



Talent Edge 2020: Redrafting talent strategies for the uneven recovery

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Talent Edge 2020 is a longitudinal survey series conducted for Deloitte Consulting LLP by Forbes Insights exploring changing talent priorities in all industries, at large businesses worldwide in the Americas, Asia Pacific, and Europe, the Middle East, and Africa. The *Talent Edge 2020* series follows the *Managing Talent in a Turbulent Economy* series from 2009 and 2010.



***Talent Edge 2020: Building the recovery together—
What talent expects and how leaders are responding***

This report probes divergences between the attitudes and desires of three generations of employees and the talent strategies and practices being utilized by employers. This report features results from a March 2011 survey that polled 356 employees at large businesses around the world.

[Read *Talent Edge 2020: Building the recovery together—What talent expects and how leaders are responding*](#)



Talent Edge 2020: Blueprints for the new normal

This inaugural report features results from an October 2010 survey that polled 334 senior business leaders and human resource executives at large global businesses. This report explores talent strategies and unfolding employee trends related to retention and the new challenges posed by the recession.

[Read *Talent Edge 2020: Blueprints for the new normal*](#)

Key findings

As 2012 begins to unfold, we can see that the hopes for a global economic recovery in 2010 gave way to a new wave of economic doubts throughout 2011. Many business leaders are recognizing the critical need to develop leaders to guide their organization in a new age of uncertainty. Many executives foresee leadership shortages in the year ahead and are looking at programs to accelerate leadership development within their companies. At the same time, given the stalled economy, many companies are seeking new sources of growth and are tailoring talent plans to address differing regional needs to support effective talent strategies and business operations.

To help shed light on how companies are adjusting to the demands of today's uneven talent market, Deloitte launched *Talent Edge 2020*—a longitudinal survey series conducted in collaboration with Forbes Insights. This January 2012 edition of *Talent Edge 2020* builds from the findings of two earlier studies: the first from a December 2010 report on executive attitudes and the second from an April 2011 report on global employee attitudes and talent concerns.

Survey respondents anticipate greater executive leadership shortages over the next several years than any other talent category in their companies—and also rank leadership as their most pressing talent concern.

Our overall goals are to identify significant trends driving corporate talent strategies and to track how companies are responding to shifting economic realities. In October 2011, Forbes Insights surveyed 376 senior executives and talent managers at large companies (annual sales of +\$500 million) worldwide, across a range of major industries. Among the key findings:

Many companies are seeking new sources of growth in a stalled economy

As the economic recovery stalls and economists debate the likelihood of a double dip recession, surveyed senior executives worldwide focused on seeking out new markets for growth in order to bolster both top- and bottom-line performance.

- When asked to rank their top strategic priorities, 38% of surveyed executives listed improving top- and bottom-line performance, followed by expanding into global and new markets at 33%.

Many executives are looking to strengthen their leadership development pipelines and programs

Survey respondents anticipate greater executive leadership shortages over the next several years than any other talent category in their companies—and also rank leadership as their most pressing talent concern. Companies are also exploring new accelerated leadership development programs to overcome expected shortfalls in leadership positions.

- Approximately one-third (30%) of executives surveyed ranked developing leaders and succession planning as today's top talent priority—the highest of any response in the survey. A nearly equal percentage (29%) predicted it will likely remain the top talent concern over the next three years.

As talent demands go increasingly global, the pressure is building to create talent strategies that can both scale (for size and efficiency) and focus on regional markets

A significant percentage of executives surveyed predict talent shortages to develop over the next year, but the areas of greatest need vary widely by region. This dual emphasis of scale and focus is more important than ever as companies seek to both exploit the global reach—and cost efficiencies—of talent systems and processes while focusing on the unique challenges within regional and country markets.

- Surveyed Asia Pacific (APAC) executives face urgent needs, with significant shortages anticipated in research and development (R&D) (68%), operations (64%), and strategy and planning (62%). Survey participants in the Americas saw executive leadership and operations as the main talent gaps (both 56%), while business leaders in the Europe, the Middle East, and Africa (EMEA) region were far less concerned about shortfalls in talent.

Many corporate talent programs are falling short on performance and investment

Many business leaders at the companies surveyed see the need for significant improvement in key areas across their talent management programs. Those executives who rated their talent programs as “world-class” also give higher ratings than their peers to both their capabilities and their levels of investment.

- Only 17% of executives surveyed believed their talent programs were “world-class across the board,” while 83% acknowledged that significant improvements need to be made. Executives who call their talent efforts “world-class” were more likely to report—by margins of 20 percentage points or more—that their companies were investing in these programs at a “high” level.

A significant percentage of executives surveyed predicted talent shortages to develop over the next year, but the areas of greatest need vary widely by region.

