% stated that flexible work was either extremely important (17%), very important (31%), or somewhat important (46%). ▶

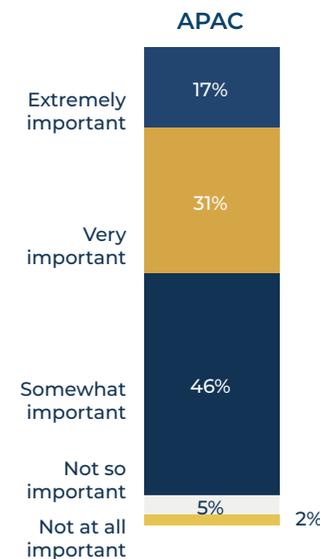
Motivation Factors — APAC

Q. What reason would attract you to seek new employment? (Select all that apply.)



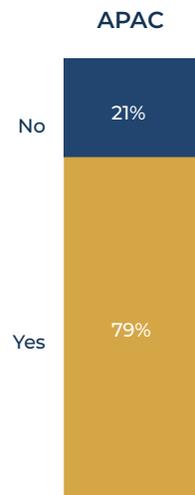
Importance of Flexible Working — APAC

Q. How important is flexible working when considering a new opportunity?



Willingness to Relocate — APAC

Q. Would you consider relocating for a role?



Willingness to Relocate

Over three quarters of employees are willing to relocate

An overwhelming majority of professionals in the APAC Supply Chain and Procurement industry stated that they would be willing to relocate for work. 79% of respondents reported that they were prepared to move location for employment reasons, whereas only 21% would not consider doing this.

Interestingly, this demonstrates a 45% increase in workers who are willing to relocate. This suggests that developments over the past year have caused workers to reassess the importance of relocating. These results will also be of particular interest to employers outside the APAC region. To land top-tier talent, employers will need to find ways of keeping up with the competition and standing out in a fiercely competitive job market. ▶

Meet the Asia Pacific Specialist Team



Jamie Thorpe
Head of DSJ Global, Asia
Jamie.Thorpe@dsjglobal.com



Jerome Quek
Head of DSJ Global, Singapore
Jerome.Quek@dsjglobal.com

3 Europe

About the Respondents

Factor	% of respondents
Seniority	Europe
Entry-level	1%
Associate	8%
Mid-Senior	38%
Director	39%
Executive	14%
Sector	Europe
Procurement	34%
Supply Chain	38%
Logistics	5%
Technical Operations	23%

Respondents by country

Q. Which country do you work in?



Economic Outlook

Economic expectations: Confidence is high and growing

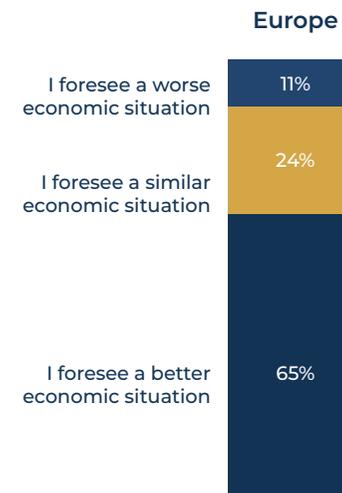
As the COVID-19 virus spread throughout the world, many European countries were hit particularly hard. This, coupled with the uncertainty and anxiety over how Brexit would impact the region's economies, provoked a wave of pessimism amongst European respondents in last year's report.

This year, the data tells a different story entirely, however. European respondents were by far the most optimistic about the prospect of economic prosperity, with 65% of respondents reporting that they foresee a better economic climate developing over the next year. Similarly, only 11% of respondents felt that the economic situation was going to worsen.

These results reflect observations that the **DSJ Global** team made in the European Supply Chain and Procurement market. **Matthew Wood**, Director at **DSJ Global**, explains how the pandemic has affected the Supply Chain industry and how recovery reveals itself. "During the pandemic, many projects around investment, transformations or centralization were paused. Some businesses were in the process of professionalizing their Supply Chain function, but all of these projects were frozen in March 2020. Now, most of these projects are back on. On the other hand, some businesses were extremely busy with the increased demands on supply chains that they weren't focusing on growth or hiring projects. But business as usual is now returning, increasing confidence in the economy." ►

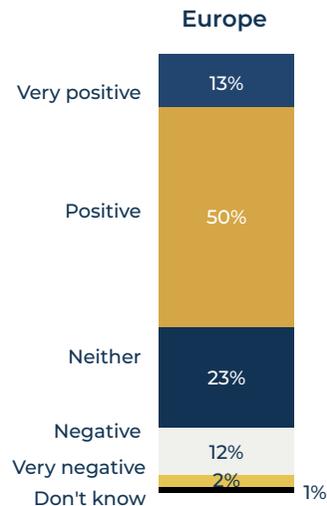
Confidence in Economic Recovery — Europe

Q. How do you think the economy will fare in the next 12 months?



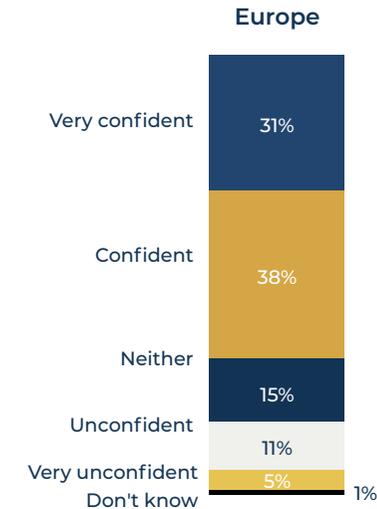
Job Market Confidence — Europe

Q. How positive are you about the current job market?



Job Security Confidence — Europe

Q. How confident do you feel about your job security in the next 6 months?



Job Market & Job Security

European employees are notably positive about the job market

Reflecting the high levels of optimism amongst the European workforce regarding the future of the economy, respondents were similarly positive about the current state of the job market. 63% of European Supply Chain and Procurement professionals are feeling positive about the current employment prospects. This is a substantial increase of 28% from last year and again was the strongest result globally.

This same optimism was demonstrated amongst the European talent pool when they were questioned about their confidence around job security. 69% of Supply Chain professionals in Europe were confident in their job security, with 31% very confident, significantly higher than both their APAC (52%) and U.S. (58%) counterparts. The European workforce also showed growth in confidence when compared to last year, with a plus of 14% compared to the 55% reported confidence in job security in 2020. ►



Many factors may be contributing to the positive outlook from European workers. Firstly, the vaccine roll out across the continent has been accomplished with impressive speed and effectiveness.⁴ Secondly, the region has experienced a remarkable economic recovery. With a growth rate of 4.2% projected for 2021, this would be the fastest economic growth experienced in the EU since 2017.⁵

On top of generic factors like the above, revisiting projects that were paused for a year creates increased talent needs in the industry, which fuels confidence in the job market. **Matthew Wood** adds, “Hiring projects that were frozen are being picked up again and Supply Chain leaders who were too busy for hiring previously are now continuing to grow their teams. And finally there are also

those businesses that learned a lot from the pandemic and are now rethinking their processes, leading to restructurings and new jobs.”

Wood further describes how the proliferation of remote working has had a beneficial impact on the job market. “Remote hiring has matured, and people are more comfortable with it. So that positively contributes to hiring processes running smoothly and therefore the trust and confidence in the job market. On top of that, we notice that candidates who would have not considered a conversation about changing roles this time last year due to insecurity, are now more comfortable in considering a move. This actually makes the recruitment market very active.” ▶

4. COVID-19 Vaccine Rollout Overview, European Centre for Disease Prevention and Control, 14 July 2021, <https://www.ecdc.europa.eu/en/covid-19/vaccine-roll-out-overview>

5. Average annual growth rate of gross domestic product in the European Union from 2013 to 2022, Statista, May 2021, <https://www.statista.com/statistics/1070317/eu-gdp-growth-rate/>

Compensation & Bonus

More than half of European workers are still expecting a pay rise

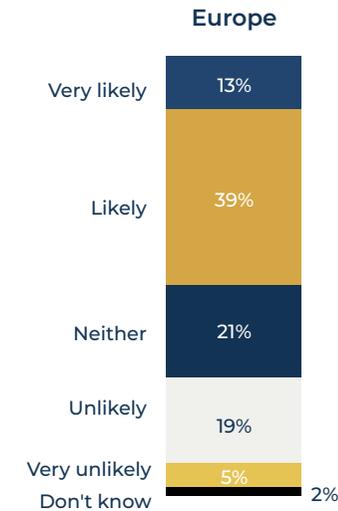
The data gathered in Europe demonstrates that over half the workforce (52%) consider it either likely or very likely that they'll receive a pay rise over the course of the next 12 months. Moreover, this 52% represents an increase of 10% compared to the 42% who felt the same way last year. This indicates growing expectations about improved job compensation amongst the majority of people.

