The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 46% of Australian employees get ample training on workplace technology, but only 26% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 85% of Australian companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees, and 49% say that this requires increased investment in training. Overall, executives are rethinking compensation, training, and HR technology.
- 33% of Australian executives say they use quantifiable metrics and benchmarking for workforce development; 32% say they know how to extract meaningful insights from data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 36% of Australian executives say they rely on younger employees or recent graduates to fill entry-level positions, but 59% of executives say Millennials entering the workforce are impacting workforce strategy.
- Australian executives may be out of touch with what Millennials think—41% of executives think Millennials are frustrated with manager quality, but 0% of Millennials said they were. 38% of executives think Millennials will consider leaving their jobs due to lack of learning and development; 0% of Millennials said they had done so.
Australian executives are significantly less likely to say their company has a culture of continuous learning. Australian companies are significantly less likely to offer incentives for pursuing further education or formal learning activities. Australian executives are significantly less likely to say their company is capable of retaining and sharing institutional knowledge. Australian employees are more likely to say their company has a formal mentoring program, but less likely to say their company encourages collaboration across teams. Australian employees are significantly less likely to think they will be proficient in technologies in three years.

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 54% of Australian employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Australian employees are: bonuses and merit-based rewards (67%), competitive compensation (52%), and flexible work location (43%).
- 60% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: job performance and results (40%); the ability to learn and be trained quickly (40%); and loyalty and commitment (32%).

What executives are saying...

“Any growth company that has a future would be lying if they tell you that they can’t find all of the right people that they need. Where we differentiate is between skill and experience. We can find people out there that have skill. What’s especially challenging is to find experience.”
—Rick von Feldt, Australian HR consultant

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 33% of Australian executives say their company plans for succession and continuity in key roles. 36% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 38% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—34% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for analytics skills will grow; 39% of employees expect to be proficient in three years, vs. just 15% who meet this standard today.
- 61% of Australian executives say their company widely offers supplemental training programs to develop new skills.
- But only 43% of employees say their company provides the right tools to help them grow and improve job performance.
- 36% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Australia

- **Executive industries:** Executives come from the following industries: banking (12%); insurance (12%); retail (21%); public sector (16%); healthcare (18%); professional services (12%); consumer goods (7%).
- **Employee industries:** Employees come from the following industries: banking (14%); insurance (11%); retail (20%); public sector (21%); healthcare (16%); professional services (8%); consumer goods (7%).
- **Employees by function:** finance (21%); HR (12%); marketing (9%); sales (15%); operations (10%); production (6%); service (8%); IT (18%).
- **Executive titles:** CEOs (0%); COOs (5%); CFOs (5%); CIOs (20%); CMO (5%); Chief Human Resources Officer (10%); VP/Directors of HR (26%); VPs of Learning/Development (9%); VPs Compensation & Benefits (12%); VP Recruiting or Talent (9%).
- **Employee titles:** front line (37%) employees; mid-level managers (43%); line-of-business managers (17%).

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About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Brazil.

The New Face of Work
Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 47% of Brazilian employees get ample training on workplace technology; 32% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 82% of Brazilian companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 38% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 50% of Brazilian companies use quantifiable metrics and benchmarking for workforce development; 46% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 48% of Brazilian executives say they rely on younger employees or recent graduates to fill entry-level positions, but 39% of executives say Millennials entering the workforce are impacting workforce strategy.
- Brazilian executives may be out of touch with what Millennials think—56% of executives think Millennials expect more feedback on the job, vs. just 40% of Millennials who say so.
Workforce 2020—Brazil

What Matters Most at Work
Companies do not understand what their employees really want from them.

- 23% of Brazilian employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Brazilian employees are competitive compensation (70%), retirement plans (69%), and up-to-date technology (62%).
- 37% of employees say more opportunities to receive training/education would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: loyalty and long-term commitment (29%); interest in the wider business (28%); and willingness to let others lead (27%).

