

A photograph of a city street at sunset. The sun is low on the horizon, creating a strong orange and yellow glow that silhouettes the buildings and people. The street is filled with cars and pedestrians, some of whom are blurred, suggesting movement. A bright yellow text box is positioned in the upper right corner of the image.

2019 EY Global Payroll Survey

Results at a glance



Building a better
working world



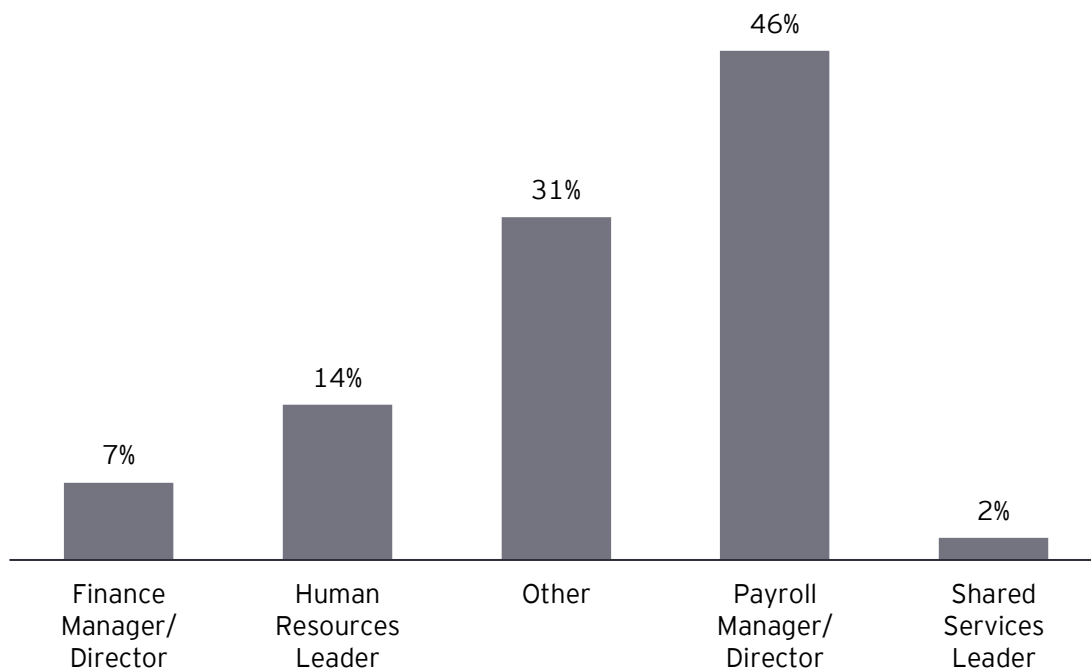
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Demographics of the Survey

1. What is your current job title?

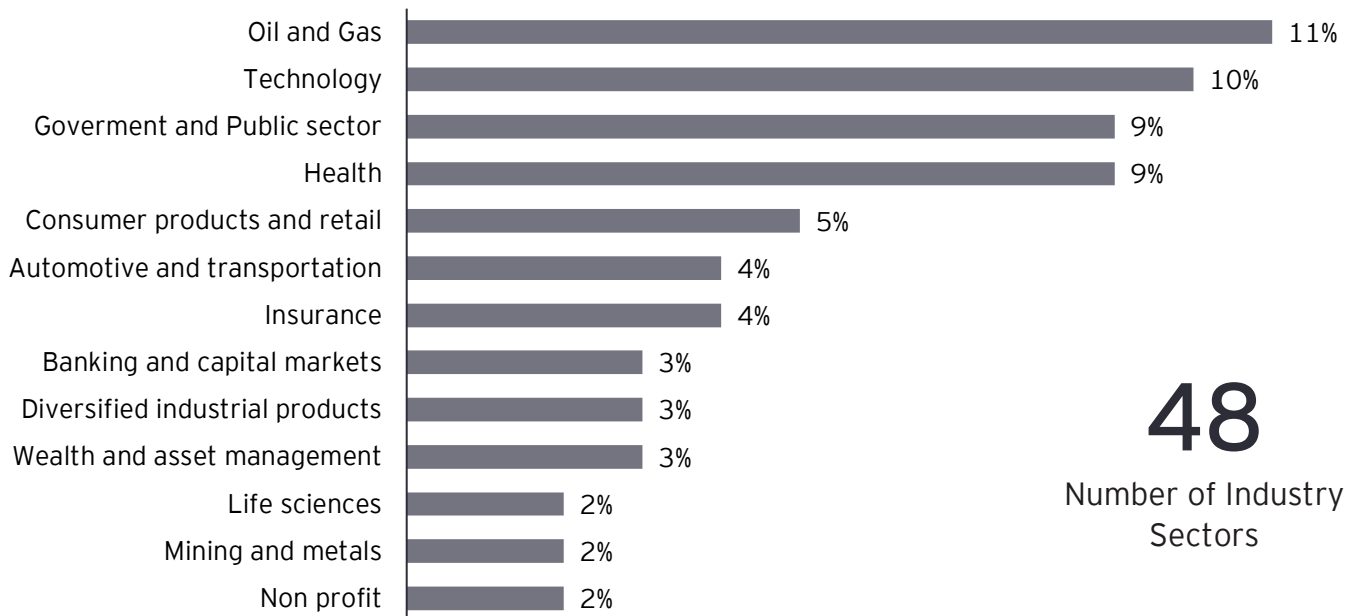
128
Number of
companies that
participated



2. In which country is your company currently headquartered?



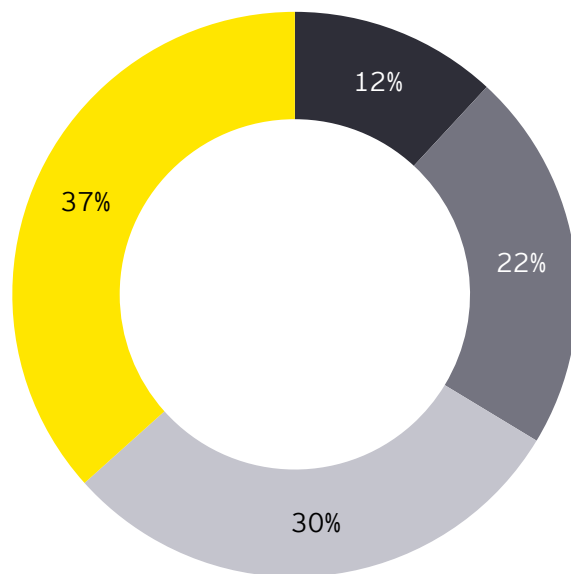
3. Which industry sector best aligns to your company's primary business?



48
Number of Industry Sectors

Industries with a response rate of less than 2% are not displayed.