Furthermore, the data on bonuses delivers further good news. 25% of European workers received an increase in their annual bonus payment, higher than any other region polled for this report. In addition to this, 29% of the sample continued to receive the same annual bonus payment as they did last year. This is the same proportion as reported in the sample by APAC professionals and higher than the 16% of U.S. respondents who gave this answer.

Matthew Wood adds that recent improvements in compensations and bonuses are to be expected, given the lack of progress in this area last year. "A lot of people would have had no salary increases, so it's not surprising that they'll catch up in the next 12 months. The good people know they're in demand and that they're hot property, and will expect to be compensated accordingly." ▶

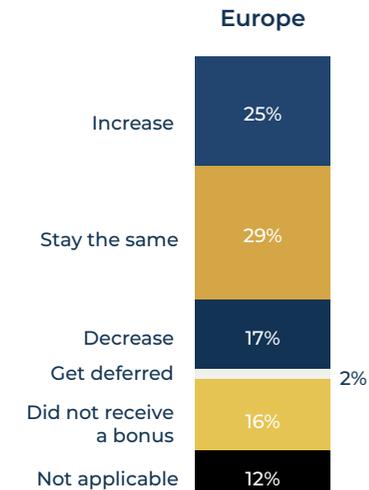
Compensation Increase — Europe

Q. How likely is it that your compensation will increase in the next 12 months?



Annual Bonus — Europe

Q. Have you received a bonus this year? If so, did it:



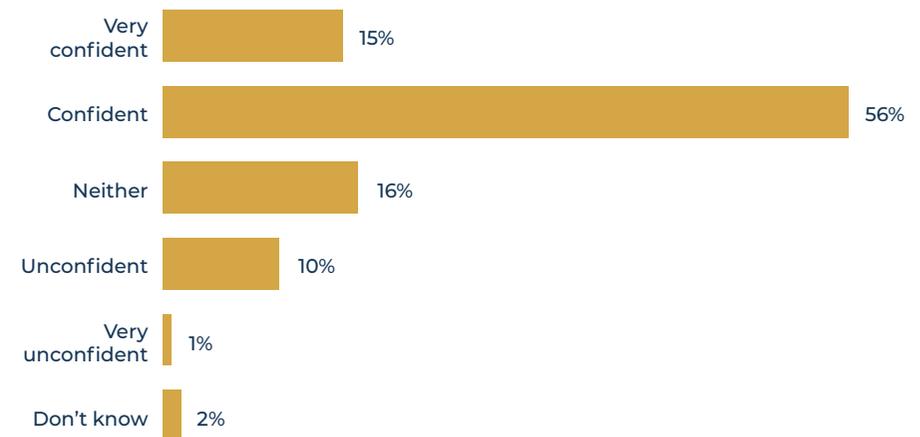
Confidence in Future Job Market

The European workforce demonstrates high levels of confidence in the future job market and finding future employment

Perhaps unsurprisingly, given the widely held feelings of optimism surrounding the state of the European economy, Supply Chain personnel in the region are confident in the industry's future job market. 71% of the questioned professionals felt confident or very confident that the job market would continue to develop positively. In addition to being substantially larger than the percentage of respondents who answered positively in the U.S. and APAC regions (at 55% and 61% respectively), this also reveals a growth of 33% in positive sentiments amongst this sample when compared to the previous years' results. ►

Confidence in Future Job Market — Europe

Q. Over the next 12 months, how confident are you that the job market will get better?



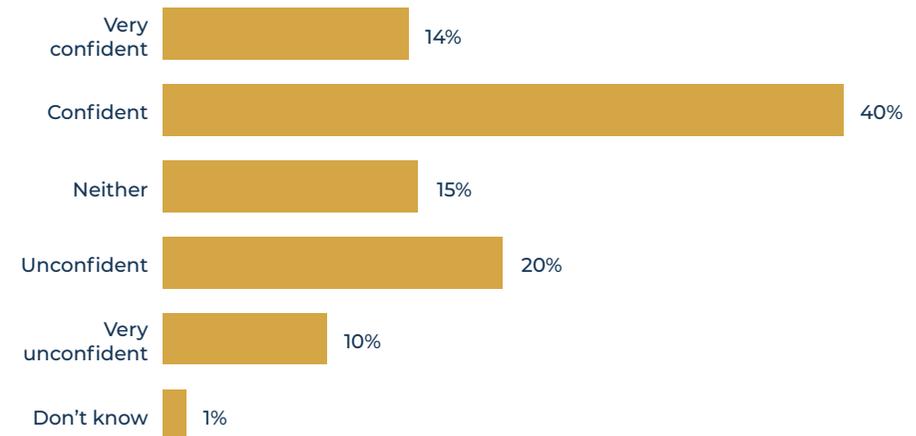
When asked about their level of confidence in acquiring a new job, Europeans reported similarly high levels of optimism. 54% were confident or very confident that they could find future employment, reflecting a growth of 11% amongst the European workforce since last year.

Adding to the rosy picture painted by data on the current European job market and job security, the material realities of market growth and increased industry activity have left workers in the region feeling reassured. In May 2021 EU unemployment figures dropped by around 382,000. It was the region's third consecutive monthly decline in the number of people without jobs. This also coincides with the fastest increase in the rate of hiring experienced across Europe in two decades, and the lowest unemployment figures since the pandemic first struck.⁶

Next to general economic recovery, **Matthew Wood** explains how increased investment and the rise of the profession itself in the public spotlight further feeds confidence in the future of the Supply Chain sector. "Many business leaders shifted focus on their Supply Chain departments throughout the past year, which will mean better technology, new ways of working and more skills needed in the future. There are so many companies in this market already, and it is still growing. Additionally, the emergence of new markets like on-demand groceries and convenience products also provides a huge job market for the future." Moreover, the high-profile role that the sector has played in solving problems such as the vaccine rollout has improved its public image. "Throughout the coming years Supply Chain will gain in glamour as a profession." ►

Employment Confidence — Europe

Q. If you become unemployed, how confident would you feel in finding another job in the next 3 months?



⁶ Arnold, M & Romei, V. EU jobless numbers drop by most since pandemic hit, *Financial Times*, <https://www.ft.com/content/ac7c6827-0922-4a67-82a1-a48326fe1fcc>

Job Satisfaction

Europe reports the highest levels of job satisfaction

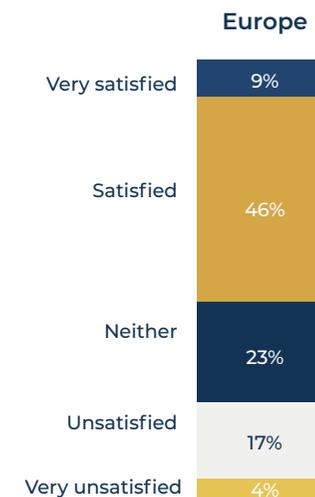
Procurement and Supply Chain workers in Europe are substantially more satisfied in their roles than employees in other regions. With 9% reporting that they are highly satisfied, and 46% that they are satisfied, a sum total of 55% reported positive sentiments towards their job. By contrast, 44% of U.S. workers were either satisfied or very satisfied, while 46% of APAC workers gave the same answers.

