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Dresner Advisory Services, LLC

2025 Edition

Workforce Planning & Analysis Market Study

Wisdom of Crowds® Series

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2025 Workforce Planning and Analysis Market Study

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This report should be used for informational purposes only. Vendor and product selections should be made based on multiple information sources, face-to-face meetings, customer reference checking, product demonstrations, and proof-of-concept applications.

The information contained in all Wisdom of Crowds® Market Study Reports reflects the opinions expressed in the online responses of individuals who chose to respond to our online questionnaire and does not represent a scientific sampling of any kind. Dresner Advisory Services, LLC shall not be liable for the content of reports, study results, or for any damages incurred or alleged to be incurred by any of the companies included in the reports as a result of its content.

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Definitions

Business Intelligence Defined

Business intelligence (BI) is “knowledge gained through the access and analysis of business information.

Business Intelligence tools and technologies include query and reporting, OLAP (online analytical processing), data mining and advanced analytics, end-user tools for ad hoc query and analysis,” and “dashboards for performance monitoring.”

Howard Dresner, The Performance Management Revolution: Business Results Through Insight and Action (John Wiley & Sons, 2007)

Workforce Planning and Analysis Defined

Workforce planning and analysis are the tools and processes that help align workforces with business goals, strategies, and workplace dynamics. They include requirements, analysis, and forecasting for current and future needs and the development of plans to address imbalances to optimize human resources, reduce costs, and improve efficiency.

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Introduction

As Dresner Advisory Services approaches its 18th anniversary in 2025, we are pleased to present the third edition of this report. We sincerely appreciate our clients' and subscribers' ongoing support and collaboration. Since our founding in 2007, we have remained committed to setting high standards, driving innovation, and increasing the value we deliver each year.

In this latest edition of the Workforce Planning and Analysis Market Study, we highlight the continuing expansion of performance management across business functions beyond finance. In the year ahead, as organizations navigate external challenges, they will need to take a more comprehensive approach to performance management to enhance their agility, decision-making, and strategic execution.

We hope the insights in this report support your operational and strategic goals. Developing this study has been a valuable endeavor, and we look forward to continuing to serve you.

Thank you to our clients, colleagues, and the broader community—your support is integral to our research. We welcome the opportunity to engage further as you explore the study's findings.

Best,



Howard Dresner
Chief Research Officer
Dresner Advisory Services

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2025 Workforce Planning and Analysis Market Study

Benefits of the Study

The Dresner Advisory Services Workforce Planning and Analysis Market Study provides a wealth of information and analysis, offering value to both consumers and producers of business intelligence technology and services.

A Consumer Guide

As an objective source of industry research, the Dresner Advisory Services Workforce Planning and Analysis Market Study helps consumers to understand how their peers leverage and invest in business intelligence and related technologies.

Through our unique vendor performance measurement system, users glean key insights into software supplier performance, enabling:

- Comparisons of current vendor performance to industry norms
- Identification and selection of new vendors

A Supplier Tool

Vendor licensees use the Dresner Advisory Services Workforce Planning and Analysis Market Study in several important ways:

External Awareness

- Build awareness for the market and supplier brand, citing Dresner Advisory Services Workforce Planning and Analysis Market Study trends and vendor performance
- Create lead and demand generation for supplier offerings through association with Dresner Advisory Services Workforce Planning and Analysis Market Study brand, findings, webinars, etc.

Internal Planning

- Refine internal product plans and align with market priorities and realities as identified in Dresner Advisory Services Workforce Planning and Analysis Market Study
- Better understand customer priorities, concerns, and issues
- Identify competitive pressures and opportunities

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About Howard Dresner and Dresner Advisory Services

The Dresner Advisory Services Workforce Planning and Analysis Market Study Report was conceived, designed, and executed by Dresner Advisory Services, LLC—an independent advisory firm—and Howard Dresner, its President, Founder and Chief Research Officer.

Howard Dresner is one of the foremost thought leaders in business intelligence and performance management, having coined the term “Business Intelligence” in 1989. He



published two books on the subject, *The Performance Management Revolution – Business Results through Insight and Action* (John Wiley & Sons, Nov. 2007) and *Profiles in Performance – Business Intelligence Journeys and the Roadmap for Change* (John Wiley & Sons, Nov. 2009). He lectures at forums around the world and is often cited by the business and trade press.

Prior to Dresner Advisory Services, Howard served as chief strategy officer at Hyperion Solutions and was a research fellow at Gartner, where he led its business intelligence research practice for 13 years.

Howard has conducted and directed numerous in-depth primary research studies over the past two decades and is an expert in analyzing these markets.

Through the Wisdom of Crowds® Business Intelligence market research reports, we engage with a global community to redefine how research is created and shared. Other research reports include:

- Wisdom of Crowds® Flagship BI Market Study
- AI, Data Science and Machine Learning
- Analytical Platforms
- Data Engineering
- Data Governance
- Enterprise Performance Management
- ESG Reporting
- Financial Consolidation, Close Management, and Reporting
- Sales Performance Management
- Self-Service BI
- Supply Chain Planning and Analysis

You can find more information about Dresner Advisory Services at www.dresneradvisory.com.

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About Jim Ericson

Jim Ericson is VP and Distinguished Analyst with Dresner Advisory Services.

Jim has served as a consultant and journalist who studies end-user management practices and industry trending in the data and information management fields.

From 2004 to 2013, he was the editorial director at *Information Management* magazine (formerly *DM Review*), where he created architectures for user and industry coverage for hundreds of contributors across the breadth of the data and information management industry.



As lead writer he interviewed and profiled more than 100 CIOs, CTOs, and program directors in a program called “25 Top Information Managers.” His related feature articles earned ASBPE national bronze and multiple Mid-Atlantic region gold and silver awards for Technical Article and for Case History feature writing.

A panelist, interviewer, blogger, community liaison, conference co-chair, and speaker in the data-management community, he also sponsored and co-hosted a weekly podcast in continuous production for more than five years.

About John Hagerty

John is a Distinguished Analyst with Dresner Advisory Services.



John is a veteran with over 35 years at the intersection of financials, HR, and supply chain software with planning, business intelligence, and analytics.

As a former business user and as a market-leading industry analyst at Gartner and AMR Research, he worked with customers and vendors on strategies to obtain best value from technology investments.

John also held product management leadership positions at Oracle and IBM as they transitioned their products to cloud architectures.

The Dresner Team

About Elizabeth Espinoza

Elizabeth is Research Director at Dresner Advisory and is responsible for the data preparation, analysis, and creation of charts for Dresner Advisory reports.

About Danielle Guinebertiere

Danielle is the Director of Client Services at Dresner Advisory. She supports the ongoing research process through her work with executives at companies included in Dresner market reports.

About Michelle Whitson-Lorenzi

Michelle is Client Services Manager and is responsible for managing software company survey activity and our internal market research data.

Survey Method and Data Collection

As with all our Wisdom of Crowds[®] Market Studies, we constructed a survey instrument to collect data and used social media and crowdsourcing techniques to recruit participants.

We include our own research community of over 8,000 organizations as well as crowdsourcing and vendors' customer communities.

Data Quality

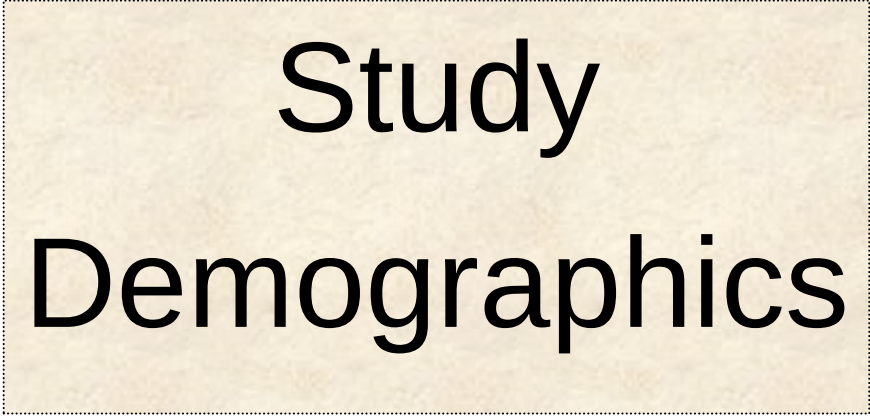
We carefully scrutinized and verified all respondent entries to ensure that only qualified participants are included in the study.

Executive Summary

2025 Workforce Planning and Analysis Market Study

Executive Summary

- Workforce planning ranks 34th among 63 topics under study. Forty-three percent say the topic is a *top priority for the overall business*. Overall, the importance assigned to workforce planning importance is flat year over year, with continued mixed sentiment toward HR's role. Only 6 percent have *no plans* for workforce planning (figs. 5-11).
- Forty-seven percent of respondents use workforce planning and analysis today, up from 46 percent in 2024. Forward adoption has declined slightly year over year. Current adoption is by far highest in North America. Excluding *HR*, *current use* is highest in *sales & marketing* and *finance*. Use scales rapidly with global headcount (figs. 12-16)
- *Human resources* and to a nearly equal extent *finance* are the most likely users, followed by *operations* and *IT*. Organizations of different size all report users in multiple roles (figs. 17-20).
- The two top planning capabilities are *workforce planning per employee* and *workforce compensation planning and scenario simulation*. *Technology* and *consumer services* respondents are among the most interested (fig. 21-26). Industry support for these capabilities is very strong and nearing maturity (fig. 57).
- The top four analysis priorities are *total compensation; headcount and core demographics; year-end projections and forecasting; and retention* (figs. 27-32). Industry support for these priorities is strong (fig. 58).
- The most popular workforce data access and manipulation capability is *utilize and update multiple hierarchies*. *Consumer services* and *technology* are likely industry adopters. Data access and manipulation is most widely practiced in larger organizations (figs. 33-38).
- The top insight creation and sharing priorities are *drill down to specific detail, share data securely to HR, and standardized metric calculations*. *Consumer services and technology* roles are likely industry adopters (figs. 39-43).
- The top integration features are *export data to Excel, PDF; integration with financial planning and budgeting applications; and ability to integrate data from HRIS systems* (figs. 44-48). Industry support for these features is strong (fig. 59).
- The top additional features are *access control based on users and roles; support for reporting/dashboards; and Excel-based data entry and import* (figs. 49-53). Industry support for these features is very strong (fig. 60).
- The top deployment priorities are *public cloud* and *multitenant SaaS support* (figs. 54-56). Industry support is selectively adequate for all user priorities (fig. 61).
- Workforce planning and analysis vendor ratings are shown on page 78.



Study Demographics

Study Demographics

Our third annual Workforce Planning and Analysis Market Study includes a cross-section of data across geographies, functions, organization size, and vertical industries. We believe that, unlike other industry research, this supports a more representative sample and offers a better indicator of true market dynamics. We construct cross-tab analyses using these demographics to identify and illustrate important industry trends.

Geography

North America, which includes the U.S., Canada, and Puerto Rico, represents 68 percent of respondents (fig. 1). Asia Pacific accounts for the next-largest group (15 percent), followed by EMEA (13 percent) and Latin America (4 percent).

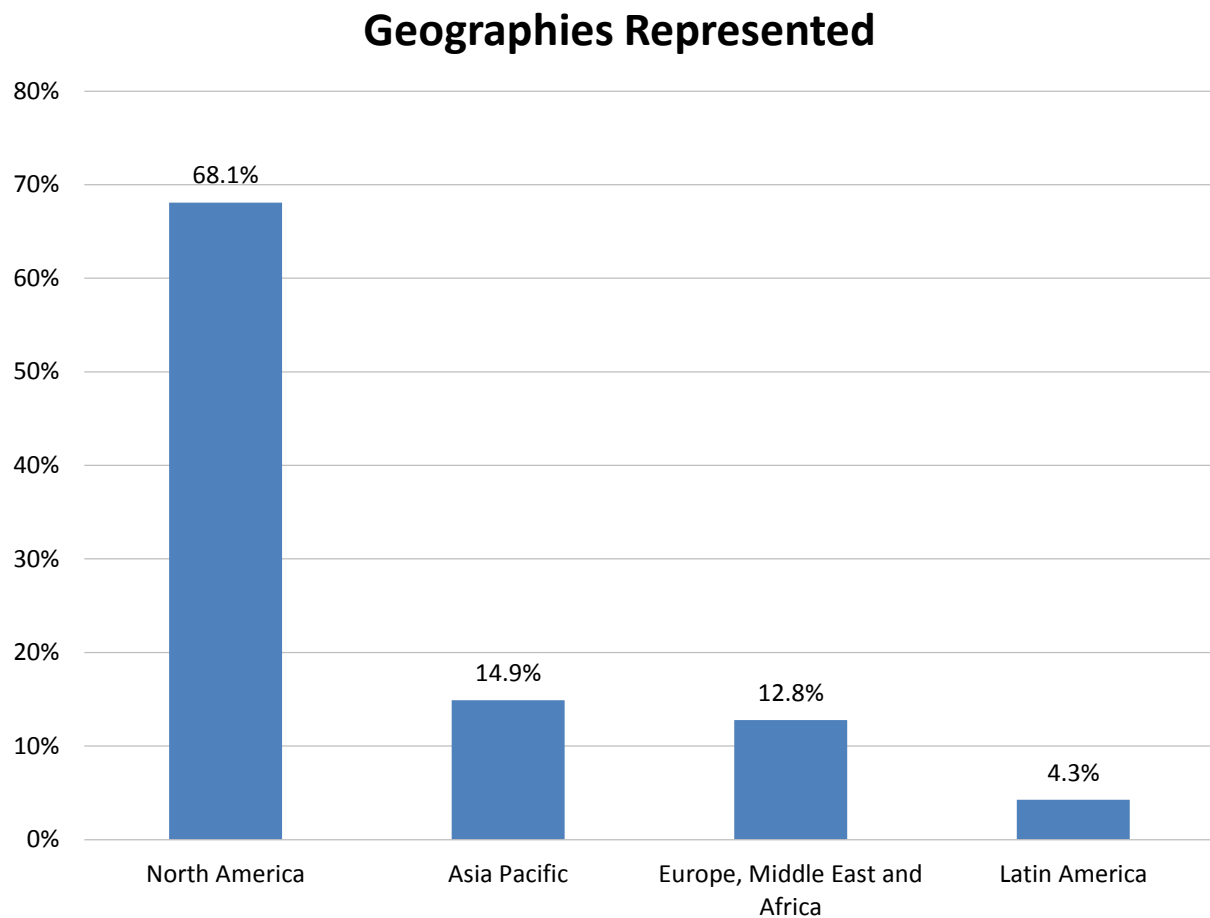


Figure 1 – Geographies represented

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Functions

Finance (about 43 percent) and IT (15 percent) are the functions most highly represented in our 2025 study sample (fig. 2). The business intelligence competency center (BICC; 10 percent), and executive management (9 percent), are the next most represented. The human resources function is underrepresented in this study sample and our report, resulting in an “outside in” view of Workforce Planning that is constrained but also revelatory of enterprise attitudes and behaviors.

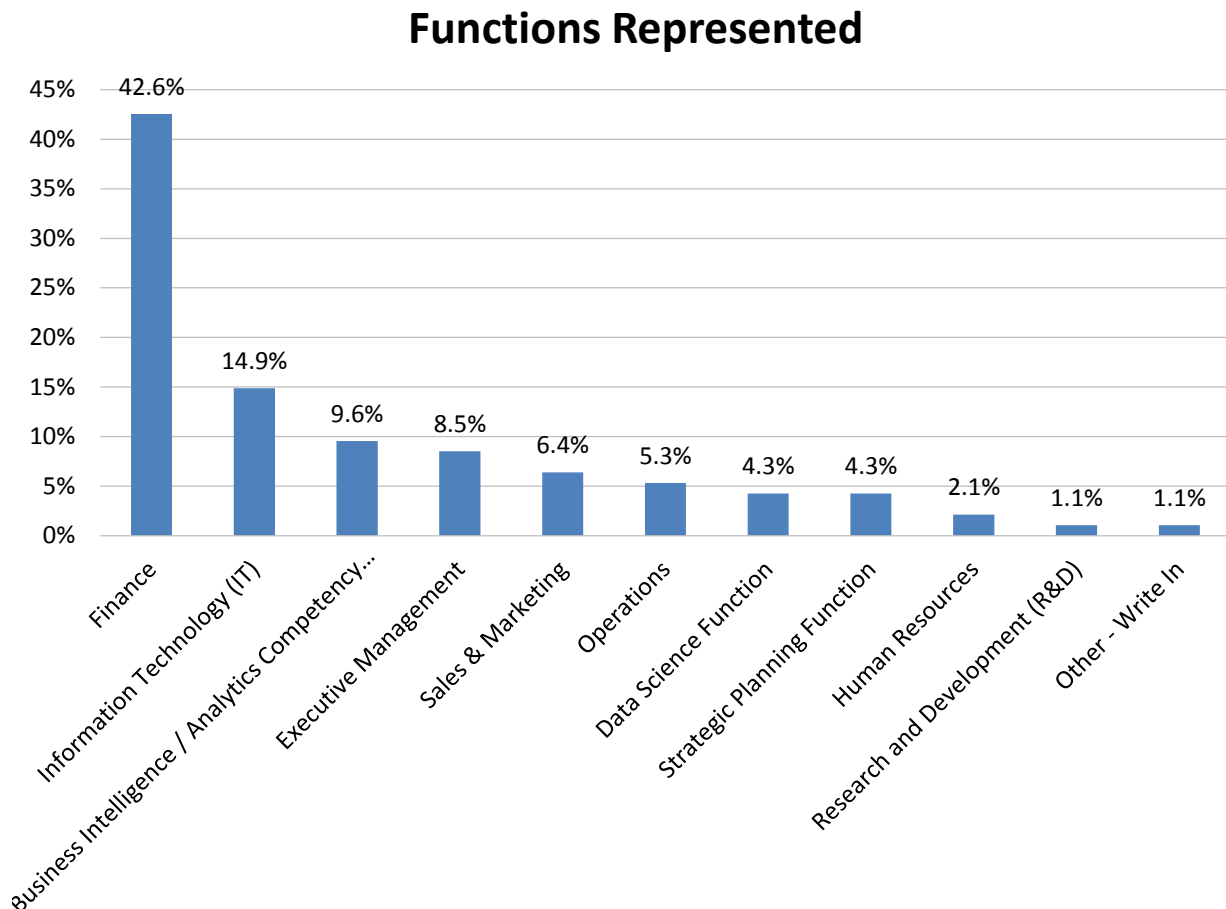


Figure 2 – Functions represented

Vertical Industries

Respondents from *manufacturing* (24 percent) *business services* (16 percent), *financial services* (12 percent) and *retail & wholesale* (11 percent) are most strongly represented in our study (fig. 3). *Healthcare* and *technology* are next most represented. We include responses from consultants, who often have greater interaction with initiatives and deeper industry knowledge than many of their customer counterparts. Consultants' responses also yield insights into the partner ecosystem for BI vendors.

Industries Represented

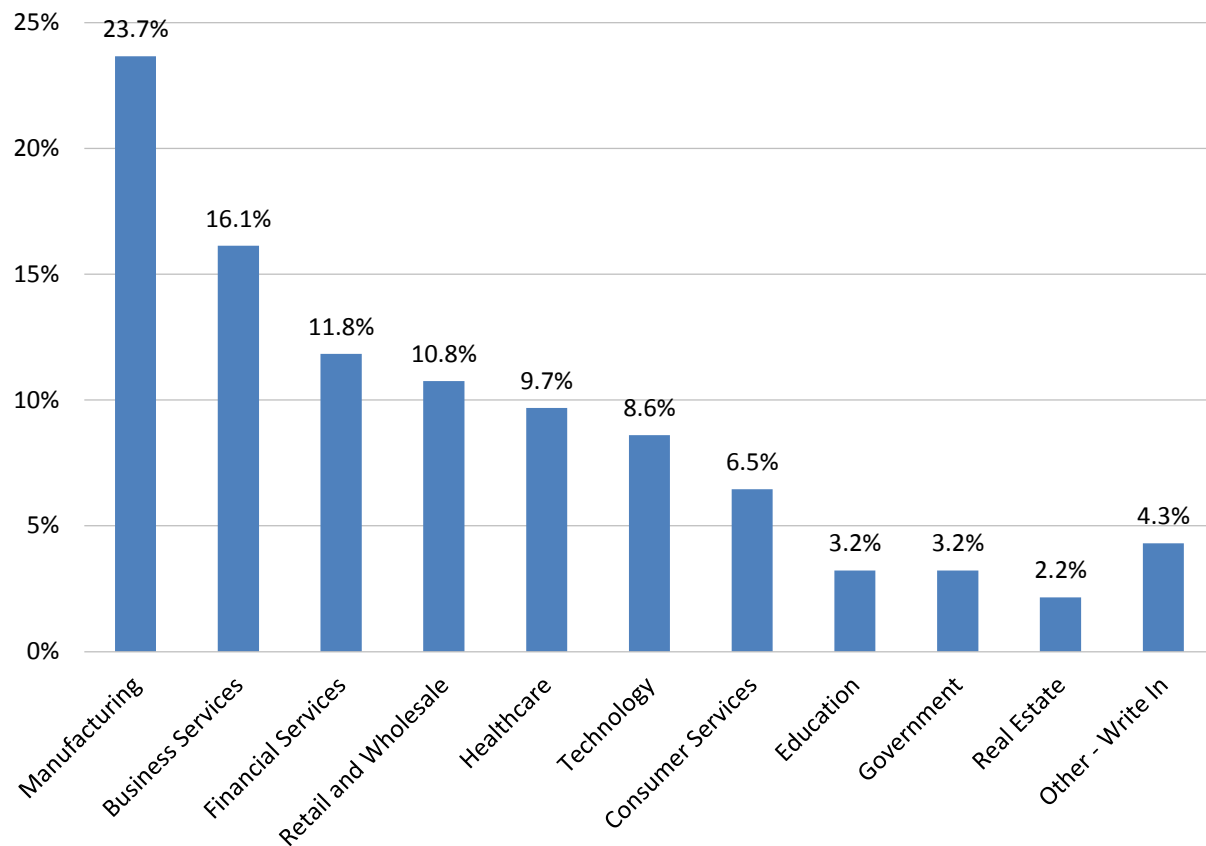


Figure 3 – Industries represented

Organization Size

Respondents represent a mix of organizational sizes and structures (fig. 4). Small organizations of 1-100 employees represent 13 percent of the sample. Midsized organizations account for about 35 percent, and the remaining 52 percent of respondents come from large organizations with more than 1,000 employees.

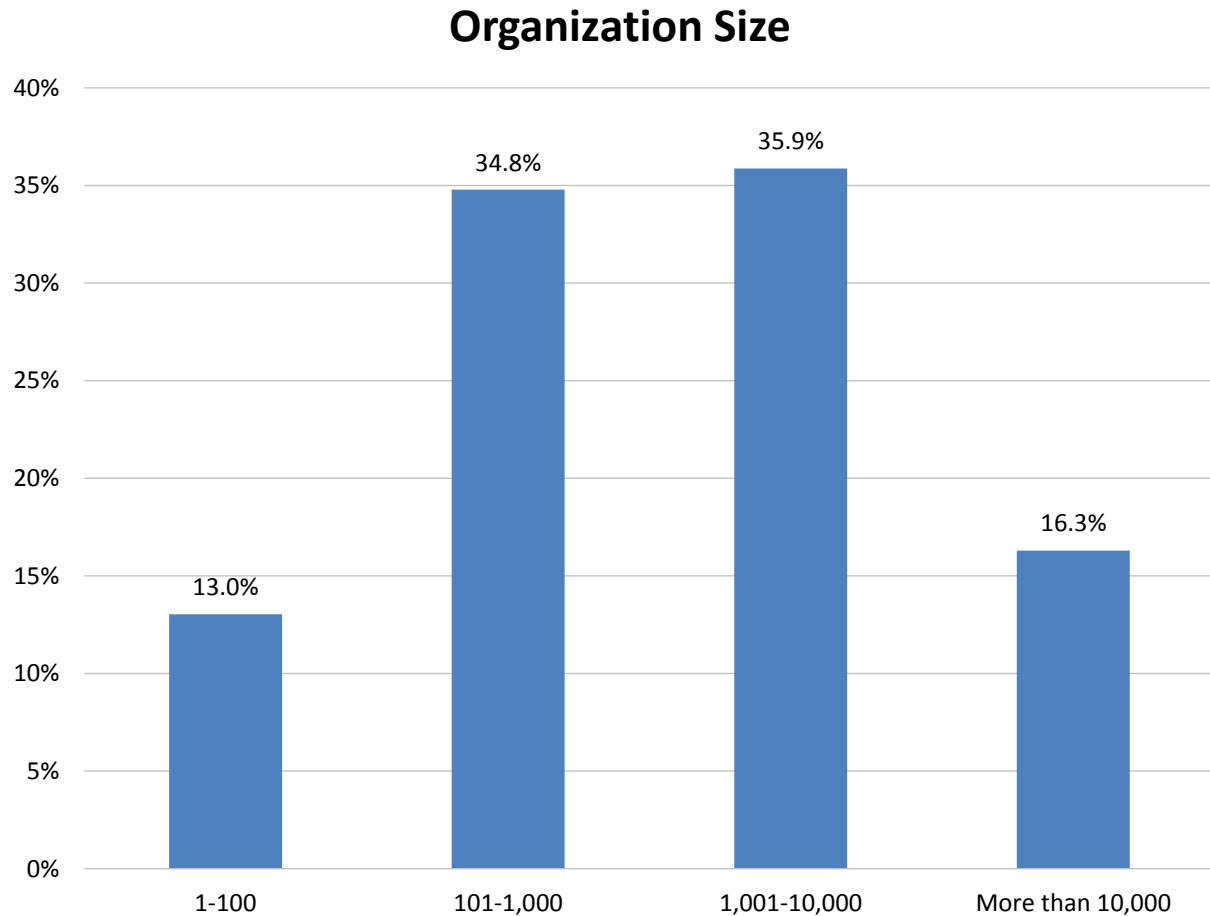


Figure 4 – Organization sizes represented

Analysis and Trends

Analysis and Trends

Importance of Workforce Planning and Analysis

Workforce planning and analysis (formerly referred to as HCM/people analytics) ranks 34th among 63 topics under study in 2025 (compared to 28th among 59 topics under study in 2024; see fig. 5). As an overarching theme, this topic affects nearly all strategic technologies and initiatives. We define workforce planning and analysis as “the tools and processes that help align workforces with business goals, strategies, and workplace dynamics.” This includes requirements, analysis, and forecasting for current and future needs, as well as the development of plans to address imbalances to optimize human resources, reduce costs, and improve efficiency.

Technologies and Initiatives Strategic to Business Intelligence

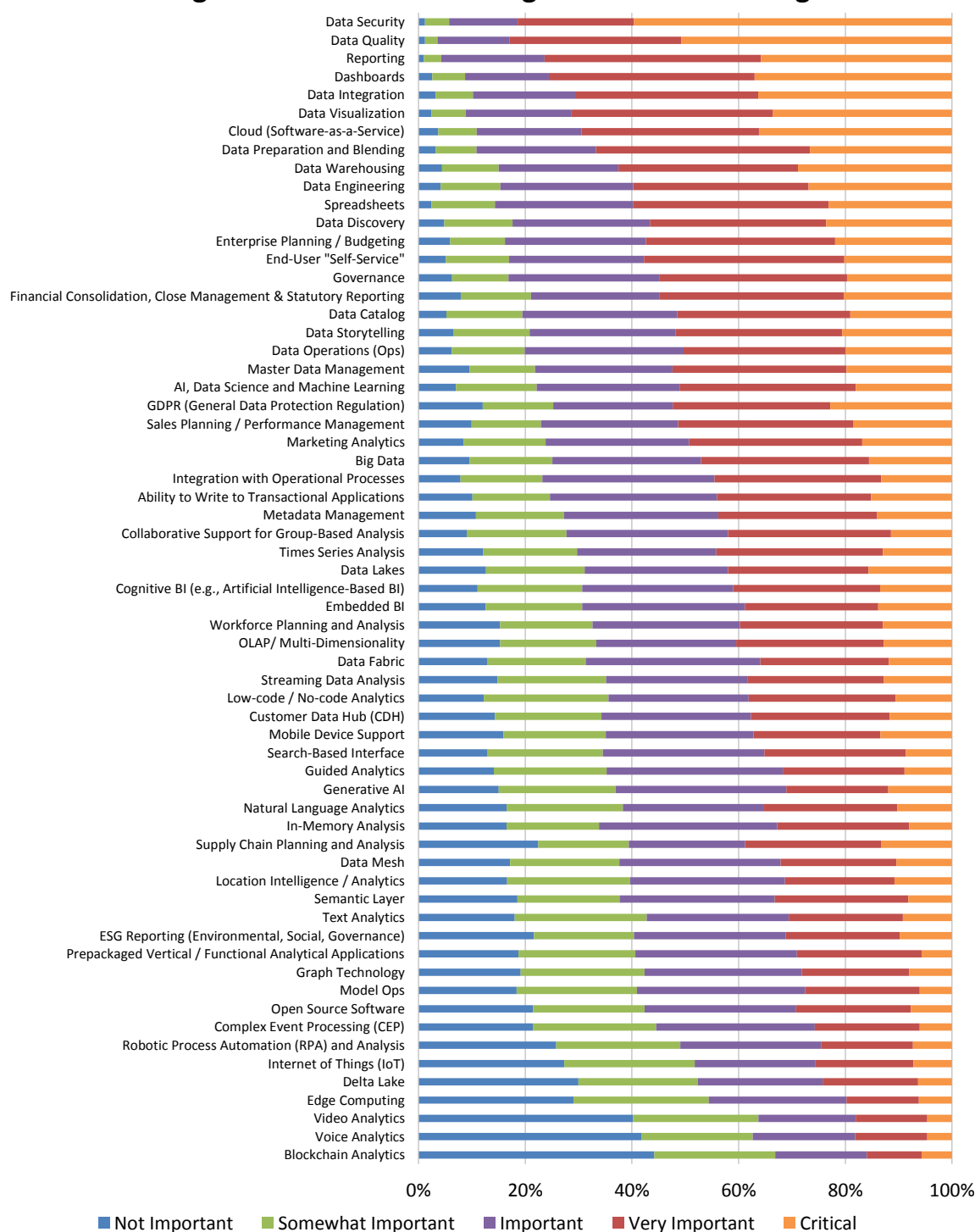


Figure 5 – Technologies and initiatives strategic to business intelligence

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Workforce Planning and Analysis Importance

Our survey asked, “What is the importance of workforce planning and analysis within your organization?” Survey respondents were allowed one of five choices shown in fig. 6.

- A plurality (43 percent) chose *top priority for the overall business* as their greatest urgency (which is almost identical to our 2024 finding).
- Another 23 percent selected the next-most popular choice, *important to HR but not a top priority*. This second pick showed a slight year-over-year decline, as did the third choice, *top priority within HR*.

We conclude that fewer users consider workforce planning and analysis a task and priority for HR alone. In still smaller numbers, 8 percent *don't know* and just 6 percent are *not considering*.