4. Approximately how many employees do you currently have globally?



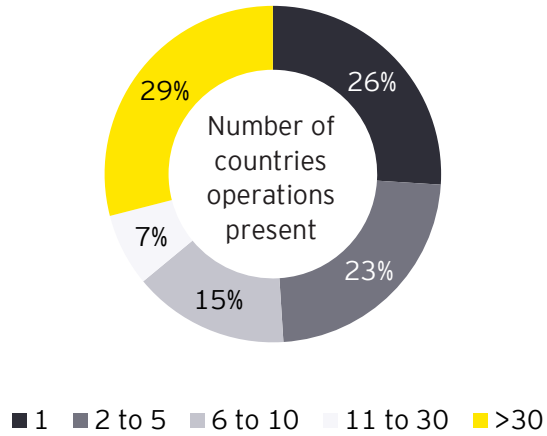
20,880
Average number of Employees

■ More than 50000 ■ 10001 to 50000 ■ 2501 to 10000 ■ 1 to 2500

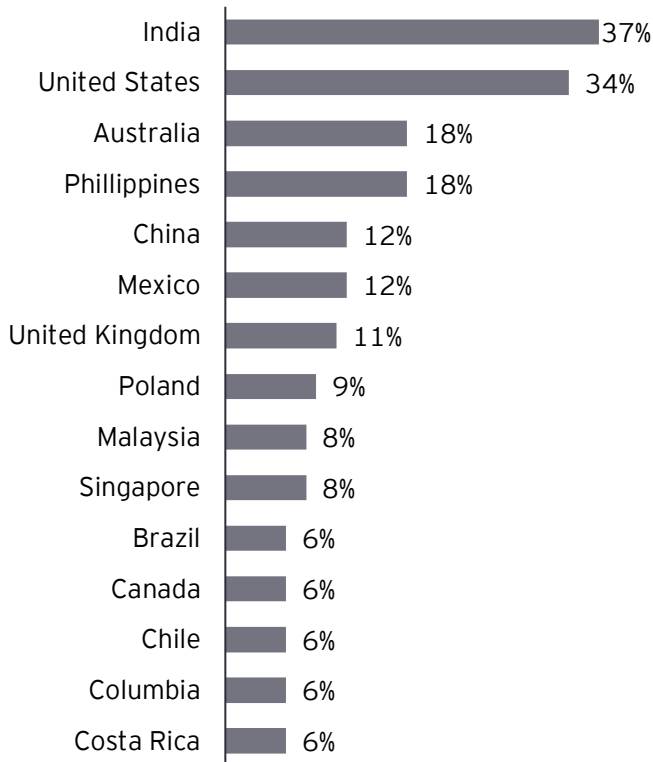
Percentages may not sum to 100% due to rounding.

HR Strategy

5. How many countries does your company currently operate in?



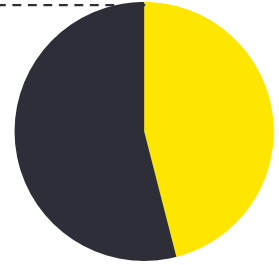
7. In which countries do you maintain an HR shared services center?



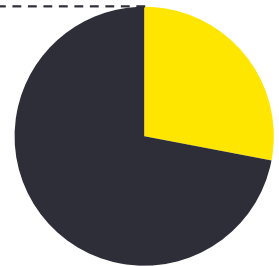
Industries with a response rate of less than 6% are not displayed. Respondents were able to select multiple answer choices. Sum of percentages will be higher than 100%.

6. What is your organization's HR shared services approach?

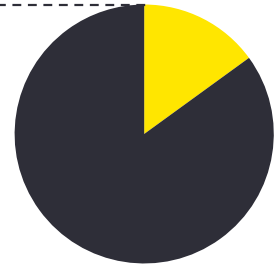
46%
No shared services



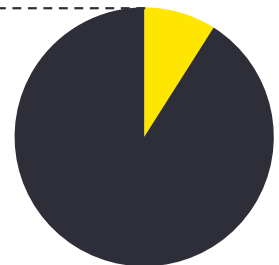
28%
Global shared services



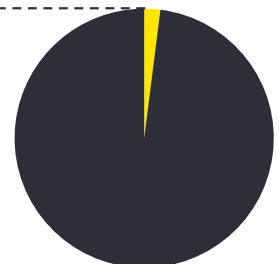
15%
Regional shared services



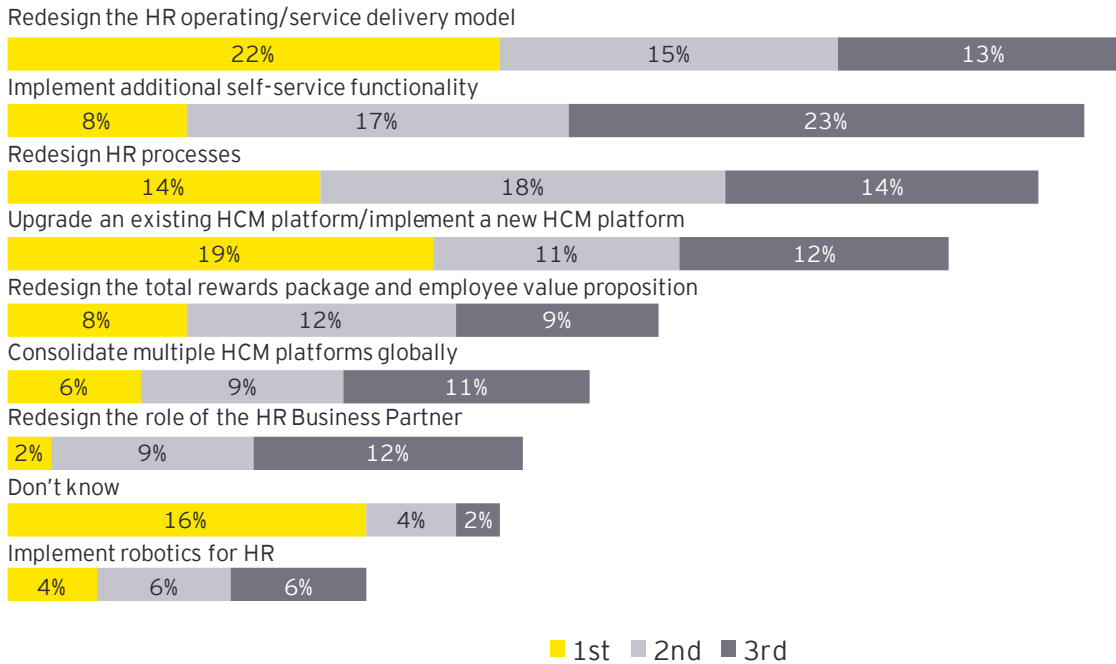
9%
Local shared services



2%
Other

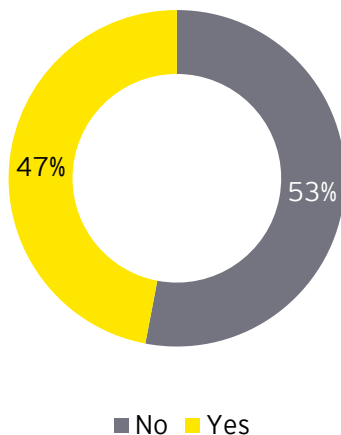


8. What are your top three HR priorities this year?

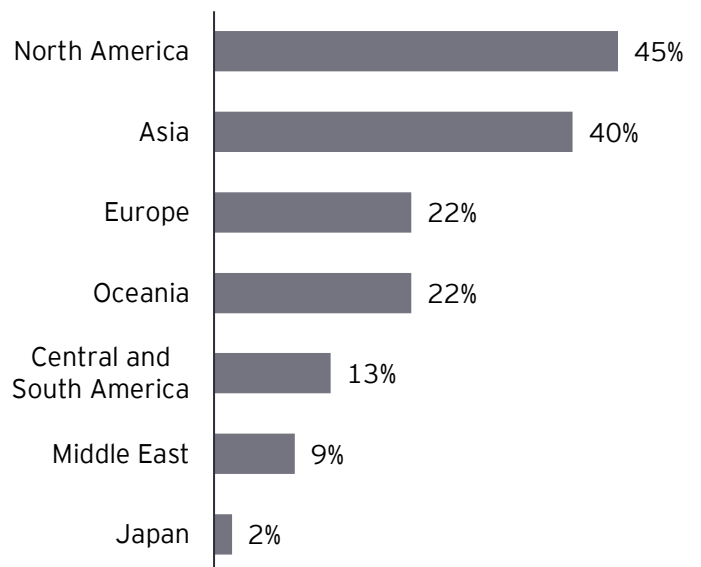


Percentages may not sum to 100% due to rounding.