Not only does Europe have the highest levels of job satisfaction out of all the regions covered in this report, but it also shows a small degree of growth in this area too. In 2020, only 52% of European respondents reported job satisfaction, demonstrating a 3% increase over the past year.

It's also worth reflecting upon the lower levels of dissatisfaction amongst workers in Europe. While 23% were neither dissatisfied nor satisfied, only 21% of workers said they were either dissatisfied or very dissatisfied. Importantly, this is also 7% lower than the 28% of workers who reported job dissatisfaction in 2020. ▶

Job Satisfaction — Europe

Q. Overall, how satisfied are you with your current job?



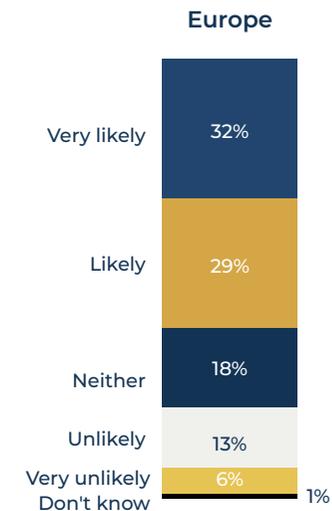
More European workers are likely to leave their job, but less than other regions

European Procurement and Supply Chain staff, much like those in other regions, report worryingly high levels of eagerness to leave their current positions. 32% are very likely, while 29% are likely to leave their jobs. While this is globally the lowest level of intent to leave a current role, it still shows that over half the industry's workforce (61%) in Europe may well be looking for alternative employment.

These findings may come as a surprise to many employers, and underscore the importance of valuing employees in the workplace. Employers must continuously find ways to provide working conditions that keep their staff engaged and fulfilled. Nevertheless, **Matthew Wood** observes, "Europe is the most confident market, the most likely to get bonuses, the most secure and satisfied in their roles, and on global comparison the least likely to leave." Importantly, the current European context is one in which **DSJ Global** is well equipped to navigate on behalf of clients. "We specialize in finding and securing this more passive talent for you. Working with candidates who are not actively looking for a new job is one of our strengths."

Intention to Leave — Europe

Q. How likely are you to look for a new role in the next 6 months?



But these results still carry a word of warning. **Wood** continues, "The Supply Chain function has more importance than ever before and 61% are willing to move on – this is something to watch out for. In the past, we would see the Supply Chain and Procurement industry as an employer-driven market where the right companies and right projects will attract good people. This power is changing significantly now. For the first time, Supply Chain is turning into a candidate-driven market where the professional talent has the control, skills and importance. Employers need to offer the right package and opportunities to win and keep this crucial talent." ►

Employee Motivation Factors

Fresh challenges and career opportunities are the most important motivators for the European workforce

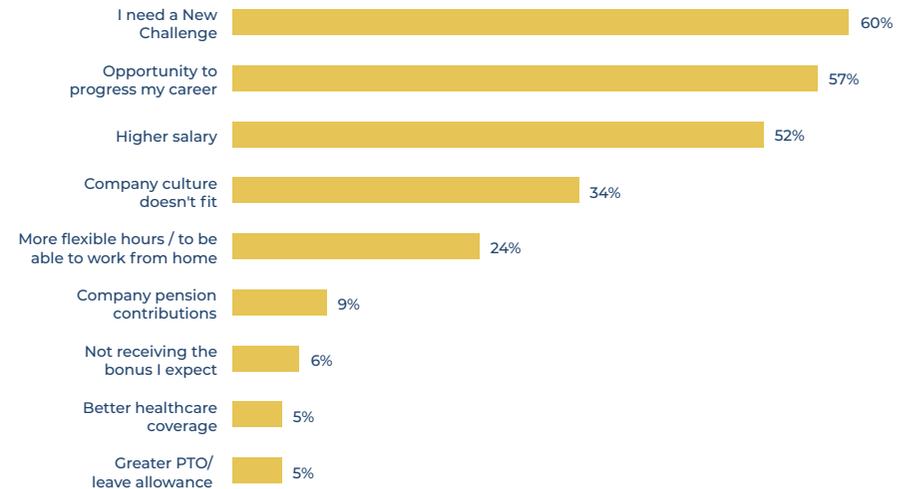
In Europe, higher salaries are not the chief motivator for the Procurement and Supply Chain talent pool. In fact, a higher salary was only the third most reported motivator, with 52% of respondents listing this. The lower importance of salaries amongst the Europeans could be in part because they have received better pay increases than other regions, and thus do not feel like they are missing out as much.

This placed more compensation behind both new challenges and an opportunity for career progression, which were listed as important motivators by 60% and 57% of workers respectively. Last year, respondents placed these three in the same order of importance when questioned on career motivational factors. It shows that while salaries are important, European workers are more interested in fulfilling roles that keep them engaged and offer good prospects for climbing up the career ladder.

This falls in line with the findings and commentary regarding the eagerness for European workers to leave their current jobs. While employers cannot directly control an employee's level of engagement, motivation, or job satisfaction at work, they should still proactively cater to the range of factors that employees seek in a company and culture to feel valued and motivated in the workplace. ►

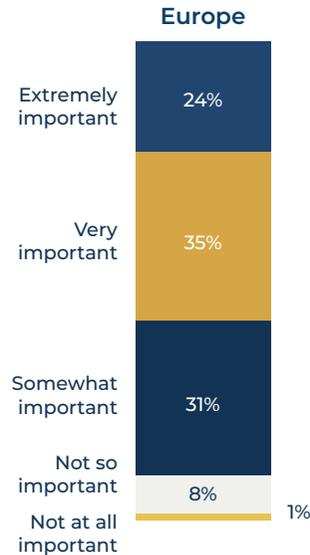
Motivation Factors — Europe

Q. What reason would attract you to seek new employment? (Select all that apply.)



Importance of Flexible Working — Europe

Q. How important is flexible working when considering a new opportunity?



Home vs. Office Balance — Europe

Q. Ideally, how many days per week would you prefer to work from home?



Flexible working arrangements and WFH days register as important issues to European workers

When asked about how important flexible working arrangements were, the responses show that this is an issue that European workers care deeply about. Only 1% of respondents said it was of no importance to them. Of the rest of the group, 24% said it was extremely important and 35% reported it as being very important. This demonstrates the significance of flexible working conditions to well over half the European workforce.

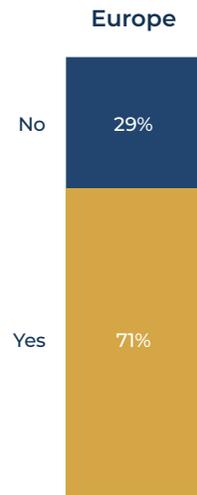
In similar fashion, the majority of European respondents reported an interest in having either two or three days a week to work from home (WFH). 42% stated they would like two days at home, while 23% answered that they wanted three WFH days. Only 4% had no interest at all in having WFH days.

Employers would be wise to take flexible working and WFH into account when developing new human resources (HR) strategies. The past year

has not only demonstrated the capacity for most organizations to successfully implement flexible arrangements and WFH days but has also given employees a taste of many non-work related benefits including significant cost savings and better work-life balance. As such, updated working conditions, in this regard, can be the difference between hiring and retaining the cream of the talent pool, and missing out entirely. In agreement with this notion, **Matthew Wood** adds, “Flexible work has to be part of a package. We saw some traditional companies pushing for in-office full time and receiving backlash, as most professionals won’t accept that anymore. People now want it written in the contract, rather than based on trust. While this could be different on an entry-level basis where professionals often benefit greatly from spending time with more experienced seniors, we also find that remote working has opened roles to bigger talent pools. In the past year, we actually made a number of fully remote placements, something which has never happened before.” ▶

Willingness to Relocate — Europe

Q. Would you consider relocating for a role?



Willingness to Relocate

Most Europeans demonstrate willingness to relocate for work

71% of respondents in Europe stated that they were willing to relocate for a job. This is marginally lower than the global average of 74%. Nevertheless, it does show that the vast majority of people working in the European procurement and Supply Chain sector are likely to seriously consider moving to a different location for the right job.