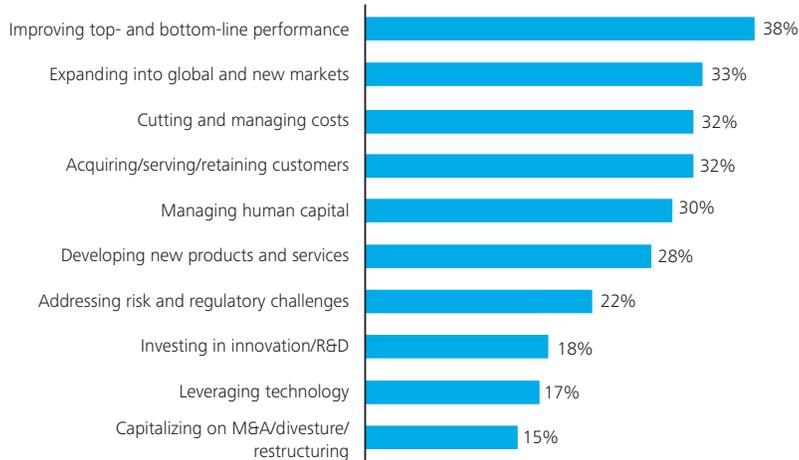


Seeking new sources of growth in a stalled economy—and the talent to exploit new opportunities

As world economies teeter between hesitant growth and a return to recession, Deloitte’s analysis of the latest survey data suggests that many top corporate executives are increasingly looking for new avenues of growth, while at the same time keeping an eye firmly fixed on bringing costs into line with economic realities.

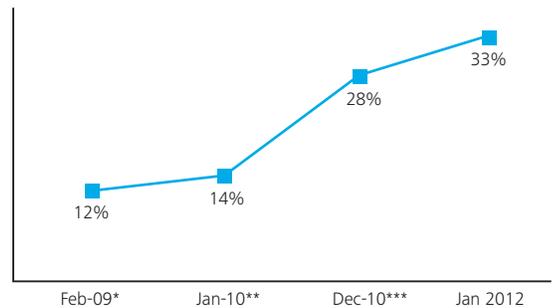
When asked to rank their top three strategic priorities, 38% of the executives surveyed listed improving top- and bottom-line performance—the highest management priority in the survey. Expanding into emerging and global markets ranked second among management priorities at 33%, while managing costs and acquiring/serving/retaining customers tied for third at 32%, followed by managing human capital at 30% (Figure 1).

Figure 1. Which top three strategic issues currently capture the most management attention at your company?



Digging Deeper: Since Deloitte released its first longitudinal talent survey results in February 2009, the percentages of surveyed executives who report that their companies are focused on expanding into global and new markets have been steadily rising. As mature economies struggle with growth rates, the search for overseas opportunities has accelerated significantly (Figure 2).

Figure 2. Executives reporting that “expanding into global and new markets” is a top strategic priority



* *Managing talent in a turbulent economy: Playing both offense and defense*, February 2009, Deloitte Consulting LLP.

** *Managing talent in a turbulent economy: Where are you on the recovery curve?* January 2010, Deloitte Consulting LLP.

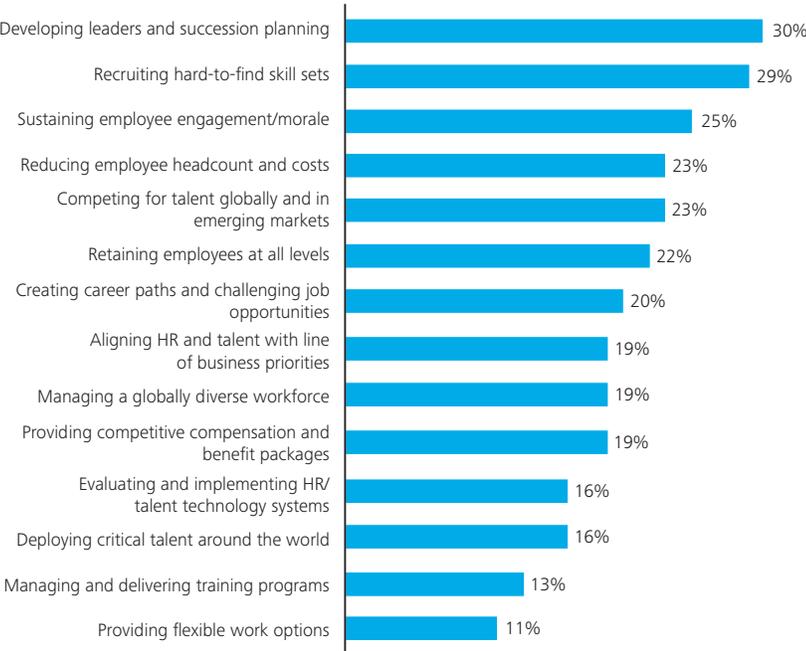
*** *Talent Edge 2020: Blueprints for the new normal*, December 2010, Deloitte Consulting LLP.