9. Are you planning to expand your business into new global market?

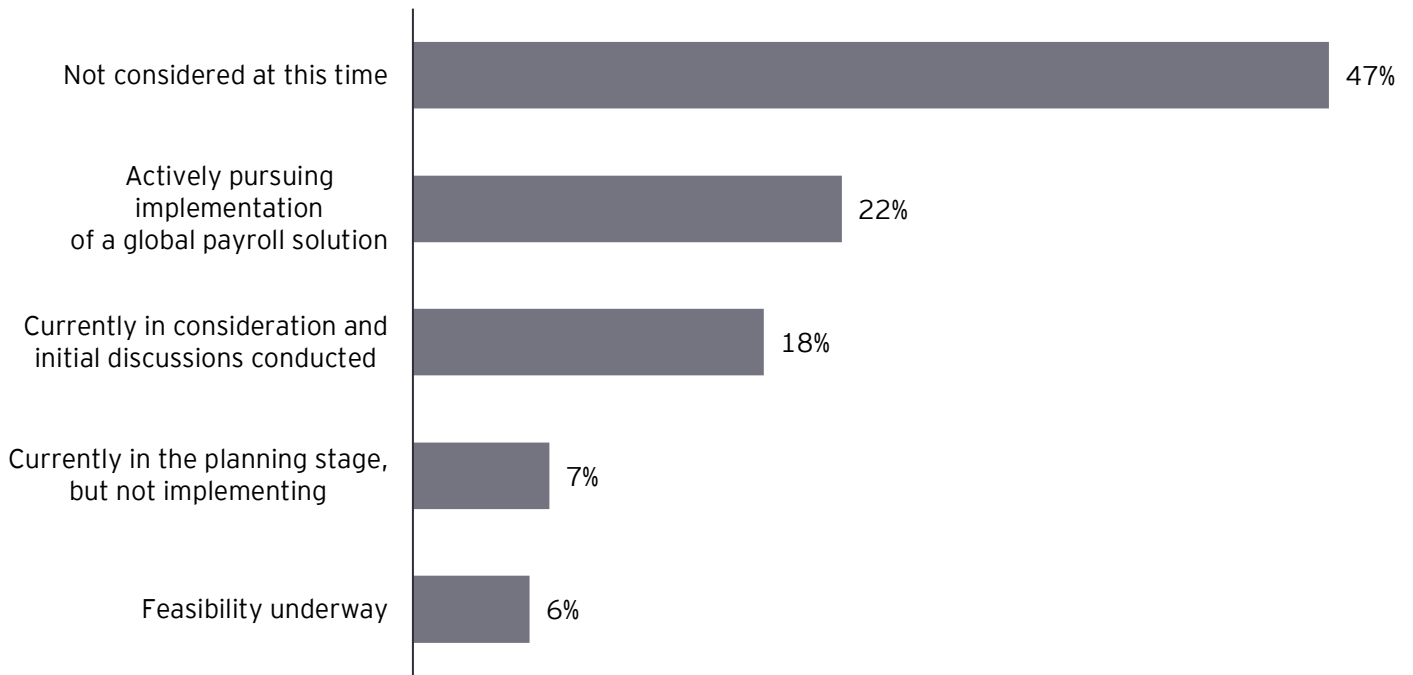


10. What are your top growth areas for adding employee headcount?

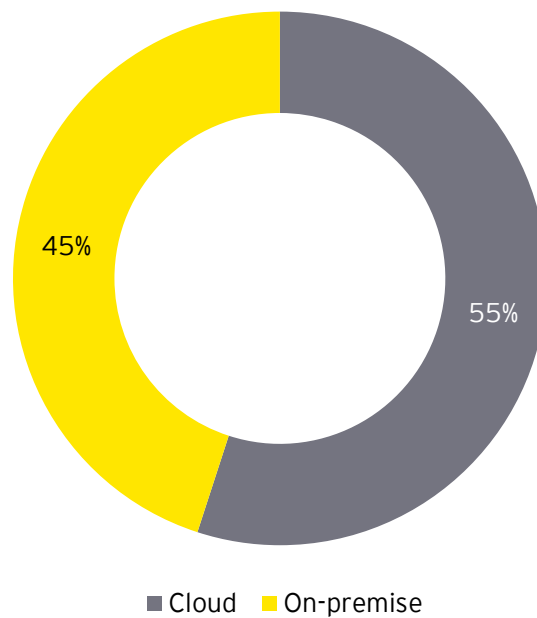


Respondents were able to select multiple answer choices. Sum of percentages will be higher than 100%.

11. Have you incorporated your expansion plans into your payroll strategy?

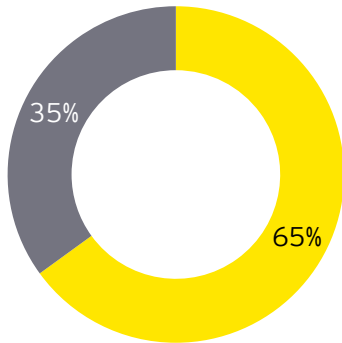


12. Is your current HCM platform an on-premise or cloud solution?



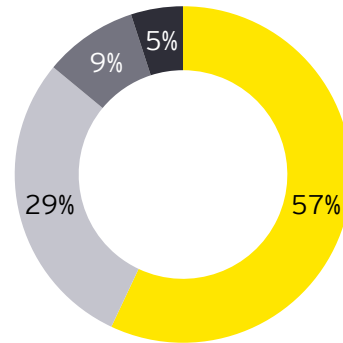
Global Payroll Service Delivery

13. Do you have a formalized payroll strategy?



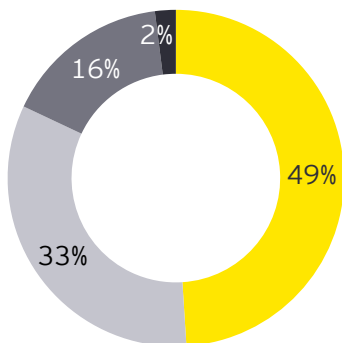
■ Yes ■ No

14. Where does payroll report within your organization?



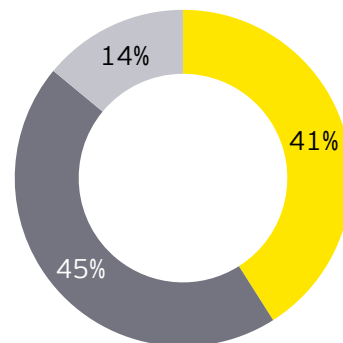
■ HR ■ Finance ■ Other ■ Finance/HR

15. Where do you believe payroll should report within your organization?



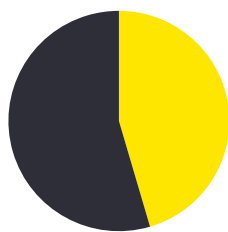
■ HR ■ Finance ■ Other ■ Finance/HR

16. Which of the following best describes how your payroll operation is currently serviced?

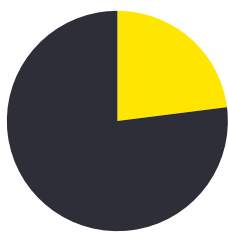


■ Both In-house and outsourced ■ In-house ■ Outsourced

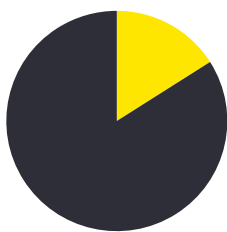
17. What is your organization's payroll shared services approach?