Matthew Wood describes how the greater provision for flexible working that is now offered might partly account for this data. “Flexible work would make a job in another country more possible for some, as they would only spend a limited amount of time there. They may also be able to keep their home base without actually fully relocating.” ▶



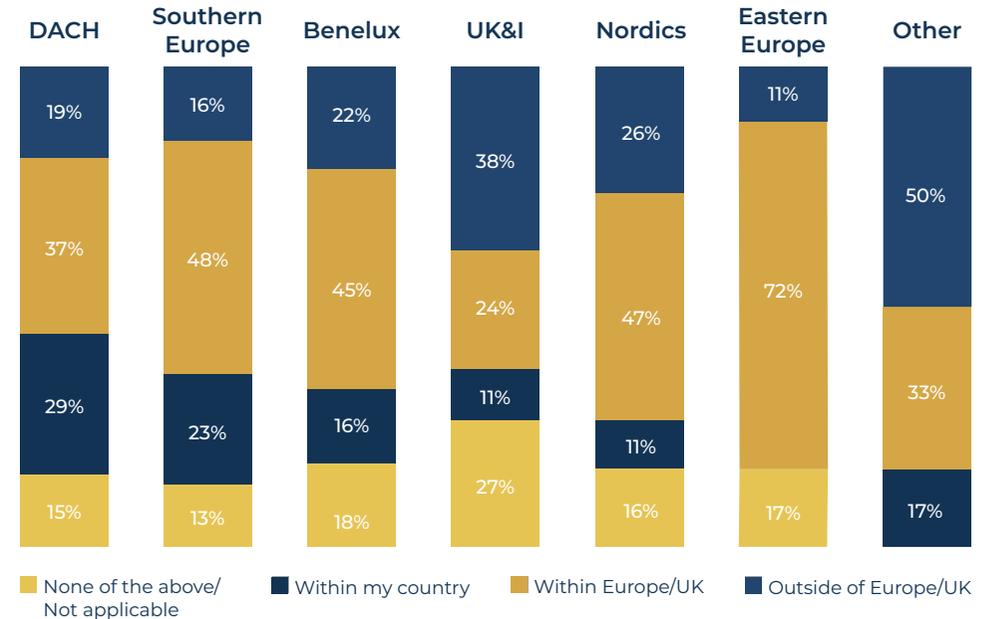
The majority of Europeans would prefer to move somewhere within Europe or the UK

European respondents were also asked where they would consider moving. Answers from different parts of the continent were notably varied. In general, the findings showed a trend where respondents were quite keen to remain in Europe or the UK. This was the most frequent response from five of the seven categorized groups across Europe. Of the respondents who gave this answer, workers in Eastern Europe reported the most strident desire to move within the European area. Here, a staggering 72% of the sample provided this answer. This could be largely explained by the disproportionately slow economic recovery in the region compared to the rest of Europe. Indeed, the World Bank notes, “Eastern Europe is projected to expand 1.9% in 2021 and 2.8% in 2022, as the recovery is constrained by geopolitical tensions, subdued domestic demand, and structural weakness.”⁷

This observation can be useful to employers that are actively recruiting across wider Europe. There is undoubtedly an untapped well of experienced professionals from this region who are keen to relocate to other European countries and benefit from better performing economies. By contrast, professionals in the DACH region (Germany, Austria, and Switzerland) were far more eager to remain in their own country than workers from other areas. 29% of respondents had this sentiment.

Most Desired Relocation Destinations — Europe

Q. If you are willing to relocate, where would you consider relocating to?



A noteworthy outlier to this pattern comes in the form of findings from the UK and Irish workforce. Here, the plurality of respondents (38%) reported that they’d consider relocating outside the UK and Europe. A reason for this could be the shared language with several economic powerhouses outside Europe, such as the U.S., Canada, and Australia – or the fact that obtaining a visa for the European Union now equals the complexity to arranging working permits for overseas territories. ▶

7. Global Economic Prospects: Europe and Central Asia. The World Bank, 8 June 2021. <https://www.worldbank.org/en/region/eca/brief/global-economic-prospects-europe-and-central-asia>