What executives are saying...
"I think the Gen-Y style fits the type of business we are in. We need speed. We need high-tech people. We need people who like to enjoy life while they work, and we have a lot of celebrations here when we make records in sales or units, whatever it is. They also value the social responsibility of our business."
— Alessandra Ginante, VP of Human Resources, Avon Brazil

The Leadership Cliff
Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- 43% of Brazilian executives say their company plans for succession and continuity in key roles, and 55% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 54% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees are more optimistic when it comes to leadership—63% of employees say leadership at their company is equipped to lead the company to success.

Executives say...
Our leaders are prepared to lead a diverse workforce. 36%
Talent available in leadership positions is sufficient to drive global growth. 47%
Our leadership has the skills to effectively manage talent. 52%

- 20% of employees say leadership ability is an important employee attribute at their company.
- 34% of employees say leadership is an important employee attribute.
- 41% of employees say their manager delivers on leadership expectations.
- 49% of employees say their company is committed to diversity.
Workforce 2020—Brazil

Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but 53% of employees expect to be proficient in analytics, vs. just 22% who claim that level of skill today.
- 39% of Brazilian executives say their company widely offers supplemental training programs to develop new skills.
- 58% of employees say their company provides the right tools to help them grow and improve job performance.
- 37% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Brazil

- Executive industries: Executives come from the following industries: banking (8%); insurance (10%); retail (18%); public sector (20%); healthcare (16%); professional services (14%); consumer goods (14%).
- Employee industries: Employees come from the following industries: banking (7%); insurance (10%); retail (13%); public sector (19%); healthcare (21%); professional services (13%); consumer goods (16%).
- Employees by function: finance (9%); HR (8%); marketing (9%); sales (12%); operations (20%); production (11%); service (13%); IT (18%).
- Executive titles: CEOs (7%); COOs (14%); CFOs (11%); CIOs (11%); CMO (5%); Chief Human Resources Officer (19%); VP/Directors of HR (18%); VPs of Learning/Development (8%); VPs Compensation & Benefits (3%); VP Recruiting or Talent (4%).
- Employee titles: front line (35%) employees; mid-level managers (50%); line-of-business managers (13%).

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The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Canada.

The Looming Talent Crisis

- The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.
- Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.
- This fact sheet outlines key survey findings about Canada.

Canada’s top 5 labor market shifts affecting workforce strategy:

- Increasing number of intermittent/seasonal employees (55%)
- Increasing number of consultant employees (51%)
- Difficulty recruiting employees with base-level skills (65%)
- Globalization of labor supply (53%)
- Increasing number of contingent employees (48%)

Executives say...

- "...my company has an execution plan for achieving its vision of workforce management."
- "...my company has a strong vision for the workforce it wants to build in three years."
- "...workforce issues drive strategy at the board level."

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 52% of Canadian employees get ample training on workplace technology; 38% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 82% of Canadian companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees, and 54% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 52% of Canadian companies use quantifiable metrics and benchmarking for workforce development; 48% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 51% of Canadian executives say they rely on younger employees or recent graduates to fill entry-level positions, while 37% of executives say Millennials entering the workforce are impacting workforce strategy.
- Canadian executives may be out of touch with what Millennials think—67% of executives think Millennials are frustrated with the quality of their managers, but just 22% of Millennials say they are.

Millennials vs. Non-Millennials

- "I expect more feedback than I currently receive." 44%
- "I am interested in quality of life over career path." 36%
- "I frequently collaborate with colleagues in other areas of the company." 49%

- "I expect more feedback than I currently receive." 37%
- "I am interested in quality of life over career path." 50%
- "I frequently collaborate with colleagues in other areas of the company." 53%
Workforce 2020—Canada

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 27% of Canadian employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Canadian employees are: competitive compensation (75%), retirement plans (68%), and vacation time (60%).
- 35% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: leadership ability (36%); high level of education and/or training (31%); and job performance and results (28%).

What executives are saying…

“I think that if you marry [Millenials’] enthusiasm, their can-do attitude, their skill set, with the wisdom of the older worker, it’s a dynamite combination and we’re experiencing it in all kinds of areas.”

—Jo-Ann Ball, Vice President Human Resources, Magellan Aerospace

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 47% of Canadian executives say their company plans for succession and continuity in key roles. However, 60% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 45% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—56% of employees say leadership at their company is equipped to lead the company to success.