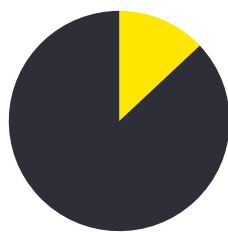
45%
No shared services



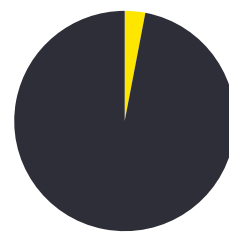
23%
Global shared services



16%
Regional shared services

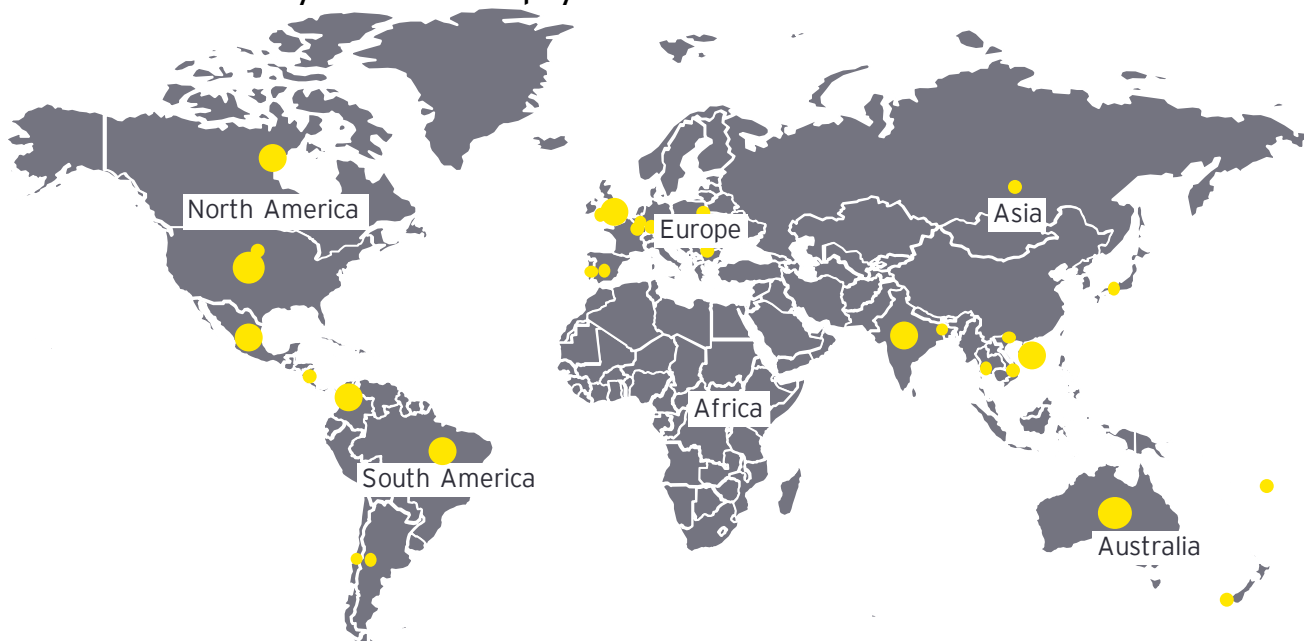


13%
Local shared services



3%
Other

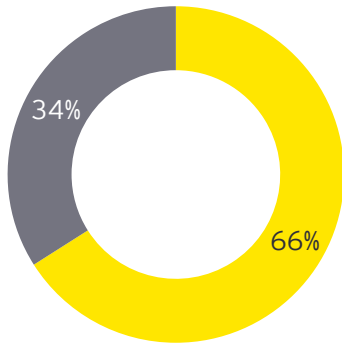
18. In which countries do you maintain a payroll shared services center?



United States	39%	Canada	7%
India	20%	Singapore	7%
Philippines	17%	Brazil	5%
Australia	15%	Colombia	5%
United Kingdom	12%	Ireland	5%
China	10%	Malaysia	5%
Mexico	10%	Poland	5%

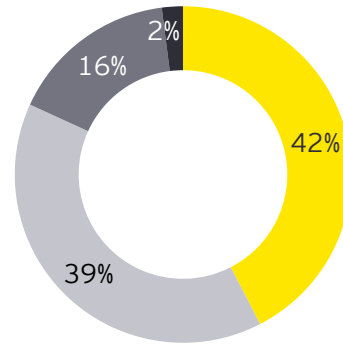
Countries identified in less than 5% of responses are displayed on the map but not included in the table. Respondents were able to select multiple answer choices. Sum of percentages will be higher than 100%.

19. Given the choice, would you prefer to change from your outsourcing model?



■ No ■ Yes

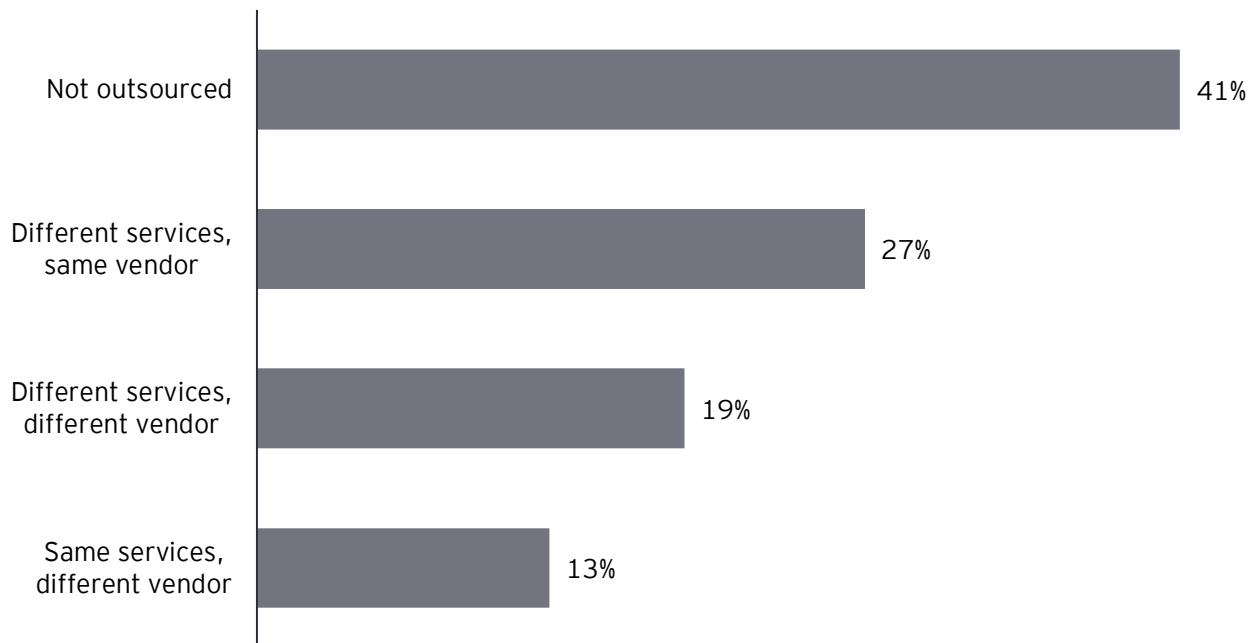
20. Is your current payroll processing vendor an on-premise or cloud solution?



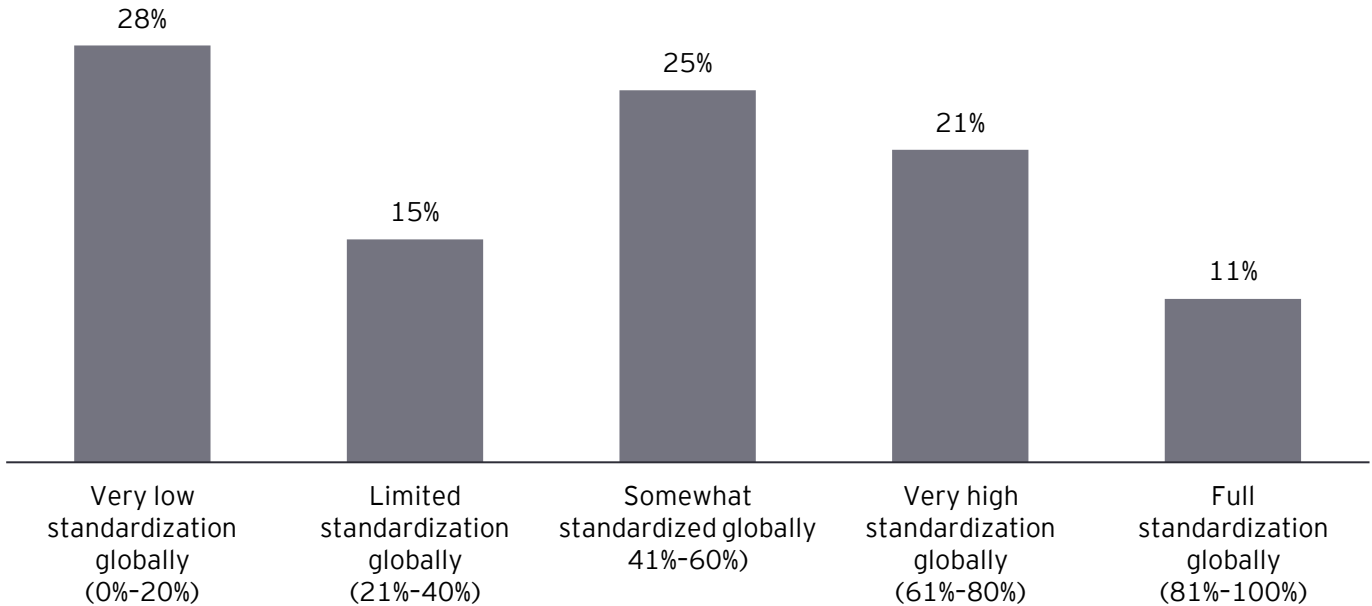
■ On-premise ■ Cloud ■ Other ■ Both

Percentages may not sum to 100% due to rounding.