Strengthening leadership pipelines through innovative strategies

Given increasing levels of economic uncertainty, perhaps it is not surprising that the current talent management environment, as evidenced by responses to our survey, appears complex and defies easy categorization. Executives are focused on developing new leaders and succession planning, with 30% of survey participants listing it as one of their top three pressing talent concerns—the highest talent concern in the survey. Also vying for attention is recruiting employees with hard-to-find skills (Figure 3).

As expanding into new and global markets has jumped up the management priority list, talent managers are rising to the challenge. Competing for talent globally and in emerging markets was named a top talent concern by nearly one in four (23%) executives surveyed. When asked to look forward three years from now, the global talent search rises even higher on the agenda to 27%.

Figure 3. Organizations’ top three most pressing talent concerns in 2011



In their efforts to identify and develop new leaders, create effective succession plans, and build global workforces, executives are aligning their talent management practices to meet these goals. In our survey, more than seven out of 10 executives surveyed singled out performance management, talent assessment, and high-potential employee development as core talent priorities that are anticipated to increase over the next 12 months (Figure 4).

This theme—an emphasis on developing the next generation of corporate leaders—appeared again when executives were asked to anticipate how their emerging talent management strategies were likely to change during the next 12 months. According to the executives who participated in the survey, over the course of the next year, many companies intend to focus on accelerated leadership development, with 40% of survey respondents ranking it in the top three. This focus makes sense as the goal of accelerated leadership development is to create a deep pipeline of potential leaders with capabilities that match each organization’s particular business needs. It also creates a strong talent brand that inspires employees and helps attract high-potential candidates from the outside.

Despite a persistently weak job market and high levels of unemployed workers seeking jobs, many executives are worried about the possible departure of potential leaders. Of the executives who participated in the survey, 71% expressed a “high” or “very high” concern about retaining critical talent over the next 12 months, along with 66% who had the same concern about keeping high-potential talent.

Figure 4. Organizations’ increasing focus on core talent management priorities over the next 12 months



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Five Takeaways on Leadership

Leadership represented a recurring theme throughout Deloitte's January 2012 edition of *Talent Edge 2020*. As surveyed executives analyzed their existing talent plans to chart future strategies, their top concerns include the following five points:

- **Developing Leaders and Succession Planning:** Surveyed executives ranked developing leaders/succession planning as the top talent concern both today and three years from now.
- **Struggling to Keep Leadership Teams Intact:** A majority of executives surveyed expressed concern about their organizations' ability to retain company leaders.
- **Predicting Leadership Shortages:** Across all talent areas, executives predicted the most severe shortages will likely occur in leadership, particularly in the Americas and EMEA.
- **Focusing on Leadership Pipeline:** Accelerated leadership development was rated the number one emerging talent strategy among global executives who participated in the survey.
- **Closing the Gap Between Priority and Performance:** Most executives surveyed rated leadership development a high priority at their companies—yet far fewer rated their leadership development capabilities highly.

Since companies can easily match compensation packages, Deloitte believes companies can differentiate themselves in the talent marketplace by going beyond financial incentives and creating customized retention strategies that address issues such as career advancement and greater recognition.

Generationally, executives and talent managers appear most concerned about retaining the future leaders of their companies. Nearly half of the respondents (47%) report a "high" or "very high" concern about Millennial employees departing for other firms, compared to 42% for Generation X employees and just 32% for Baby Boomers.

Data from Deloitte's April 2011 *Talent Edge 2020* employee report makes it clear that employers are right to be concerned since 65% of surveyed employees were already looking for a new job or planning to look for a new job—but they may not have a good handle on which employees they risk losing. The employers who participated in the January 2012 report were most concerned about losing employees from Generation Y. However, according to our April 2011 employee report, 72% of Generation X employees are already looking or plan to make their next career move, compared to 63% of Millennials.

Are companies taking the steps necessary to retain top employees? The evidence is mixed. Four in ten (40%) executives surveyed confirmed that their organization has an updated retention plan in place, and another 36% reported that an updated retention plan is in the works. However, only 30% of executives surveyed were "very confident" in the overall effectiveness of their company's retention strategies and programs.

Our April 2011 employee report suggested that different generations have different goals, expectations, and desires—and organizations should tailor and target their talent strategies to satisfy each employee group from Baby Boomers to Gen Xers to Millennials. Surveyed executives appear to understand that different retention initiatives appeal to different generations. The only incentive ranked among the top three by surveyed executives for all generational groups was additional bonuses/financial incentives (Figure 5). Since companies can easily match compensation packages, Deloitte believes companies can differentiate themselves in the talent marketplace by going beyond financial incentives and creating customized retention strategies that address issues such as career advancement and greater recognition. In addition, organizations should focus on creating connections as

employees are more likely to stay in an organization where they feel connected—to other employees, to their manager to the organization’s purpose, and to the resources they need.