Meet the European Specialist Team



Matthew Wood
Director at DSJ Global
Matthew.Wood@dsjglobal.com

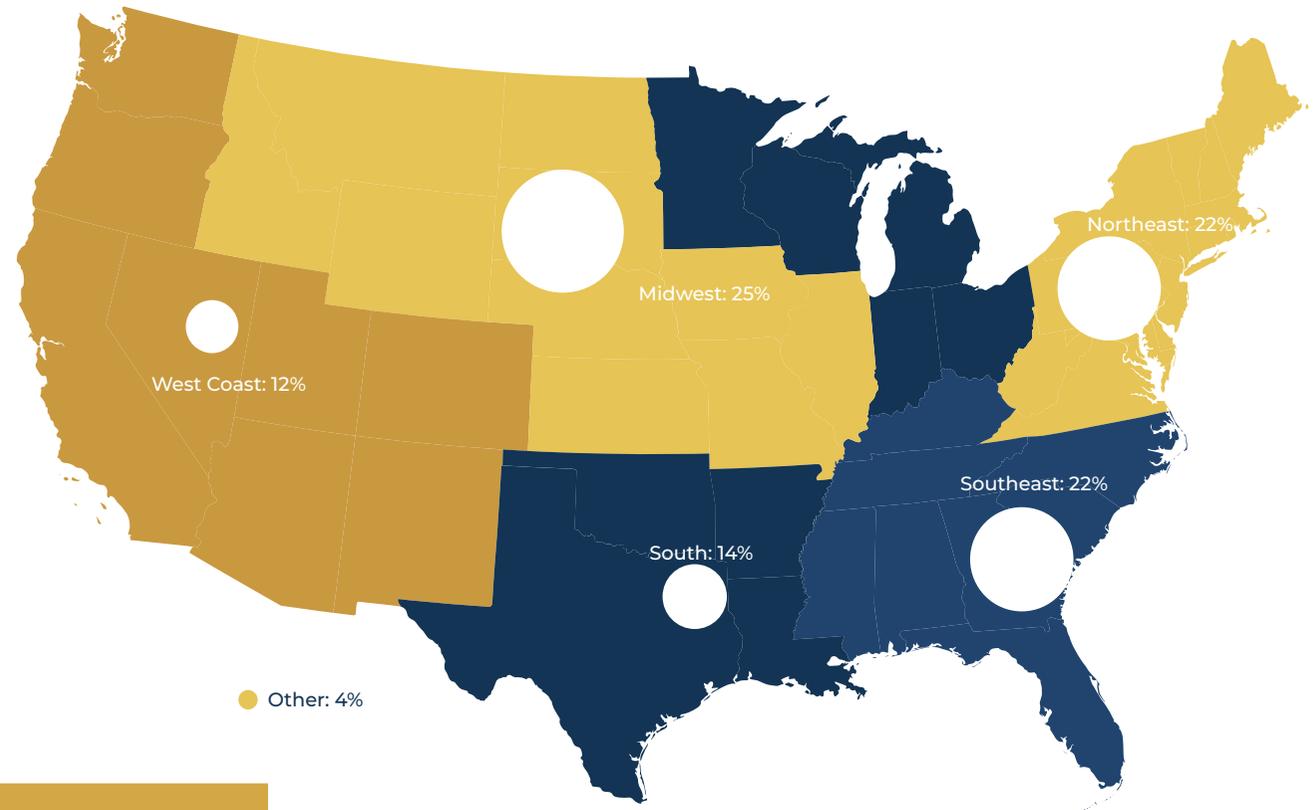


Nick Aoun
Market Specialist
Nick.Aoun@dsjglobal.com



Tom Willis
Head of DSJ Global Berlin
Tom.Willis@dsjglobal.com

4 United States



About the Respondents

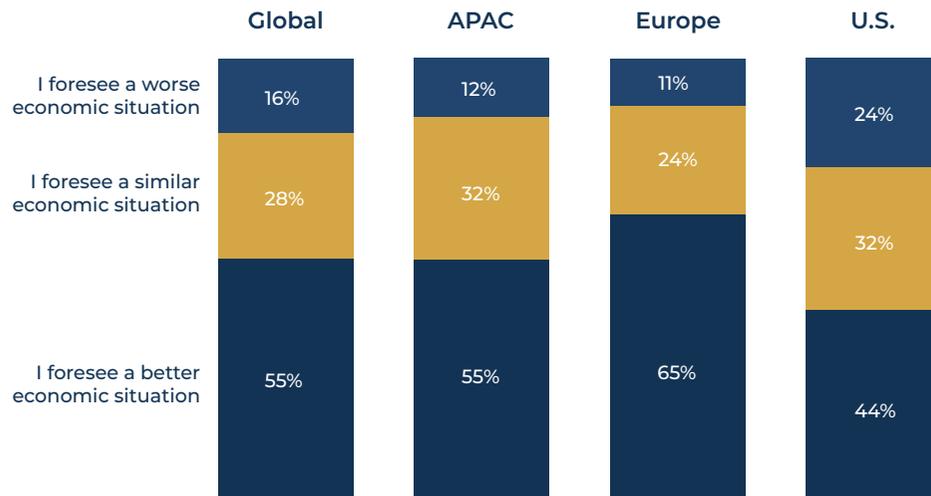
Factor	% of respondents
Seniority	U.S.
Entry-level	0%
Associate	5%
Mid-Senior	43%
Director	36%
Executive	16%

Sector	U.S.
Procurement	20%
Supply Chain	39%
Logistics	9%
Technical Operations	32%

Respondents by US region
Q. Which US state do you work in?

Confidence in Economic Recovery — U.S.

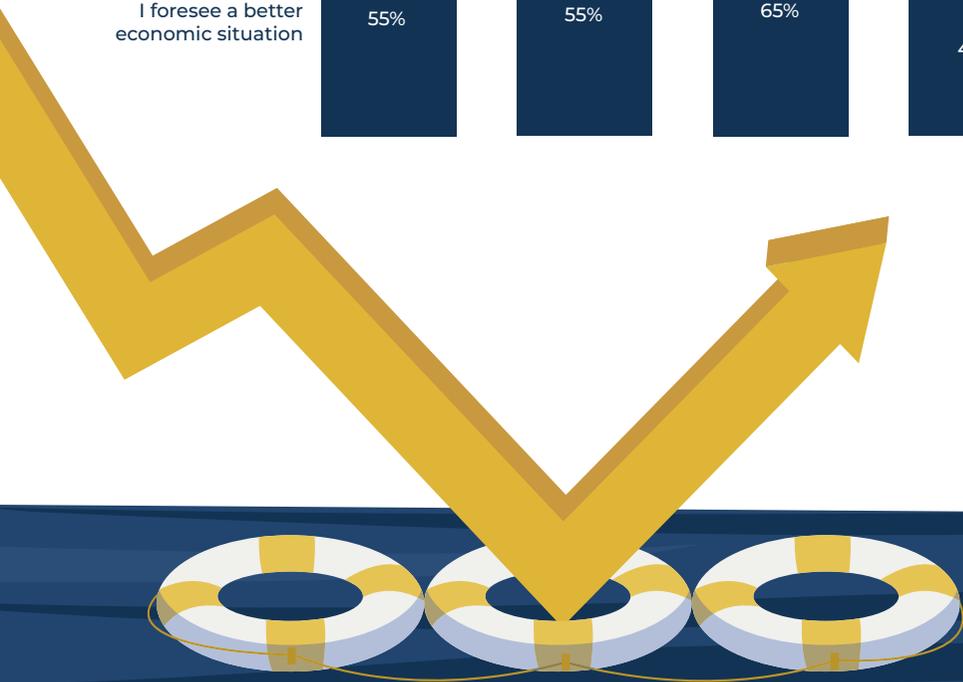
Q. How do you think the economy will fare in the next 12 months?



Economic Outlook

Disruptions in the Supply Chain

Respondents from the U.S. were significantly more pessimistic than those from other regions when asked about their economic outlook. Only 44% reported that they foresaw a better economic situation, much lower than workers from Europe (65%) and the APAC region (55%). Similarly, 24% of the U.S. sample expected a worse economic situation to develop in the future. This was the highest percentage of respondents to give this answer across all the regions, with only 11% of Europeans and 12% of APAC employees reporting the same sentiments. ▶



These findings are largely a result of the pandemic. Procurement and Supply Chain teams made headline news with shortages in critical products and consumer goods across the U.S. On top of empty shelves and inflated prices as consumers scoured the Internet for common items, supply chains continue to be wrecked by disruptions like the Suez Canal blockage. This reveals the need for more resilient and transparent supply chains, and the impact that the Supply Chain industry has on the economy. The U.S. has not been able to weather the storm of COVID-19 as well as many other countries. As of July 18, 2021, almost 34 million confirmed and presumptive cases had been reported within the country. This has already caused significant disruption to the U.S. Supply Chain sector.^{8,9}

Despite this comparatively gloomy assessment, there are more positive developments on the horizon. The U.S. Procurement and Supply Chain workforce has grown significantly more optimistic about the economic outlook than they reported last year. There has been a 14% increase in people feeling positive about the economic forecast, up from 30% last year. Similarly, there has been a 23% reduction in workers feeling

pessimistic about the future development of the economy, down from 47%. This is likely driven by the roll out of the vaccine in the United States, which despite facing significant obstacles, has in mid-July 2021 reached over 339 million people – just under 50% of the population.

In addition to this, the country's wider economy remains in a good shape, regardless of the multiple problems facing industrial activities in the U.S. In fact, many expert observers forecast a boom in GDP growth to higher levels in 2022 than were predicted prior to the pandemic.¹⁰ **Emily Prendergast**, Director of end-to-end Supply Chain Recruitment at **DSJ Global**, echoes this sentiment, sharing that, “there is a lot of growth happening now with companies opening new facilities and expanding production.” She adds, “Companies with HQs in the U.S. are looking to bring manufacturing back to the U.S. from overseas to be able to exert more control over production and processes, and mitigate future disruptions.” This suggests that maintaining the high activity levels recently seen in the industry may well help to continue fueling the growing optimism amongst the U.S. workforce. ▶

8. Yanelli, A. US supply chain disruptions to take longer than anticipated to clear up – Fed, Independent Commodity Intelligence Services, 14 July 2021. <https://www.icis.com/explore/resources/news/2021/07/14/10663281/us-supply-chain-disruptions-to-take-longer-than-anticipated-to-clear-up-fed>

9. Total number of cases and deaths from coronavirus (COVID-19) in the United States as of July 18, 2021, Statista, 18 July 2021. <https://www.statista.com/statistics/1101932/coronavirus-covid19-cases-and-deaths-number-us-americans/>

10. Bachman, D, United States Economic Forecast 2nd Quarter 2021, Deloitte, 14 June 2021. <https://www2.deloitte.com/us/en/insights/economy/us-economic-forecast/united-states-outlook-analysis.html>

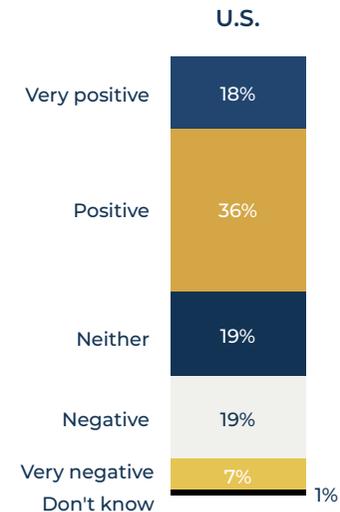
Job Market & Job Security

Although cautious in economic outlook, most U.S. employees are still optimistic about the job market

While the Procurement and Supply Chain workforce expressed less positive sentiments about the economy, they are nevertheless feeling much more positive about the job market. 18% of the sample stated that they were feeling very positive, and 36% answered that they were positive, resulting in a total 54% with an optimistic outlook on the job market. This is nearly twice the number of respondents that gave positive answers last year (28%), suggesting that the talent pool is feeling increasingly confident in the industry's recovery. This makes sense when viewed in the context of recent developments. Last year, Supply Chain professionals were hit hard by the COVID-19 outbreak. The sector has successfully endured the pandemic, and accordingly, workers have a much more positive outlook on employment opportunities moving forward.