21. How would you improve your outsourcing model?

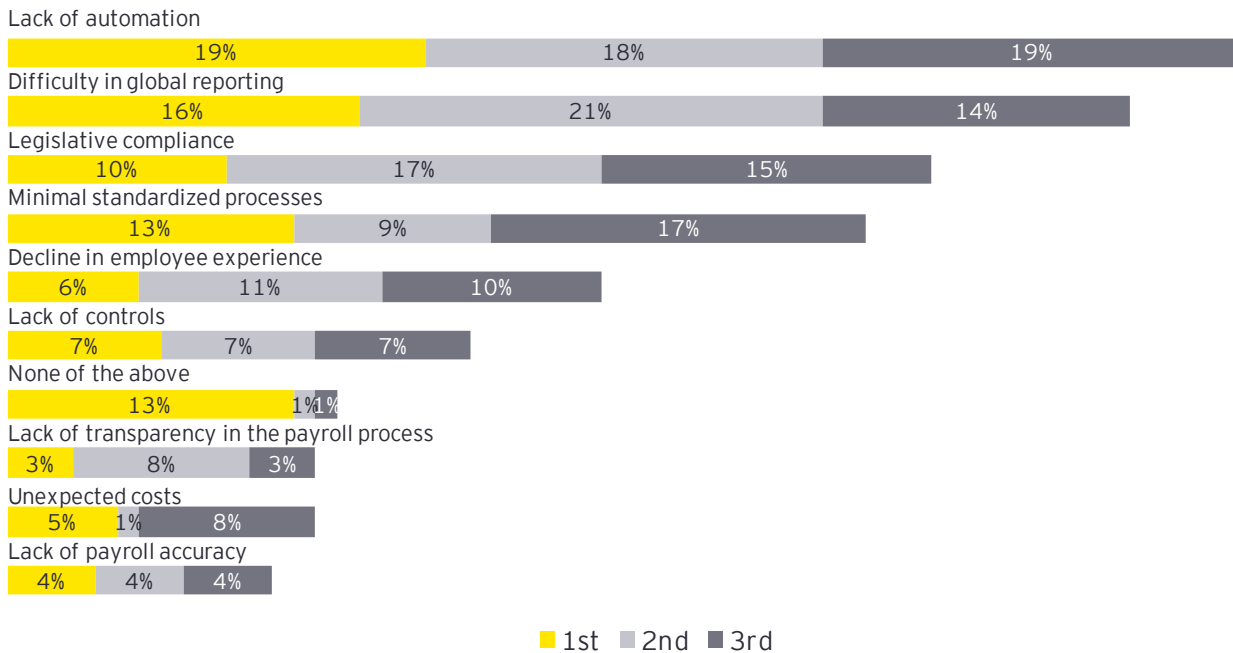


22. Which of the following statements best describes how standardized your payroll processes are globally?



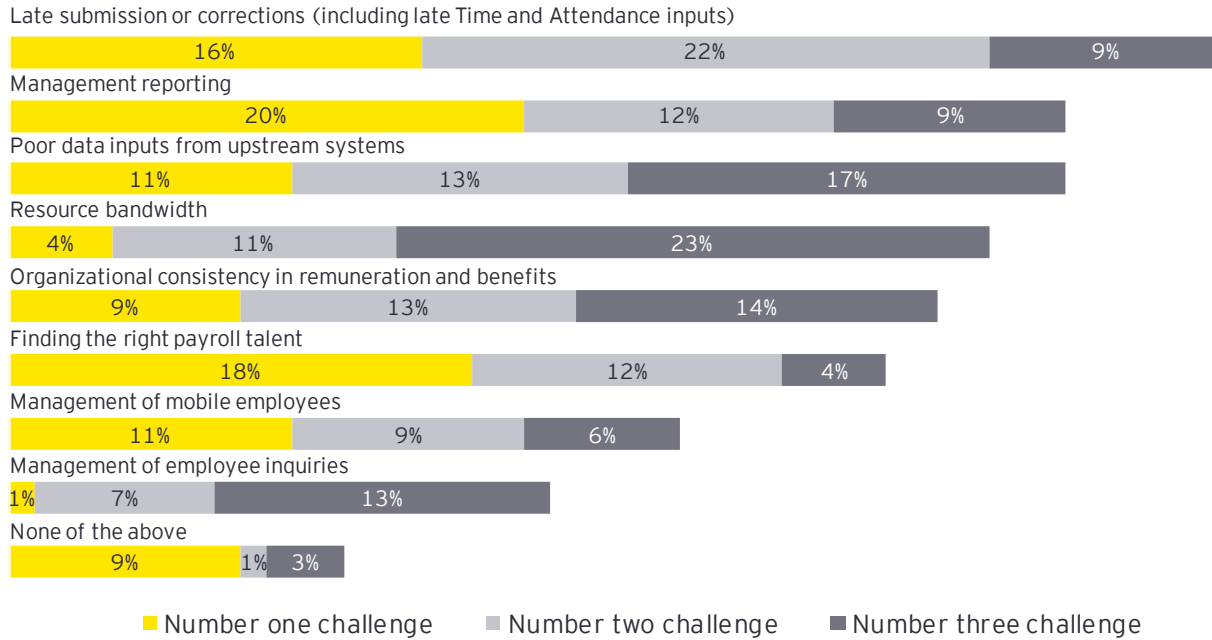
Percentages may not sum to 100% due to rounding.

23. What are the top three challenges of your current service delivery model?

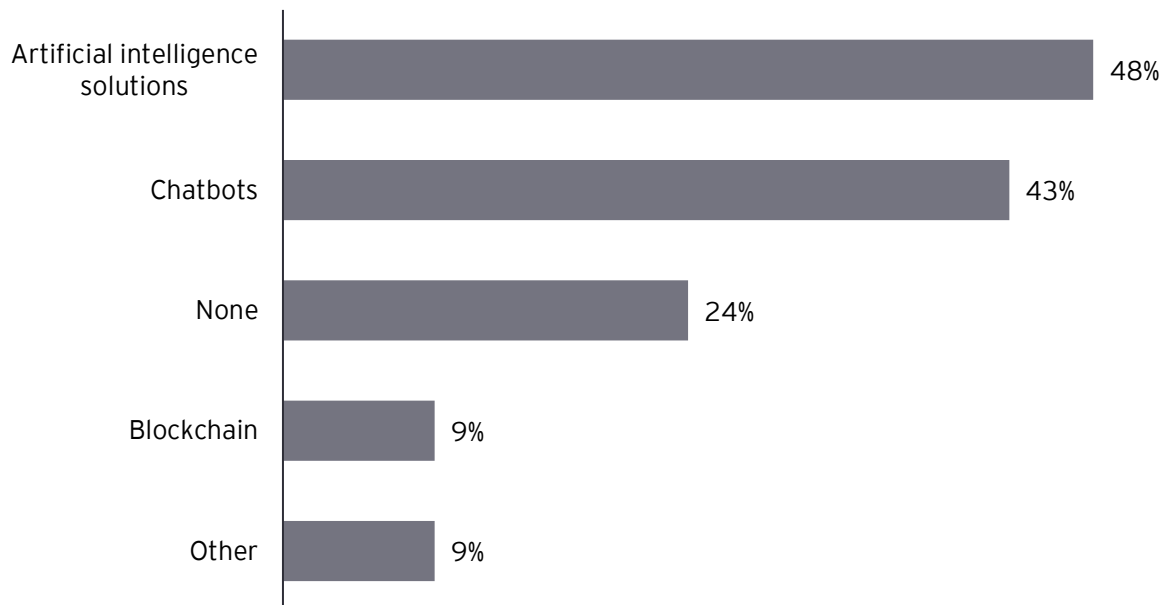


Responses with 1% or less not shown.

24. Other than legislative compliance and organizational consistency in the payroll process, what are the top three payroll operations challenges facing your company?