Designing effective retention strategies starts with a clear understanding of employee goals and desires. However, there appears to be a disconnect between employers and employees in three areas:

- **Intensity Gap:** Employers recognized that promotion/job advancement is a strong retention tool, but they appear to be underestimating just how powerfully this incentive impacts all generations of employees. When it comes to Generation X, both employers and employees ranked promotion/job advancement at the top, but employees rate it 32 percentage points higher than their employers. For Generation Y, the intensity gap is eight percentage points (Figure 5).
- **Employer-Boomer Mismatch:** Employers believe Baby Boomers are interested in additional benefits, additional bonuses, and flexible work arrangements. However, this generation is seeking more than just additional compensation and flexible schedules. According to our April 2011 report, Baby Boomers ranked promotions/job advancement as their top retention incentive at 50%; however, this incentive did not even appear among the top three in the employer survey. More than four in ten (43%) Baby Boomers surveyed also ranked increased support/recognition

from supervisors as a key retention incentive—the only generational group to list this issue within their top three.

- **Money Matters:** Every generation of employees surveyed ranked additional compensation among the top three incentives for keeping them with their current employers. However, employers did not list additional compensation near the top for any generation—although they did see the value in additional bonuses or other financial incentives.

These findings suggest that executives may be exacerbating company pipeline issues by not focusing on the initiatives which can more effectively retain employees.

Employers recognize that promotion/job advancement is a strong retention tool, but they appear to be underestimating just how powerfully this incentive impacts all generations of employees.

Figure 5. Top three most effective retention initiatives by generation: Executives vs. employees

| Ranking | Gen Y/Millennials (31 and younger) | | Generation X (ages 32-47) | | Baby Boomers (ages 48-65) | |
|---------|--|--|---|--|---|--|
| | Executives | Employees* | Executives | Employees* | Executives | Employees* |
| 1 | Promotion/job advancement (33%) | Promotion/job advancement (41%) | Promotion/job advancement (32%) | Promotion/job advancement (64%) | Additional benefits (e.g., health and pensions) (42%) | Promotion/job advancement (50%) |
| 2 | Individualized career planning (within your company) (27%) | Additional compensation (40%) | Additional bonuses or financial incentives (31%) | Additional bonuses or financial incentives (41%) | Additional bonuses or financial incentives (33%) | Support and recognition from supervisors or managers (43%) |
| 3 | Additional bonuses or financial incentives (25%) | Additional bonuses or financial incentives (33%) | Leadership development programs and flexible work arrangements (tie at 29%) | Additional compensation (33%) | Flexible work arrangements (32%) | Additional compensation (42%) |

* Talent Edge 2010: Building the recovery together—What talent expects and how leaders are responding, April 2011, Deloitte Consulting LLP.

Global talent plans challenged by regional needs

As many companies look overseas for growth, the competition for talent is increasingly global—a trend we first identified in the December 2010 edition of *Talent Edge 2020*. Analyzing the results of this new survey, it quickly became apparent that companies should adapt their talent strategies and priorities to fit different global regions while also addressing the simultaneous challenge of scale. When surveyed executives were asked to forecast areas where they expect talent to be in short supply over the next year, where they were located had a significant influence on the talent they believe they will need, with APAC having greater shortages than both EMEA and the Americas (Figure 6).

In the APAC region, more than half of executives surveyed predict talent shortages across all twelve of the functional areas surveyed, with an overall average of 61%. The most pressing needs appear to be in R&D, where 68% of APAC executives foresee talent shortages, followed by operations and procurement and supply chain at 64%, and then strategy and planning at 62% (Figure 6).

The shortages that APAC executives surveyed are predicting are in line with results reported from our April 2011 employee report. When asked if workers were already looking or planning to search for a new job in the next 12 months, a majority of surveyed APAC employees said “yes” at 59%.

Digging Deeper: The talent required in the coming years will vary significantly by industry. These differences are especially pronounced in Energy/Utilities and Financial Services. For example, only 7% of respondents in the Financial Services industry believe they will have severe talent shortages in operations, while 37% of respondents in Energy/Utilities expect these shortages. Over two in three (67%) respondents in Financial Services expect slight to no shortages in marketing, compared to 57% in Energy/Utilities who expect moderate to severe marketing talent shortages.