Executives say…

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Our leaders are prepared to lead a diverse workforce.</td>
<td>35%</td>
</tr>
<tr>
<td>Talent available in leadership positions is sufficient to drive global growth.</td>
<td>54%</td>
</tr>
<tr>
<td>Our leadership has the skills to effectively manage talent.</td>
<td>60%</td>
</tr>
</tbody>
</table>

- 36% of employees say leadership ability is an important employee attribute at their company.
- 22% of employees say their manager delivers on leadership expectations.
- 50% of employees say their company is committed to diversity.
Workforce 2020—Canada

Bridging the Talent Gap—
The Learning Mandate

**Better training and education opportunities would benefit employees and businesses alike.**

- The need for technology skills (e.g. analytics, cloud) will grow, but 44% of employees expect to be proficient in analytics in the next three years, vs. just 19% with proficient skills now.
- 38% of Canadian executives say their company widely offers supplemental training programs to develop new skills.
- 63% of employees say their company provides the right tools to help them grow and improve job performance.
- 41% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Canada

- **Executive industries**: Executives come from the following industries: Banking (10%); insurance (7%); retail (17%); public sector (17%); healthcare (17%); professional services (14%); consumer goods (19%).
- **Employee industries**: Employees come from the following industries: Banking (12%); insurance (11%); retail (19%); public sector (22%); healthcare (19%); professional services (9%); consumer goods (6%).
- **Employees by function**: Finance (7%); HR (10%); marketing (7%); sales (16%); operations (23%); production (8%); service (8%); IT (16%).
- **Executive titles**: CEOs (1%); COOs (24%); CFOs (17%); CIOs (9%); CMOs (2%); Chief Human Resources Officer (15%); VP/Directors of HR (17%); VPs of Learning/Development (7%); VPs Compensation & Benefits (2%); VP Recruiting or Talent (8%).
- **Employee titles**: front line (31%) employees; mid-level managers (42%); line-of-business managers (22%).

### About the project

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Workforce 2020

Country Fact Sheet: Chile

The Looming Talent Crisis

♦ The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

♦ Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

♦ This fact sheet outlines key survey findings about Chile.

Chile’s top 5 labor market shifts affecting workforce strategy:

- Globalization of labor supply (60%)
- Increasing number of consultant employees (60%)
- Increasing number of intermittent/seasonal employees (45%)
- Difficulty recruiting employees with base-level skills (63%)
- Changing expectations of employees (55%)

Executives say...

...my company has a strong vision for the workforce it wants to build in three years.

...my company has an execution plan for achieving its vision of workforce.

...workforce issues drive strategy at the board level.

44% 43% 37%

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

♦ 48% of Chilean employees get ample training on workplace technology; 39% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

♦ 92% of Chilean executives say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 40% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

♦ 52% of Chilean companies use quantifiable metrics and benchmarking for workforce development; 46% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

♦ 42% of Chilean executives say they rely on younger employees or recent graduates to fill entry-level positions, and 40% of executives say Millennials entering the workforce are impacting workforce strategy.

♦ Chilean executives may be out of touch with what Millennials think—55% of executives think Millennials are frustrated with the quality of their managers, but just 28% of Millennials say they are.
What Matters Most at Work

Companies do not understand what their employees really want from them.

- 22% of Chilean employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Chilean employees are: competitive compensation (77%), access to social media (68%), and vacation time (61%).
- 41% of employees say access to current technology would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: loyalty and long-term commitment (30%); interest in the wider business (25%); and self-directed learning (24%).

What executives are saying...

“Workforce development has been an important driver for our company for many years now. We have not experienced a major change in direction, but rather, a continuous fine tuning over what works and what doesn’t.”
—Claudia Nario, Director of Talent, Staffing, Training, OD & Internal Communications, LATAM Airlines Group

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 41% of Chilean executives say their company plans for succession and continuity in key roles. 58% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 43% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees largely agree with employers when it comes to leadership—55% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap—
The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, and 58% of employees expect to be proficient in analytics in the next three years, vs. just 27% with proficient skills now.
- 40% of Chilean executives say their company widely offers supplemental training programs to develop new skills.
- 62% of employees—a number that’s higher than most other countries—say their company provides the right tools to help them grow and improve job performance.
- 44% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Chile