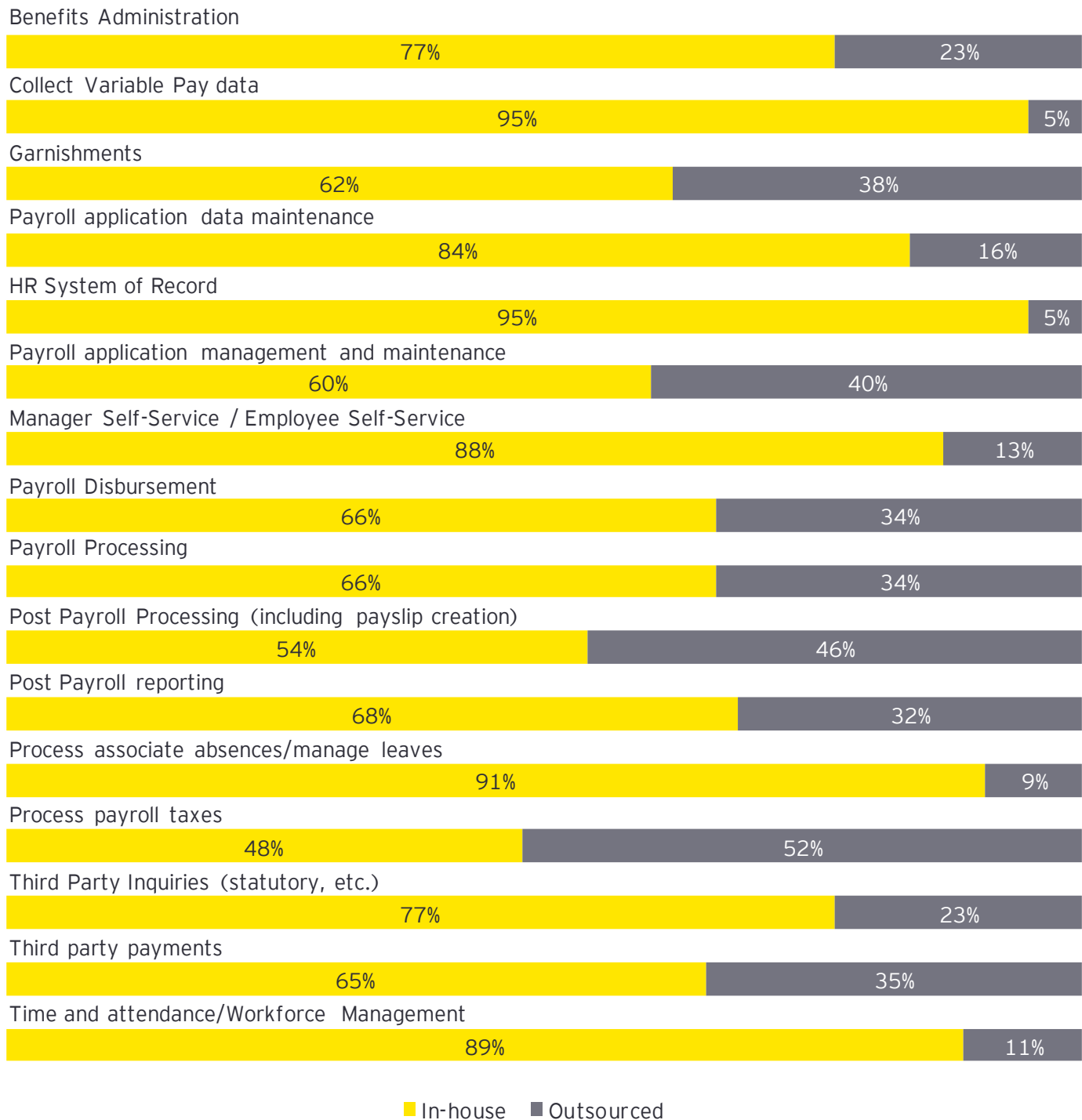


25. Do you currently use or plan to use any of the following technologies in payroll?



Respondents were able to select multiple answer choices. Percentages may not sum to 100% due to rounding.

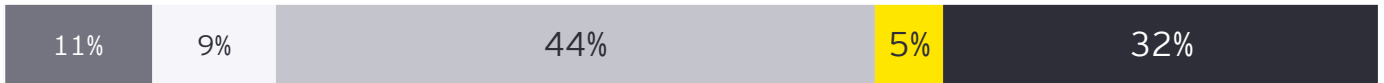
26. Which processes are managed in-house or outsourced by your payroll provider?



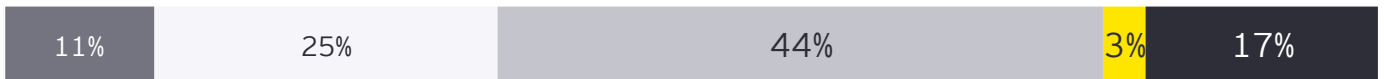
Percentages may not sum to 100% due to rounding.

27. How is your organization addressing your primary operational challenge?

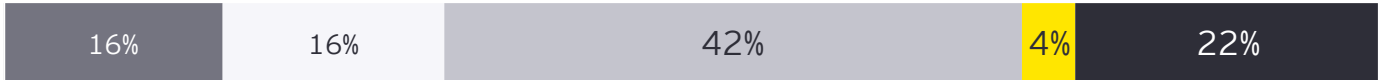
Finding the right payroll talent



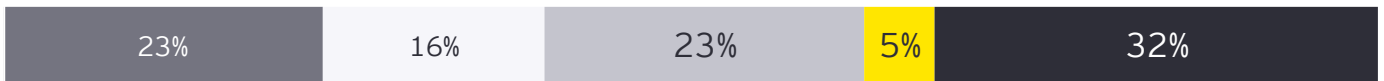
Late submissions or corrections (including late time & attendance inputs)



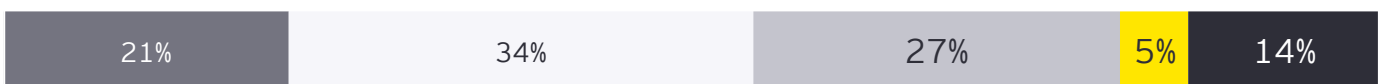
Management of employee inquiries



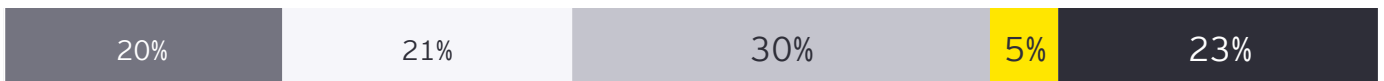
Management of mobile employees



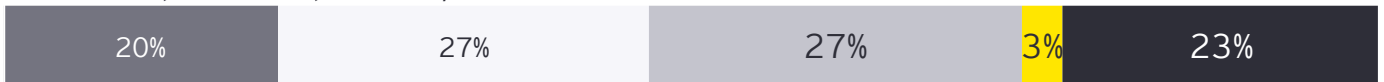
Management reporting



Organizational consistency in Remuneration and benefits



Poor data inputs from upstream systems



Resource bandwidth

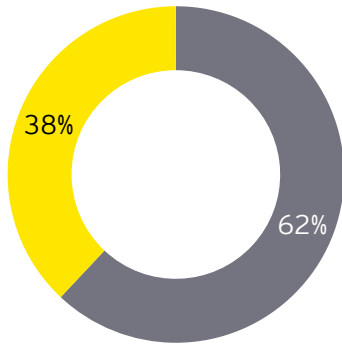


- Globally
- Locally
- No plan of action
- Improvement planned in the next 12 months
- No budget to address

Percentages may not sum to 100% due to rounding.