Workforce Planning and Analysis Importance 2023-2025

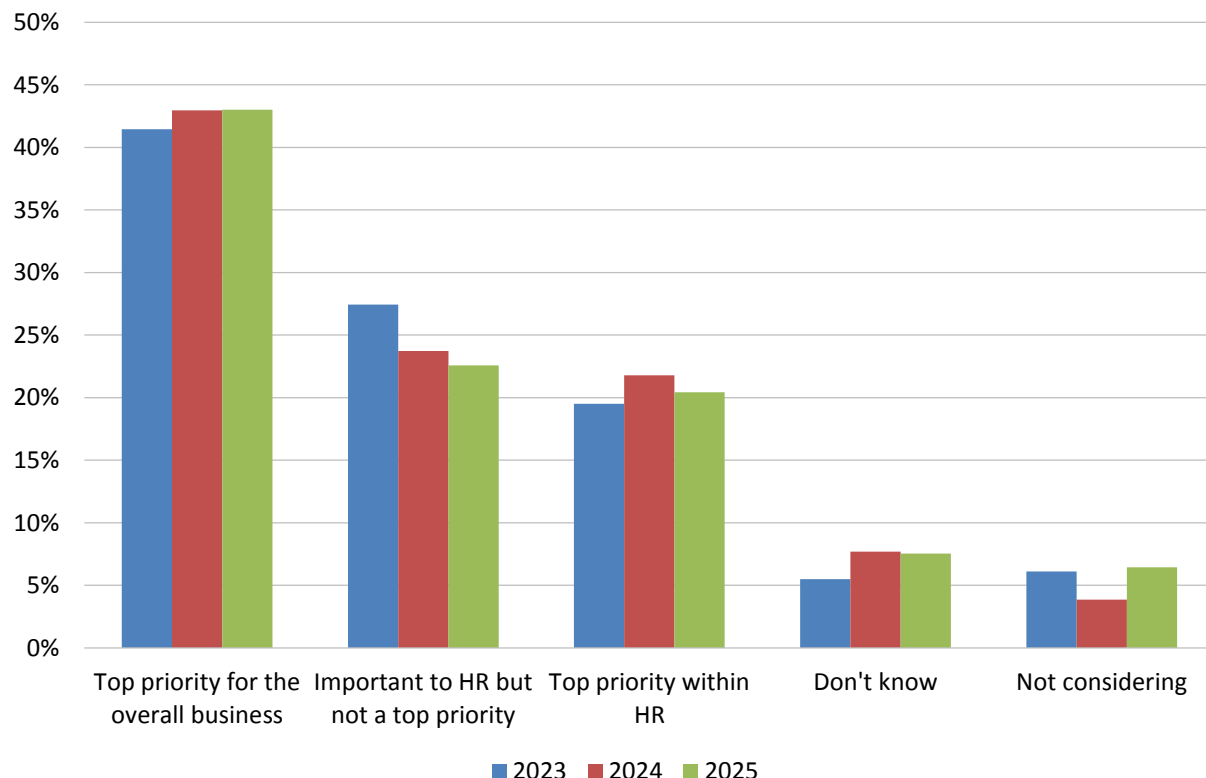


Figure 6 – Workforce planning and analysis importance 2023-2025

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Geography affects the perceived importance of workforce planning and analysis, with North America and Asia Pacific respondents reporting somewhat stronger sentiment than those in EMEA (fig. 7). This year, EMEA respondents are the least likely (36 percent) to select *top priority for the overall business*, compared with 50 percent in Asia Pacific and 47 percent in North America. When we combine the top three choices by importance (excluding *not considering*), North America sentiment increases to 95 percent, followed by 91 percent in EMEA and 86 percent in Asia Pacific.

Workforce Planning and Analysis Importance by Geography

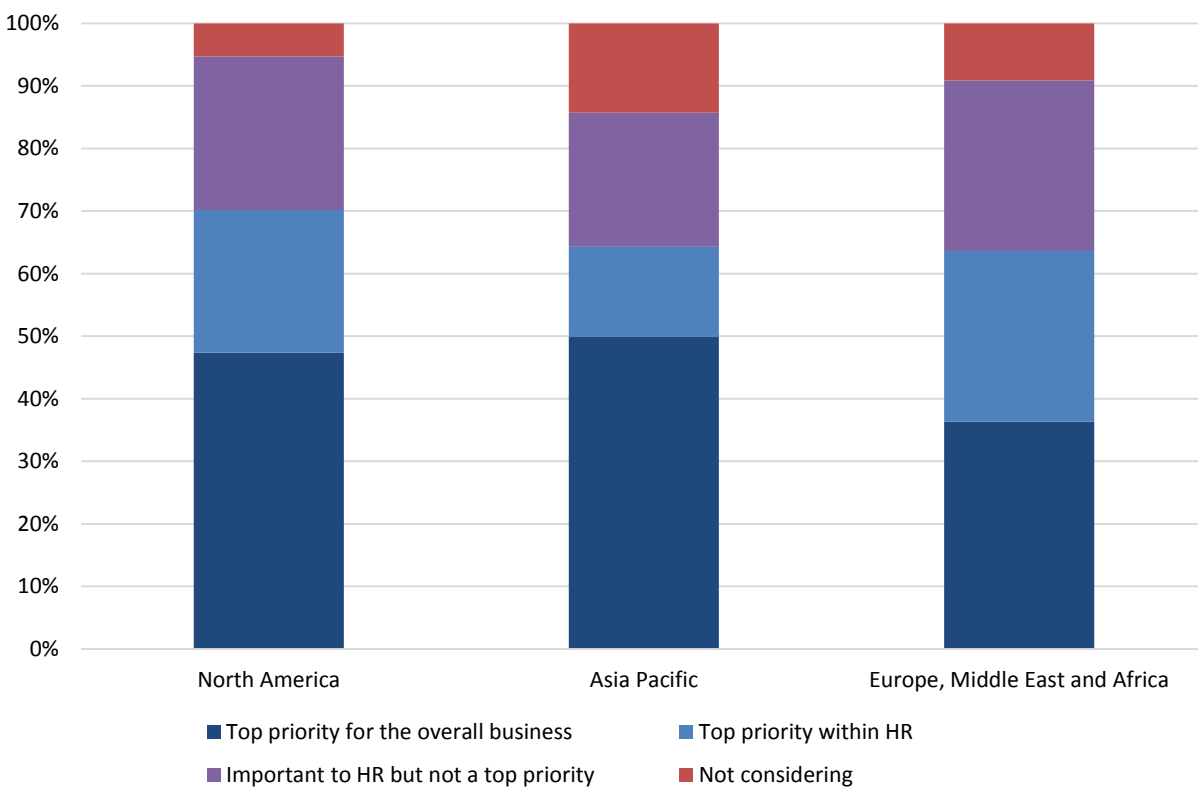


Figure 7 – Workforce planning and analysis importance by geography

Industry attitudes toward workforce planning and analysis vary widely in 2025 (fig. 8).

- *Business services, retail & wholesale, technology and manufacturing* respondents (industries with varieties of uniquely skilled, high-demand workforce requirements) are most likely (about 60 percent, 50 percent, 50 percent, and 45

2025 Workforce Planning and Analysis Market Study

percent, respectively) to say workforce planning and analysis is a *top priority for the overall business*.

- *Consumer services* respondents are least likely (20 percent) to call workforce planning a *top priority for the overall business*, but assign the highest industry importance as a *top priority within HR*.
- *Healthcare* respondents are just 29 percent likely to say workforce planning and analysis importance is a *top priority for the overall business*, and nearly 30 percent say they are *not considering*--a surprising finding within such a highly operational staffing setting.

Workforce Planning and Analysis Importance by Industry

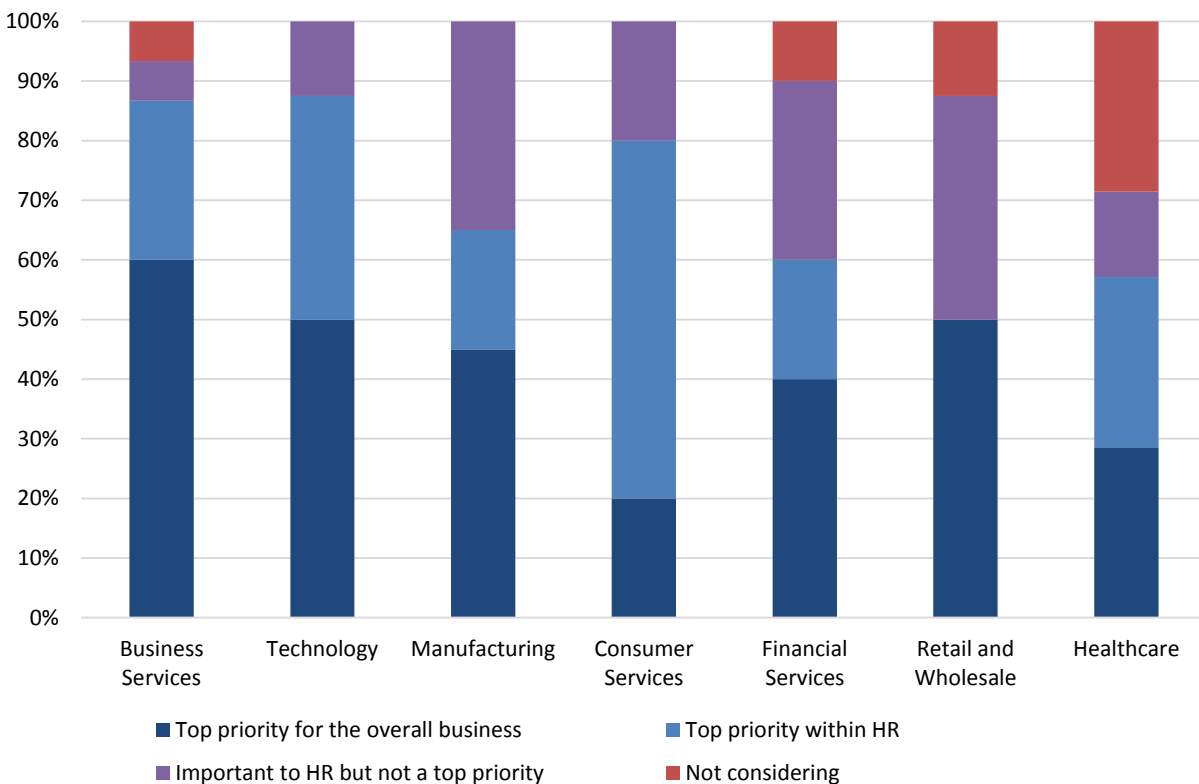


Figure 8 – Workforce planning and analysis importance by industry

The importance assigned to workforce planning and analysis is somewhat concentrated according to function, suggesting each has different attitudes and drivers (fig. 9).

2025 Workforce Planning and Analysis Market Study

- Respondents in *finance* (58 percent) are most likely to view workforce planning as an *overall execution priority for the business*, which suggests a strong planning linkage with HR and other departments.
- *IT* is next most likely (43 percent) to link enterprise capabilities across departments.
- The *BICC* and *executive management* are among the functions relatively more likely to see criticality delegated to the *HR* function, or potentially to third-party services. Notably, we found that one-quarter of the *executive management* sample is not considering workforce planning and analysis.
- *Sales & marketing* noticeably sees workforce planning and analysis as a compartmentalized *HR* or external service.

Workforce Planning and Analysis Importance by Function

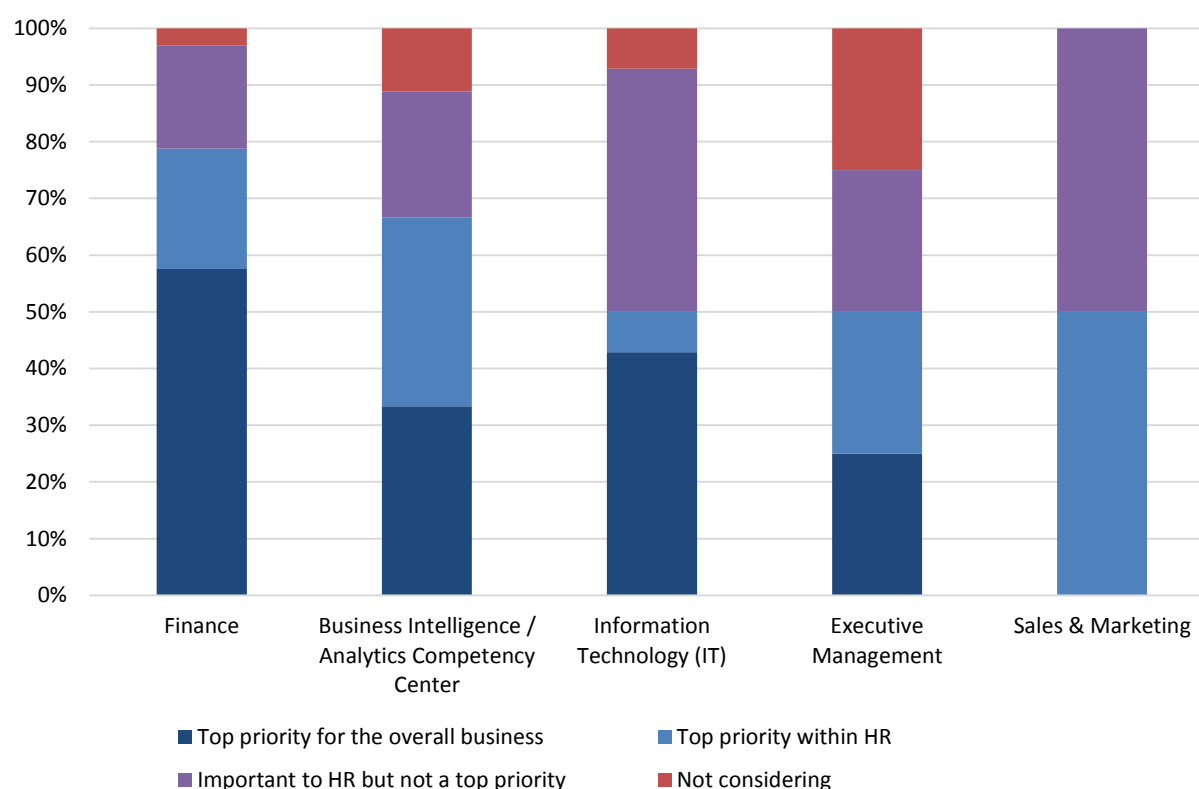


Figure 9 – Workforce planning and analysis importance by function

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The criticality of workforce planning and analysis correlates directly to organization size in 2025 and is more likely to be identified as a *top priority for the overall business* as the organization's global headcount increases (fig. 10).

- This year, *very large* organizations (those with 10,000 or more employees) are most likely (57 percent) to consider workforce planning and analysis a *top priority for the overall business*, compared with 54 percent of *large organizations*, 40 percent of *midsize organizations*, and just 33 percent of their *small* peers.
- We are not surprised to find scale factors into enterprise alignment goals as it reflects a concession to workplace and workforce dynamics and complexity. We also note that, after their *small* peers, *very large* organizations are most likely to delegate workforce planning to their HR practices, which are likely among the most comprehensive or mature in our survey sample.

Workforce Planning and Analysis Importance by Organization Size

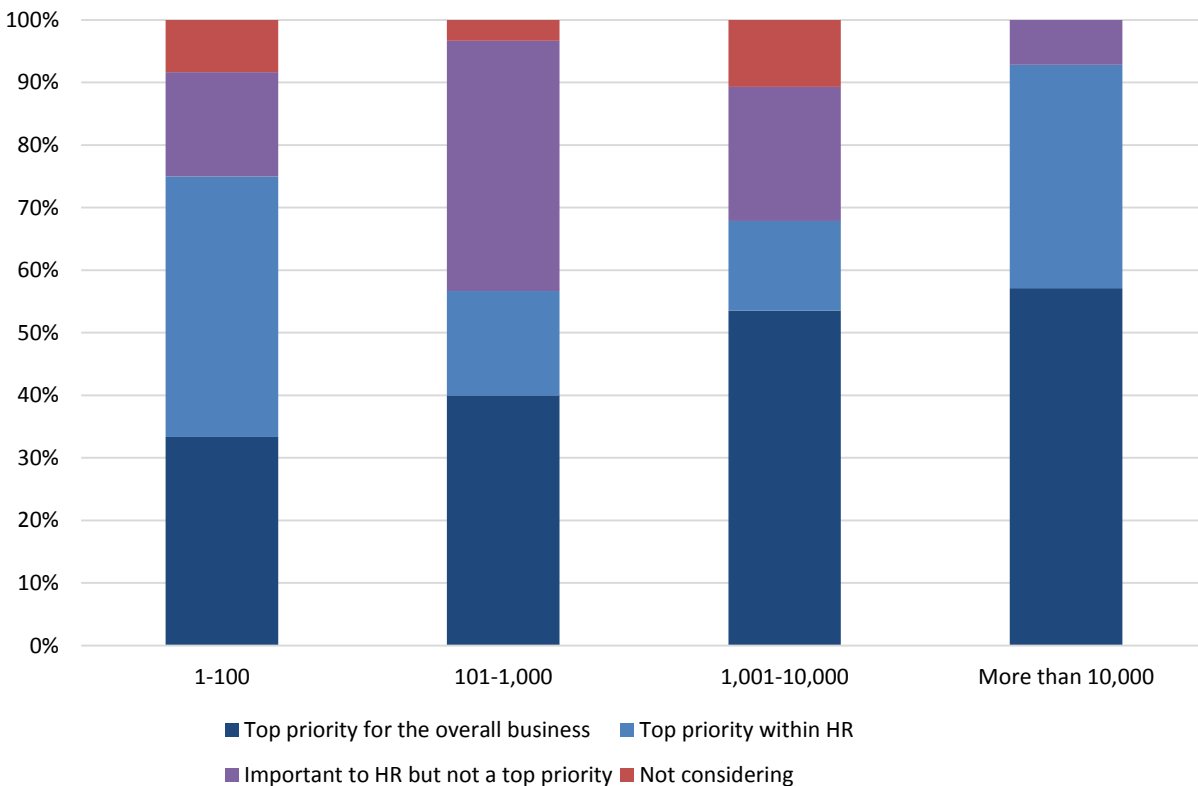


Figure 10 - Workforce planning and analysis importance by organization size

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The importance of workforce planning and analysis does not correlate directly to company age in 2025, but it does merit some observations (fig. 11).

- Perhaps our most revealing finding is that the youngest organizations (five years or less) say they are least likely (22 percent) to describe workforce planning and analysis as a *top priority for the overall business*.
- In stark contrast, all older organizations are 45 percent to 62 percent likely to consider the topic an *overall priority for the business*.

Startup and younger organizations with momentum are likely to be more dynamically built than more mature businesses and consequently may be more likely to delegate or seek services for workforce planning and placement. Enterprise alignment of workforce planning and analysis is therefore potentially an indicator of maturity.

Workforce Planning and Analysis Importance by Company Age

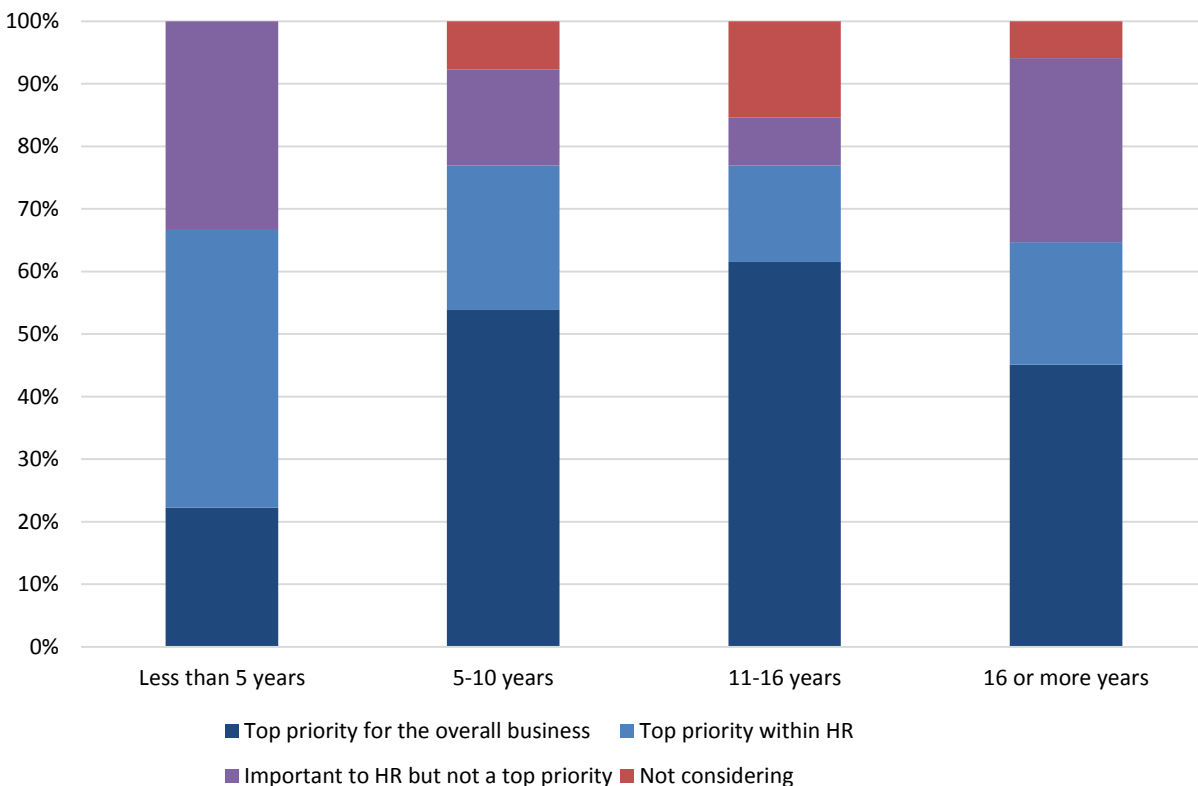


Figure 11 – Workforce planning and analysis importance by company age

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Workforce Planning and Analysis Adoption

We asked organizations about their current usage and future plans for adopting workforce planning and analysis (fig. 12).

- In 2025, a plurality (47 percent) of respondents say they are using it today, up from 46 percent in 2024 and 42 percent in 2023.
- While the trend toward wider adoption is positive, we see a slight decline in momentum, with 12-month adoption slightly lower than we observed in 2024 and 24-month plans only slightly higher year over year.
- The number of organizations with *no plans* also declined slightly year over year though it remains higher than in 2023.

Workforce Planning and Analysis Adoption 2023-2025

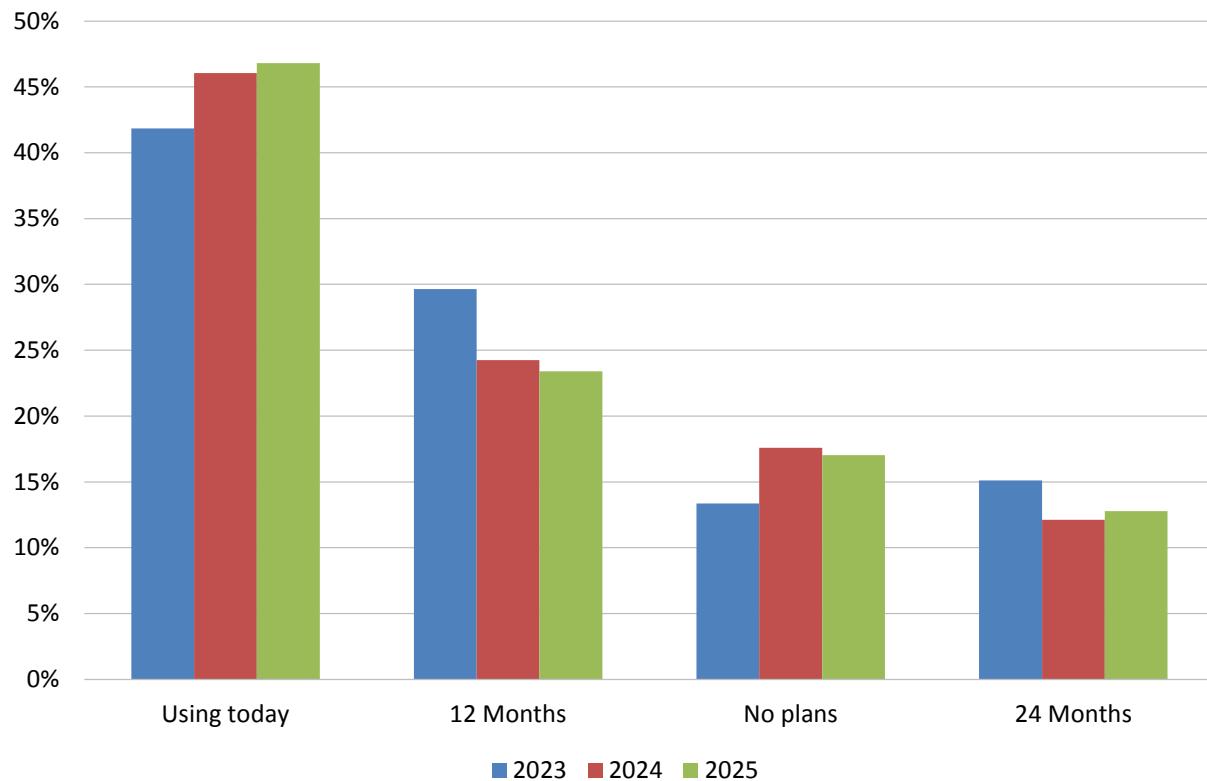


Figure 12 – Workforce planning and analysis adoption 2023-2025

2025 Workforce Planning and Analysis Market Study

Current use and projected plans for workforce planning and analysis vary by geography. Overall current usage is by far highest in North America (55 percent), followed by Asia Pacific (29 percent) and EMEA (17 percent; fig. 13). This year, both Asia Pacific (43 percent) and EMEA (42 percent) report strong 12-month deployment plans. Fully one-third of EMEA respondents report *no plans* for workforce planning and analysis, compared to 17 percent in North America and 7 percent in Asia Pacific.

Workforce Planning and Analysis Adoption by Geography

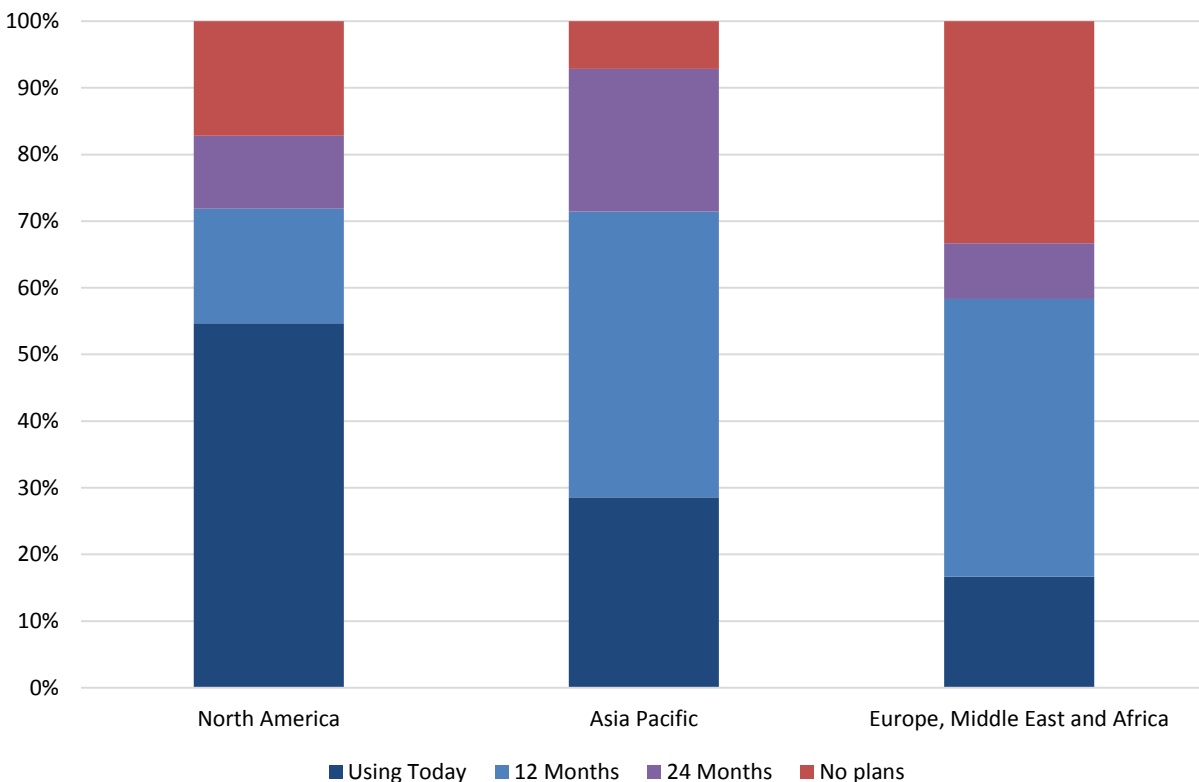


Figure 13 – Workforce planning and analysis adoption by geography

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Rankings for workforce planning and analysis adoption vary noticeably by industry vertical in 2025 (fig. 14).

- This year, 100 percent of *technology* respondent organizations report current use of workforce planning and analysis, followed by about two-thirds of respondents in *business services* and *consumer services*.
- Thereafter, fewer than one-third of respondent organizations in *manufacturing*, *healthcare*, *financial services* and *retail & wholesale* report *current use* of workforce planning and analysis.
- That said, 12-month adoption predictions raise usage numbers to a majority in all industries except *retail & wholesale*.

We find the breadth of adoption numbers surprising, particularly in cyclical, dynamic, and complex workforce industries.