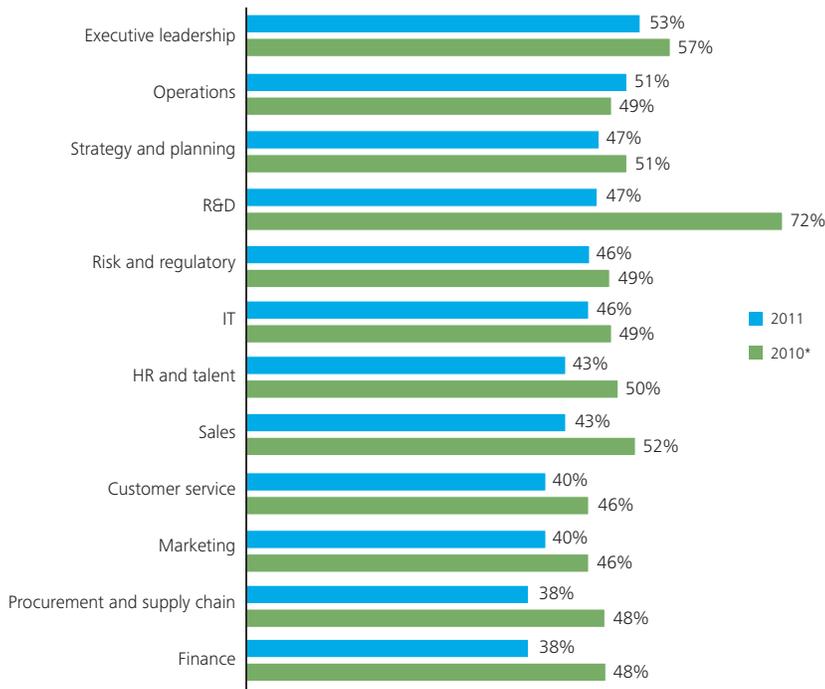
Executives in the EMEA region appear to face far less pressing talent shortages than in APAC or the Americas, with an average across the 12 functional areas of only 31% (30 percentage points less than APAC). Nearly half (47%) of those surveyed in EMEA see potential shortages in executive leadership talent, but that was the only category that rose above 40% (Figure 6). In the Americas, surveyed executives anticipate significant talent shortages in executive leadership (56%), operations (56%), and IT (50%) (Figure 6).

Figure 6. Do you expect significant or moderate talent shortages in the following areas over the next year?

| Functional Area | APAC | Americas | EMEA |
|---|------------|------------|------------|
| R&D | 68% | 45% | 33% |
| Operations | 64% | 56% | 34% |
| Procurement and supply chain | 64% | 36% | 19% |
| Risk and regulatory | 63% | 41% | 38% |
| Strategy and planning | 62% | 46% | 38% |
| Customer service | 62% | 38% | 22% |
| Sales | 60% | 44% | 28% |
| IT | 59% | 50% | 33% |
| Executive leadership | 58% | 56% | 47% |
| HR and talent | 56% | 44% | 32% |
| Marketing | 56% | 43% | 24% |
| Finance | 56% | 38% | 24% |
| Average across 12 functional areas | 61% | 45% | 31% |

Digging Deeper: Is R&D falling off the executive radar screen? In Deloitte’s December 2010 survey report, nearly three-quarters of executives (72%) forecasted talent shortages in R&D. Those concerns seem to have eased—only 47% now say R&D will need a talent infusion in the next 12 months (Figure 7). This same trend was evident when we asked executives what strategic issues were at the top of their agendas. In 2010, 27% ranked R&D highly, compared to just 18% who did so in 2011 (Figure 1). While R&D is typically a long-term play and the payoffs often do not come for years, many companies are being pressured to focus on short-term cost containment as well as revenue generation given the uncertain economy. So if a company is looking to bolster its balance sheet, they may be sacrificing long-term R&D for short-term benefits.

Figure 7. Talent shortages comparison 2011 vs. 2010



* Talent Edge 2020: Blueprints for the new normal; December 2010, Deloitte Consulting LLP.

Over the course of the next 12 months, about three out of four executives surveyed in the APAC region expect to ramp up hiring across the board in virtually every organizational function.

Regional differences were also reflected in projected hiring patterns over the next year, with APAC again showing a far more vigorous talent market and more aggressive hiring plans.

Over the course of the next 12 months, about three out of four executives surveyed in the APAC region expect to ramp up hiring across the board in virtually every organizational function. The hottest talent areas in the APAC region are anticipated to be operations, sales, and marketing. In each of these areas, more than 80% of executives and talent managers expect to be hiring additional employees during the next year.

In the Americas, 72% of executives surveyed anticipate hiring additional employees in operations, along with 63% in IT and 62% each in sales and R&D. The hiring picture looks far bleaker in the EMEA region. The only categories for which more than four in ten executives surveyed planned additional hiring were sales at 45% and operations at 44%, according to the October 2011 data.



Spotlight: Talent programs falling short, investment not up to the challenge

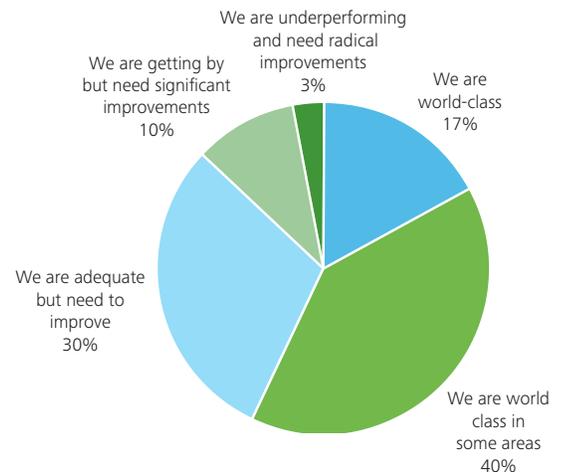
In each edition of *Talent Edge 2020*, Deloitte shines the spotlight on one key area of talent management in order to gain a more in-depth understanding of where companies are excelling and why. In our October 2011 survey, we asked executives to assess their capabilities across seven critical talent management initiatives and to rate both the level of importance and investment in each.