Job Market Confidence — U.S.

Q. How positive are you about the current job market?



As the industry makes its recovery, there will be heightened demand for high-performance talent. This makes it a sellers' market. It's great news for prospective candidates, but also means companies must ensure that the roles and compensation on offer are sufficiently attractive. As **Emily Prendergast** puts it, "Candidates have more choices than they have ever had. The market is hot, and candidates know it. Clients need to move quickly and put together competitive offers." This sentiment is reflected in the data as 52% of professionals felt confident that they could secure a new job quickly within three months if needed.

This is even more prominent in the burgeoning U.S. technical engineering sector. In the past, this function was frequently outsourced to APAC and Europe. More recently, however, companies have shifted towards scouting talent locally. ►

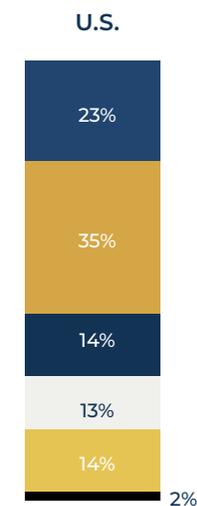
A majority of the U.S. workforce is confident in their job security

23% of U.S. workers were very confident in their job security while 35% were confident – adding up to a total 58% of the sample with positive sentiments. This is a substantial increase from the 37% who reported similar feelings in last year's survey. It shows that a growing proportion of the workforce feels a sense of stability and security in their current positions.

Emily Prendergast observes that this growth in confidence is primarily because “candidates that are still with their current company have made it through COVID-19, and so are feeling secure.” However, she urges companies not to get complacent in their approach to staff retention by adding, “the hot market is making candidates want to explore other opportunities”. **Christine Corson**, Director – end-to-end Supply Chain Recruitment at **DSJ Global**, warns that companies' hiring strategies may need to be similarly updated. “Employers need to be prepared that there aren't as many candidates out there. They need to target more passive talent. In the current climate, candidates can be more selective, and top talent will be grabbed up quickly.” ▶

Job Market Confidence — U.S.

Q. How positive are you about the current job market?



Compensation & Bonus

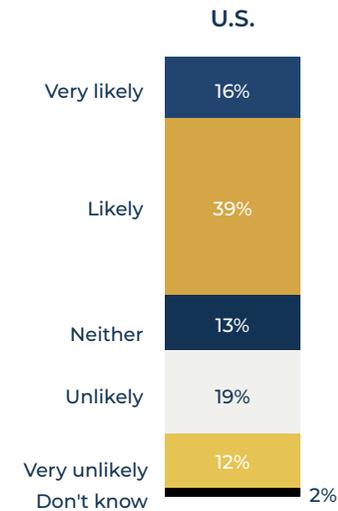
More than half of the U.S. workforce expects to receive a pay increase this year

Data gathered on the U.S. workforce’s compensation also paints a brighter picture than the one concerning the general economic outlook. Here, the respondents who said it was either very likely (16%) or likely (39%) that they’d receive a pay increase totaled 55%. While this is lower than their counterparts in the APAC region, where 57% were likely to receive a pay increase, it is higher than both the European sample (52%) and the global average (54%). According to **Christine Corson**, this increasing compensation trend is a key retention strategy, as professionals know their worth in the currently competitive job market. On the employer’s side, not only are they increasing compensation to retain existing employees, but they must also offer competitive compensation packages to secure the best talent.

The good news regarding compensation is somewhat neutralized by the less inspiring data that’s been gathered on bonuses. The percentage of the U.S. workforce that didn’t receive a bonus (34%), was significantly higher than both the European and the APAC region’s workers (16% and 14% respectively). Nevertheless, this can still be viewed with a level of optimism. The proportion of U.S. workers that didn’t get a bonus may have been high, but it is notably lower than the 46% who did not receive one last year. This shows that the numbers of workers being awarded bonuses is actually increasing at an impressive rate. ▶

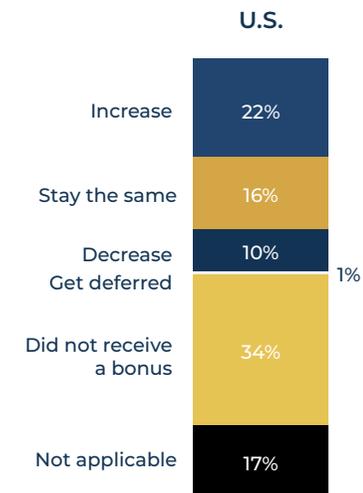
Compensation Increase — U.S.

Q. How likely is it that your compensation will increase in the next 12 months?



Annual Bonus — U.S.

Q. Have you received a bonus this year? If so, did it:



Confidence in Future Job Market

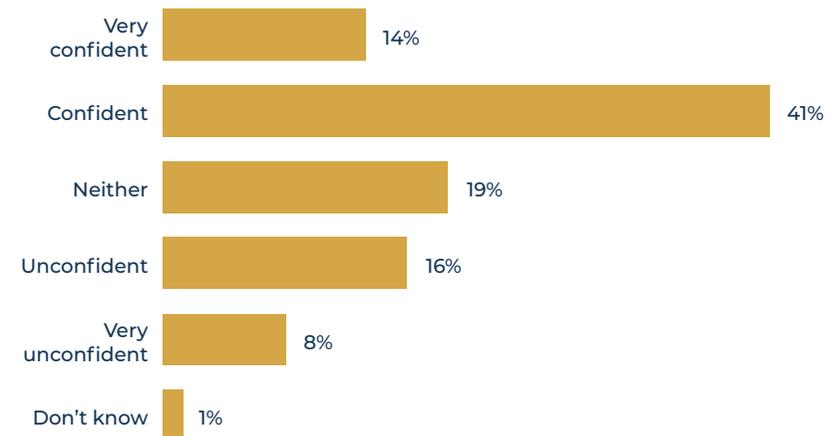
Confidence in the future job market growing amongst U.S. workers

Results showed that a majority (55%) of U.S. Procurement and Supply Chain professionals are confident in the future of the job market. This demonstrates substantial growth compared to 43% who reported confidence in this area in last year's survey. Yet again, it is clear that the U.S. workforce is gradually feeling increasingly secure in the state of the industry. This is likely due to the way that Supply Chain teams have successfully navigated through significant challenges over the last 18 months and are defining what the new normal looks like in their organization.

There are specific industries as well that are likely influencing a more positive outlook on the job market. For example, **Christine Corson** notes that, "E-commerce is now becoming an industry of its own with shopping and buying habits having changed significantly in the last year. Organizations are making investments both in the different types of supply chain required, as well as investment in headcount." ▶

Confidence in Future Job Market — U.S.

Q. Over the next 12 months, how confident are you that the job market will get better?



Job Satisfaction

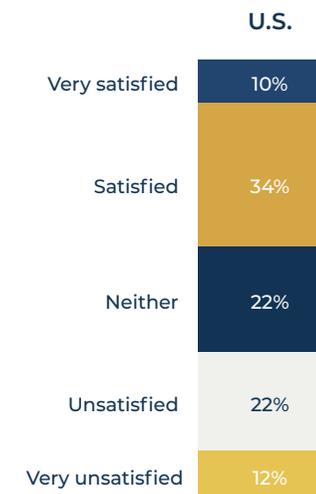
The U.S. workforce is the least satisfied globally

When questioned about their level of job satisfaction, the data from U.S. professionals was eye opening. Those who reported feeling either satisfied (34%) or highly satisfied (10%) totaled only 44% of the sample. Those respondents who felt either unsatisfied (22%) or highly unsatisfied (12%) constituted 34% of the sample, the highest found in any of the regions. These findings demonstrate a substantial retention risk for U.S. companies. Although the percentage of employee satisfaction has grown by 8% over the past year, companies would still be wise to address this potential retention issue sooner rather than later.