Workforce Planning and Analysis Adoption by Industry

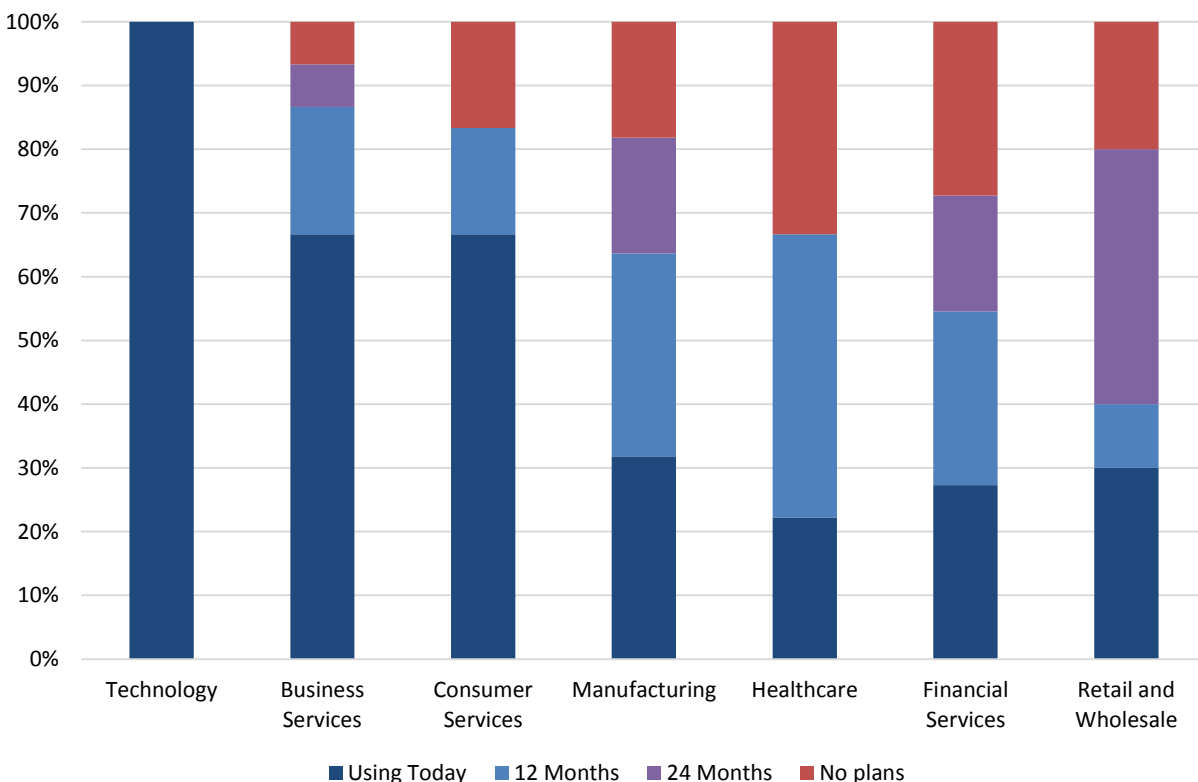


Figure 14 – Workforce planning and analysis adoption by industry

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The use of workforce planning and analysis varies widely by function (fig. 15).

- In our 2025 study, *sales & marketing* (67 percent) and *finance* (63 percent) are the most likely and only majority *current users* by function. *Sales & marketing's* high rate of adoption offers an interesting contradiction to its much lower importance scores (fig. 9). By comparison, *finance* reports both high importance and adoption scores.
- *IT* and *operations* report current use in the range of 40 percent, with 12-month plans for strong majority adoption.
- Conversely, only one-quarter of *executive management* respondents are current users, though they again predict majority use within 12 months.
- Finally, BICC respondents are the least likely current users (10 percent) and most likely to report *no plans* (45 percent). This could indicate either that these respondents have little need for external BICC recruiting or that they're more likely to outsource their workforce planning and analysis functions.

Workforce Planning and Analysis Adoption by Function

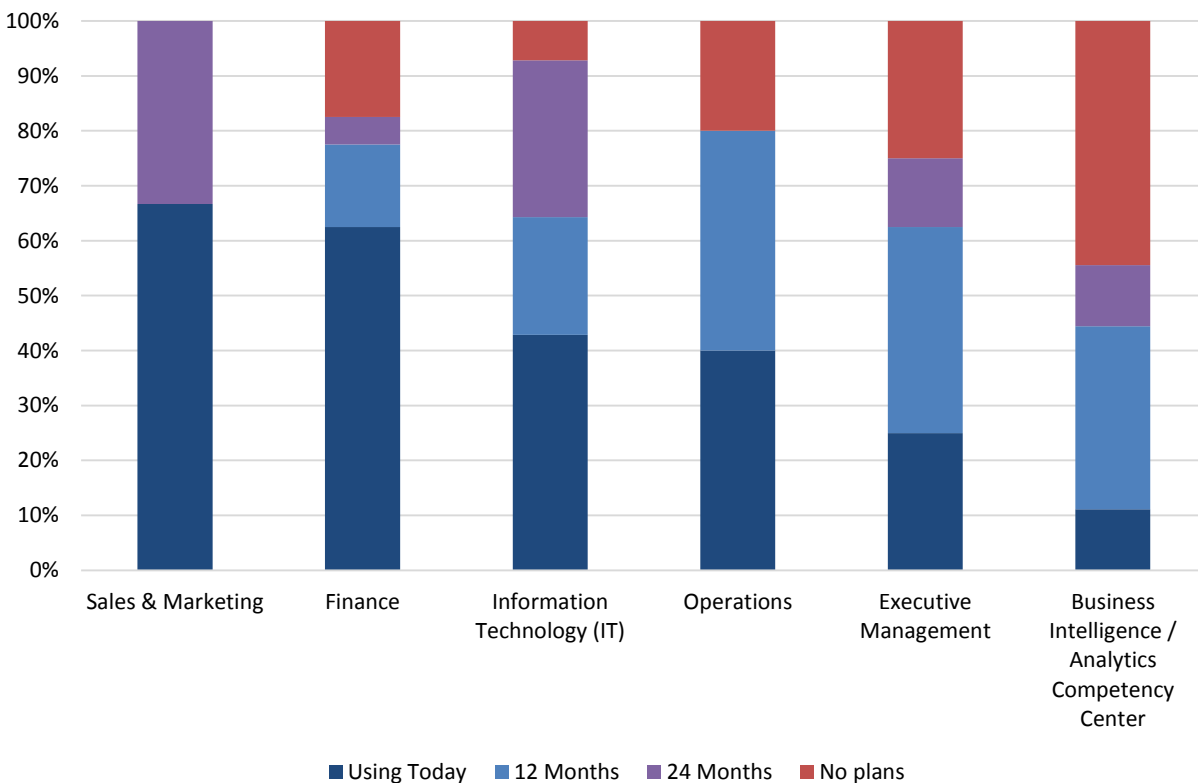


Figure 15 – Workforce planning and analysis adoption by function

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Current usage and future plans for workforce planning and analysis correlate sharply with organization headcount in 2025 (fig. 16).

- This phenomenon is most plainly seen in current usage, which ranges from a high 67 percent in very large organizations (>10,000 employees) to a low of about 33 percent in small organizations (1-100 employees).
- Small peer organizations show the greatest 12-month momentum (42 percent), reflecting the linear growth we see in current use according to organization size.
- While all organizations of any size are close to 66 percent likely to have 12-month adoption plans at minimum, the *no plans* contingent is highest (22 percent) in midsize (101-1,000 employees) organizations.

Workforce Planning and Analysis Adoption by Organization Size

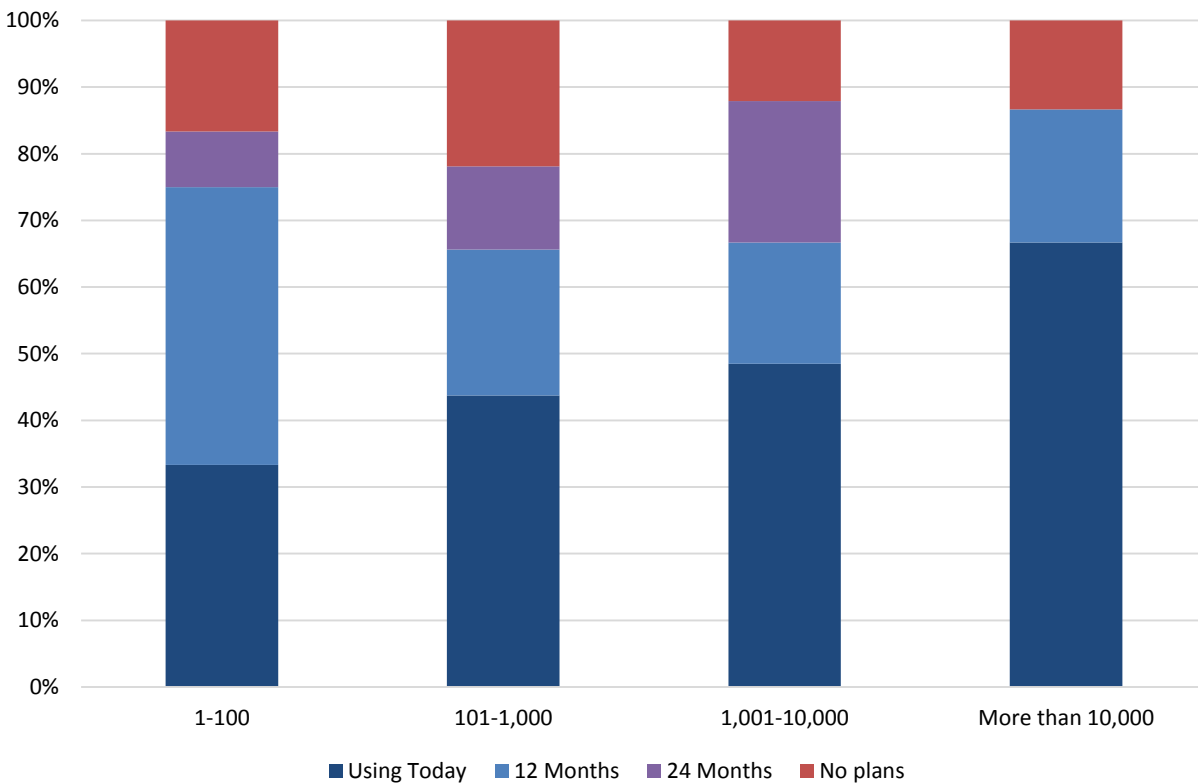


Figure 16 – Workforce planning and analysis adoption by organization size

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Workforce Planning and Analytics Users

We asked respondents, “Who are/will be the users of workforce planning and analysis?” using a weighted scale reflecting *primary* use, *secondary* use, or *will not use*.

- Predictably, all enterprise respondents say *human resources* is the *most likely primary user*, followed in nearly equal numbers by *finance* (fig. 17). This reaffirms that *finance* is inevitably linked to workforce planning; however, we also see strong weighted primary and secondary use among respondents in *operations*, *IT*, *sales* and *customer service*.
- With the exception of *finance*, year-over-year sentiment is slightly lower across all functions: The top six rankings remain unchanged between 2024 and 2025.

Workforce Planning and Analysis Users 2023-2025

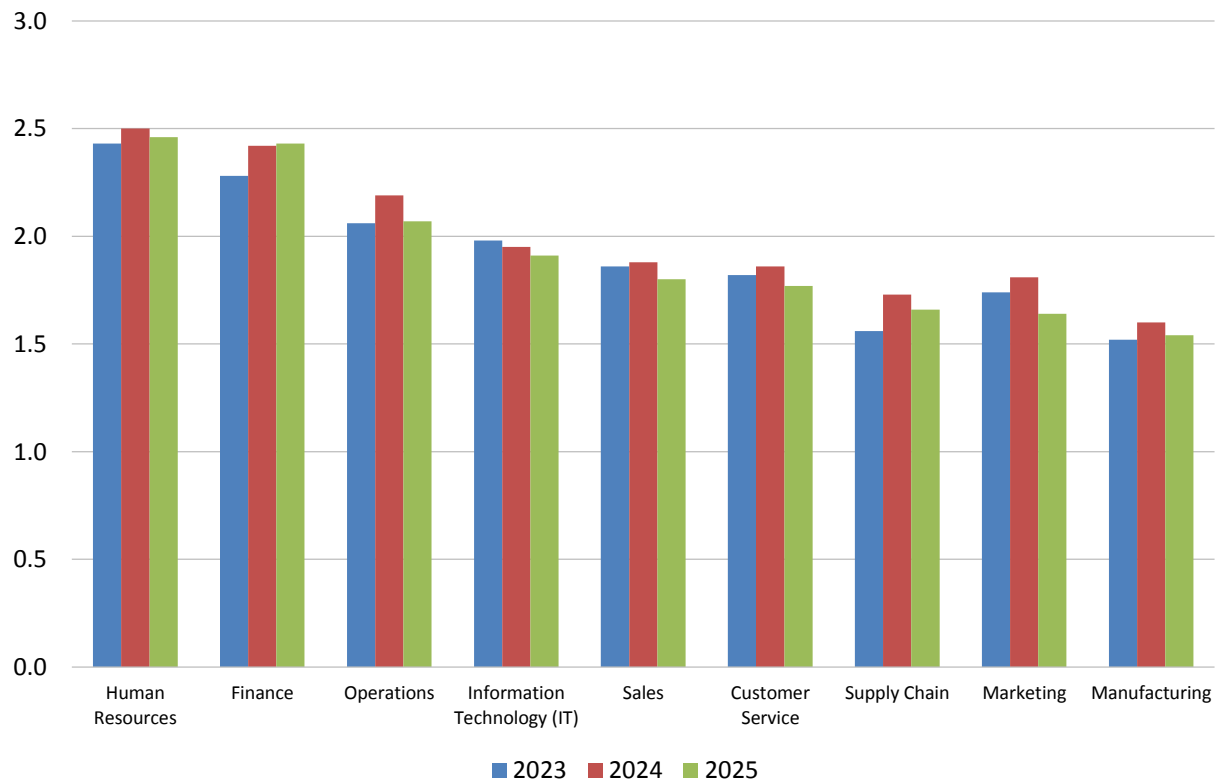


Figure 17 – Workforce planning and analysis users 2023-2025

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Users of workforce planning and analysis vary broadly by geographic region in 2025 (fig. 18).

- Users in *human resources* and *finance* are the most tightly clustered globally. *HR* users are slightly the most predominantly weighted mean in EMEA, while *finance* users are slightly the most emphasized in North America.
- In all other functional categories, Asia Pacific respondents are by far the most likely to be primary or secondary users of workforce planning and analysis.

Workforce Planning and Analysis Users by Geography

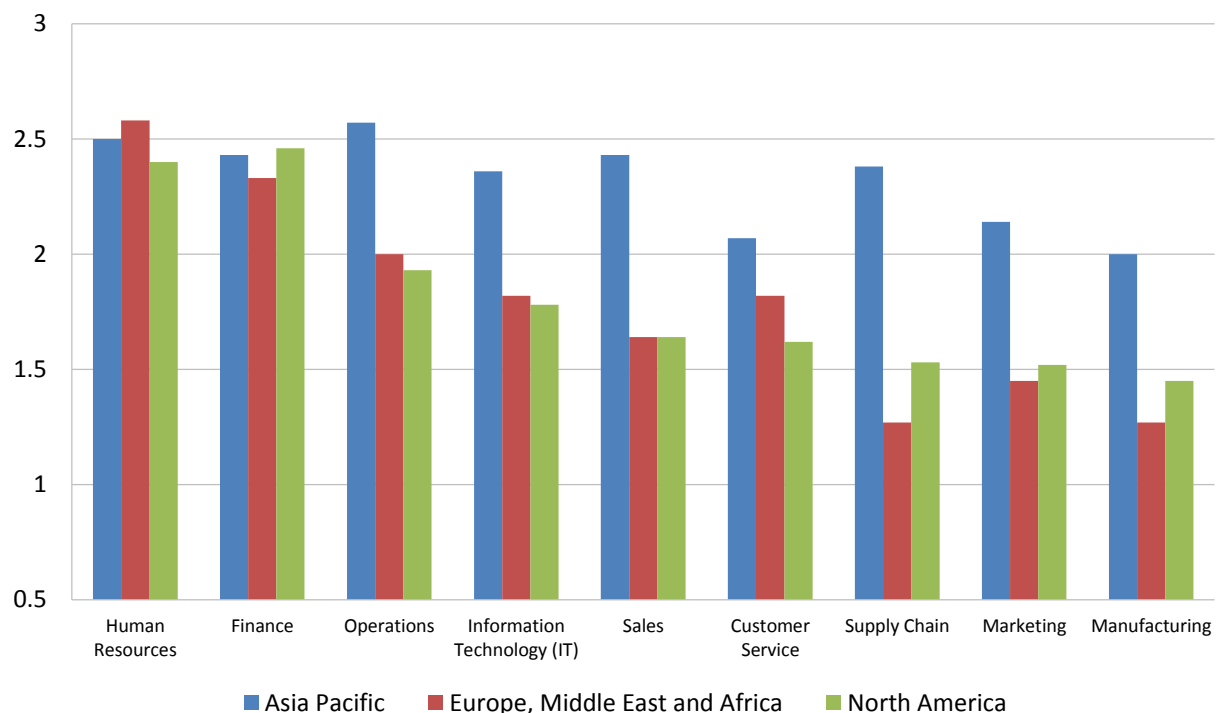


Figure 18 – Workforce planning and analysis users by geography

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The users of workforce planning and analysis in 2025 vary by industry, though we can see some patterns of use (fig. 19).

- This year, for example, respondents in *technology* organizations share the highest-weighted-mean likelihood of workforce planning use across all departments, but not in all categories.
- *Manufacturing* organizations are most likely to cite *HR* and are among the most likely to name *sales* and *supply chain* as primary or secondary users.
- *Healthcare* respondents are among the most likely users within their own *finance*, *operations* and *supply chain* departments.

In sum, multiple industries report users in multiple functions throughout the enterprise.

Workforce Planning and Analysis Users by Industry

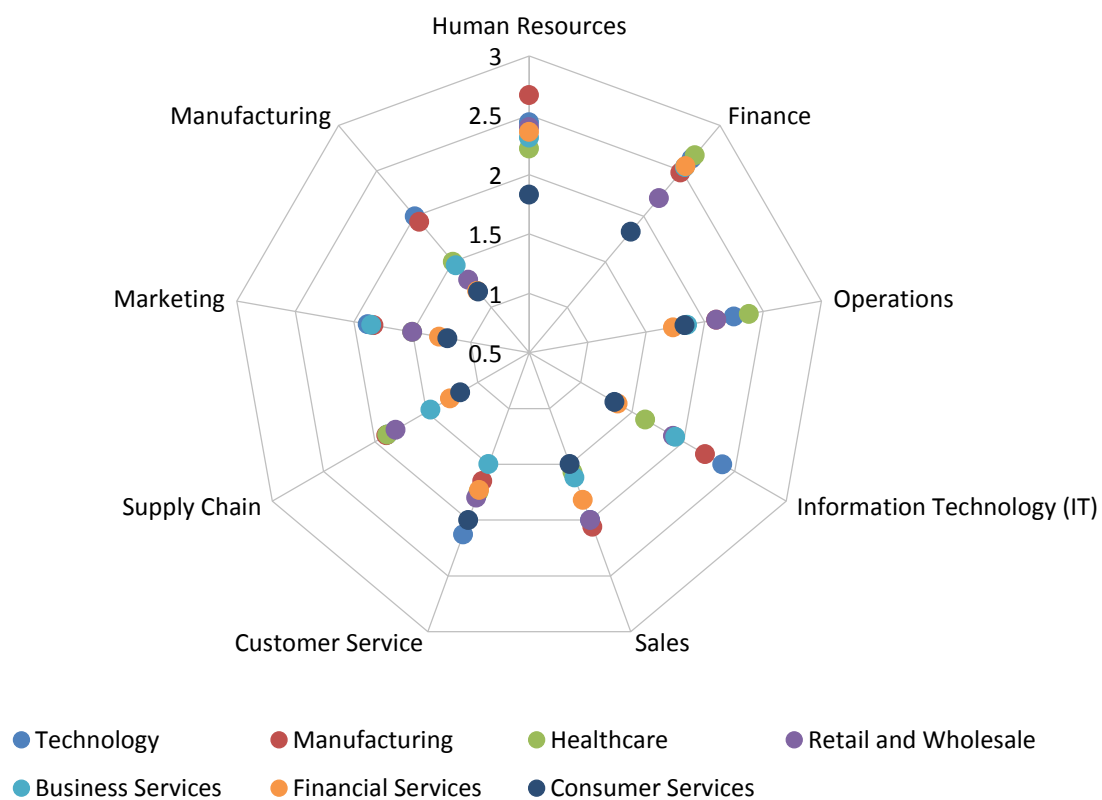


Figure 19 – Workforce planning and analysis users by industry

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Organizations of any size are similarly likely to report users of workforce planning in multiple roles (fig. 20).

- In the case of *HR* and *finance*, the top two most frequently named user roles, their primary and secondary users are by far most likely found in very large organizations (those with more than 10,000 employees) and large organizations (1,001-10,000 employees).
- In most roles ranked lower according to the weighted mean—including *operations*, *IT*, *customer service*, *supply chain*, *marketing* and *manufacturing* — small organizations (with 1-100 employees) are more likely to report users of workforce planning and analysis.
- Among all user roles, *sales* is the most tightly clustered function across organizations of different size.

Workforce Planning and Analysis Users by Organization Size

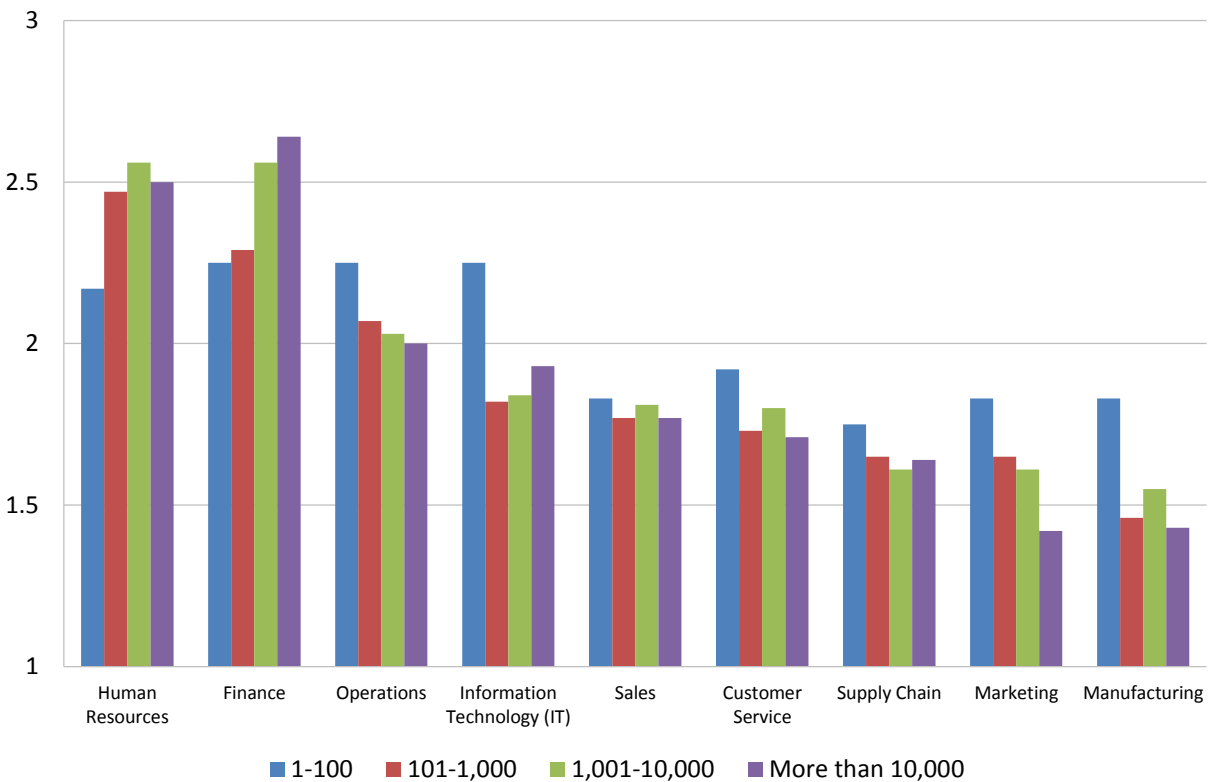


Figure 20 – Workforce planning and analysis users by organization size

2025 Workforce Planning and Analysis Market Study

Workforce Planning Capabilities

We asked respondents to “assign the importance associated with” a list of 17 workforce planning capabilities on a scale ranging from “not important” to “critical” (fig. 21).

In 2025, the top two features by weighted-mean score, *workforce planning per employee* (3.8) and *workforce compensation planning and scenario simulation* (3.8), hold cumulative criticality at or near the level signifying *very important*. The same two capabilities were most important in 2024, though at slightly higher levels.

Though lower ranked, the third- and fourth-most important capabilities, *workforce costing* and *rolling workforce forecasts*, are the only two capabilities to reach all-time high scores in 2025. All others are below 2024 levels.

Workforce Planning Capabilities 2023-2025

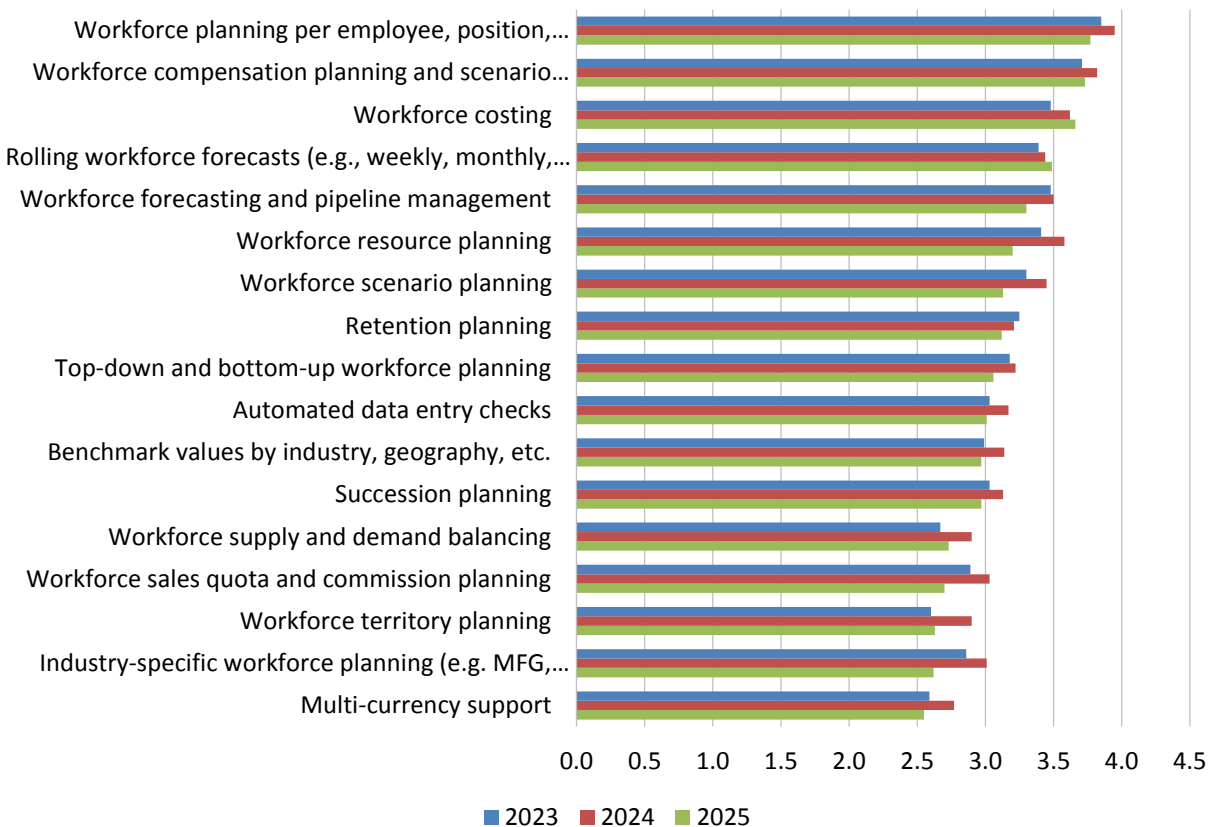


Figure 21 – Workforce planning capabilities 2023-2025

2025 Workforce Planning and Analysis Market Study

Workforce planning capabilities reveal breakouts of interest by geography. For the most part, they are notably higher in EMEA and Asia Pacific than in North America (fig. 22).

- That distinction does not extend to the top two features, *workforce planning per employee* and *workforce compensation planning and scenario simulation*, where sentiment is highest or second highest in North America. After the top two however, North American interest lessens.
- Features most favored in EMEA include *workforce costing*, *workflow management*, *retention planning*, *benchmark values by industry*, and *cross business-unit/entity planning*.
- Features of particular interest to Asia Pacific respondents include *workforce planning and pipeline forecasting*, *workflow management*, and *succession planning*.

Workforce Planning Capabilities by Geography

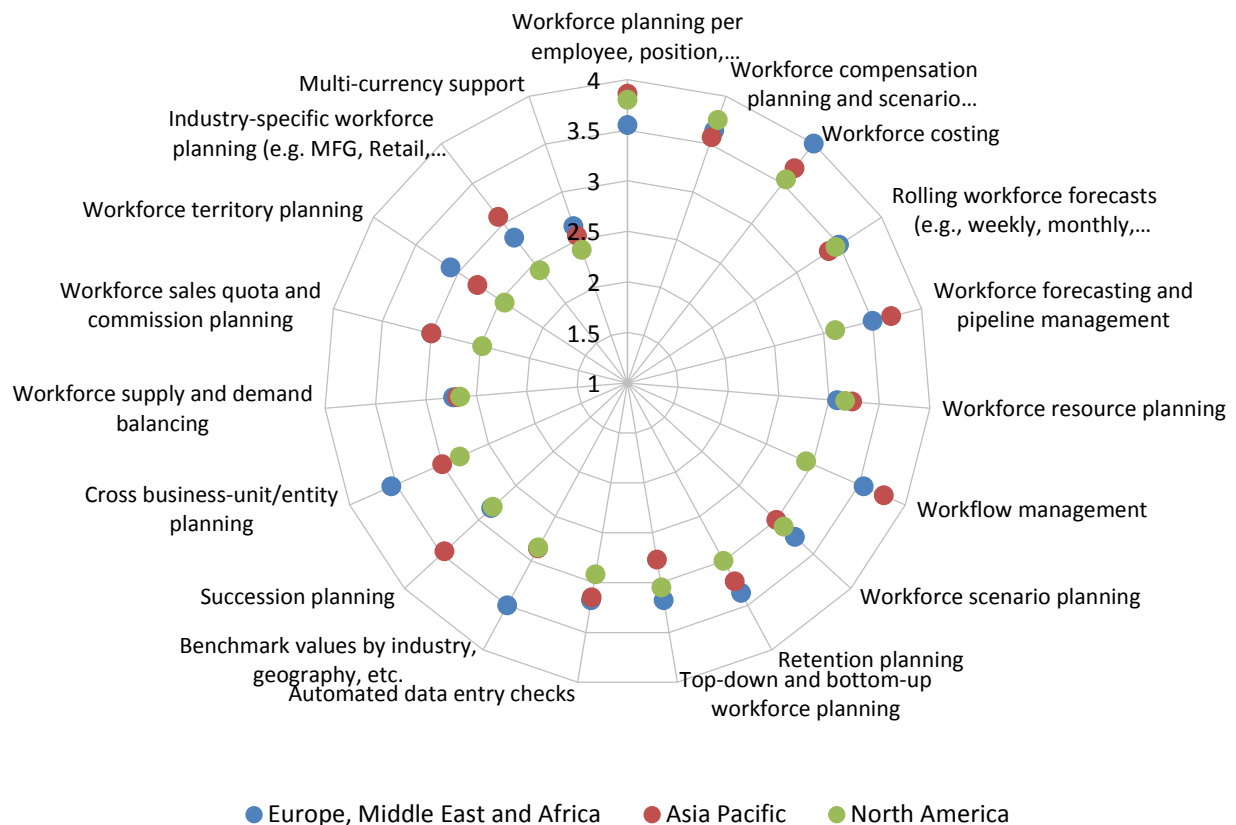


Figure 22 – Workforce planning capabilities by geography

2025 Workforce Planning and Analysis Market Study

Interest in workforce planning capabilities varies by industry in 2025 but does show some patterns (fig. 23).