As Deloitte began to dig deeper with questions about specific talent programs, three conclusions stood out:

- Most executives surveyed rated talent management programs a high priority;
- Many did not have a high degree of confidence in their capabilities to deliver the talent, skills, and leaders they need; and
- Companies with self-assessed “world-class” talent programs see both their capabilities and investment commitments differently than their counterparts at other organizations.

Many companies recognize the need to assemble, train, and retain a world-class workforce as they strive to prosper in an increasingly competitive global economy. Yet many executives appear to believe their talent management programs are not up to the challenge. Only 17% of executives surveyed believe their overall talent management programs are “world-class”. More than four in ten (43%) described their talent management programs as adequate but in need of improvement, just getting by, or underperforming (Figure 8).

Figure 8. Self-assessment of overall talent management programs



While most executives agree talent management programs are a high priority, many lack confidence in their capabilities to deliver the talent, skills, and leaders they need.



Talent Management Priorities

Breaking the numbers down individually by priority, capability, and investment level sharpens the picture. Corporate emphasis on leadership development programs was a recurring theme throughout this survey, so perhaps it is not surprising that 53% of survey participants rated it a “high” priority at their companies—the top choice out of the seven talent management initiatives (Figure 9).

Interestingly, surveyed executives who called their organizations’ talent management programs “world-class” had a vastly different sense of which programs were more important at their companies. While 56% agreed that leadership development is important, executives at these “world-class” companies ranked every other priority higher (Figure 10). In Deloitte’s view, these findings suggest that “world-class” companies have already focused on developing their leadership pipelines and are turning their attention to new priorities, such as workforce analytics and talent function operating model.

Figure 9. Percent of respondents rating talent priority, capability, and level of investment as “high”

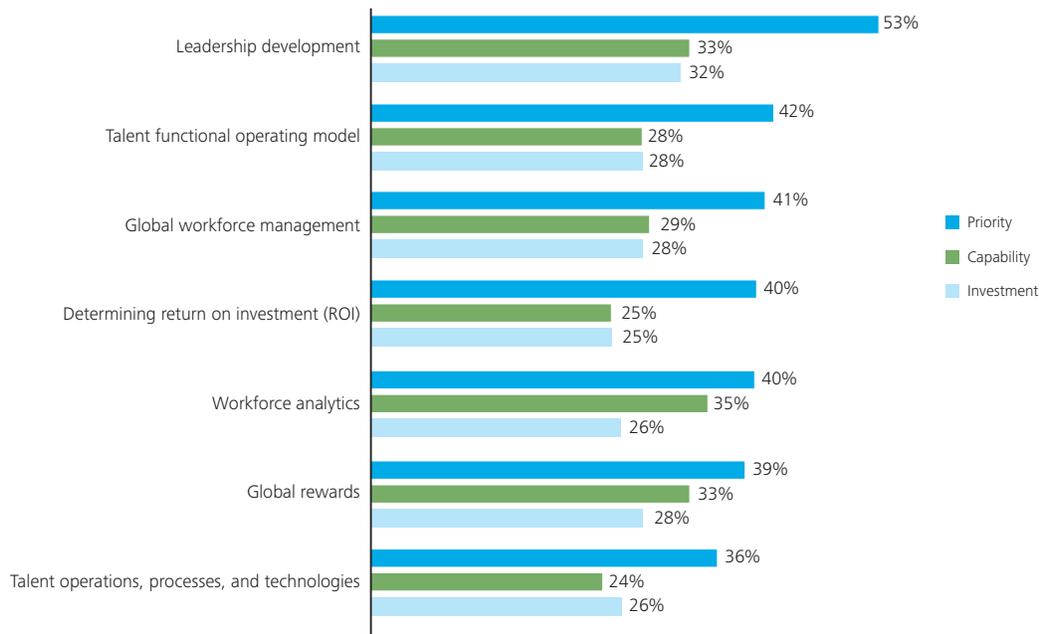


Figure 10. Importance of priority area is “high”: World-class talent programs vs. non-world-class talent programs



Digging Deeper: Depending on whether their company has experienced layoffs in the past six months, there are some notable differences in the ways executives think about their organizations' talent areas. For surveyed executives who have seen recent layoffs, almost half (48%) rated their talent function operating model as a high priority. For those who have not experienced layoffs, this drops to just over one third (37%). Also, at organizations that reported layoffs, almost half (47%) of executives rated workforce analytics as a high priority—just one in three (33%) rated workforce analytics as highly in organizations that have not experienced layoffs.