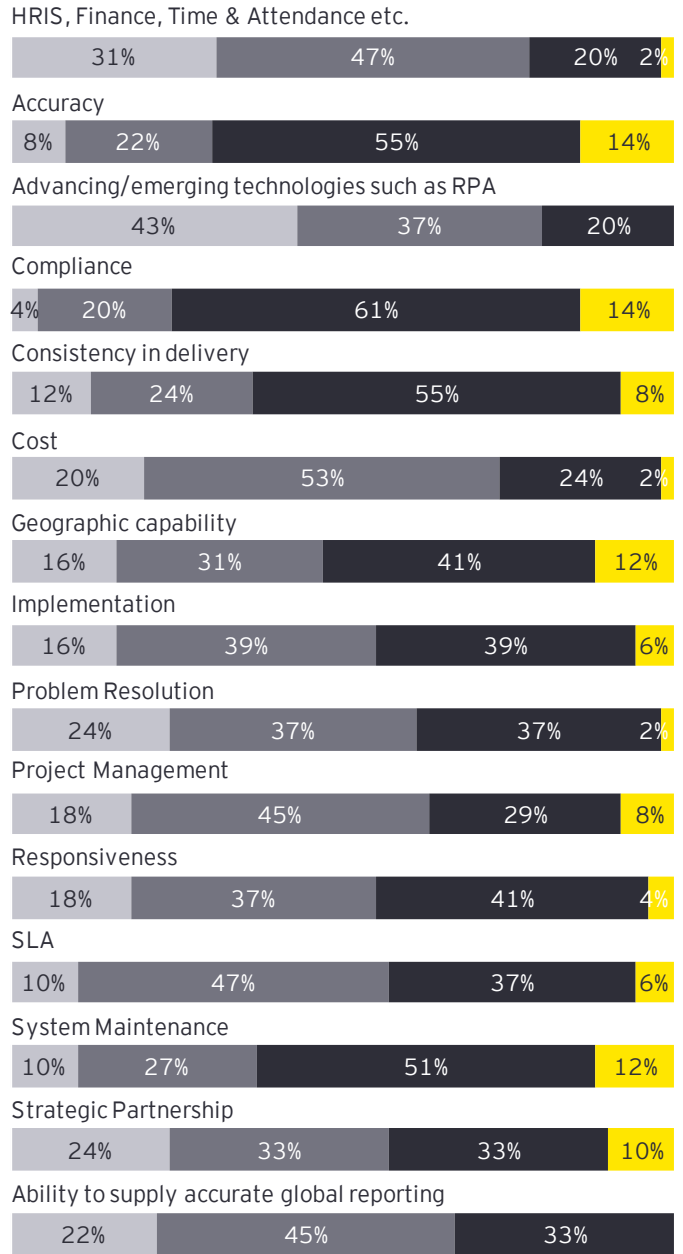
Payroll Vendor Management

28. Does your organization currently use a managed services vendor for payroll?



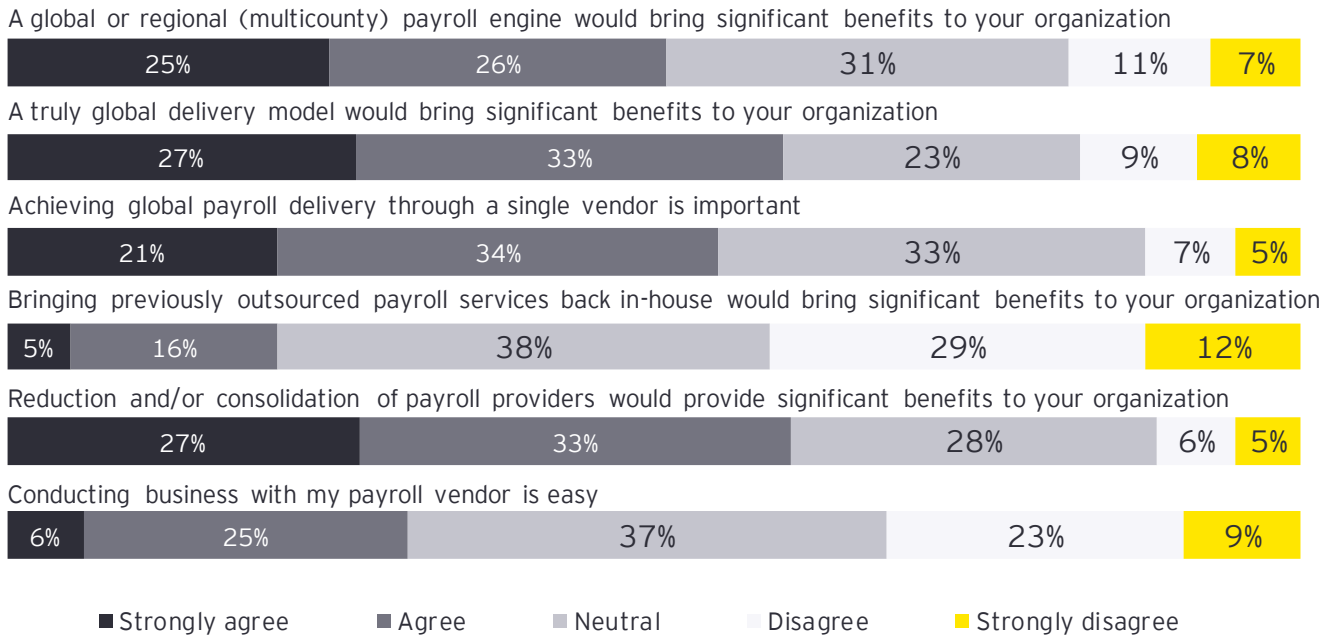
■ No ■ Yes

29. How would you rate the performance of your current payroll provider on the following?



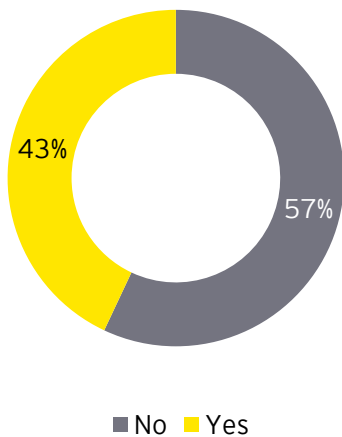
■ Poor ■ Fair ■ Good ■ Very Good

30. To what extent do you agree with the following statements?

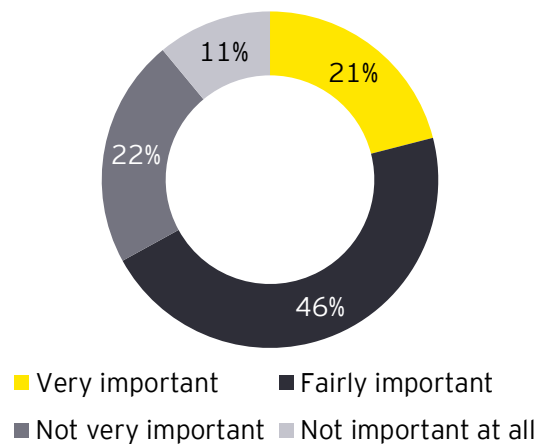


Percentages may not sum to 100% due to rounding.