Emily Prendergast warns, “Candidates may be grateful to their employers for being able to stay at their company, but many aren’t fully satisfied. Many have gotten burned a bit through being furloughed or receiving pay cuts. Also, they may be realizing how competitive the market is and how much they are worth.” ▶

Job Satisfaction — U.S.

Q. Overall, how satisfied are you with your current job?



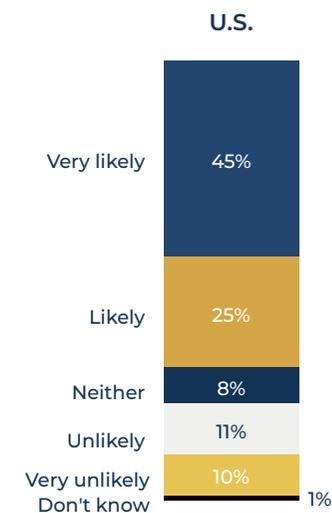
Over two thirds of workers in the U.S. are eager to leave their job

The U.S. workforce reports extremely high levels of discontent with their jobs. A staggering 70% of respondents said they intended to look for new work in the next 6 months. This represents a great opportunity for employers to strengthen their teams from a large pool of talent. In the same breath, these will no doubt be sobering findings for team leaders and human resources departments. It highlights the need for understanding employee motivations and actively working towards addressing them.

Emily Prendergast advises, “A lot of candidates are moving to companies where previous teammates have gone. This is a more targeted approach, going where you know people already.” This suggests that companies would do well to analyze where their new recruits are coming from, and then incorporate this into their hiring strategies. ▶

Intention to Leave — U.S.

Q. How likely are you to look for a new role in the next 6 months?



Employee Motivational Factors

U.S. professionals are ready to leverage the candidate driven market

As stated, 70% of U.S. professionals reported that they would look for a new job opportunity in the next 6 months. In the candidate-driven landscape of the current job market, job seekers know their worth and are more willing to explore the opportunities that are available. **Christine Corson** explains that in particular, “Many candidates are interested in moving into industries and companies that thrived during the pandemic such as ecommerce, pharmaceuticals, and food and beverage.”

For companies aiming to retain their talent it's critical that they understand employee motivations and needs, and then address them quickly.



Higher salaries are the most important motivator for U.S. professionals

Contrary to other regions, the U.S. workforce finds a lot more motivation in financial reward. Higher salaries were by far the strongest motivator for the workforce in the region with 62% of respondents highlighting this factor. Interestingly, this demonstrates a change in priorities amongst the talent pool in the U.S. from last year, when career progression was the primary motivating factor.

Emily Prendergast highlights, “Compensation has always been a strong motivator, but post COVID-19 this has become a stronger factor. Candidates are seeing others interview and are becoming aware of what they can get now. This means clients should start paying for the talent, not for the role. They need to be more flexible to get high-quality professionals in the post-COVID landscape, which means re-evaluating compensation bandings and red tape.”

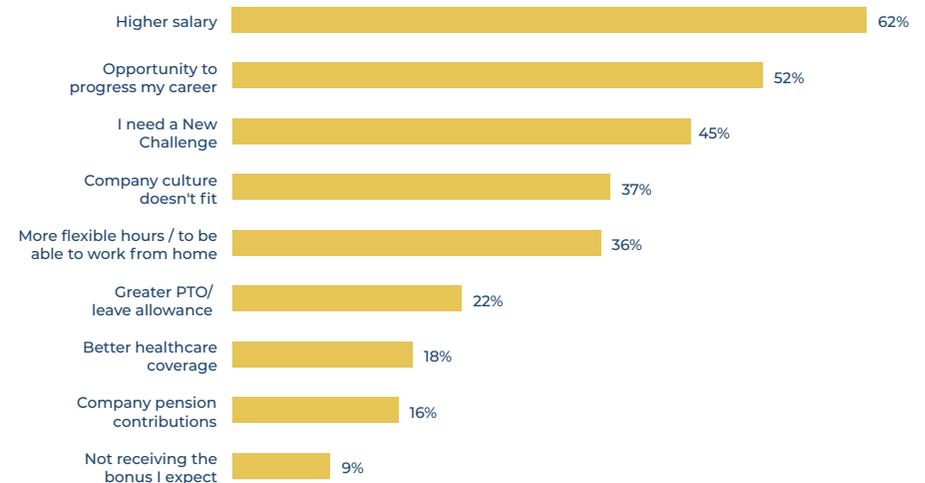
Christine Corson agrees with this assessment, adding “Paying a premium for top talent is making an investment in your supply chain, not just filling a role. Protect the future of your business”.

The next two most important factors were the opportunity to progress a career with 52%, and the need for a new challenge with 45%. These are consistently the most crucial factors for talent globally. This highlights the needs for employers in all countries to put more focus on developing challenging, fulfilling roles with clear routes for advancement.

Another area where the U.S. workforce stands out compared to the other regions, is in how important they consider both flexible working and the ability to work from home. Here, 36% of respondents considered this to be a key element of career motivation. This is notably higher than the talent pool in Europe, where only 24% gave this answer, and the APAC region, where just 23% responded accordingly. A further breakdown of this is provided below. ▶

Motivation Factors — U.S.

Q. What reason would attract you to seek new employment? (Select all that apply.)



A clear majority of U.S. workers consider flexible working to be important

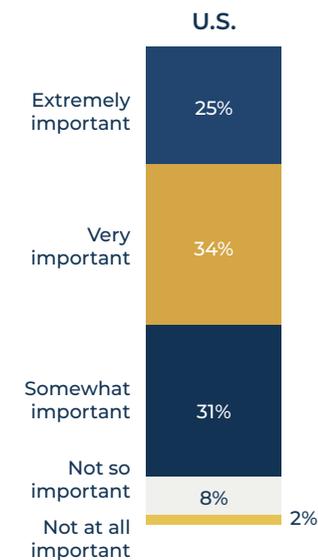
When asked directly about their feelings on flexible working, 59% of the U.S. talent pool indicated flexible work is important to them. This was the same proportion as those in Europe, but markedly higher than professionals in the APAC region at 48%

“About 10% of roles we have placed this year are fully remote and 60% have some remote flexibility,” **Emily Prendergast** highlights. “Most clients have adapted by introducing remote working arrangements even for the more technical and operational roles. Companies need to work-in flexibility to remain competitive. Candidates are now mandating that there is some form of flexibility.” Indeed, those companies that neglect to develop sufficient flexible working arrangements for their staff may well find themselves losing out. “60% of the offers we’ve had rejected, are due to relocation. To avoid this, companies should let people work remotely and report into a local location.”

U.S. workers were also questioned about their thoughts on the specific amount of working from home that they would like to have. The responses indicate that professionals in this region are most interested in having two days to work from home, with 30% of the sample giving this answer. Having three days at home was the next most popular answer, with 25% of respondents stating this, and five days was the third most popular with 19%. Interestingly, only 9% were interested in spending their whole week in the

Importance of Flexible Working — U.S.

Q. How important is flexible working when considering a new opportunity?



office, suggesting that COVID-19 may have created a paradigm shift in the way employees view their working arrangements.

Christine Corson warns, “Companies that don’t have an official WFH plan are losing candidates due to uncertainty. If they don’t know what they are going to do, then it’s hard to plan for the next 12 -18 months.” Moreover, the landscape of the job market has shifted considerably since the advent of COVID-19. “Candidates previously didn’t expect to work from home. Now, if hiring managers don’t offer enough flexibility, they will turn roles down.” ►

Willingness to Relocate

U.S. professionals report a significant willingness to relocate for the right job

In 2021, 71% of end-to-end Supply Chain professionals in the U.S. reported that they would be willing to relocate, compared to 69% who stated this last year. This is a very high proportion, and demonstrates a growing readiness to move amongst professionals in the country. It is clear evidence of an increasingly mobile talent pool in the post-COVID world.