Talent Management Capabilities

Do talent management priorities align with corporate capabilities? Not according to our survey data. When it comes to leadership development, for example, 53% of executives surveyed rated leadership programs a "high" priority, yet only 33% believe they have "high" capabilities in this area (Figure 9). We believe that organizations looking to "raise their talent management game" in order to better attract and retain employees may want to start with improving their leadership development programs.

Of the executives who regarded their talent programs as "world class," 53% rated their leadership development capabilities highly, compared to just 28% of other respondents—a 25-point gap.

Perhaps not surprisingly, many companies with self-identified "world-class" talent programs had significantly more confidence in their capabilities across all seven talent areas. Of the executives who regarded their talent programs as "world class," 53% rated their leadership development capabilities highly, compared to just 28% of other respondents—a 25-point gap (Figure 11).

Figure 11. Capability in priority area is "high": World-class talent programs vs. non-world-class talent programs



Talent Management Investment

In addition to inquiring about talent priorities and capabilities, Deloitte asked executives to rate the level of investment their companies are making. In each instance, the gap between talent program priorities and investment was at least 10 percentage points, with the biggest gap appearing in leadership development (Figure 9).

Comparing those companies with “world-class” talent programs against their competitors proved to be an interesting benchmarking exercise. By significant margins—often 20 percentage points or more—surveyed executives who rated their talent programs as “world-class” also reported a “high” level of investment in these initiatives (Figure 12).

Figure 12. Investment in priority area is “high”: World-class talent programs vs. non-world-class talent programs



Leadership Checklist

Based on Deloitte research on leadership,* some of the key steps organizations can take into consideration when planning and implementing leadership development programs include:

- Aligning leadership strategy to business strategy in order to measure individual and organization success consistently.
- Creating a clear leadership capability framework so the organization has a defined picture of what a future senior leader needs to do well.
- Recognizing that leadership potential is different than current performance—and learning how to spot and assess for potential using objective criteria.
- Putting decision rights and governance in place regarding developmental job moves for high-potentials.
- Creating high-impact programs to accelerate on-the-job development and the formation of critical support networks.
- Ensuring senior leaders are setting the right example, including being “hands-on” in leadership development programs.

* Source: Deloitte’s *Leadership by design: An architecture to build leadership in organizations*, Deloitte Consulting, 2011.

The bottom line

What a difference a year makes...

2011 started with the prospect of an imminent global recovery and ended with the specter of a double dip recession that threatened to create a long and uneven global recovery. The standout findings from the latest edition of Deloitte's *Talent Edge 2020* series are twofold: the near universal agreement about the existing and potentially growing shortage of executive leadership and the significant regional differences in talent needs around the globe. The world may now be one economy, but it is definitely not one talent market.

According to the majority of executives surveyed for this report, current corporate leadership development programs are not capable of meeting the challenge ahead. Surveyed executives report that their companies are not investing the resources necessary to develop new leaders.

Looking to the future, in order to thrive, not just survive, we believe executives should ask themselves three critical questions:

- Where can we find opportunities for growth in an uncertain economy that is recovering at different rates in different regions?
- Do we have the right talent in the right places to leverage those opportunities?
- Do we have the talent and leaders—and the required talent programs—to weather the economic, technological, and regulatory challenges ahead?

Ultimately, building world-class talent programs requires investment. Our research has shown that while fewer than one in five surveyed executives self-identified their organizations as “world-class” in talent, more than four in five acknowledge the need for significant improvements and investments. The organizations that self-report that they are “world-class” in talent are not sitting back and waiting for a slow recovery to solve their talent challenges. These executives are more likely to invest (by a two to one margin) across the board on talent priorities and initiatives. These talent leaders are taking responsibility for their futures and focusing investments and capabilities on their top priorities. They are getting down to the brass tacks (i.e., hard work) of rebuilding and developing new talent programs for leaders and critical employees. In short, self-assessed “world-class” companies are putting their money on the table and investing in talent priorities and programs.



The world may now be one economy,
but it is definitely not one talent
market.

Survey demographics

In the latest report of Deloitte's *Talent Edge 2020* longitudinal study, Forbes Insights surveyed 376 senior executives, 66% of whom held Board, CEO, CFO, CHRO, or HR/Talent Director positions (Figure 13).

As Figure 14 shows, all survey respondents were employed by companies with annual revenues of more than \$500 million. More than eight in ten (82%) work for companies larger than \$1 billion in revenues and 34% report their companies generate revenues higher than \$10 billion.

Figure 13. Which of the following describes your title?