31. Do you believe there is a single vendor who can handle all of your payroll needs globally?

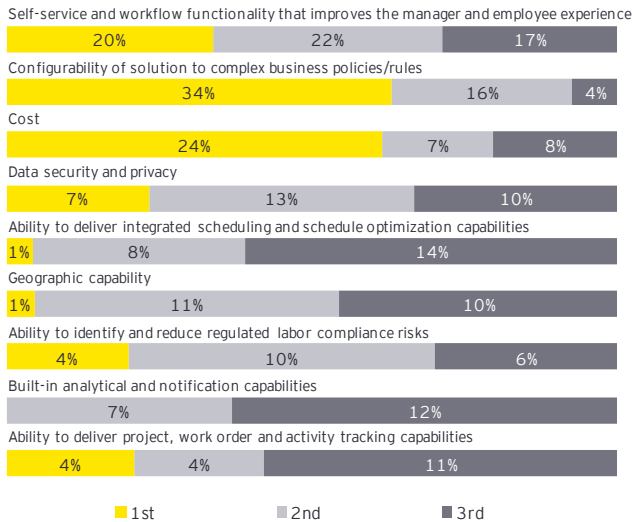


32. How important is achieving global payroll delivery through a single vendor?



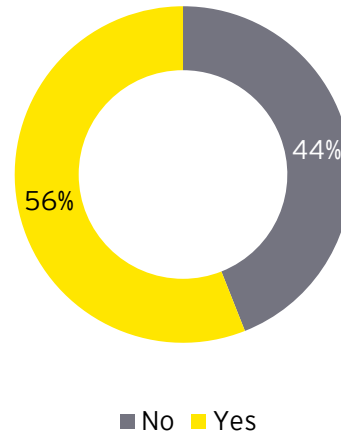
Workforce Management

33. What are your top three criteria for selecting a new workforce/Time and Attendance vendor?



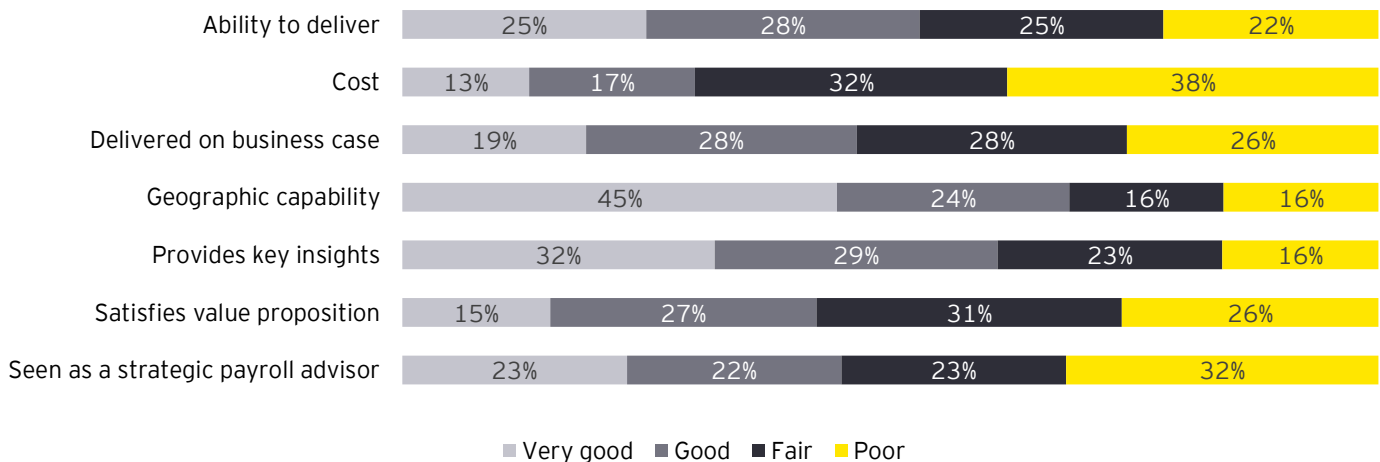
Vendors with a response rate of less than 1% are not displayed.

34. Does your organization currently use a vendor for time and attendance/workforce management?



Vendor Recognition & Rating

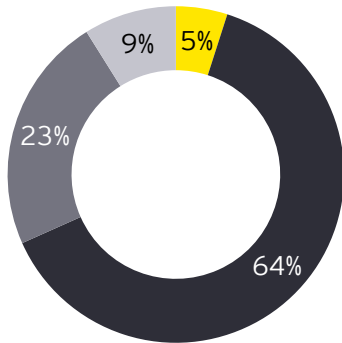
35. Collectively, several vendors (ADP, Ascender, BDO, Blue Marble, Ceridian, CloudPay, Neeyamo, NGA, Oracle, Safeguard, SAP, SD Worx, TMF, Ultimate and Workday) were rated according to the categories below:



Percentages may not sum to 100% due to rounding.

Employee Experience

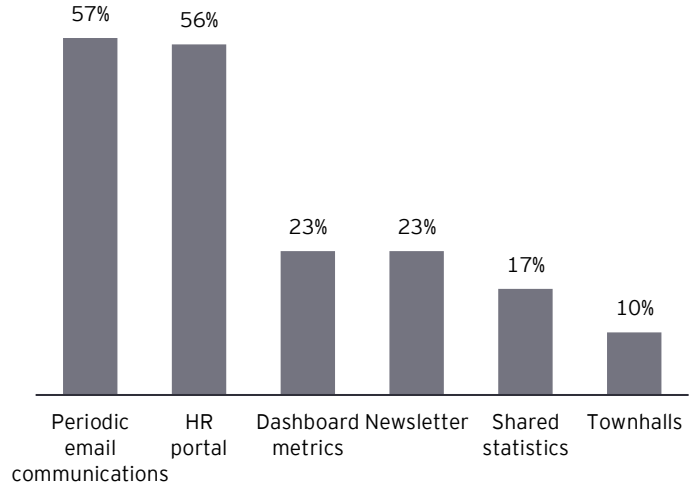
36. Has your organization considered or are you currently using on-demand pay?



■ Plans to implement ■ No plans to implement
■ Unsure ■ Currently in use

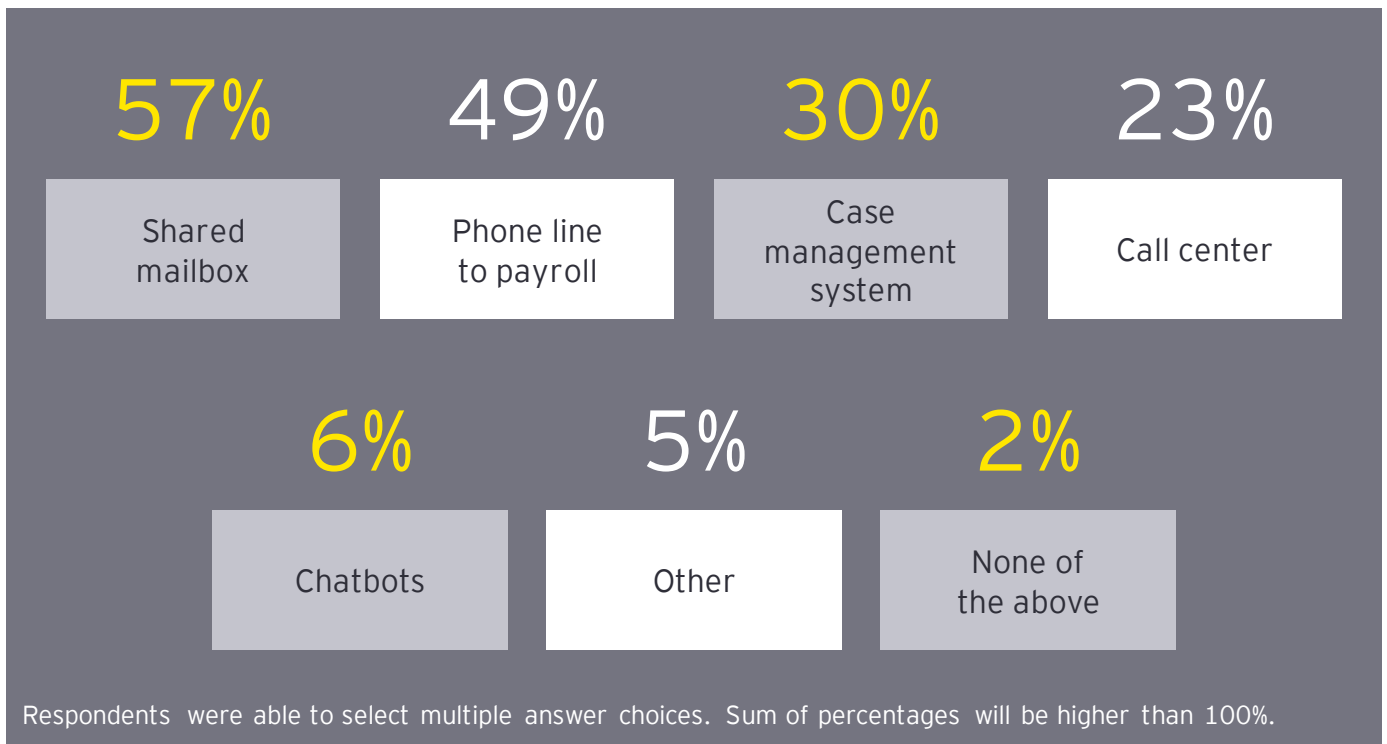
Percentages may not sum to 100% due to rounding.

37. How do you communicate and educate your employees and management on the value of payroll?



Respondents were able to select multiple answer choices. Sum of percentages will be higher than 100%.

38. How do you manage employee payroll inquiries? Select all that apply.



Respondents were able to select multiple answer choices. Sum of percentages will be higher than 100%.

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