- **Executive industries**: Executives come from the following industries: banking (8%); insurance (10%); retail (18%); public sector (16%); healthcare (14%); professional services (14%); consumer goods (20%).
- **Employee industries**: Employees come from the following industries: banking (13%); insurance (14%); retail (25%); public sector (19%); healthcare (13%); professional services (8%); consumer goods (10%).
- **Employees by function**: finance (15%); HR (11%); marketing (10%); sales (17%); operations (18%); production (6%); service (7%); IT (18%).
- **Executive titles**: CEOs (6%); COOs (20%); CFOs (13%); CIOs (6%); CMO (5%); Chief Human Resources Officer (21%); VP/Directors of HR (16%); VPs of Learning/Development (5%); VPs Compensation & Benefits (2%); VP Recruiting or Talent (6%).
- **Employee titles**: front line (28%) employees; mid-level managers (48%); line-of-business managers (23%).

About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about China.

**The Looming Talent Crisis**

- The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

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- This fact sheet outlines key survey findings about China.

**China’s top 5 labor market shifts affecting workforce strategy:**

- Globalization of labor supply (47%)
- Changing work models (e.g., telecommuting, flex time) (36%)
- Millennials entering the workforce (73%)
- Increasing number of intermittent/seasonal employees (36%)
- Difficulty recruiting employees with base-level skills (34%)

**Executives say...**

- ...my company has an execution plan for achieving its vision of workforce management.
- ...my company has a strong vision for the workforce it wants to build in three years.
- ...workforce issues drive strategy at the board level.
- 71% of executives say workforce issues drive strategy at the board level.
- 74% of executives say their company has an execution plan for achieving its vision of workforce management.
- 25% of executives say my company has a strong vision for the workforce it wants to build in three years.

**The New Face of Work**

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- While 60% of Chinese employees get ample training on workplace technology, only 31% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

- 92% of Chinese executives say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 26% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

- 26% of Chinese companies use quantifiable metrics and benchmarking for workforce development; 38% know how to extract meaningful insights from that data.

**A Millennial Misunderstanding**

**Millennials are different, but not as different as companies think.**

- 37% of Chinese executives say they rely on younger employees or recent graduates to fill entry-level positions, and fully 73% of executives say Millennials entering the workforce are impacting workforce strategy.

- Chinese executives may be out of touch with what Millennials think—37% of executives think Millennials are frustrated with the quality of their managers, but just 2% of Millennials say they are.

**Millennials**

- 21% expect more feedback than they currently receive.
- 29% are interested in quality of life over career path.
- 33% frequently collaborate with colleagues in other areas of the company.

**Non-Millennials**

- 46% expect more feedback than they currently receive.
- 36% are interested in quality of life over career path.
- 42% frequently collaborate with colleagues in other areas of the company.
Workforce 2020—China

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 35% of Chinese employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Chinese employees are: competitive compensation (60%), bonuses and merit-based rewards (56%), and education (42%).
- 54% of employees say defined opportunities for career development would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: high level of education/ training (52%); loyalty and long-term commitment (49%); and the ability to learn/ be trained quickly (46%).

What executives are saying...

"Workforce development is becoming critical at all levels. It’s a key driver of retention. I have led the initiatives over the past 12 months looking at applying and different development programs and succession paths at both senior level, mid-level and junior level. Clearly our goal is to improve retention."

—Chris Watson, Chief People Officer, Naked Retreats

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 33% of Chinese executives say their company plans for succession and continuity in key roles. 34% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 39% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—42% of employees say leadership at their company is equipped to lead the company to success.

<table>
<thead>
<tr>
<th>Executives say...</th>
<th>26%</th>
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<td>Talent available in leadership positions is sufficient to drive global growth.</td>
<td>Our leadership has the skills to effectively manage talent.</td>
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</tbody>
</table>

- 4% of employees say leadership ability is an important employee attribute at their company.
- 31% of employees say their company is committed to diversity.
- 0% of employees say their manager delivers on leadership expectations.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but only 33% of employees expect to be proficient in analytics in the next three years, and just 16% are proficient now.
- 82% of Chinese executives say their company widely offers supplemental training programs to develop new skills.
- But only 27% of employees say their company provides the right tools to help them grow and improve job performance.
- 43% of employees say their company encourages continuing education and training to further career development.