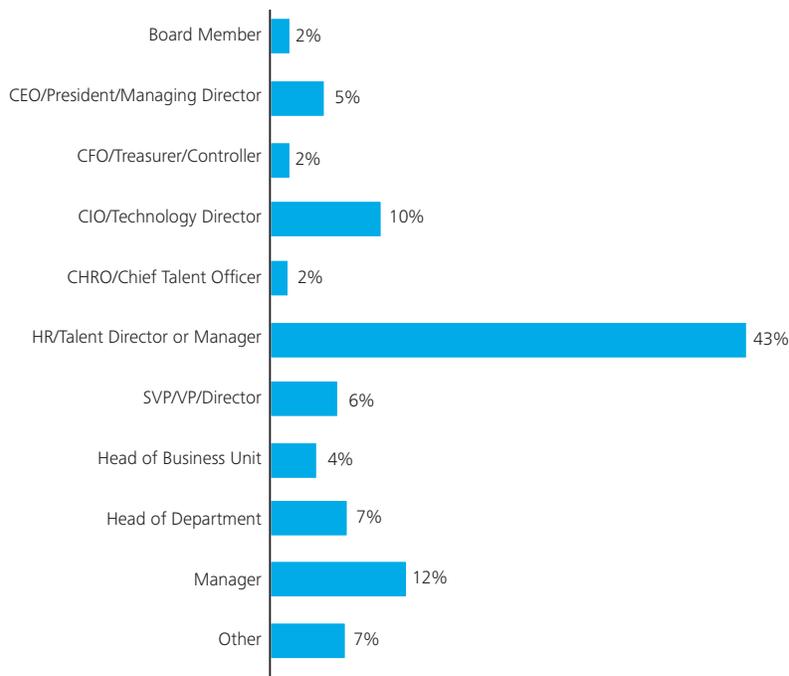
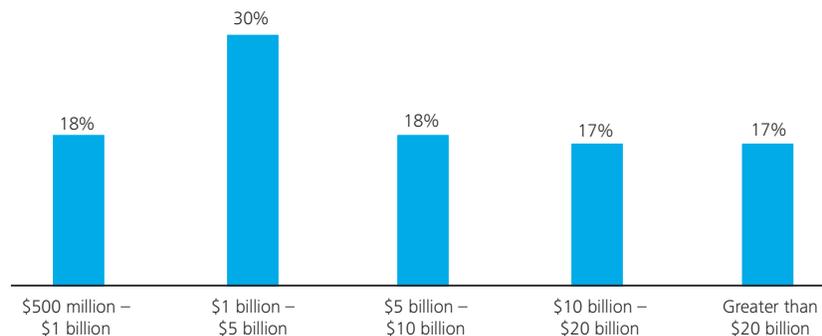


Figure 14. Company revenues during the most recent fiscal year



As shown in Figure 15, participating executives are dispersed through the world's three major economic regions: 38% in the Americas; 34% in Europe/Middle East/Africa; and 28% in the Asia Pacific region.

Survey participants represent a broad set of industries (Figure 16), including Technology/Media/Telecommunications (27%), Consumer/Industrial Products (27%), Energy/Utilities (19%), Life Sciences/Health Care (9%), and Financial Services (15%).

Figure 15. Respondents by location

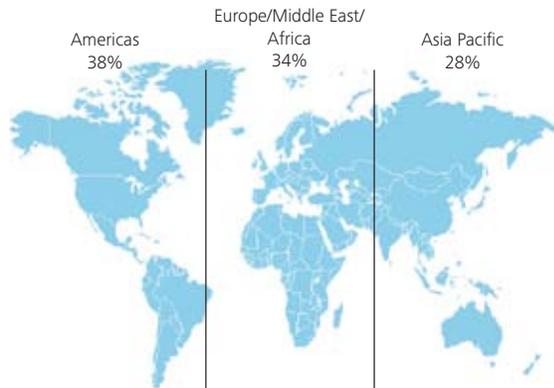
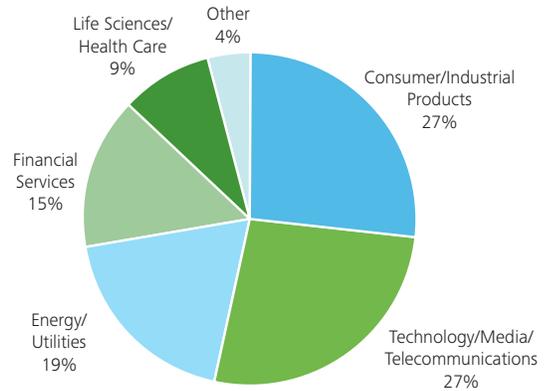


Figure 16. Company industries



Deloitte's Talent Edge 2020 longitudinal study will continue to track the shifts in talent strategies, trends and priorities in the months ahead. The next edition of the study will be published in the spring of 2012 and will focus on employees.

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About the survey

Talent Edge 2020 is a follow up to the *Managing Talent in a Turbulent Economy* longitudinal talent survey series. This survey explores the changing talent priorities and strategies of executives at global and large national companies. This report features results from an October 2011 survey that polled 376 senior business leaders and human resource executives at large businesses in the Americas, Asia Pacific, and Europe, the Middle East, and Africa. For more information see www.Deloitte.com/us/talent.

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