These findings will be valuable to recruiters who are keen to give their organizations an injection of new, enthusiastic, high-performing workers. Employers that are willing to help with relocation costs will have access to a wider talent pool than ever before.

The sample of respondents that were questioned came from different regions in the U.S. Looking at the data as a whole, though, it is clear that, in general, workers are open to opportunities elsewhere, across the board. Last year, the Northeast was the most popular destination for relocation within the U.S. However, the Southeast has now emerged as the destination of choice, by quite a wide

margin. Out of the professionals who said they were willing to relocate, 30% chose the Southeast as their top pick. Florida and North Carolina have become particularly popular destinations for relocation, as people look for a more balanced lifestyle outside the traditional city hubs. Texas has also become a favored destination, which is no surprise given the allurement of no income tax in the state.

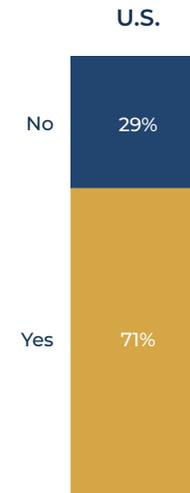
Christine Corson sums up this growing readiness to move perfectly. “People are spending more time at home now, so they’re having more thoughts about quality of life.” This has led the average person to yearn for a better work-life balance, which can be more easily struck outside of large urban hubs.

Emily Prendergast observes, “Candidates are more willing to relocate to areas that are less urban and suburban. The Southeast is a spot that many candidates have requested. The West Coast region is also popular but in smaller cities outside of San Francisco and Los Angeles. This means clients in less desirable locations need to adjust their strategy.”

There does indeed seem to be a wealth of research reinforcing Emily’s point. Recent data published by the World Economic Forum

Willingness to Relocate — U.S.

Q. Would you consider relocating for a role?



and Statista, including surveys conducted by Gallup, have found that COVID-19 has, in fact, pushed many Americans out of cities and into the countryside. Nearly 50% of the respondents of a U.S. adult survey stated that they would prefer to live in a rural region or small town than in a big urban center. This shows a 9% growth of people with this sentiment since 2018. “The remote working possibilities are thought to be powering the change.”¹¹ Companies that want to attract the best talent would be wise to pay attention to these developing trends.

Meet the United States Specialist Team



Christine Corson

Director – End-to-End Supply Chain Recruitment
at DSJ Global

Christine.Corson@dsjglobal.com



Emily Prendergast

Director – End-to-End Supply Chain Recruitment
at DSJ Global

Emily.Prendergast@dsjglobal.com

5 Key Findings

Key Findings

This year's annual **DSJ Global** Job Confidence Index Report aims to set a touchstone, mapping out the retrospective bull and bear factors in the talent space, all within the trajectory of intricate, complex global supply chains and their response to the ever-evolving world around them. Whether you operate as an international shipping company or out of a local warehouse, understanding the motivators, pain points, and distinct desires of the workforce can be pivotal for success and ultimately improve the bottom line moving forward. The findings from our international pipeline of mid-to-senior Supply Chain professionals' points at an overall renewed confidence in the current labor market, which in effect, is resonant in the tidal wave of growth, resilience, and productivity witnessed in the sector.

In sum, from factors encompassing an upswing in economic expectations to general optimism in job confidence, it's no denying that this year overturns the gloomy memorandum that dominated sentiments in 2020. However, whilst Supply Chain verticals moved mountains to prevent a talent exodus last year, concurrently we are in the midst of a candidate driven market, and the war for business-critical talent has begun. To navigate through this market, which is certainly not going to slow down, and remain the employer of choice, companies need strong vision, leadership, effective employee engagement, and to know how to attract mission-critical candidates before the competition inevitably does. Even with the fragility and changeable nature of global supply chains, it is imperative to keep your business on the front foot, following these key principles:

- Positive employee experience synonymous to retention and performance metrics – communicate with your workforce at all levels of the corporate ecosystem to align with their vision, preferences, and goals, which in turn, may help to prevent attrition problems.
- High mobility in the talent community – prioritize specialist business-critical roles that are largely sought after, e.g. Procurement, Supply Chain Management, Transportation, Inventory Control, Data Analytics, Distribution Network Design and Planning.
- Chart a path forward that keeps you leading from the frontline – map out the market and engage with specialist talent before the competition. As Procurement and Supply Chain players reflect on their long-term goals and pursue new opportunities, amidst the post-pandemic background, many will be presented with multiple offers on the table, so now is the time to secure industry-leading talent that can better position your business for measurable growth.
- Understand the motivations of high caliber candidates so you can construct an offer that's difficult to refuse – whether that's a flexible working business model, a competitive relocation package, or a generous bonus and compensation scheme.
- Partner with your HR function to craft an attractive working policy – that clearly reflects the interchangeable business landscape and rapidly evolving economy; one that ensures consistency, fair practice, and facilitates work output and outcomes. ►

Strike while the iron is hot

Today, the Procurement and Supply Chain talent market is ripe with possibilities. With every business tactically manoeuvring in the same talent pool, talented job seekers will have little tolerance for a sluggish, outdated hiring process. For organizations looking to differentiate themselves from the pack, it's important to keep things swiftly moving and make savvy decisions over your business-critical hires. Transformative technologies such as artificial intelligence (AI) and virtual reality (or VR) can saturate digital processes and keep your talent pipeline fluidly flowing, which might be the best chance to snap up essential employees and policymakers.

Nurture professionals' engagement levels

Our comprehensive findings highlight global market visionaries within the end-to-end Supply Chain industry are confident in their employability. Is your business doing all that it can to proactively engage and retain key employees? As firms are catapulted into a business landscape, which is released from the lingering grips of the world health crisis, retaining professionals with strong business acumen and a specialized skill set has never been more important. Employers can work hard to understand talent sentiment; namely their preferences and motivators, maintaining communication, and ensuring that your workforce feels valued and supported.

Harness an attractive employment offering

It may sound counterintuitive, but a complete and competitive employment package gains currency. Dynamic attraction strategies should complement a candidate's individualistic growth objective, including long-term career progression, adequate compensation, and unique challenges. By investing in the right talent, businesses can profit from long-term revenue generation and exponentially advance their operational growth strategies.

Our Offices

Los Angeles

T: +1 310 773 0243

www.dsjglobal.com

San Francisco

T: +1 415 872 1750

www.dsjglobal.com

Dallas

T: +1 469 718 2700

www.dsjglobal.com

Chicago

T: +1 331 240 3246

www.dsjglobal.com

Charlotte

T: +1 704 247 5900

www.dsjglobal.com

New York

T: +1 646 759 4560

www.dsjglobal.com

Boston

T: +1 617 322 0144

www.dsjglobal.com

London

T: +44 (0) 20 3758 8800

www.dsjglobal.co.uk

Zürich

T: +41 44 542 12 82

www.dsjglobal.ch

Berlin

T: +49 30 72 62 11 444

www.dsjglobal.de

Singapore

T: +65 3165 1400

www.dsjglobal.hk

Hong Kong

T: +852 3008 1901

www.dsjglobal.hk

About us

DSJ Global is a leading specialist recruitment agency for procurement and supply chain professionals. We know that procurement and supply chain is the critical business driver in any business. We exist to take care of one of the market's most significant challenges: talent acquisition. Today, we provide permanent, contract and multi-hire recruitment from our global hubs all over the world.

We pride ourselves in keeping our professional network up-to-date with any changes that will shape the future of work or affect the hiring process. Visit our website to discover more invaluable insights, including exclusive research, salary guides and market trends.

 www.dsjglobal.com



A Phaidon International brand



A Phaidon International brand