- For example, respondents in *technology* dominate interest with the highest or near-highest importance scores for many or most capabilities. Standout interest among *technology* respondents include top-pick areas *workforce planning per employee*, *workforce compensation planning*, *workforce costing*, *rolling forecasting*, *workforce forecasting and pipeline management*, and many others.
- *Consumer services* respondents report the second-highest weighted mean response by industry. They specify the top four capabilities, plus lower-ranked areas, including *workforce resource planning* and *retention planning*, as areas of high interest.

In sum, multiple industries report interest in multiple workforce planning capabilities.

Workforce Planning Capabilities by Industry

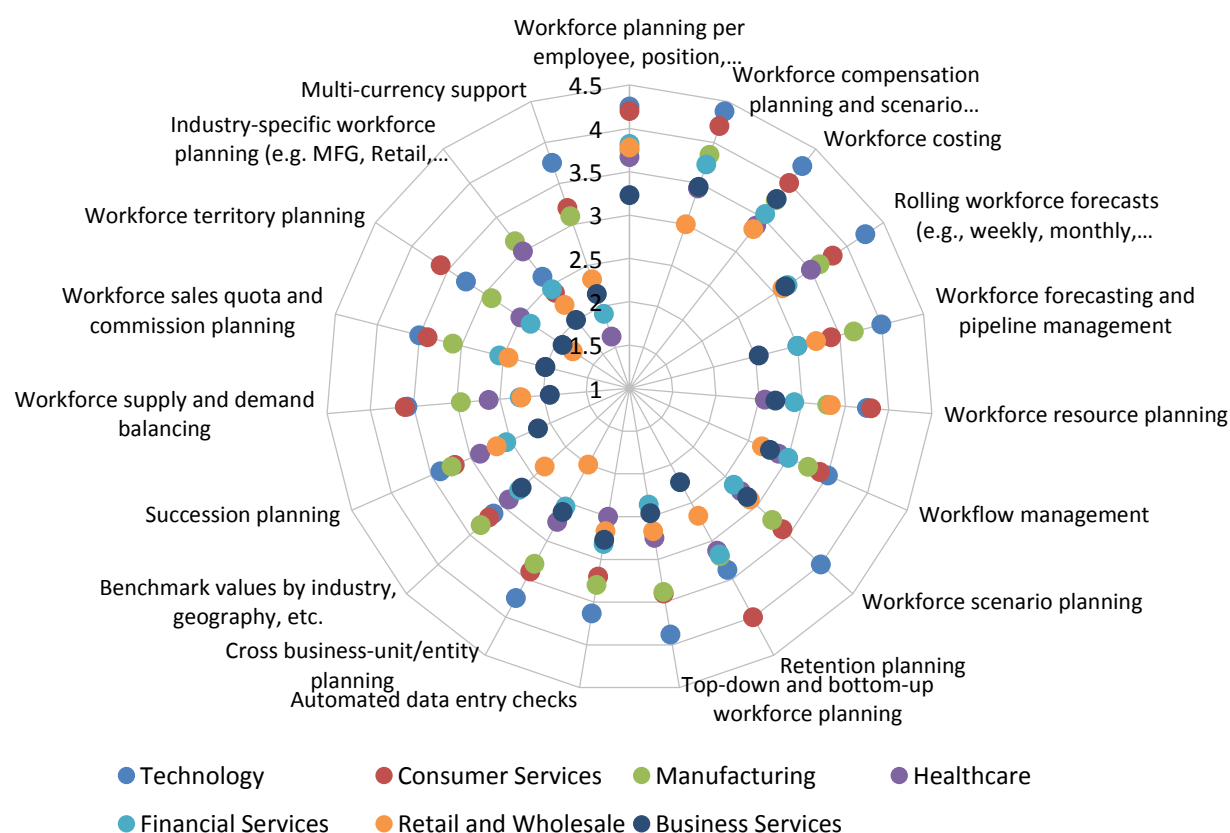


Figure 23 – Workforce planning capabilities by industry

2025 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning capabilities shows specific areas of interest by function in 2025 (fig. 24).

- *BICC* respondents show the highest weighted-mean interest overall, particularly so in some lower-ranked areas, including *workflow management*, *retention planning*, *benchmark values*, *succession planning*, *cross business-unit/entity planning*, and *workforce supply and demand planning*.
- Among many findings of interest, respondents in operations report the highest interest in the top capabilities of *workforce planning per employee*, *workforce compensation planning*, and *rolling workforce forecasts*.
- *Finance* respondents also report high interest in the top four capabilities and several lower-ranked areas.

Workforce Planning Capabilities by Function

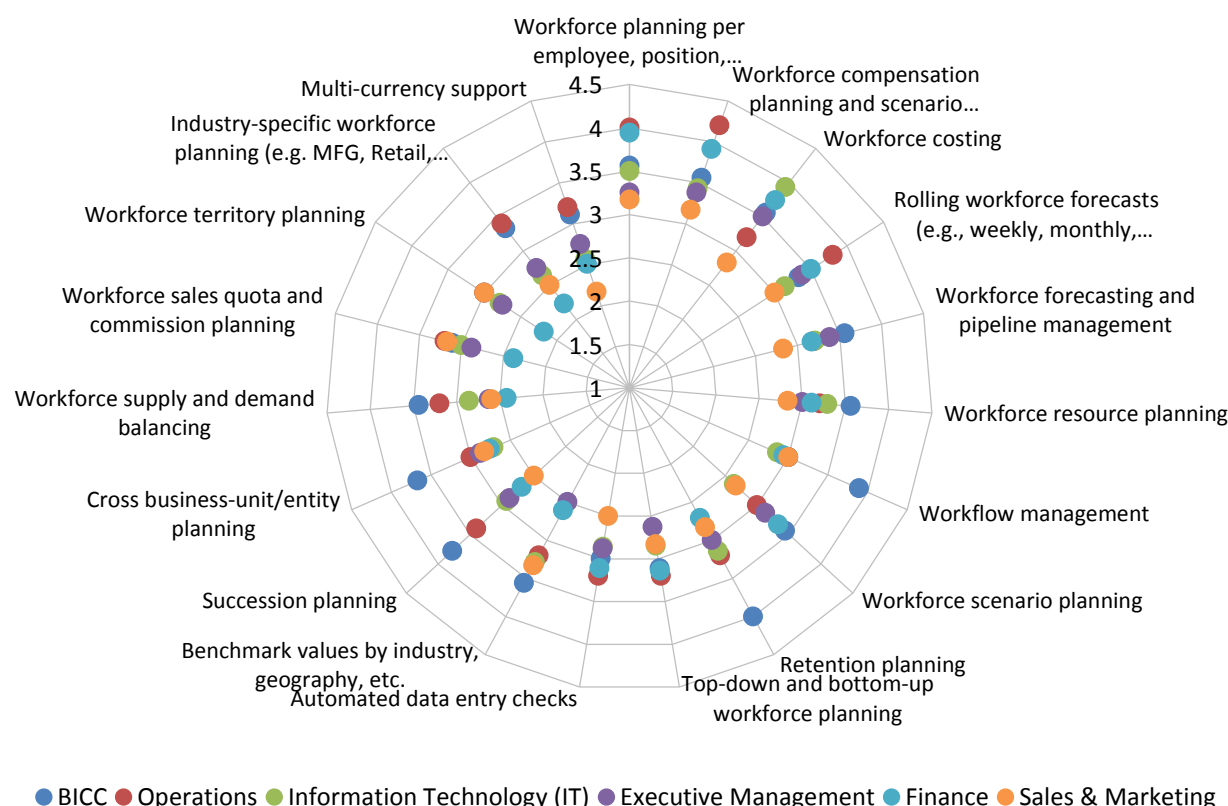


Figure 24 – Workforce planning capabilities by function

2025 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning capabilities in 2025 correlates strongly with global organization headcount, particularly in the case of very large organizations with more than 10,000 employees (fig. 25).

- Very large organizations posted the highest or equally highest scores for at least 16 of 19 capabilities sampled, including the top 11.
- Small organizations' (1-100 employees) areas of interest include *cross business unit/entity planning* and *workforce sales quota and commission planning*.
- Midsize organizations (101-1,000 employees) report the highest interest in *benchmark values by industry, geography, etc.*

That said, interest in capabilities often correlates closely with organization size, with some values clustered.

Workforce Planning Capabilities by Organization Size

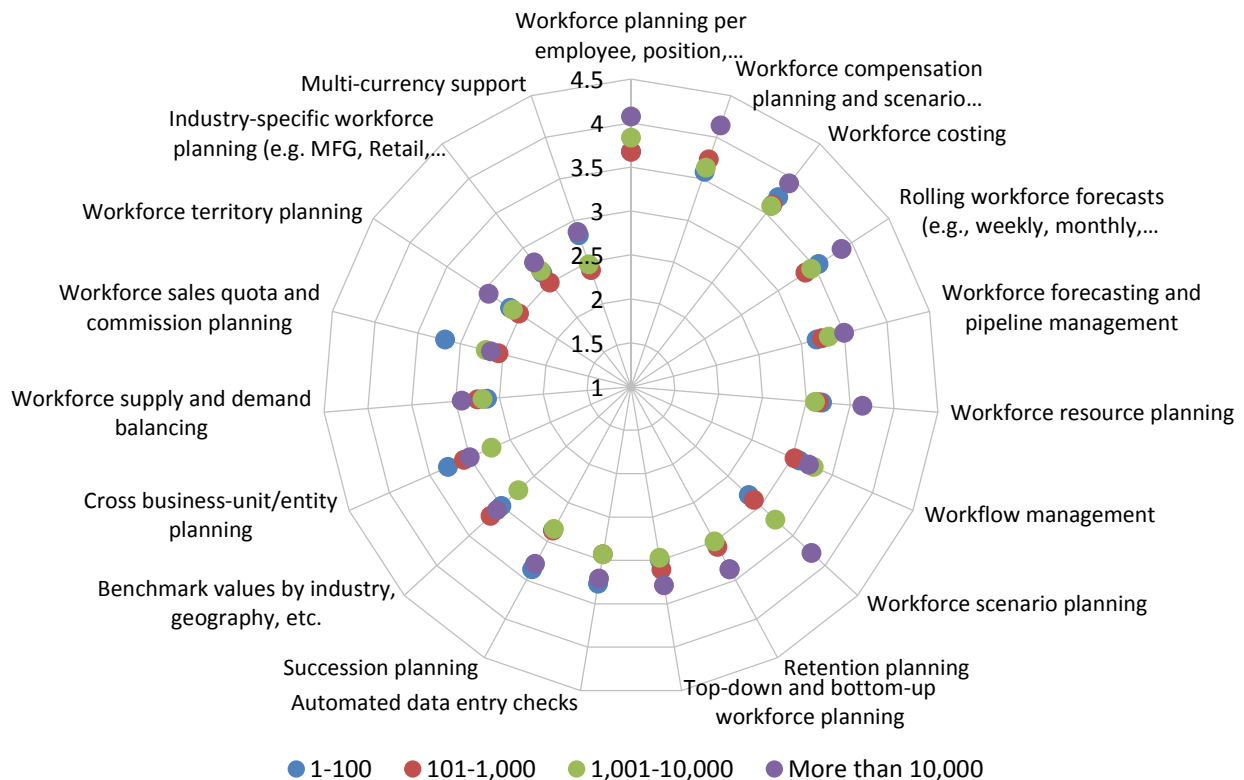


Figure 25 – Workforce planning capabilities by organization size

2025 Workforce Planning and Analysis Market Study

Sentiment toward specific workforce planning capabilities varies according to company age in 2025, with some patterns visible (fig. 26).

- Organizations that are 11-16 years old show the strongest overall interest, giving the highest scores for the top five and several lower-ranked capabilities. In 2024, we observed the same effect, suggesting this marks a timeline for the onset of interest and the emergence of enterprise workforce planning capabilities in these older organizations.
- Organizations that are five years old or younger display overall lower but high selective interest; for example, there is noticeably high interest in areas of *workflow management*, *workforce supply and demand balancing* and *workforce sales quota and commission planning*.
- The oldest organizations (16 years or older) also report selective interest: It's highest for the top two capabilities, *workforce planning per employee* and *workforce compensation planning*, along with *workforce resource planning*.

Workforce Planning Capabilities by Company Age

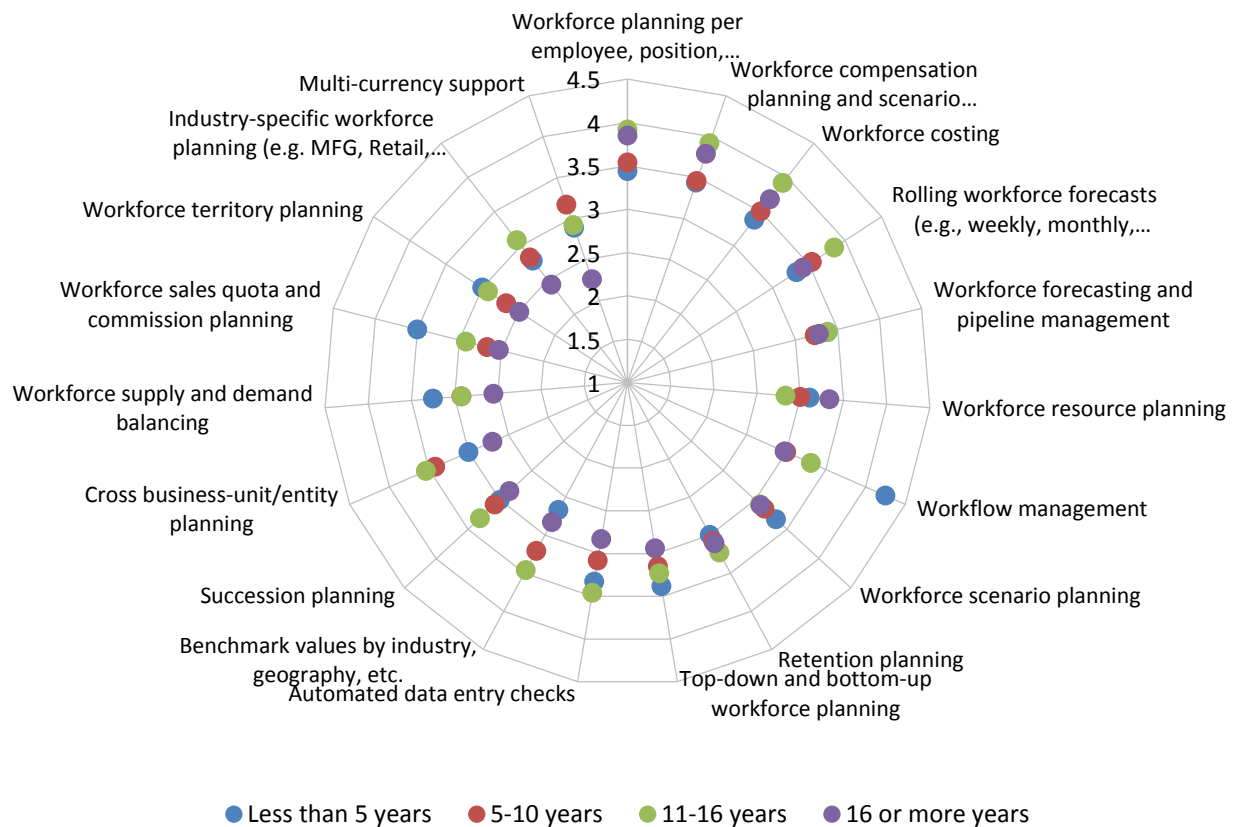


Figure 26 - Workforce planning capabilities by company age

2025 Workforce Planning and Analysis Market Study

Workforce Analysis Priorities

Our survey asked respondents to “assign the importance associated with” a list of 23 workforce analysis capabilities (fig. 27).

This year, *total compensation/salary* is the top priority, with the highest weighted mean score of 3.8, near *very important*.

The next top three priorities, *headcount and core demographics*, *year-end projections and forecasting*, and *retention*, received scores of 3.4-3.6, about midway between *important* and *very important*.

Although the top 14 priorities are all at a level of *important* or greater in 2025, scores for all workforce analysis priorities declined year over year compared to 2024.

Workforce Analysis Priorities 2023-2025

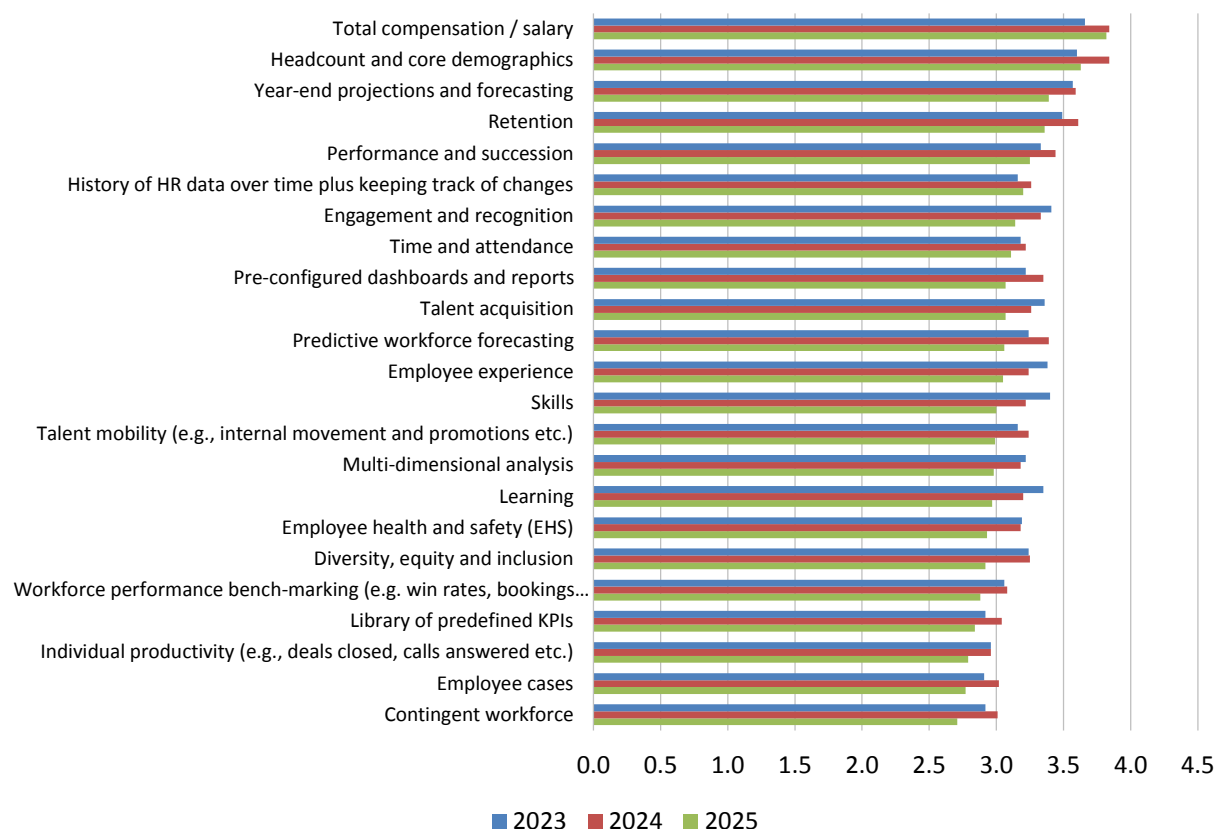


Figure 27 – Workforce analysis priorities 2023-2025

2025 Workforce Planning and Analysis Market Study

Viewed by geography, in 2025 the great majority of workforce analysis priorities (15 out of 19) are most important to respondents in EMEA, often by wide margins (fig. 28). By contrast, North American respondents report the highest scores for six of the seven most important priorities and equal the top score for *year-end projections*. *Talent mobility* and *employee health* are most important to Asia Pacific respondents.

Workforce Analysis Priorities by Geography

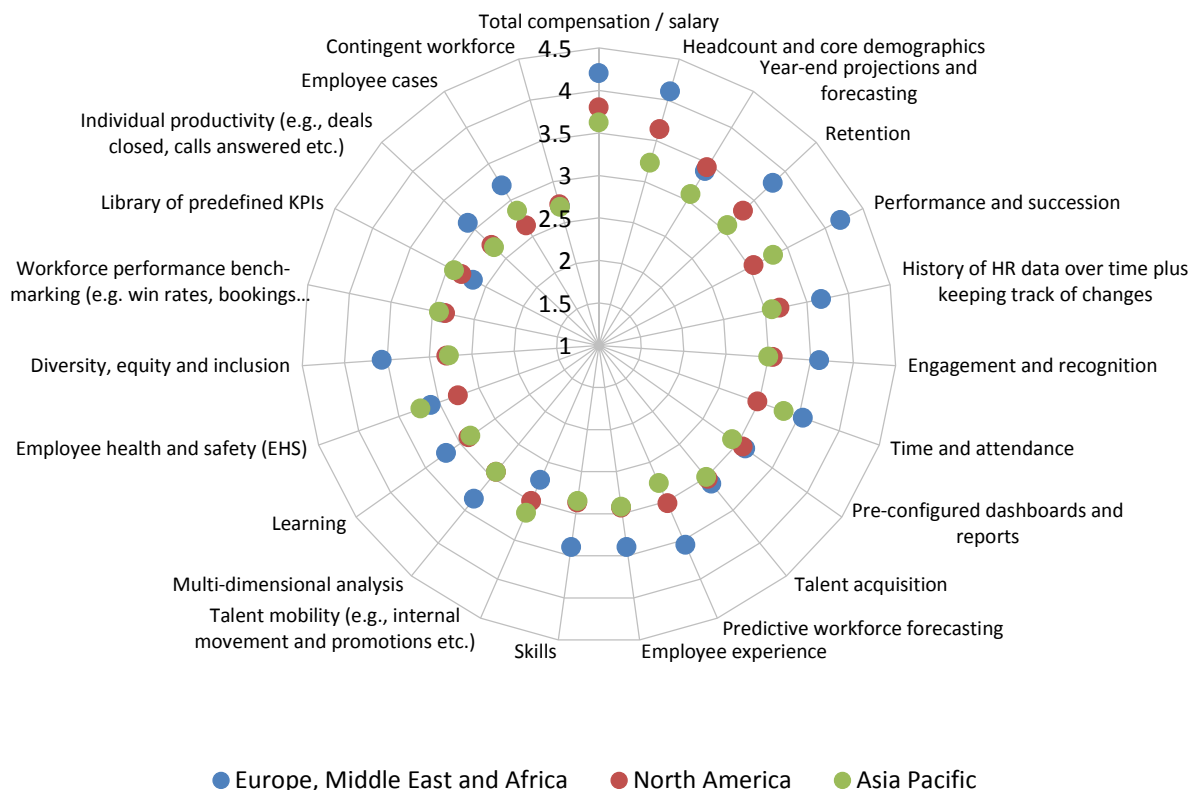


Figure 28 – Workforce analysis priorities by geography

2025 Workforce Planning and Analysis Market Study

Sentiment toward workforce analysis capabilities varies according to industry in 2025 (fig. 29).

- Weighted-mean sentiment is highest overall in *consumer services*, with particular and eclectic emphasis on *retention, time and attendance, talent acquisition, skills, talent mobility, learning, and workforce performance*.
- *Technology* respondents post the second-highest scores overall by industry, with top scores in areas including *total compensation/salary, headcount and core demographics, year-end projections and forecasting, performance and succession, and history of HR data over time plus keeping track of changes*.

Workforce Analysis Priorities by Industry

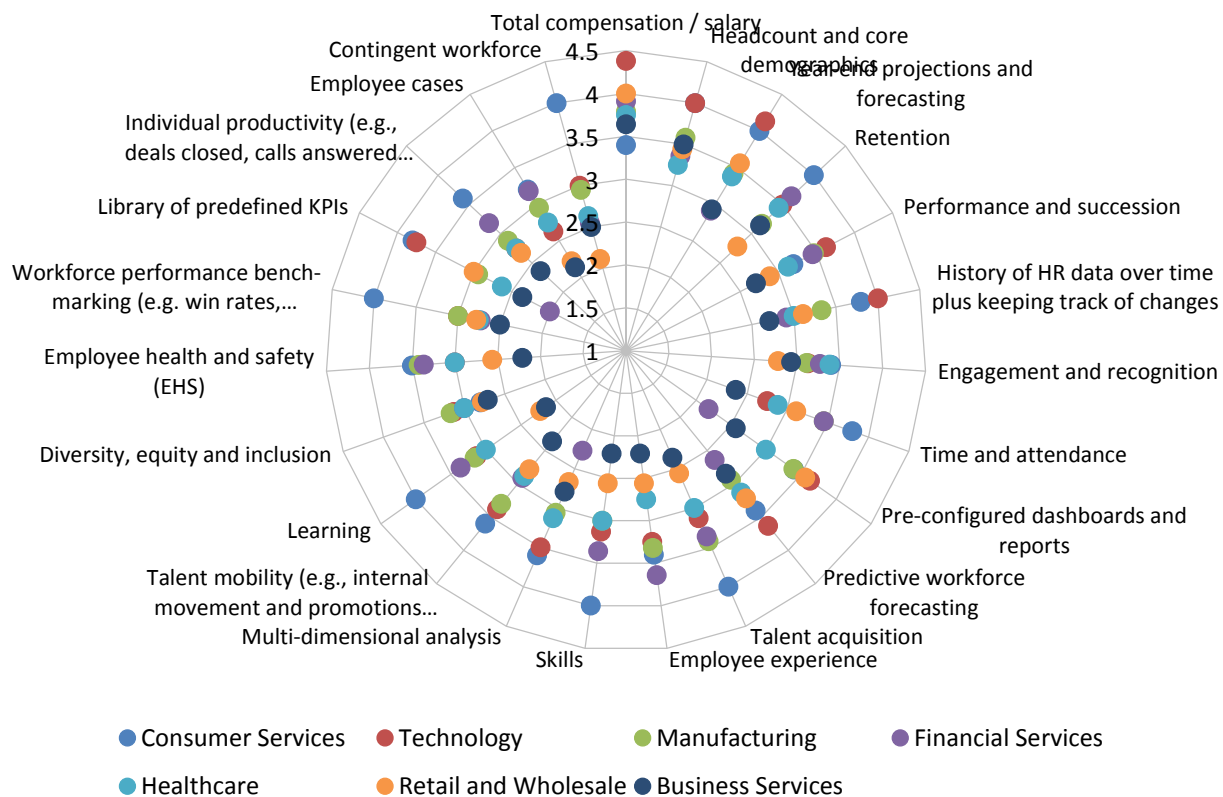


Figure 29 – Workforce analysis priorities by industry

2025 Workforce Planning and Analysis Market Study

Embedded workforce analysis priorities vary unevenly by function in 2025.

- Overall interest is highest in *operations*, where sentiment is clearly strongest in the top three priorities: *total compensation/salary*, *headcount and core demographics* and *year-end projections and forecasting*.
- For *BICC*, the highest-scored areas include *retention*, *performance and succession*, *history of HR data over time and keeping track of changes* and *engagement and recognition*.
- *IT* reports the highest interest in *time and attendance* and *talent acquisition* and narrowly leads in its interest in *skills*.

Workforce Analysis Priorities by Function

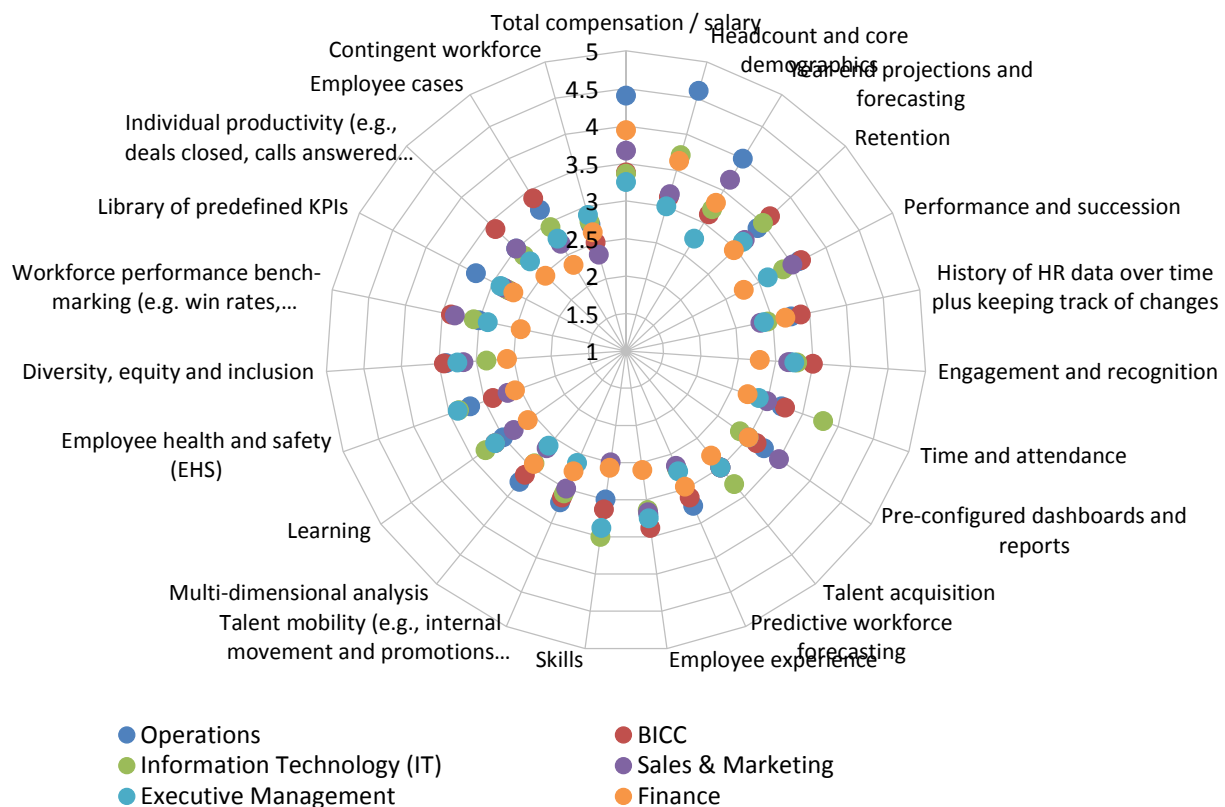


Figure 30 – Workforce analysis priorities by function

2025 Workforce Planning and Analysis Market Study

Viewed by organization size, interest in workforce planning and analysis correlates directly with global headcount, particularly for the largest organizations with more than 10,000 employees (fig. 31).