Survey demographics: China

- Executive industries: Executives come from the following industries: banking (9%); insurance (7%); retail (17%); public sector (15%); healthcare (18%); professional services (19%); consumer goods (15%).
- Employee industries: Employees come from the following industries: banking (11%); insurance (9%); retail (23%); public sector (7%); healthcare (31%); professional services (8%); consumer goods (9%).
- Employees by function: finance (8%); HR (13%); marketing (17%); sales (13%); operations (14%); production (10%); service (7%); IT (18%).
- Executive titles: CEOs (4%); COOs (4%); CFOs (8%); CIOs (16%); CMO (2%); Chief Human Resources Officer (8%); VP/Directors of HR (8%); VPs of Learning/Development (10%); VPs Compensation & Benefits (26%); VP Recruiting or Talent (14%).
- Employee titles: front line (45%) employees; mid-level managers (46%); line-of-business managers (8%).

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This fact sheet outlines key survey findings about Colombia.

**The Looming Talent Crisis**

- The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.
- Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.
- This fact sheet outlines key survey findings about Colombia.

**Colombia’s top 5 labor market shifts affecting workforce strategy:**

- 60% Globalization of labor supply
- 55% Changing work modes (e.g., telecommuting, flex time)
- 68% Difficulty recruiting employees with base-level skills
- 59% Increasing number of intermittent/seasonal employees
- 55% Increasing number of consultant employees

Executives say...

- ...my company has a strong vision for the workforce it wants to build in three years.
- ...my company has an execution plan for achieving its vision of workforce management.
- ...workforce issues drive strategy at the board level.

**A Millennial Misunderstanding**

*Millennials are different, but not as different as companies think.*

- 45% of Colombian executives say they rely on younger employees or recent graduates to fill entry-level positions, 47% of executives say Millennials entering the workforce are impacting workforce strategy.
- Colombian executives may be out of touch with what Millennials think—78% of executives think Millennials are frustrated with the quality of their managers, but just 23% of Millennials say they are.

**The New Face of Work**

*Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.*

- 48% of Colombian employees get ample training on workplace technology; 44% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 92% of Colombian executives say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 38% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 57% of Colombian companies use quantifiable metrics and benchmarking for workforce development; 61% know how to extract meaningful insights from that data, compared with 42% of the global total.
Workforce 2020—Colombia

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 24% of Colombian employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Colombian employees are: competitive compensation (79%), retirement plans (70%), and flexible work location (65%).
- 33% of employees say more opportunities to receive training/education would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: interest in the wider business (32%); loyalty and long-term commitment (30%); and leadership ability (28%).

What executives are saying...

“Right now we have very good people who are making very good development progress. That’s because we are not just preparing the people on hard skills, we are preparing on soft skills like leadership, teamwork, services…so they can be managers in the store easily.”

— Karym Grijalba, Human Resources Manager, Sodimac Colombia

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- 57% of Colombian executives say their company plans for succession and continuity in key roles. 74% say that when a senior person leaves, the company tends to fill the role from within the organization—a significantly higher percentage than the total respondents.
- 49% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees largely agree with employers when it comes to leadership—54% of employees say leadership at their company is equipped to lead the company to success.

Executives say...

- 39% of employees say leadership ability is an important employee attribute at their company.
- 45% of employees say their manager delivers on leadership expectations.
- 28% of executives say leadership is an important employee attribute.
- 50% of employees say their company is committed to diversity.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, and 65% of employees expect to be proficient in analytics in the next three years, vs. just 32% with proficient skills now.
- 47% of Colombian executives say their company widely offers supplemental training programs to develop new skills.
- 70% of employees say their company provides the right tools to help them grow and improve job performance, compared with 45% of the global total.
- 50% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Colombia