- Very-large organizations report the highest interest in most priorities, including 10 of the top 11, often by wide margins.
- Exceptions to this rule of scale apply to small organizations (those with 1-100 employees), who give the highest scores to *performance and succession* and *employee experience*, and to otherwise lower-ranked priorities including *individual productivity*.
- Small and midsize organizations (101-1,000 employees) invariably show the lowest interest in workforce analysis priorities.

The top five priorities are at least *important* to all organizations, regardless of size.

Workforce Analysis Priorities by Organization Size



Figure 31 – Workforce analysis priorities by organization size

2025 Workforce Planning and Analysis Market Study

Eleven- to sixteen-year-old organizations, which are most likely to have entrenched legacy workforce practices, are most likely to display high levels of sentiment and interest toward workforce analysis priorities (fig. 32).

- Interestingly, the next-youngest grouping of organizations that are five to 10 years old ranks that same measure lowest.
- The youngest organizations that are *five years old or less* are especially keen on *multidimensional workforce analysis, individual productivity and year-end projections and forecasting*, taking the top priority position in each of those areas.

While results also vary according to industry and function, we expect older organizations would be more likely to concentrate legacy workforce analysis in their HR, strategic planning, or finance practices.

Workforce Analysis Priorities by Company Age

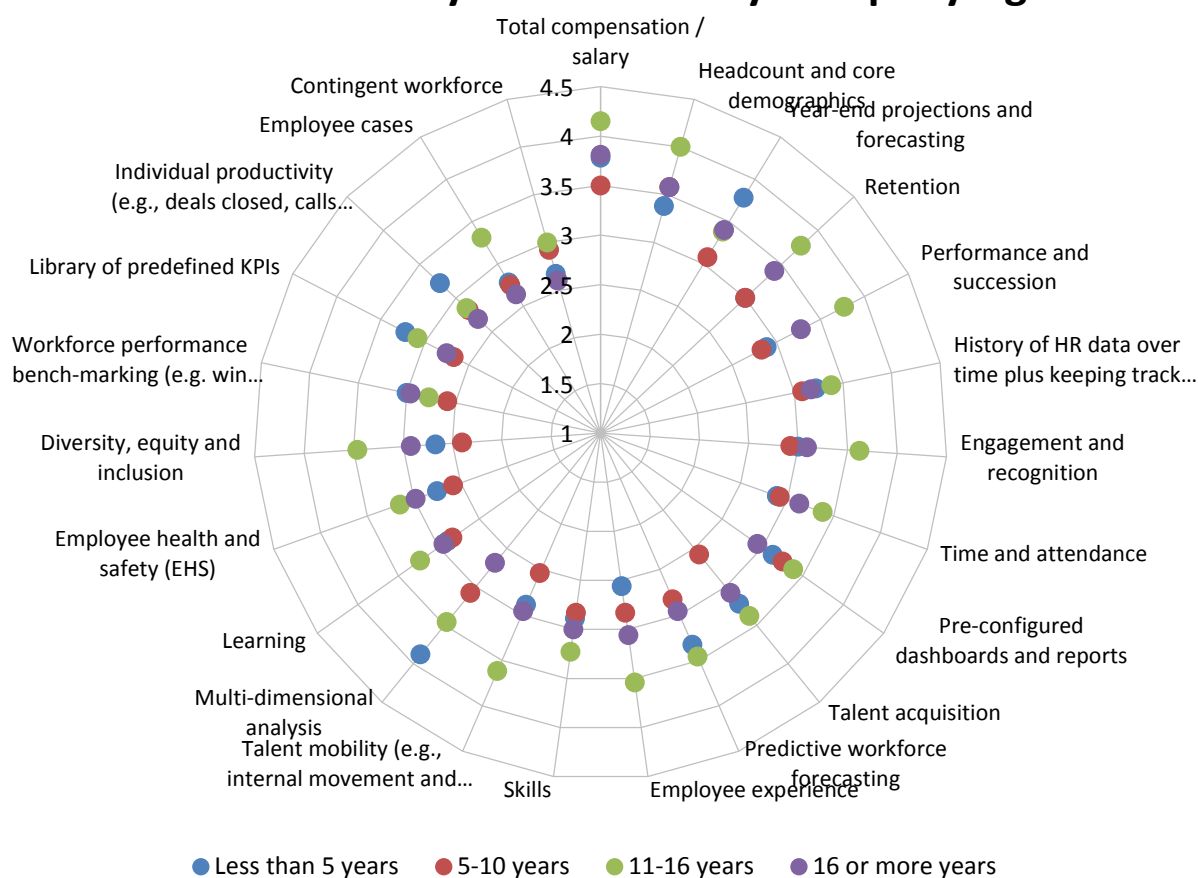


Figure 32 – Workforce analysis priorities by company age

2025 Workforce Planning and Analysis Market Study

Embedded Workforce Data Access and Manipulation

We asked respondents to “assign the importance associated with” a list of seven workforce data access and manipulation capabilities in 2025 (fig. 33).

- The most popular, *utilize and update multiple hierarchies*, received a weighted-mean score of 3.6, approaching the level signifying *very important*.
- The next most important, *unify data from multiple source systems*, got a weighted-mean score of 3.4, midway between *important* and *very important*.
- Five of the seven measures received 2025 scores greater than 3.0 (> *important*) scores.
- Two of the measures—*adding business measures* and *accessing relevant industry benchmarks*—slipped below the 3.0 weighted mean score for the first time since we first published this research in 2023.

While each category shows slight decreases from last year’s survey, the rankings remain very close and reflect the same overall priority.

Workforce Data Access and Manipulation 2023-2025

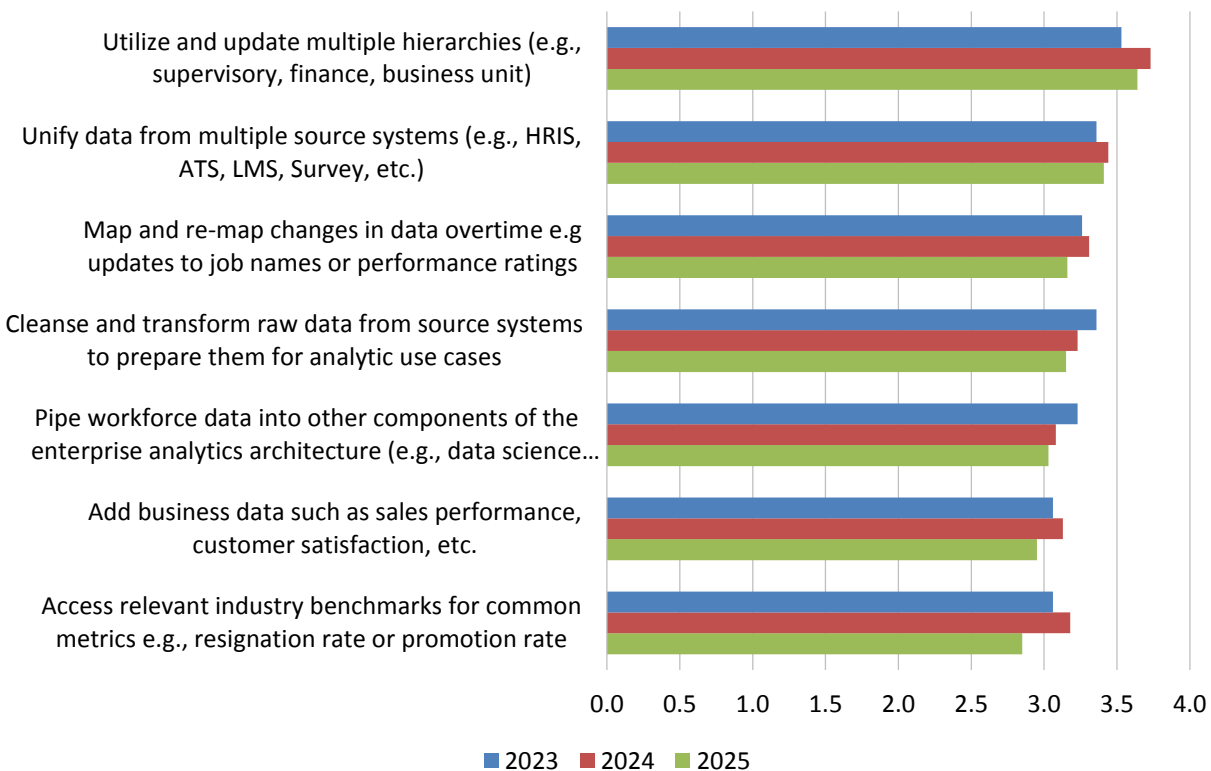


Figure 33 – Workforce data access and manipulation 2023-2025

2025 Workforce Planning and Analysis Market Study

Viewed by geography, sentiment toward workforce data access and manipulation capabilities is somewhat clustered and is strongest among respondents in Europe, Middle East and Africa (EMEA; fig. 34).

- EMEA respondents give high or near high scores well above the level of *important* in six of the seven access and manipulation priorities, though *accessing relevant industry benchmarks* is an outlier.
- North American respondents narrowly lead sentiment toward *map and re-map changes in data over time*. All regions assign scores of *important* or higher to four priorities: *utilize and update multiple hierarchies*; *unify data from multiple source systems*; *cleanse and transform raw data*; and *pipe workforce data into other components of enterprise analytics*.
- Asia Pacific respondents report the lowest overall interest by weighted mean.

Workforce Data Access and Manipulation by Geography

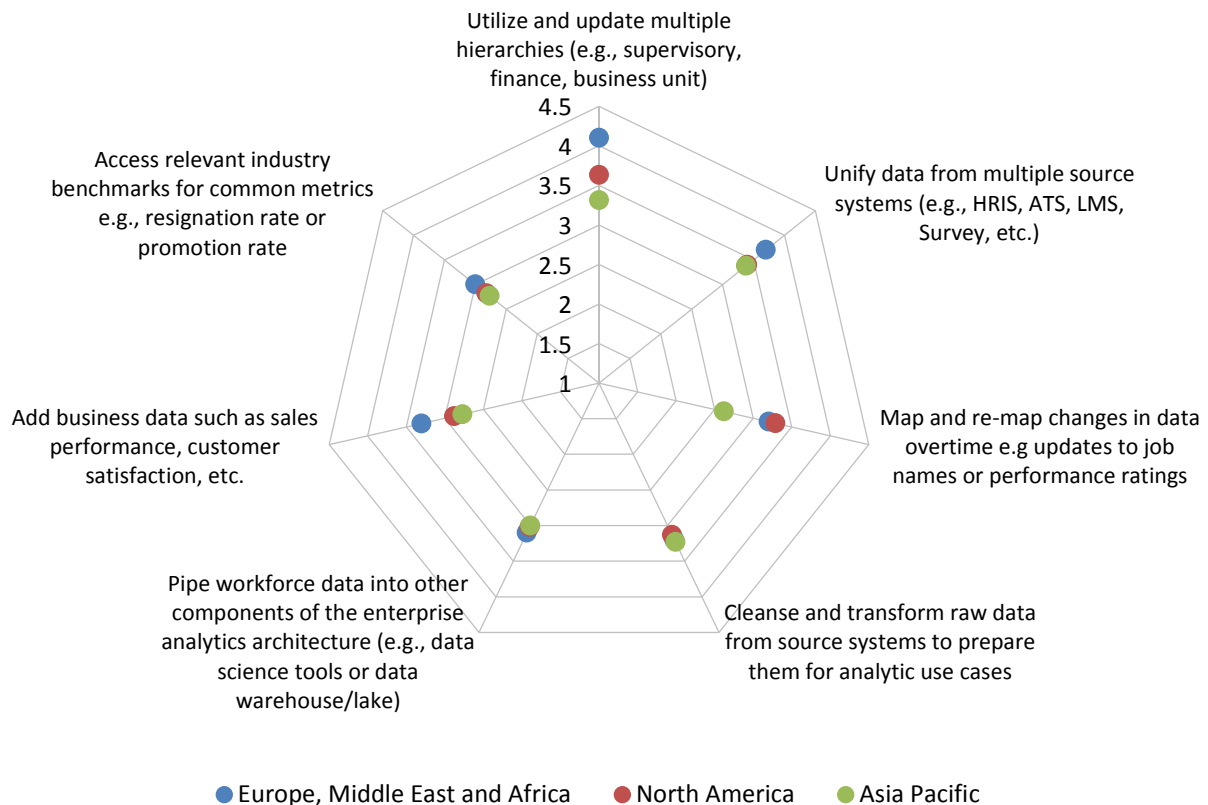


Figure 34 – Workforce data access and manipulation by geography

2025 Workforce Planning and Analysis Market Study

In 2025, interest in workforce data access and manipulation capabilities varies by industry: Those reporting the highest priorities include *consumer services*, *technology*, *manufacturing*, and *healthcare* (fig 35).

- *Consumer services* leads in sentiment toward five of the seven priorities while *technology* respondents lead in two: *utilize and update multiple hierarchies* (with a rating of 4.4 (between *very important* and *critical*) and *pipe workforce data into other components*.
- *Retail & wholesale* stands out from some other industries for its strong emphasis on both *unify data from multiple source systems* and *utilize and update multiple hierarchies*.

Workforce Data Access and Manipulation by Industry

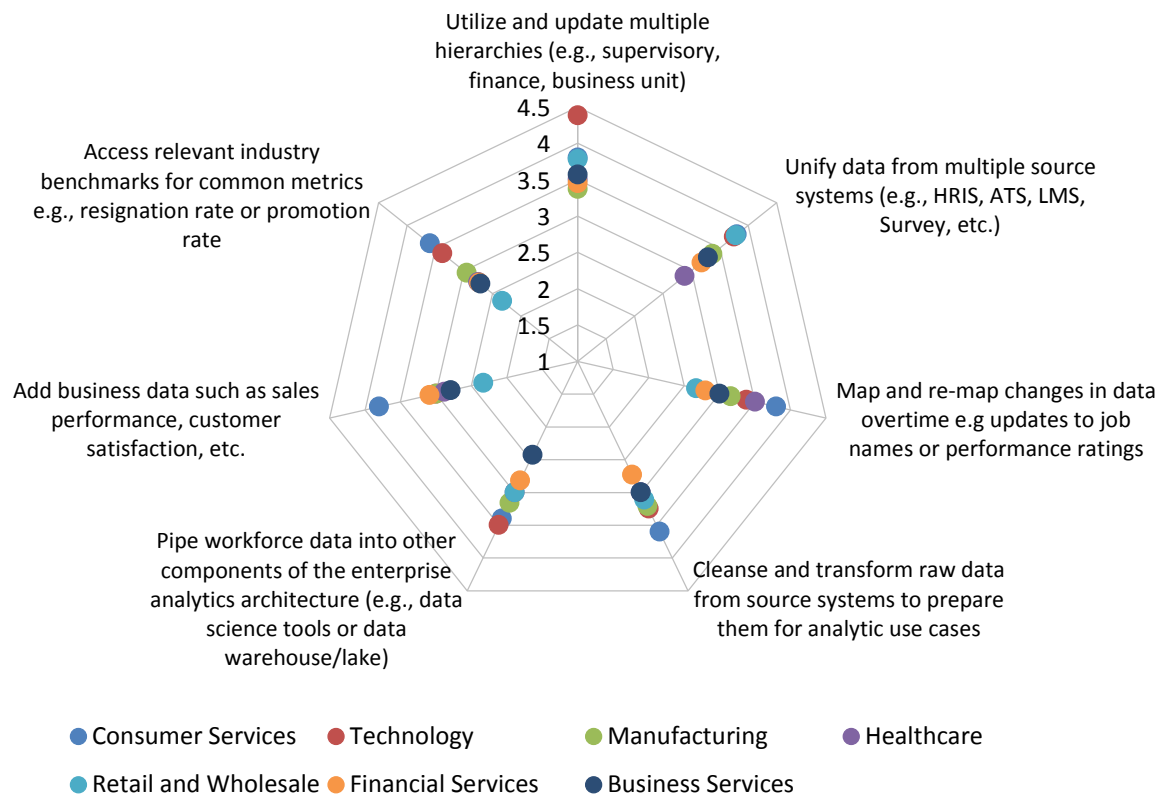


Figure 35 – Workforce data access and manipulation by industry

2025 Workforce Planning and Analysis Market Study

In 2025, *workforce data access and manipulation* score highest as priorities among *IT* and *BICC* functions that support and manage the analytic infrastructure. *Finance*, often a key cohort in any analysis activity, is also strongly vested in these capabilities. In fact, *finance* scores *unify data from multiple sources* above all other functions, while *operations* rates *utilize and update multiple hierarchies* most highly. *Executive management* trails all other functions in a majority of capabilities, with the lowest ratings in five of seven capabilities.

Workforce Data Access and Manipulation by Function

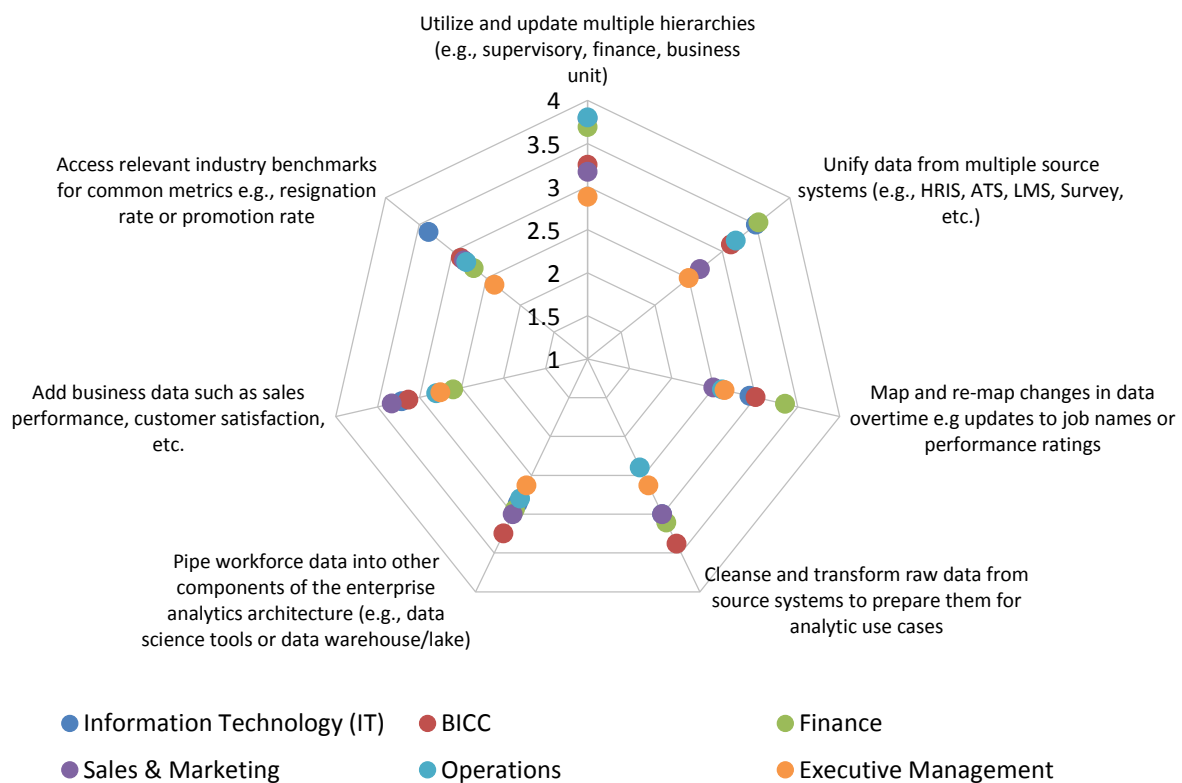


Figure 36 – Workforce data access and manipulation by function

2025 Workforce Planning and Analysis Market Study

In 2025, just as it did in 2024, interest in data access and manipulation capabilities correlates positively with increasing global headcount and is always strongest in *very large* organizations (those with more than 10,000 employees) or *large* organizations (with 1,001-10,000 employees; fig. 37).

- The top-rated feature—*utilize and update multiple hierarchies*—scores as very important with very large enterprises, and other features are largely rated between *important* and *very important*.
- Small organizations (1-100 employees) and midsize organizations (101-1,000 employees) generally report lower importance ratings. The exception is *add business data*, which small firms rate higher than all other groups, at a weighted-mean score of 3.6 (between *important* and *very important*).

Workforce Data Access and Manipulation by Organization Size

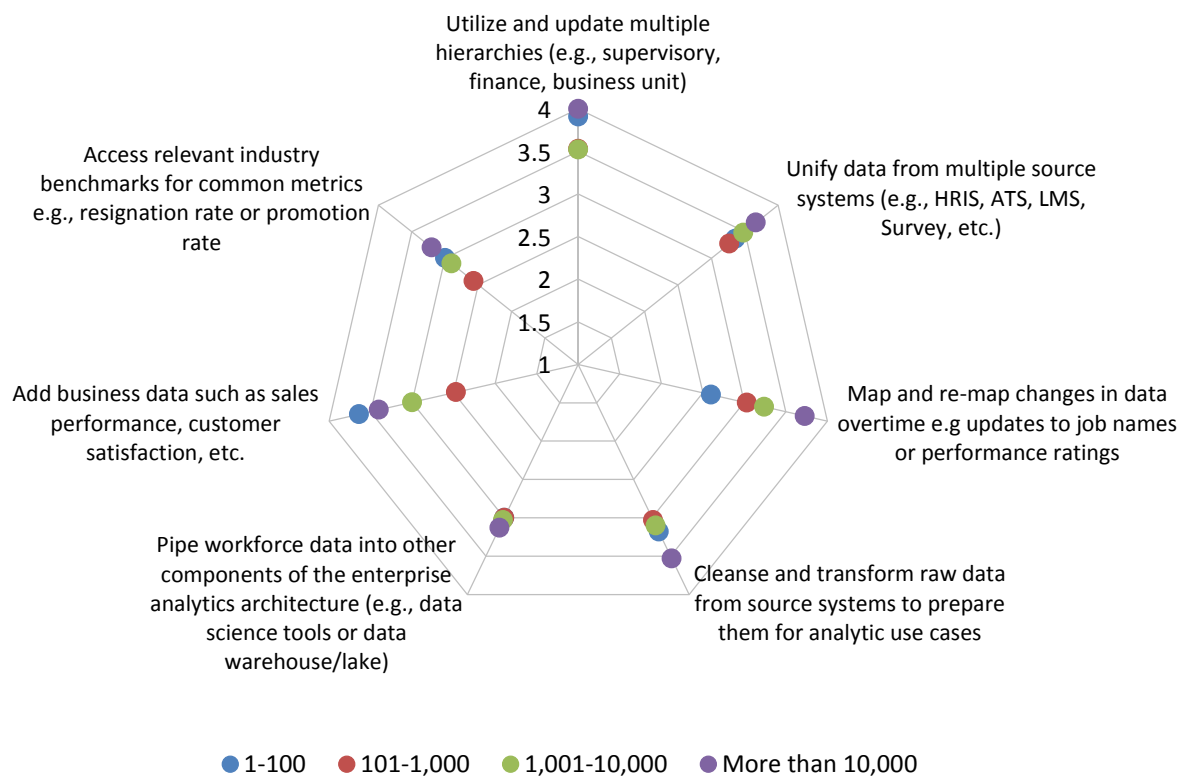


Figure 37 – Workforce data access and manipulation by organization size

2025 Workforce Planning and Analysis Market Study

In 2025, there is no obvious correlation between an organization's self-rated success with business intelligence and the importance it assigns to workforce data access and manipulation (fig. 38). This is a change from 2024, when success and perceived importance were strongly correlated. While 2025's results appear to be "all over the map," this finding is somewhat offset by the similarity between the results and their close clustering.

Workforce Data Access and Manipulation by Success with BI

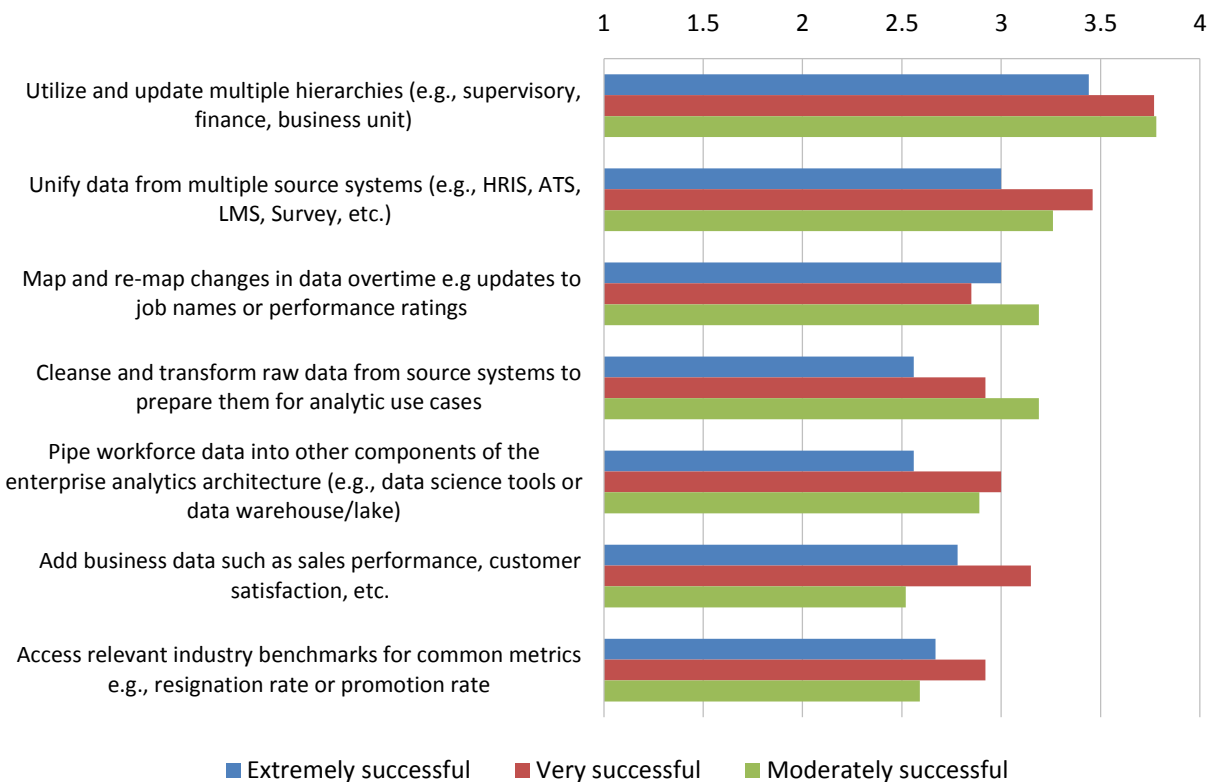


Figure 38 – Workforce data access and manipulation by success with BI

2025 Workforce Planning and Analysis Market Study

Workforce Insight Creation and Sharing

We asked respondents to “assign the importance associated with” a list of 16 workforce data insight creation and sharing capabilities (fig. 39).

- In 2025, the top five features are all near or at the midway point between *important* and *very important*. They include *drill down to specific detail within the chart*, *share data securely with HR business partners*, *standardized metric calculations*, *build and share dashboards*, and *customize or add new metrics or calculations*.
- Only three priorities gained in importance year over year—*share data securely*, *predict future outcomes*, and *guide users in interpretation of the data*.
- All other priorities are at or slightly below 2024 results, but very nearly the same as last year.

Workforce Insight Creation and Sharing 2023-2025

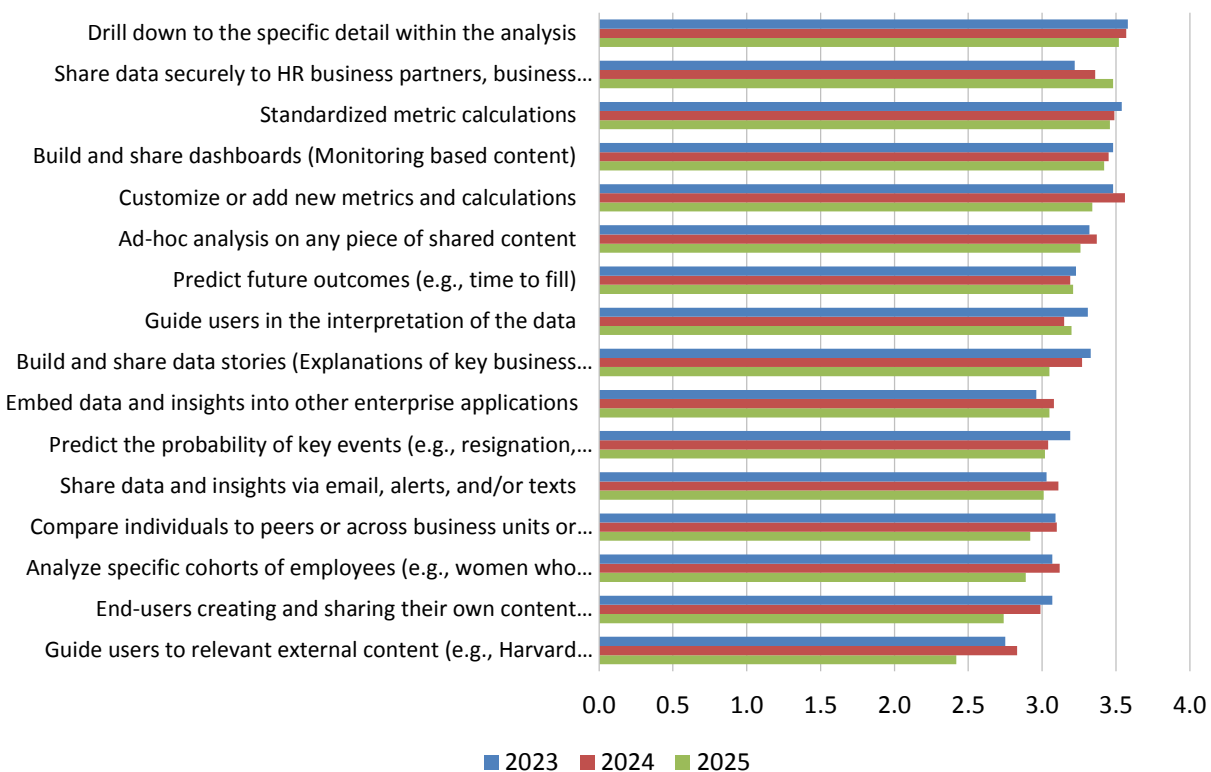


Figure 39 – Workforce insight creation and sharing 2023-2025

2025 Workforce Planning and Analysis Market Study

Viewed by geography, sentiment toward workforce insight creation and sharing capabilities is somewhat clustered, with interest variably highest in different regions (fig. 40).

- By a narrow margin, interest this year for all features is highest in Asia Pacific.
- EMEA interest is next highest, followed by North America. Of the top five capabilities, EMEA leads in four: *share data securely*, *standardized metric calculations*, *build and share dashboards*, and *customize and add new metrics and calculations*, while North America scores the most popular capability—*drill down to specific detail*—as the most important.

Workforce Insight Creation and Sharing by Geography

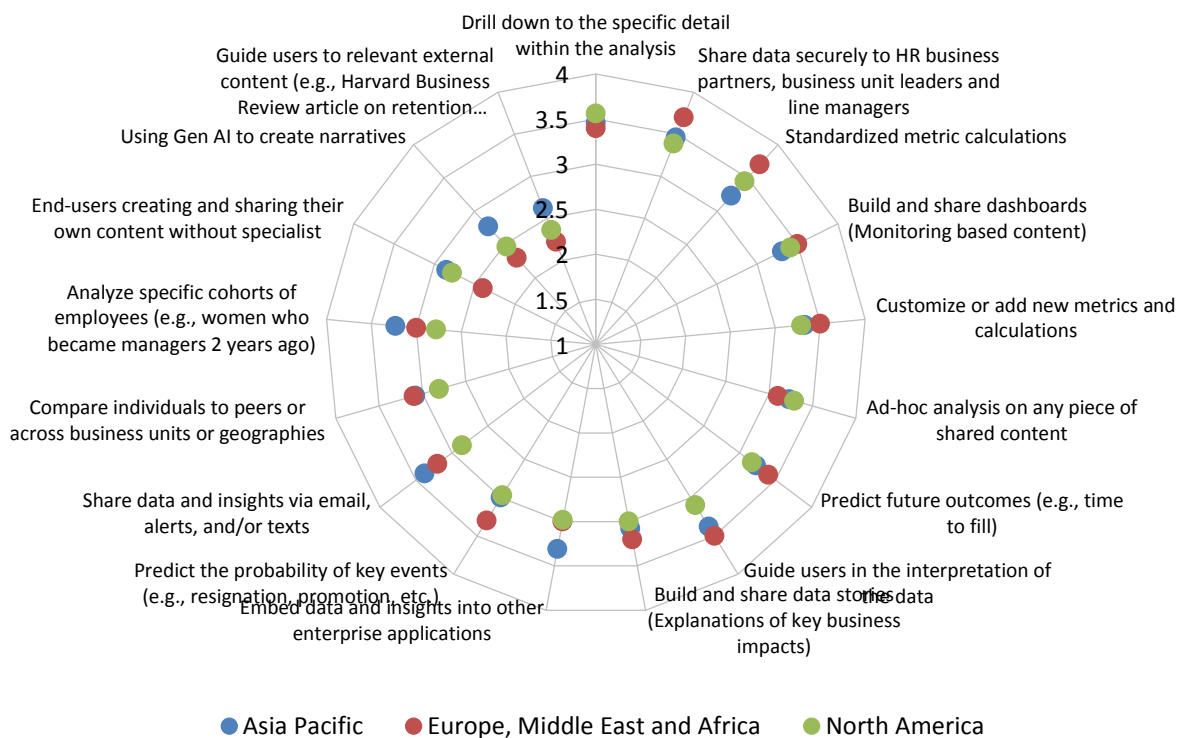


Figure 40 – Workforce insight creation and sharing by geography

2025 Workforce Planning and Analysis Market Study

Sentiment toward workforce insight creation and sharing capabilities varies by industry in 2025, with some leaders or first-movers emergent (fig. 41).

- *Consumer services* leads in overall sentiment by weighted mean, followed by *technology*, *healthcare*, and *manufacturing*. Interest is highest for priorities like *drill down to details*, *share data securely with HR partners*, and *standardized metric calculations*.
- *Consumer services* respondents submit that *using Gen AI to create narratives* is *very important* (weighted mean = 4), far above any other industry response. None of the other industries' weighting of this capability met the weighted-mean 3.0 threshold signifying *important*.
- *Consumer services* and *technology* respondents both rated *embed data and insights into other enterprise applications* as *important to very important*, significantly higher than other industries.

Workforce Insight Creation and Sharing by Industry

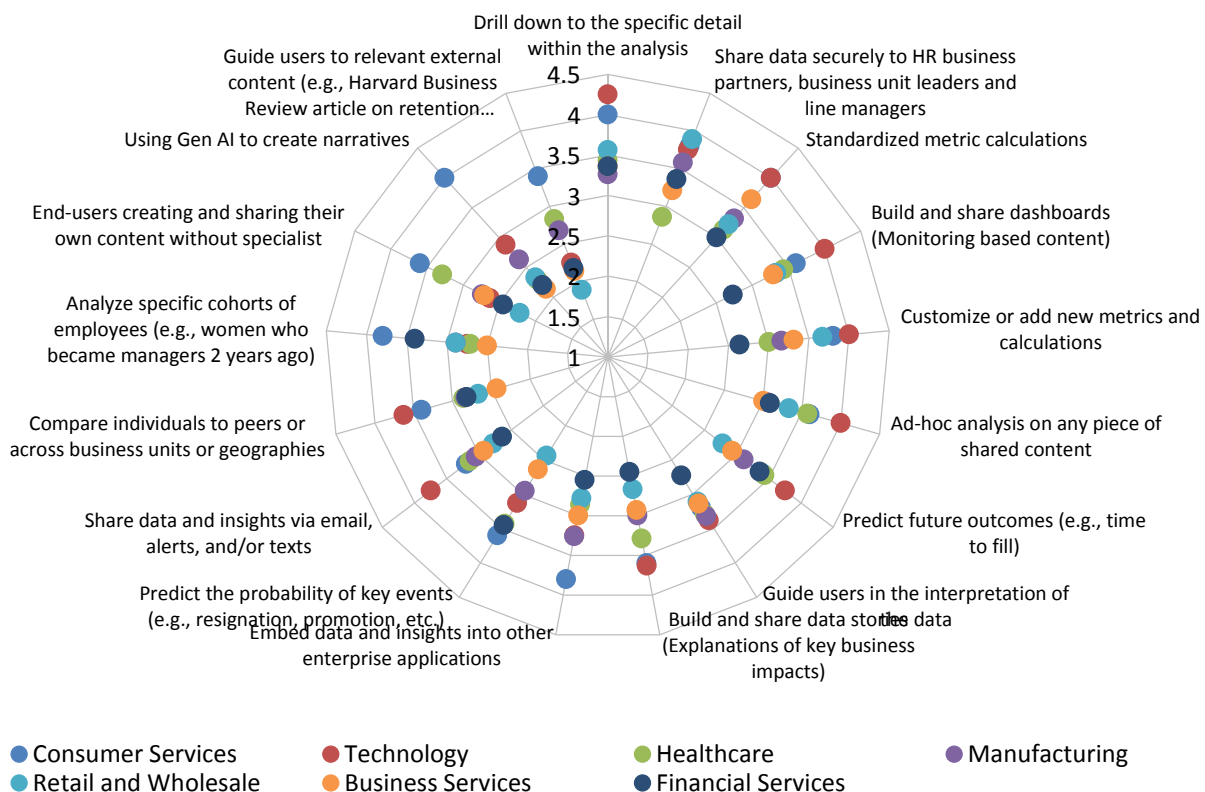


Figure 41 – Workforce insight creation and sharing by industry

2025 Workforce Planning and Analysis Market Study

In 2025, interest in workforce insight creation and sharing capabilities varies by function, with some patterns emerging (fig. 42).

- *BICC* respondents give high or well above-average scores to all priorities and led interest in every case.
- *Information Technology* also assigned *important* to *very important* ratings to nearly all capabilities and followed the *BICC* in overall ratings.
- Surprisingly, *finance*, whose job often involves creating a storyline to provide insight into what results mean, rated *use Gen AI to create narratives* and *guide users to relevant external content* lowest of any function and capability.

Workforce Insight Creation and Sharing by Function

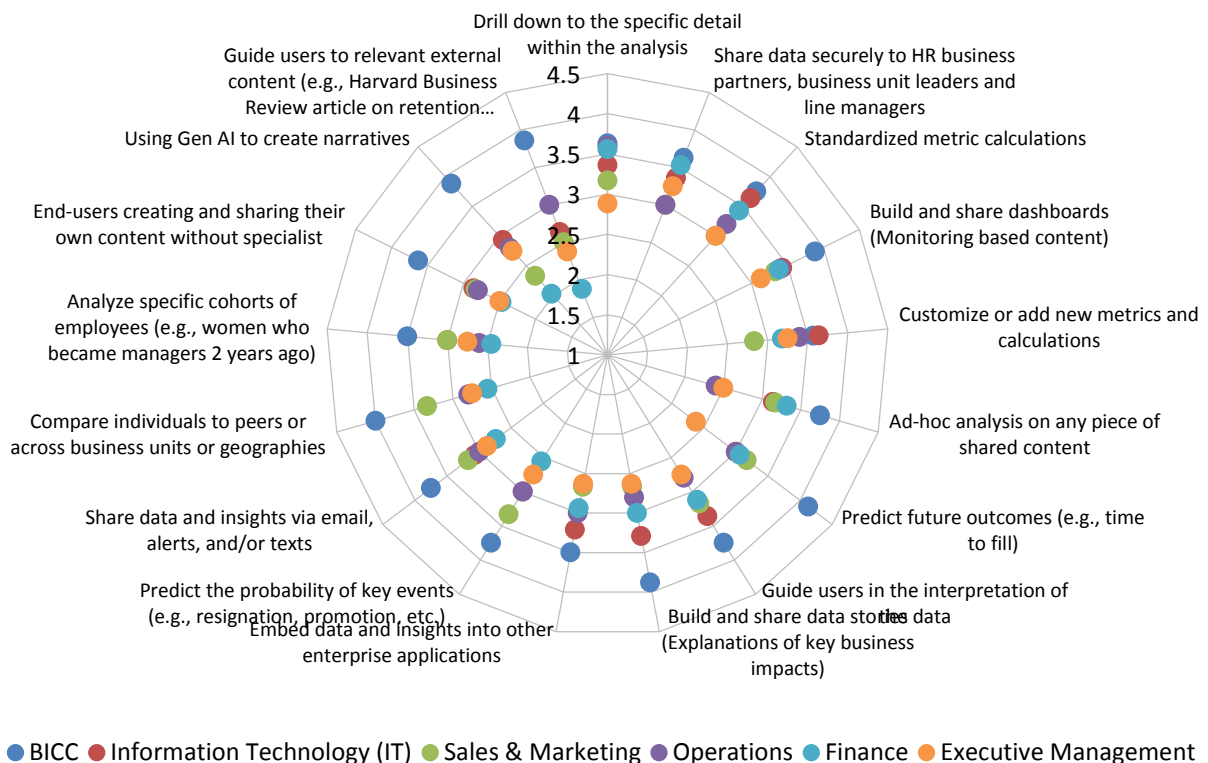


Figure 42 – Workforce insight creation and sharing by function

2025 Workforce Planning and Analysis Market Study

Just as we observed in 2023-2024, interest in workforce insight creation and sharing capabilities in 2025 remains highest in either *very large* organizations (those with more than 10,000 employees) or *large* organizations ((1,001-10,000 employees; fig. 43).

- Three areas of interest that cluster together by organizational size are also the top priorities overall: *drill down to the specific detail within the chart, share data securely with HR business partners, and standardized metric calculations.*
- As in 2024, the top eight out of 17 priorities are at least *important* to all organizations, regardless of size.

Workforce Insight Creation and Sharing by Organization Size

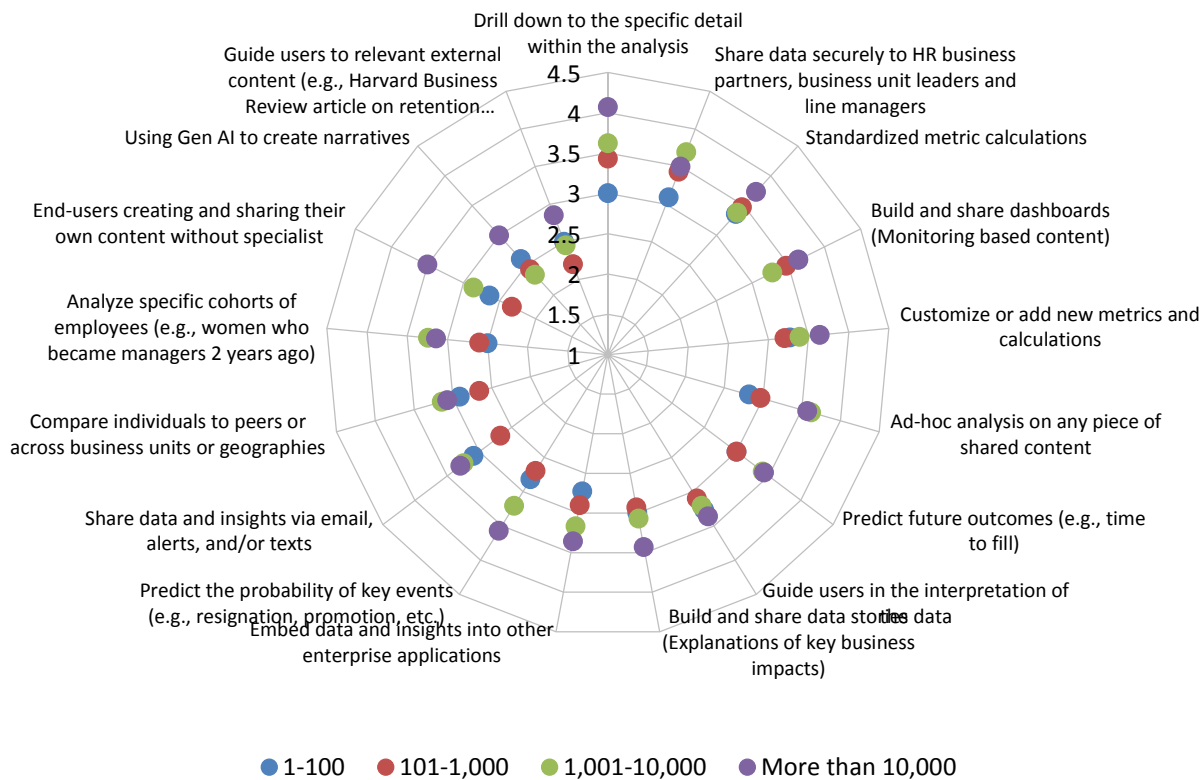


Figure 43 – Workforce insight creation and sharing by organization size

2025 Workforce Planning and Analysis Market Study

Workforce Planning and Analysis Integration Features

We asked respondents to “assign the importance associated with” a list of eight workforce planning and analysis integration features in 2025 (fig. 44). The top three features are *export data to Excel, PDF; integration with financial planning and budgeting applications; and ability to integrate data from HRIS systems*. This result differs slightly from 2024, when respondents deemed *ability to integrate data from leading ERP systems* more important than HRIS integration. The top three features received weighted-mean scores between 3.7 and 4.1, close to or slightly above the level signifying *very important*. A second tranche of capabilities including *ability to integrate data from ERP systems* and *integration with compensation management systems* scored well above the level of *important* this year. Seven of eight priorities received slightly lower sentiment scores in 2025 than in 2024, with *ability to integrate data from HRIS systems* the only feature rated more highly this year.

Workforce Planning and Analysis Integration Features 2023-2025

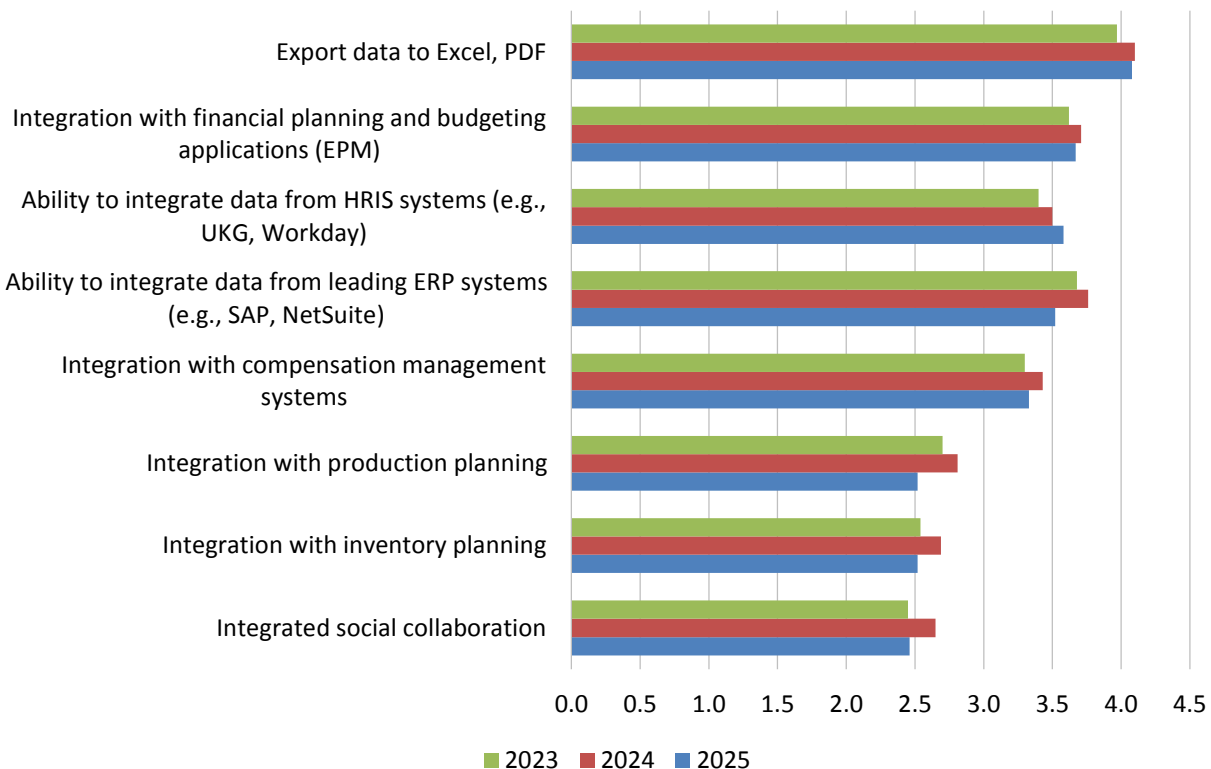


Figure 44 - Workforce planning and analysis integration features 2023-2025

2025 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning and analysis integration features in 2025 varies by geography for individual features (fig. 45).

- While *Asia Pacific* has the highest overall weighted-average score across all categories, *North America* follows closely in second place.
- The most clustered and universally important feature is *export data to Excel, PDF*, which all geographies score close to or greater than the level of *very important*.
- While EMEA ranks *export data to Excel and PDF integration* most highly, North American respondents also have a strong affinity to that capability, as well as to *integration with financial planning and budgeting applications (EPM)*—much more so than EMEA respondents.

Workforce Planning and Analysis Integration Features by Geography

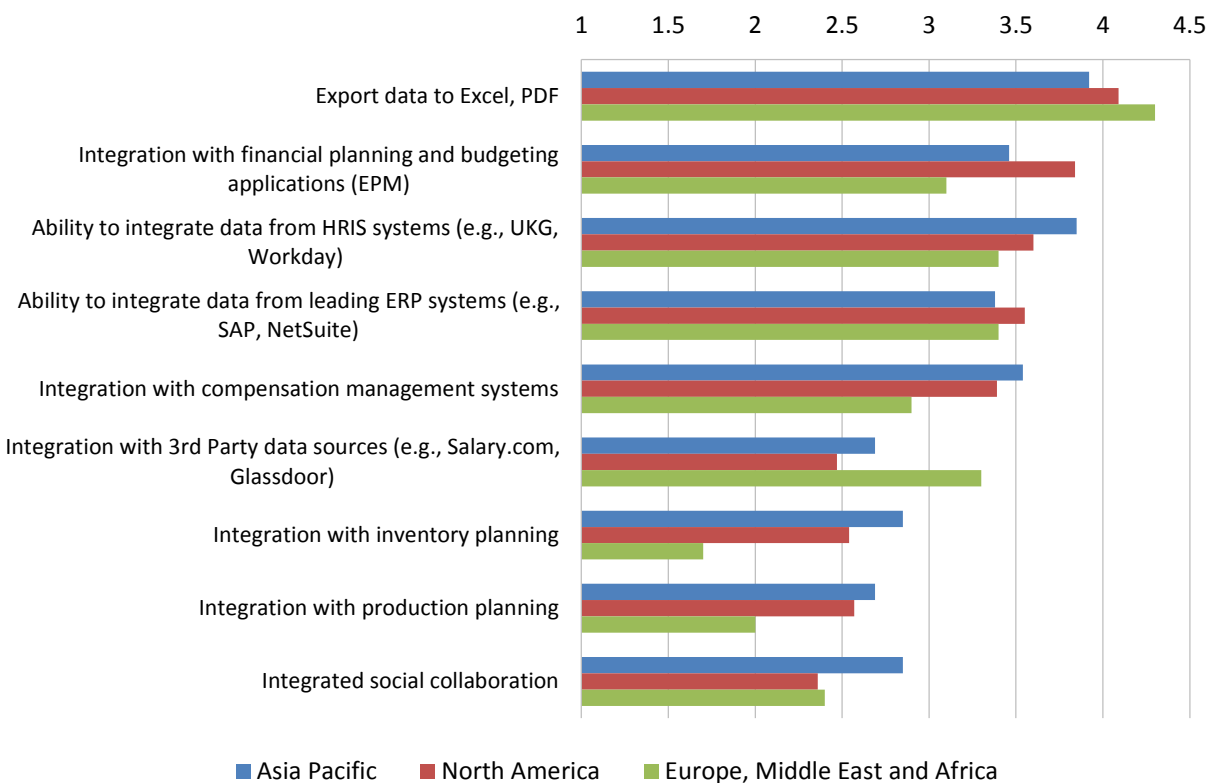


Figure 45 – Workforce planning and analysis integration features by geography

2025 Workforce Planning and Analysis Market Study

Workforce planning and analysis integration feature interest varies by industry in 2025 (fig. 46).

- As we expected, interest is greatest and most clustered across all industries for *export data to Excel, PDF*, with cumulative scores near or above the level of *very important*.
- *Technology* respondents report the highest scores for *ability to integrate data from leading ERP systems*, while *healthcare* firms indicate *integration with financial planning and budgeting applications (EPM)* is a high priority.
- Resource-heavy *retail and wholesale* industry respondents give the top score to *ability to integrate data from HRIS systems*.
- Respondents in *manufacturing* report the highest overall weighted average to *integration with production planning*, *integration with inventory planning*, and *integrated social collaboration*.

Workforce Planning and Analysis Integration Features by Industry

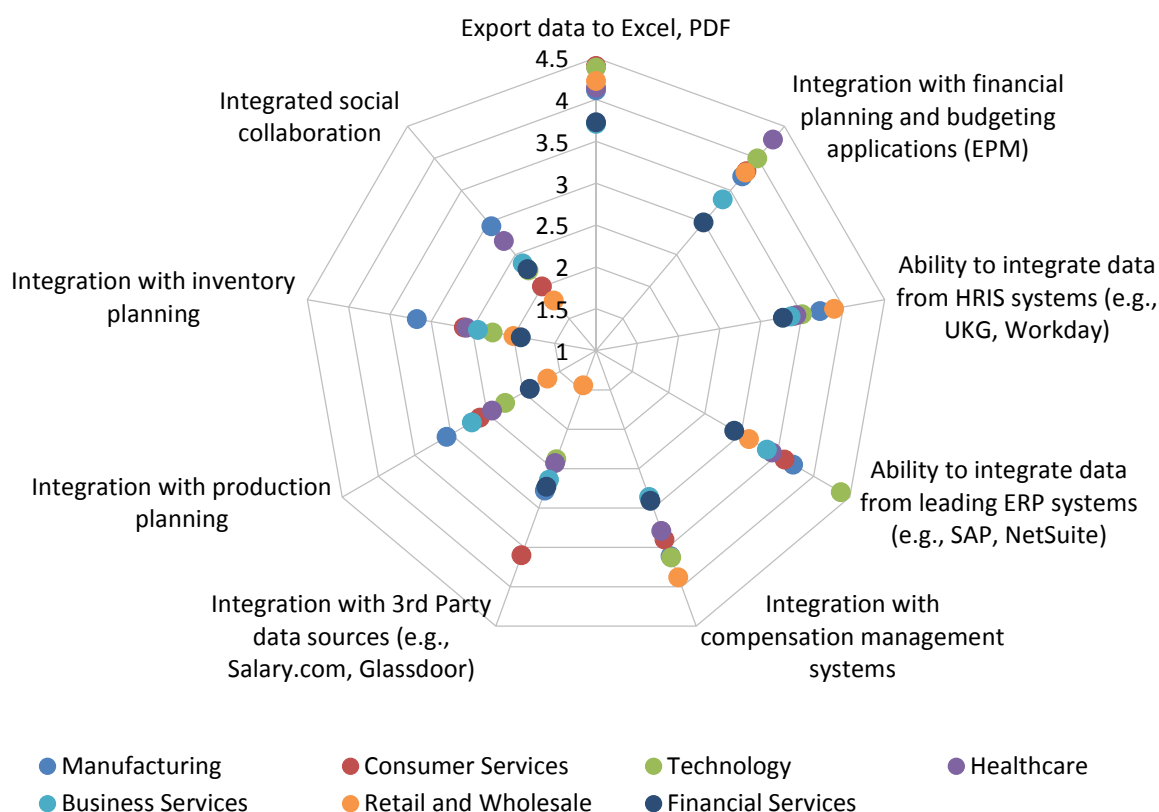


Figure 46 – Workforce planning and analysis integration features by industry

2025 Workforce Planning and Analysis Market Study

Interest in workforce planning and analysis integration features continues to vary broadly and in detail by function in 2025 (fig. 47).

- Unexpectedly, *operations* respondents give high or near-high scores to most features, including top-ranked *export to Excel, PDF*, as well as *ability to integrate data from leading ERP systems* and *integration with compensation management systems*. In contrast, our 2024 study found that *operations* was least interested in every feature sampled.
- Also in 2025, *BICC* posted above-average scores to nearly all features polled.

Workforce Planning and Analysis Integration Features by Function

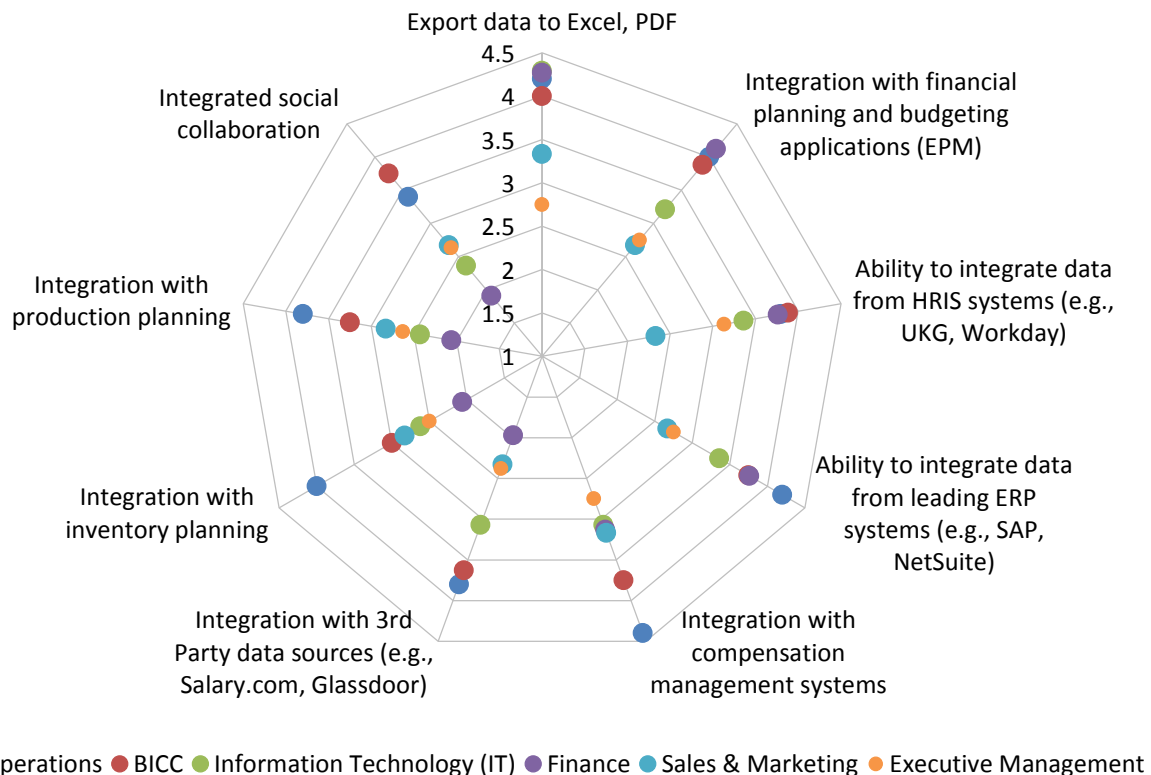


Figure 47 – Workforce planning and analysis integration features by function

2025 Workforce Planning and Analysis Market Study

While organizations of all sizes score integration features as *important*, interest is highest among the very large firms (organizations with more than 10,000 employees). This continues a trend we saw in 2024 (fig. 48).

In 2025, small enterprises (1-100 employees) show lower interest than other segments, but still rate the overall category as *important*. The top five integration features are at least *important* to all organizations, regardless of size.

Workforce Planning and Analysis Integration Features by Organization Size

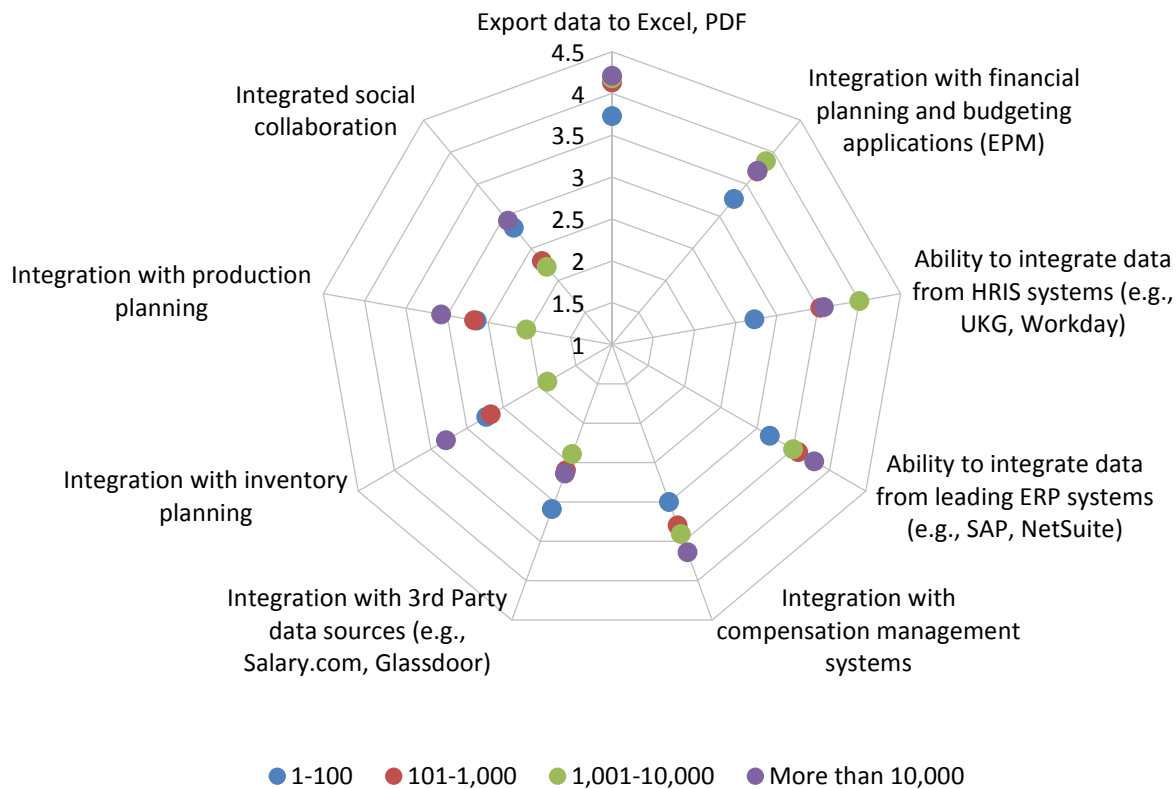


Figure 48– Workforce planning and analysis integration features by organization size

2025 Workforce Planning and Analysis Market Study

Workforce Planning and Analysis Additional Features

We asked respondents to “assign the importance associated with” a list of 13 additional features in 2025 (fig. 49).

- Interest in additional features remains strong, but in nearly all cases, is slightly lower than in 2024.
- For a second year, the top three features are *access control based on users and roles*, *support for reporting/dashboards*, and *Excel-based data entry and import*, all of which approach or exceed the 4.0 score signifying *very important*.
- In all, eight of 13 additional features are at least *important* to respondents in 2024, down from nine in 2024.

Workforce Planning and Analysis Additional Features 2023-2025

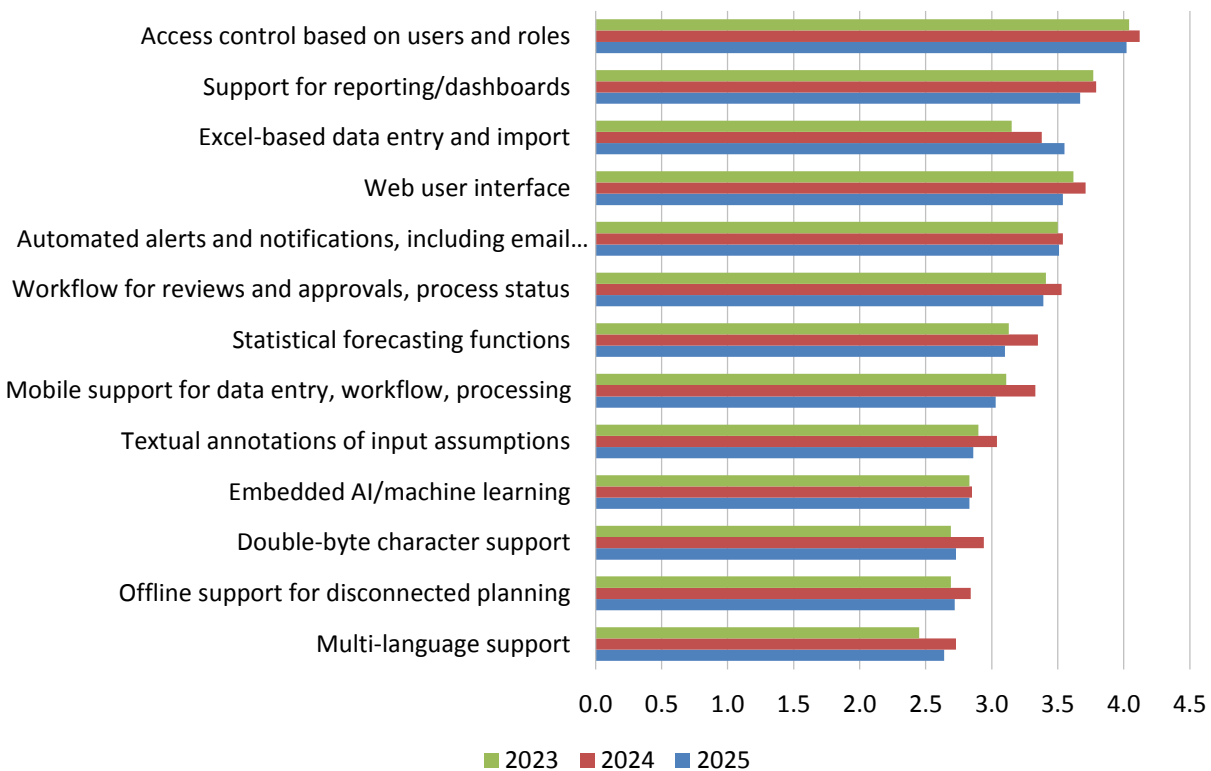


Figure 49 – Workforce planning and analysis additional features 2023-2025

2025 Workforce Planning and Analysis Market Study

In 2025, sentiment toward workforce planning and analysis additional features varies by geography. But five of the six top features—namely, *support for reporting/dashboards*; *Excel-based data entry*; *Web user interface*; *automated alerts*; and *workflow for reviews*—are somewhat clustered and of similar importance across all geographies (fig. 50).

- The top feature, *access control based on users and roles*, is very important in all geographies and especially important for EMEA.
- The top six additional features are at least *important* to respondents in all regions—down from the top eight features in 2024.

Workforce Planning and Analysis Additional Features by Geography

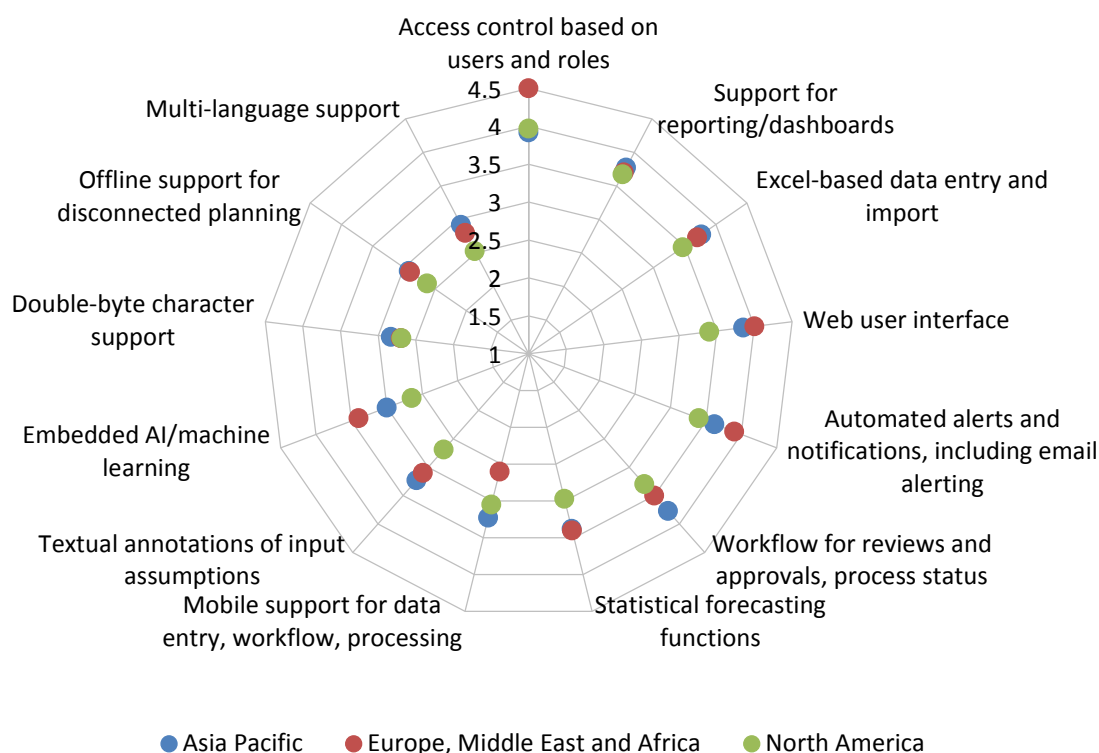


Figure 50 – Workforce planning and analysis additional features by geography

2025 Workforce Planning and Analysis Market Study

Industry sentiment toward workforce planning and analysis additional features is high across multiple industries in 2025 (fig. 51).

- For example, four of seven industries—led by *technology*, *consumer services*, *business services*, and *retail and wholesale*—assign scores greater than *very important* to the top feature, *access control based on users and roles*.
- This year, respondents in *technology*, *consumer services*, and *manufacturing* tended to give the most multiple high additional feature scores, while *financial services* and *retail & wholesale* respondents posted many average or below-average scores.

Nevertheless, we continue to observe exceptions and pockets of unique interest that are more easily observed in raw data than represented in a compressed multi-column chart.

Workforce Planning and Analysis Additional Features by Industry

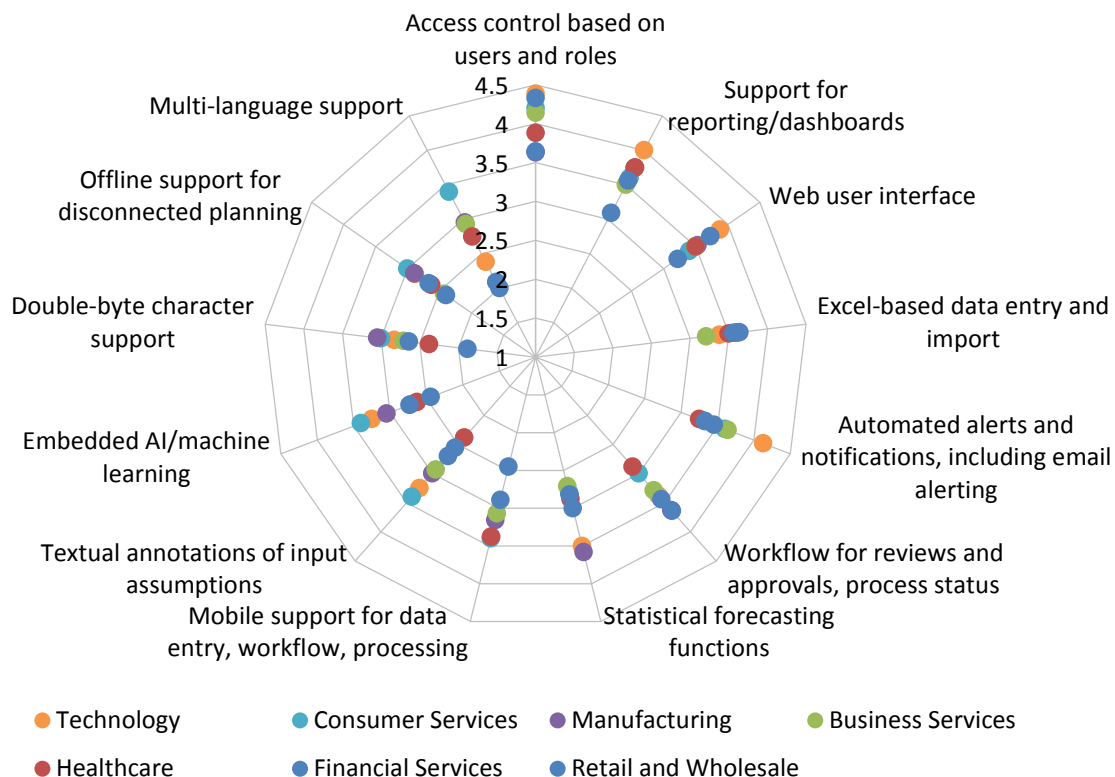


Figure 51 – Workforce planning and analysis additional features by industry

2025 Workforce Planning and Analysis Market Study

As expected, 2025 interest in workforce planning and analysis additional features varies by function.

- Interest is often highest among *BICC*, *operations*, and *IT* respondents (fig. 52). These three functions assign the highest importance to top-ranked *access control based on users and roles*.
- *Executive management* shows the lowest level of interest in many additional features, including *Excel-based data entry and import*. This rating disparity is even more noticeable when compared to *BICC*, *IT*, and *finance*, which indicate much higher importance.
- *Finance*, often a major participant in any planning and analysis activity, also views these capabilities as important, but somewhat surprisingly, is in the middle of the pack across all functions—though this finding is consistent with prior years.

Workforce Planning and Analysis Additional Features by Function

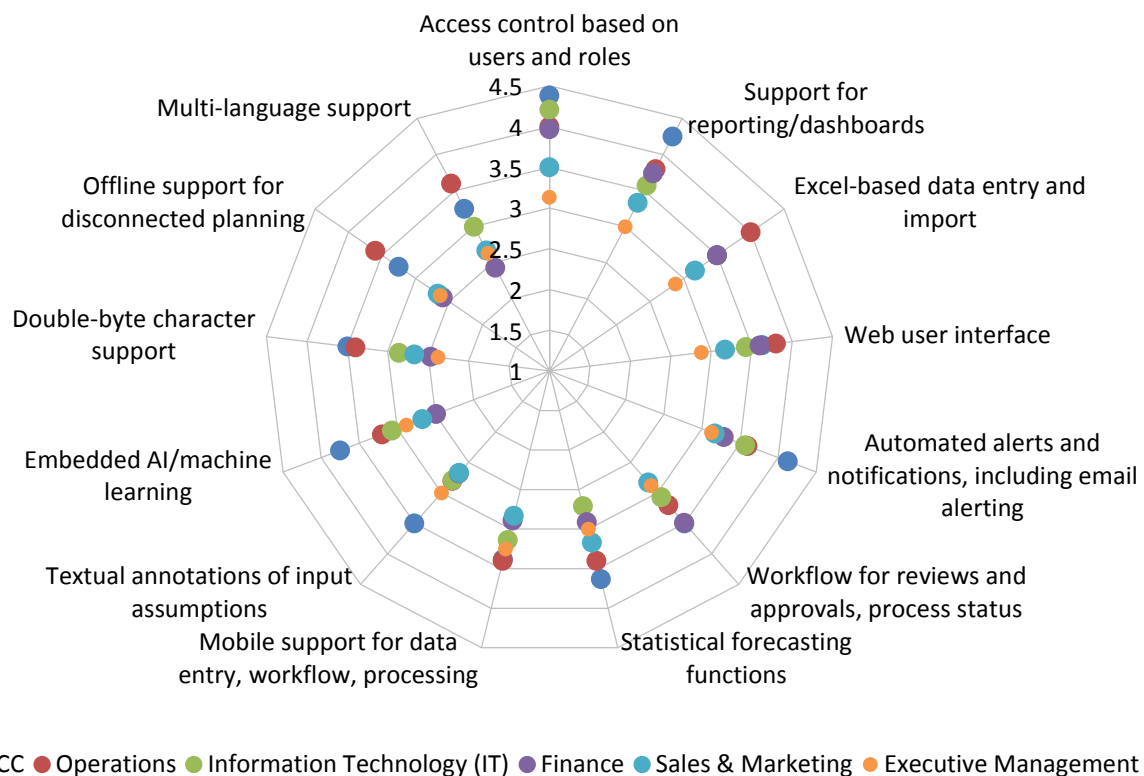


Figure 52 – Workforce planning and analysis additional features by function

2025 Workforce Planning and Analysis Market Study

Interest in workforce planning and analysis integration features generally increases with organization size and is most often highest in either *very large* organizations (those with more than 10,000 employees) or *large* organizations (with 1,001-10,000 employees; fig. 53). This year, however, midsize companies (101-1,000 employees) report the lowest level of interest in all additional features.

Like last year, interest in top features such as *access control based on users and roles*, *support for reporting/dashboards*, and *Excel-based data entry*, along with *Web user interface*, are among the most clustered additional features of universal interest to organizations of any size.

The perception of *embedded AI/machine learning* has improved from 2024, moving up two slots from its prior position of 12th out of 13.

Workforce Planning and Analysis Additional Features by Organization Size

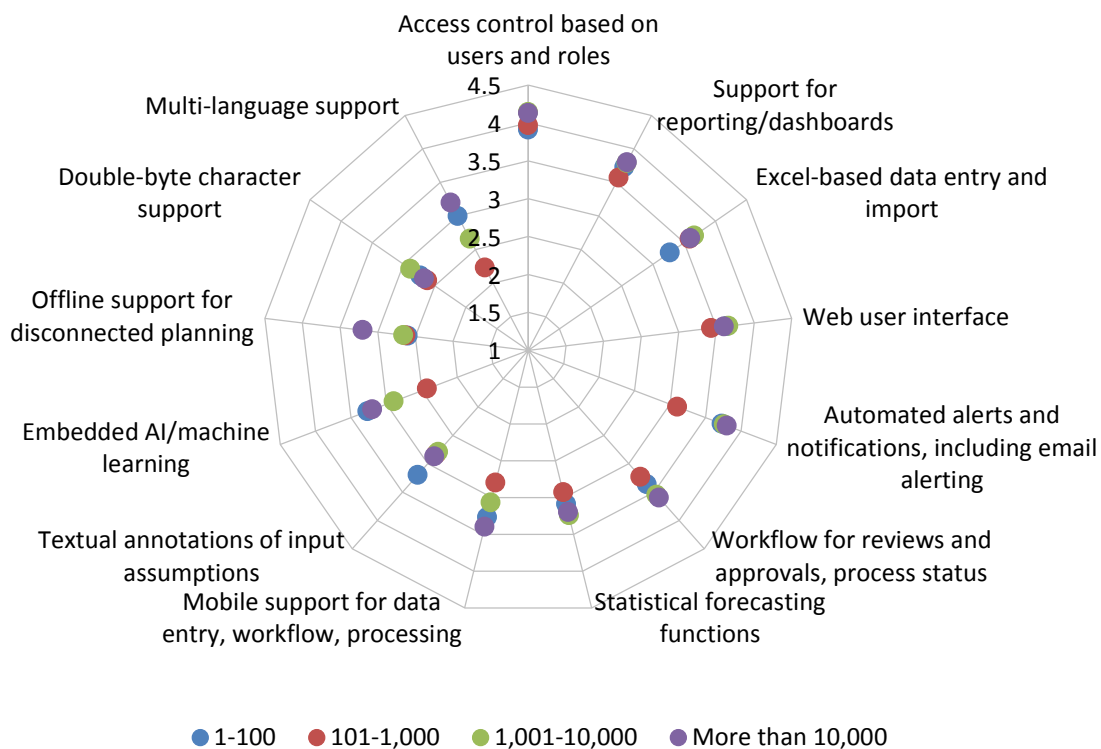


Figure 53 – Workforce planning and analysis additional features by organization size

Workforce Planning and Analysis Deployment Priorities

We asked respondents to “assign the importance associated with” a list of six workforce planning and analysis deployment priorities in 2025 (fig. 54).

- Two of the three leading options, *multitenant solution* and *public cloud*, both received scores above the level of *important*.
- Four of these deployment options declined compared with 2024 results.
- But two—public cloud and on-premises deployment—showed a slight increase in importance.

The remaining findings look more like results from 2023 than 2024, if anything.

Workforce Planning and Analysis Deployment Priorities 2023-2025

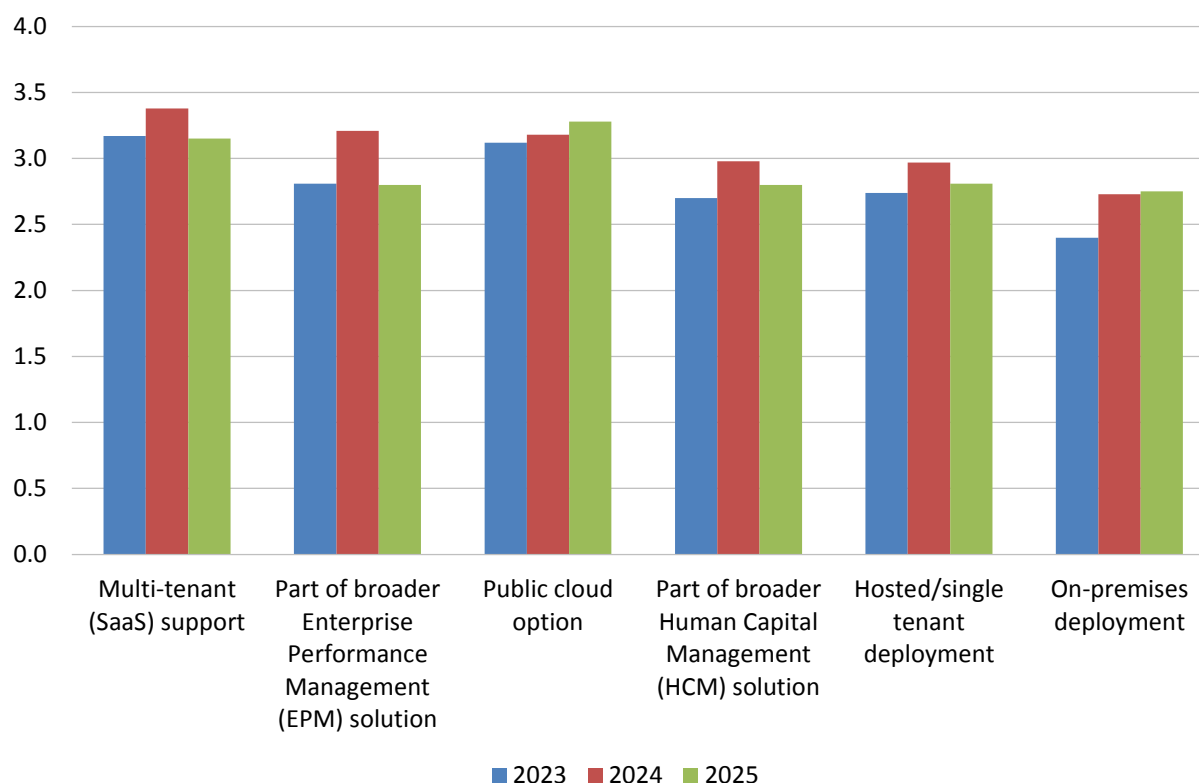


Figure 54 – Workforce planning and analysis deployment priorities 2023-2025

2025 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning and analysis deployment varies by geography in 2025, but interest is consistently highest in Asia Pacific (fig. 55).

- Across all deployment options, *multitenant SaaS support* is most clustered and rated at similar importance across geographies.
- Among the more skewed results, *on-premises deployment* is distinctly least relevant to respondents in *North America*, but much higher for *Asia Pacific* and *EMEA*, while *part of a broader HCM solution* and *part of a broader EPM solution* is distinctly most popular among *Asia Pacific* respondents.
- The top two options are at least *important* to all respondents, regardless of geography.
- Clearly, cloud-based options are the preference for many organizations, especially in *North America*.

Workforce Planning and Analysis Deployment Priorities by Geography

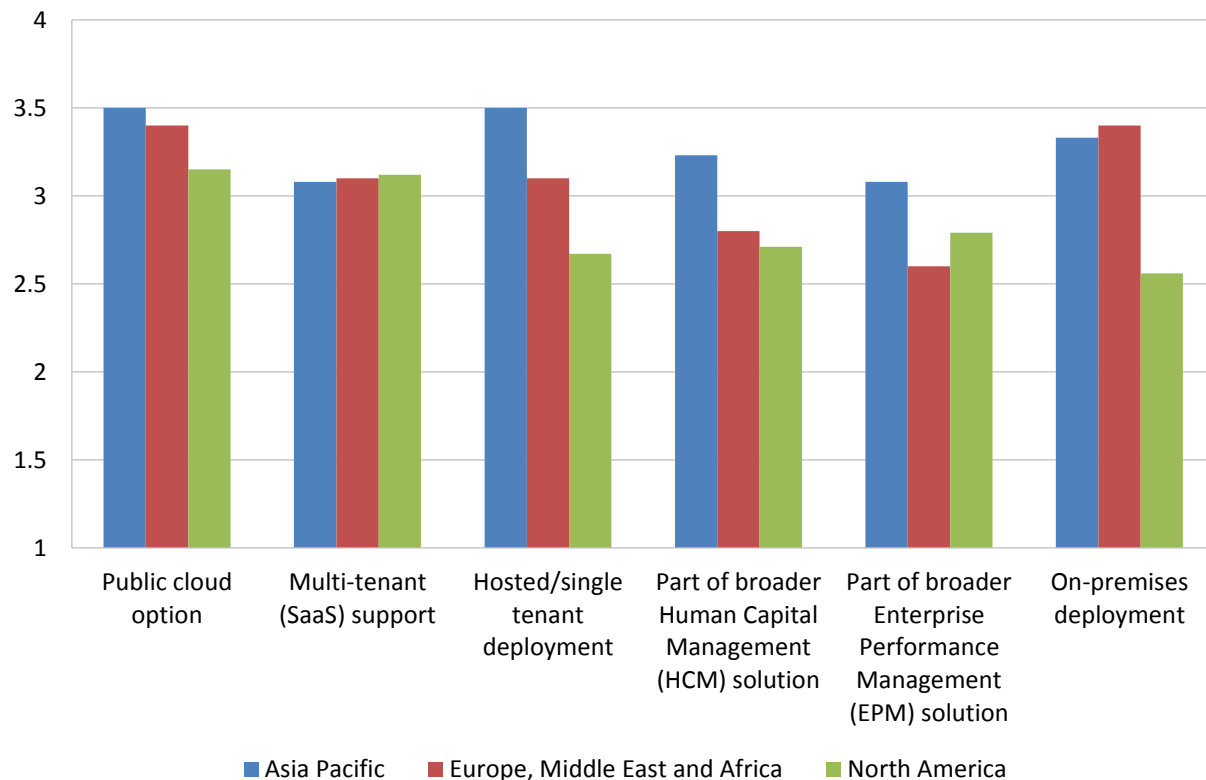


Figure 55 – Workforce planning and analysis deployment priorities by geography

2025 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning and analysis deployment priorities varies by function, though individual roles find multiple options acceptable in 2025, as they did in 2024 (fig. 56).

- For example, respondents who work in *BICC* indicate the strongest preferences of any role across all six deployment options, but assign the highest importance to *public cloud* and *hosted/single tenant deployment*.
- *BICC* staff, followed by *finance*, are by far the strongest supporters of both *part of a broader EPM solution* and *part of a broader HCM solution*.
- *On-premises deployment* was assigned the lowest overall level of importance, with *operations* giving this option the lowest score of any role or any deployment method.

Workforce Planning and Analysis Deployment Priorities by Function

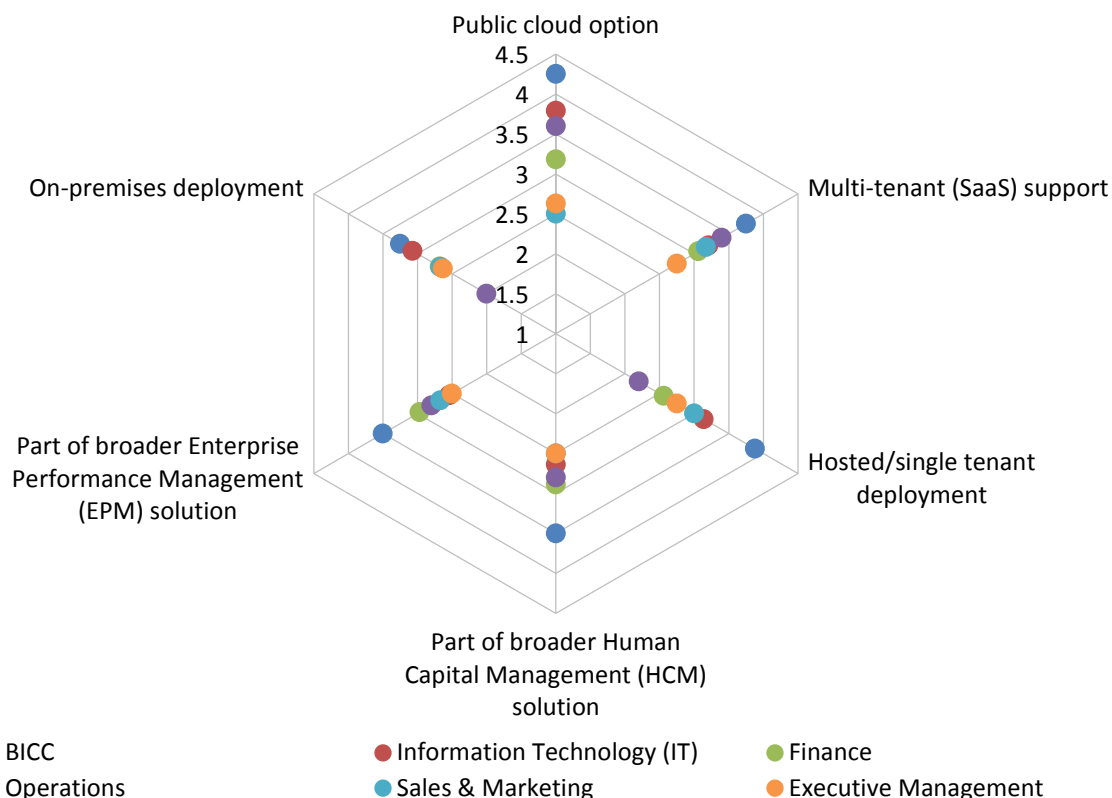


Figure 56 – Workforce planning and analysis deployment priorities by function

Industry and Vendor Analysis

Industry and Vendor Analysis

Industry Workforce Planning Feature Support

We asked industry respondents to identify all of the workforce planning features in their solution in 2025 that are currently available or planned (fig. 57).

Across the 19 features sampled, we find support very strong and near maturity. The top seven features are projected to attain 100 percent support within the next 12 months.

Among remaining features, future development plans are strongest for *multicurrency support*, *industry specific workforce planning*, and *workflow management*. We believe this supports user measures of the importance of workforce planning capability in 2025 (fig. 21).

Industry Support of Workforce Planning Features

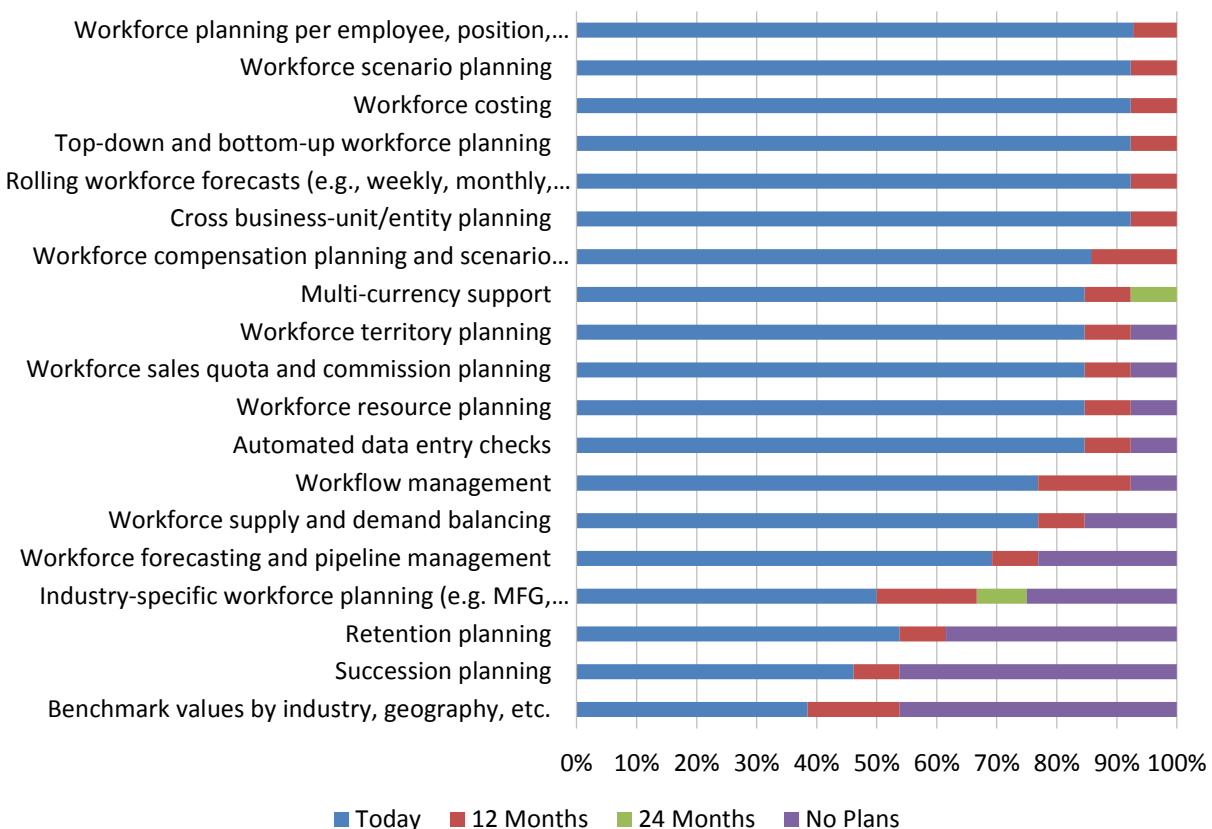


Figure 57 – Industry support of workforce planning features

Industry Workforce Analytics Domains Support

Industry support for workforce analytics domains remains strong in 2025, with half or more of our respondents currently supporting 18 of 23 domains, (fig. 58), up from 12 of 23 in 2024.

- The top three domains, *year-end projections and forecasting*, *multidimensional analysis*, and *headcount and core demographics* are 100 percent supported today.
- The greatest number of 12-month development plans target *pre-configured dashboards and reports* and *predictive workforce forecasting*. Current industry support is likely adequate to meet current demand for user workforce analysis (fig. 27).

Industry Support of Workforce Analytics Domains

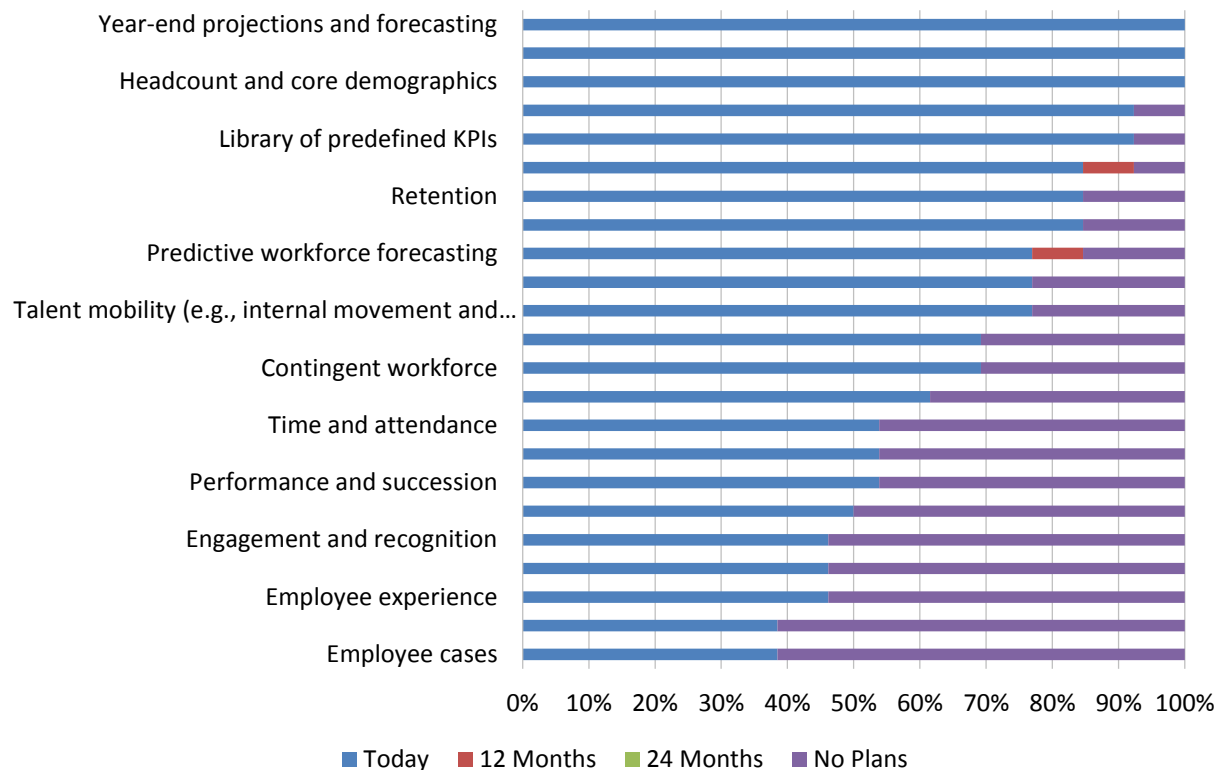


Figure 58 – Industry support of workforce analytics domains

Industry Workforce Planning and Analysis Integration Support

There is strong industry support for a range of workforce planning and analysis integration capabilities in 2025 (fig. 59).

- Only the top capability—*export data to Excel, PDF*—is fully supported this year. The next two—*ability to integrate data from leading ERP systems* and *ability to integrate data from HRIS systems*—should be fully supported within the next 12 months.
- *Integrated social collaboration* is currently supported by 62 percent of the industry sample, up significantly from 9 percent in 2024. Integration with third-party data sources is supported by 54% of the industry sample. Industry support is aligned with and well ahead of user requirements (fig. 44).

Industry Support of Workforce Integration Features

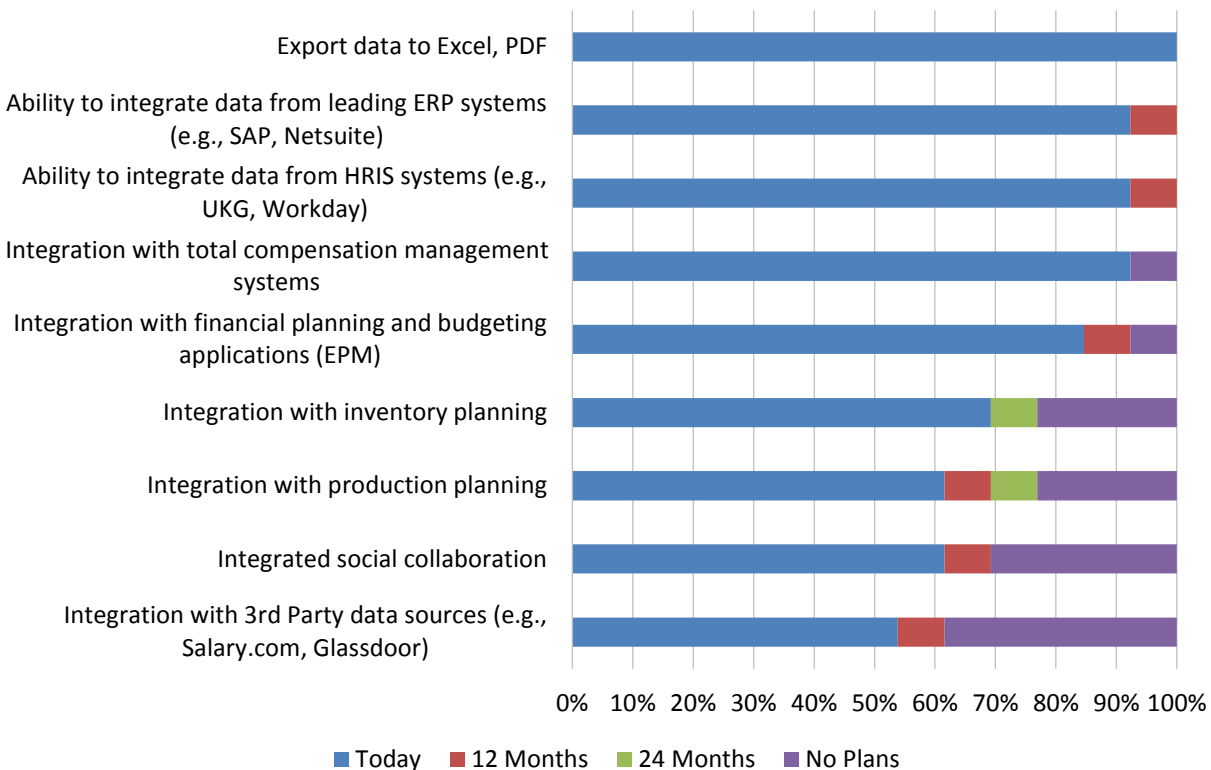


Figure 59 – Industry support of workforce integration features

2025 Workforce Planning and Analysis Market Study

Industry Workforce Planning and Analysis Technology Support

Industry support for workforce planning and analysis technology remains very strong in 2025 and is mostly complete, with further minor investment planned for the next 24 months (fig. 60). The top two features, *web user interface* and *access controls based on users and roles* are 100 percent currently supported. The next three features, *textual annotation of input assumptions*, *support for reporting/dashboards*, and *Excel-based data entry* are projected to reach 100 percent support within 12 months. Another feature, *automated alerts and notifications*, is projected to reach 100 percent support within 24 months. Of particular note is organizations' projection that support for *generative AI features* will increase from 54 percent currently to 100 percent within 12 months, a marked increase from 2024. In 2025, industry support is more than adequate for user requirements (fig. 49).

Industry Support of Workforce Technologies

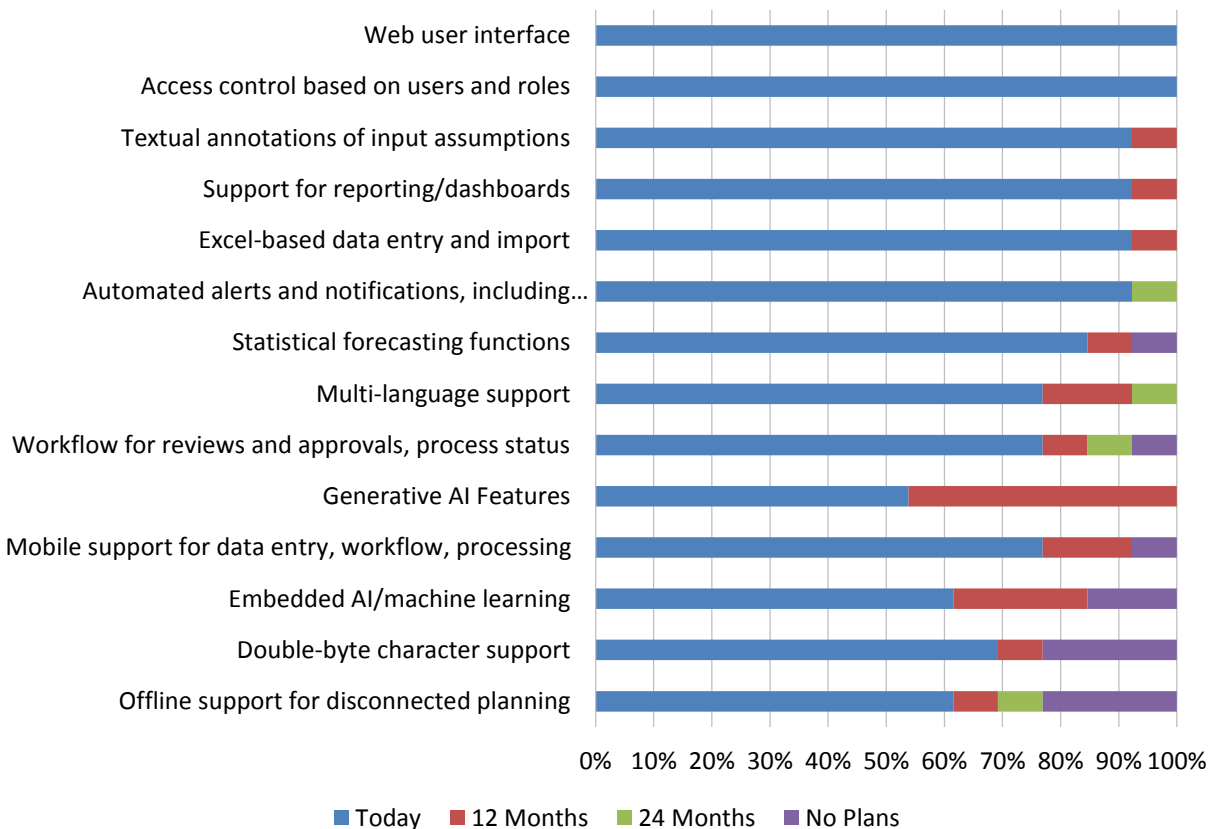


Figure 60 – Industry support of workforce technologies

Industry Workforce Planning and Analysis Packaging and Deployment Support

Industry support for various workforce planning and analysis packaging and deployment options is broad and mostly mature (fig. 61). Our 2025 industry sample reports 70 percent or higher support for *multitenant, public cloud, hosted/single tenant deployment* and *part of broader EPM solution*. *Hosted/single-tenant deployment* is the next most currently supported (82 percent), with future support expected to exceed 90 percent. Of our industry sample, 31 percent offer *HCM solution* inclusion, down from 2024. *On-premises* deployment is available from only 23 percent of this year's industry sample.

Our 2025 industry deployment options are otherwise mature and selectively strong enough to support most, if not all, user preferences (fig. 54).

Industry Support of Workforce Packaging and Deployment Options

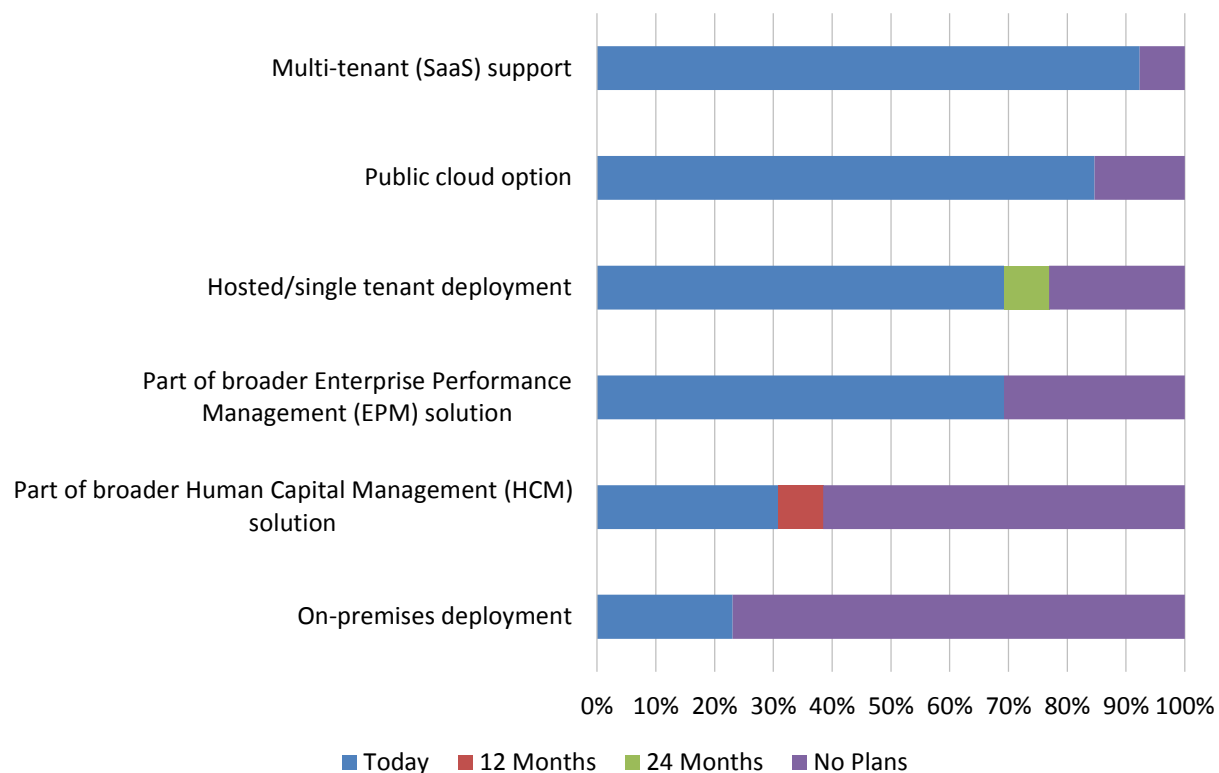


Figure 61 – Industry support of workforce packaging and deployment options

2025 Workforce Planning and Analysis Market Study

Workforce Planning and Analysis Vendor Ratings

In rating the vendors, we considered a number of criteria across planning, analytics, integration, technology, and deployment capabilities.

Top rated vendors include Anaplan (1st), Unit4 (1st), Workday (1st), Kepion (2nd), Visier (2nd), Palantir (3rd), Pigment (4th), and Vena (5th).

Workforce Planning and Analysis Vendor Ratings

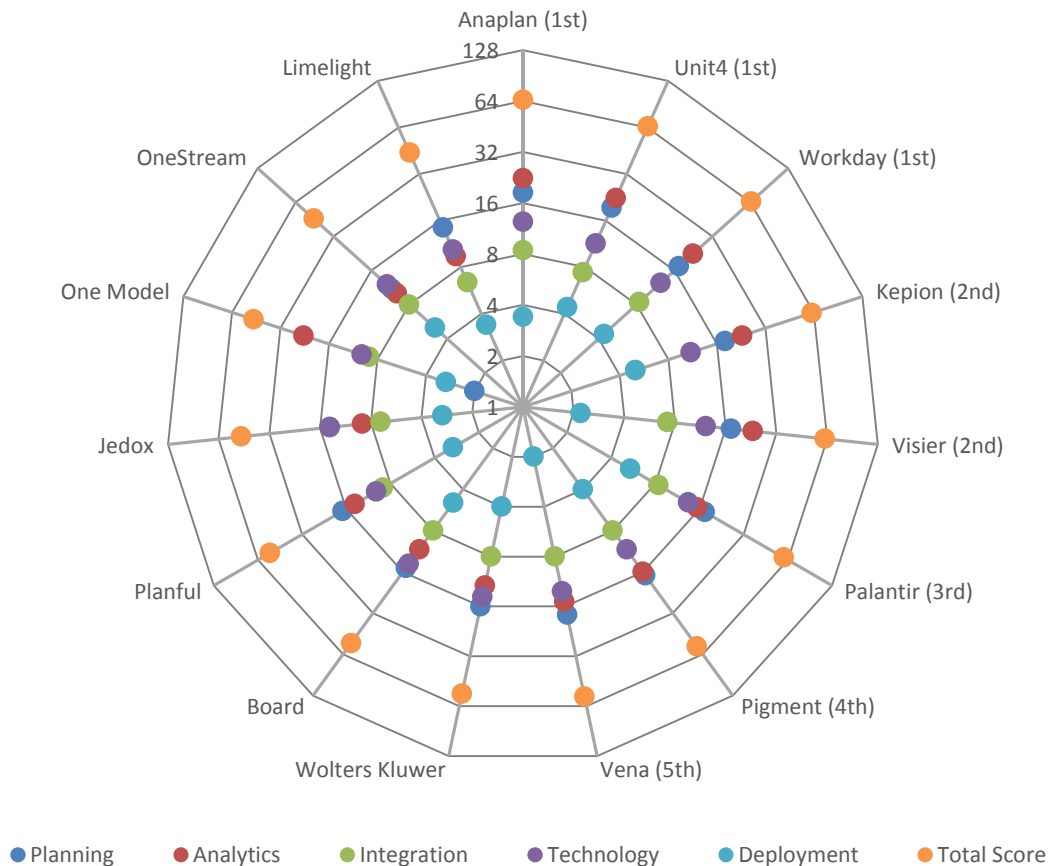


Figure 62 – Workforce planning and analysis vendor ratings

Other Dresner Advisory Services Research Reports

- Wisdom of Crowds® “Flagship” Business Intelligence Market Study
- AI, Data Science, and Machine Learning
- Analytical Data Infrastructure
- Analytical Platforms
- Cloud Computing and Business Intelligence
- Data Catalog
- Data Engineering
- Data Governance
- Embedded Business Intelligence
- Enterprise Performance Management
- ESG Reporting
- Financial Consolidation, Close Management and Reporting
- Guided Analytics
- Master Data Management
- ModelOps
- Sales Performance Management
- Self-Service Business Intelligence
- Small and Midsize Enterprise Business Intelligence
- Small and Midsize Enterprise Performance Management
- Supply Chain Planning and Analysis

2025 Workforce Planning and Analysis Market Study

Appendix: Workforce Planning and Analysis Study Survey Instrument

Name: _____

Company Name: _____

Address: _____

City: _____

State: _____

Country: _____

Email Address: _____

Major Geography

- ☐ Asia/Pacific
- ☐ Europe, Middle East and Africa
- ☐ Latin America
- ☐ North America

What is your current title?

What function are you a part of?

- ☐ Business intelligence competency center
- ☐ Executive management
- ☐ Finance
- ☐ Information Technology (IT)
- ☐ Manufacturing
- ☐ Marketing

2025 Workforce Planning and Analysis Market Study

☐ Project/program management office

☐ Sales

☐ Research and development (R&D)

☐ Other - Write In: _____

Please select an industry

☐ Advertising

☐ Aerospace

☐ Agriculture

☐ Apparel & accessories

☐ Automotive

☐ Aviation

☐ Biotechnology

☐ Broadcasting

☐ Business services

☐ Chemical

☐ Construction

☐ Consulting

☐ Consumer products

☐ Defense

☐ Distribution & logistics

☐ Education

☐ Energy

☐ Entertainment & leisure

2025 Workforce Planning and Analysis Market Study

- ☐ Executive search
- ☐ Federal government
- ☐ Financial services
- ☐ Food, beverage, & tobacco
- ☐ Healthcare
- ☐ Hospitality
- ☐ Gaming
- ☐ Insurance
- ☐ Legal
- ☐ Manufacturing
- ☐ Mining
- ☐ Motion picture & video
- ☐ Not for profit
- ☐ Pharmaceuticals
- ☐ Publishing
- ☐ Real estate
- ☐ Retail & wholesale
- ☐ Sports
- ☐ State & local government
- ☐ Technology
- ☐ Telecommunications
- ☐ Transportation
- ☐ Utilities
- ☐ Other - Write In: _____

2025 Workforce Planning and Analysis Market Study

How many employees does your company employ worldwide?

- ☐ 1-100
- ☐ 101-1,000
- ☐ 1,001-2,000
- ☐ 2,001-5,000
- ☐ 5,001-10,000
- ☐ More than 10,000

Workforce Planning and Analysis

What are your plans for employing workforce planning and analysis?*

- ☐ Using Today
- ☐ 12 Months
- ☐ 24 Months
- ☐ No Plans

What is the importance of workforce planning and analysis within your organization?

- ☐ Top priority for the overall business
- ☐ Top priority within HR
- ☐ Important to HR but not a top priority
- ☐ Not considering
- ☐ Don't know

Workforce Planning and Analytics Products

2025 Workforce Planning and Analysis Market Study

Which vendor/product are you using for workforce planning and analysis?:

How satisfied are you with your vendor and product for workforce planning and analysis?

- ☐ Extremely satisfied
- ☐ Mostly satisfied
- ☐ Somewhat satisfied
- ☐ Somewhat unsatisfied
- ☐ Unsatisfied

Who are / will be the users of workforce planning and analysis?

	Primary	Secondary	Will not use
Sales	☐	☐	☐
Finance	☐	☐	☐
Human Resources	☐	☐	☐
Information Technology (IT)	☐	☐	☐
Manufacturing	☐	☐	☐
Marketing	☐	☐	☐
Operations	☐	☐	☐
Supply Chain	☐	☐	☐

2025 Workforce Planning and Analysis Market Study

Customer Service	()	()	()
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Please assign the importance associated with the following workforce planning capabilities

	Critical	Very Important	Important	Somewhat Important	Not Important
Workforce compensation planning and scenario simulation	()	()	()	()	()
Workforce planning per employee, position, organization and vacancy	()	()	()	()	()
Benchmark values by industry, geography, etc.	()	()	()	()	()
Industry-specific workforce planning (e.g. MFG, Retail, Healthcare, Pharma, CPG)	()	()	()	()	()
Multi-currency support	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

Rolling workforce forecasts (e.g., weekly, monthly, quarterly, annual)	()	()	()	()	()
Workforce costing	()	()	()	()	()
Workforce forecasting and pipeline management	()	()	()	()	()
Workforce sales quota and commission planning	()	()	()	()	()
Workforce resource planning	()	()	()	()	()
Workforce territory planning	()	()	()	()	()
Workforce scenario planning	()	()	()	()	()
Workforce supply and demand balancing	()	()	()	()	()
Top-down and bottom-up workforce planning	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

Automated data entry checks	()	()	()	()	()
Succession planning	()	()	()	()	()
Retention planning	()	()	()	()	()
Cross business-unit/entity planning	()	()	()	()	()
Workflow management	()	()	()	()	()

Please assign the importance associated with the following workforce analysis capabilities

	Critical	Very Important	Important	Somewhat Important	Not Important
Headcount and core demographics	()	()	()	()	()
Retention	()	()	()	()	()
Engagement and recognition	()	()	()	()	()
Diversity, equity and inclusion	()	()	()	()	()
Total compensation	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

/ salary					
Performance and succession	()	()	()	()	()
Talent mobility (e.g., internal movement and promotions etc.)	()	()	()	()	()
Employee experience	()	()	()	()	()
Employee cases	()	()	()	()	()
Employee health and safety (EHS)	()	()	()	()	()
Time and attendance	()	()	()	()	()
Talent acquisition	()	()	()	()	()
Learning	()	()	()	()	()
Skills	()	()	()	()	()
Contingent workforce	()	()	()	()	()
Individual productivity (e.g., deals closed, calls answered)	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

etc.)					
History of HR data over time plus keeping track of changes	()	()	()	()	()
Library of predefined KPIs	()	()	()	()	()
Multi-dimensional analysis	()	()	()	()	()
Pre-configured dashboards and reports	()	()	()	()	()
Predictive workforce forecasting	()	()	()	()	()
Year-end projections and forecasting	()	()	()	()	()
Workforce performance benchmarking (e.g. win rates, bookings etc.)	()	()	()	()	()

How important are the following data access and manipulation capabilities?

2025 Workforce Planning and Analysis Market Study

	Critical	Very Important	Important	Somewhat Important	Not Important
Utilize and update multiple hierarchies (e.g., supervisory, finance, business unit)	()	()	()	()	()
Unify data from multiple source systems (e.g., HRIS, ATS, LMS, Survey, etc.)	()	()	()	()	()
Access relevant industry benchmarks for common metrics e.g., resignation rate or promotion rate	()	()	()	()	()
Add business data such as sales performance, customer satisfaction, etc.	()	()	()	()	()
Map and re-map changes in data overtime e.g. updates to job names or performance ratings	()	()	()	()	()
Pipe workforce	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

data into other components of the enterprise analytics architecture (e.g., data science tools or data warehouse/lake)					
Cleanse and transform raw data from source systems to prepare them for analytic use cases	()	()	()	()	()

How important is the ability to create/share the following business insights?

	Critical	Very Important	Important	Somewhat Important	Not important
Standardized metric calculations	()	()	()	()	()
Customize or add new metrics and calculations	()	()	()	()	()
Analyze specific cohorts of employees (e.g., women who became managers 2 years ago)	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

Ad-hoc analysis on any piece of shared content	()	()	()	()	()
Drill down to the specific detail within the analysis	()	()	()	()	()
Predict the probability of key events (e.g., resignation, promotion, etc.)	()	()	()	()	()
Predict future outcomes (e.g., time to fill)	()	()	()	()	()
Compare individuals to peers or across business units or geographies	()	()	()	()	()
Share data securely to HR business partners, business unit leaders and line managers	()	()	()	()	()
Share data and insights	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

via email, alerts, and/or texts					
Embed data and insights into other enterprise applications	()	()	()	()	()
Guide users in the interpretation of the data	()	()	()	()	()
Build and share dashboards (Monitoring based content)	()	()	()	()	()
Build and share data stories (Explanations of key business impacts)	()	()	()	()	()
Guide users to relevant external content (e.g., Harvard Business Review article on retention strategies)	()	()	()	()	()
End-users creating and	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

sharing their own content without specialist					
Using Gen AI to create narratives	()	()	()	()	()

How important are the following integration features for a workforce planning and analysis solution?

	Critical	Very Important	Important	Somewhat Important	Not important
Ability to integrate data from HRIS systems (e.g., UKG, Workday)	()	()	()	()	()
Ability to integrate data from leading ERP systems (e.g., SAP, NetSuite)	()	()	()	()	()
Export data to Excel, PDF	()	()	()	()	()
Integration with compensation management systems	()	()	()	()	()
Integration	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

with financial planning and budgeting applications (EPM)					
Integration with inventory planning	()	()	()	()	()
Integration with production planning	()	()	()	()	()
Integrated social collaboration	()	()	()	()	()
Integration with 3rd Party data sources (e.g., Salary.com, Glassdoor)	()	()	()	()	()

How important are the following additional features for a workforce planning and analysis solution?

	Critical	Very Important	Important	Somewhat Important	Not important
Access control based on users and roles	()	()	()	()	()
Automated alerts and notifications, including email alerting	()	()	()	()	()

2025 Workforce Planning and Analysis Market Study

Double-byte character support	()	()	()	()	()
Excel-based data entry and import	()	()	()	()	()
Support for reporting/dashboards	()	()	()	()	()
Mobile support for data entry, workflow, processing	()	()	()	()	()
Multi-language support	()	()	()	()	()
Offline support for disconnected planning	()	()	()	()	()
Statistical forecasting functions	()	()	()	()	()
Textual annotations of input assumptions	()	()	()	()	()
Web user interface	()	()	()	()	()
Workflow for reviews and approvals, process status	()	()	()	()	()
Embedded AI/machine learning	()	()	()	()	()

144) How important are the following deployment features for a workforce planning and analysis solution?

2025 Workforce Planning and Analysis Market Study

	Critical	Very Important	Important	Somewhat Important	Not important
Public cloud option	()	()	()	()	()
Multi-tenant (SaaS) support	()	()	()	()	()
Hosted/single tenant deployment	()	()	()	()	()
On-premises deployment	()	()	()	()	()
Part of broader Enterprise Performance Management (EPM) solution	()	()	()	()	()
Part of broader Human Capital Management (HCM) solution	()	()	()	()	()