- **Executive industries:** Executives come from the following industries: banking (6%); insurance (8%); retail (16%); public sector (15%); healthcare (17%); professional services (17%); consumer goods (17%); other (17%).
- **Employee industries:** Employees come from the following industries: banking (8%); insurance (8%); retail (15%); public sector (14%); healthcare (17%); professional services (22%); consumer goods (18%).
- **Employees by function:** finance (11%); HR (10%); marketing (14%); sales (12%); operations (15%); production (10%); service (9%); IT (18%).
- **Executive titles:** CEOs (7%); COOs (26%); CFOs (11%); CIOs (3%); CMOs (3%); Chief Human Resources Officer (20%); VP/Directors of HR (14%); VPs of Learning/Development (6%); VPs Compensation & Benefits (5%); VP Recruiting or Talent (8%).
- **Employee titles:** front line (37%) employees; mid-level managers (39%); line-of-business managers (23%).

About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Czech Republic.

The New Face of Work
Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 48% of Czech employees get ample training on workplace technology; 30% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 80% of Czech executives say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 40% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 52% of Czech companies use quantifiable metrics and benchmarking for workforce development; 42% know how to extract meaningful insights from that data.

A Millennial Misunderstanding
Millennials are different, but not as different as companies think.

- 57% of Czech executives say they rely on younger employees or recent graduates to fill entry-level positions, 54% of executives say Millennials entering the workforce are impacting workforce strategy.
- Czech executives may be out of touch with what Millennials think—66% of executives think Millennials are frustrated with the quality of their managers, but just 10% of Millennials say they are.

The Looming Talent Crisis

- Czech Republic’s top 5 labor market shifts affecting workforce strategy:
  - Globalization of labor supply (60%)
  - Increasing number of contingent employees (55%)
  - Millennials entering the workforce (54%)
  - Difficulty recruiting employees with base-level skills (67%)
  - Aging workforce (56%)

Executives say...

- “…my company has a strong vision for the workforce it wants to build in three years.”
- “…workforce issues drive strategy at the board level.”
- “…my company has an execution plan for achieving its vision of workforce management.”
What Matters Most at Work

*Companies do not understand what their employees really want from them.*

- 33% of Czech employees are satisfied or very satisfied with their jobs.
- The *most important benefits and incentives* to Czech employees are: competitive compensation (66%), bonuses and merit-based rewards (59%), and retirement plans (54%).
- 38% of employees say *more comprehensive benefits* would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: the ability to learn and be trained (31%); a high level of education (31%); and loyalty and long-term commitment (30%).

What executives are saying...

“Younger employees want balance between work and leisure time. They’re not always willing to work overtime, and sometimes loyalty is lacking. On the other hand, they tend to have more knowledge of foreign languages and technology.”

— Věra Marková, HR director, České dráhy

The Leadership Cliff

*Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.*

- 42% of Czech executives say their company plans for succession and continuity in key roles. 49% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 42% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees largely agree with employers when it comes to leadership—50% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, and 52% of employees expect to gain proficiency in analytics in the next three years, vs. just 14% with proficient skills now.
- 45% of Czech executives say their company widely offers supplemental training programs to develop new skills.
- 61% of employees say their company provides the right tools to help them grow and improve job performance.
- 35% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Czech Republic

- **Executive industries:** Executives come from the following industries: banking (5%); insurance (8%); retail (17%); public sector (16%); healthcare (18%); professional services (17%); consumer goods (19%).
- **Employee industries:** Employees come from the following industries: banking (3%); insurance (8%); retail (17%); public sector (16%); healthcare (20%); professional services (22%); consumer goods (14%).
- **Employees by function:** finance (11%); HR (9%); marketing (6%); sales (6%); operations (16%); production (10%); service (12%); IT (30%).
- **Executive titles:** CEOs (7%); COOs (18%); CFOs (15%); CIOs (15%); CMOs (3%); Chief Human Resources Officer (20%); VP/Directors of HR (10%); VPs of Learning/Development (7%); VPs Compensation & Benefits (2%); VP Recruiting or Talent (3%).
- **Employee titles:** front line (47%) employees; mid-level managers (35%); line-of-business managers (18%).

About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Denmark.

### Denmark’s top 5 labor market shifts affecting workforce strategy:

- **55%** Increasing number of intermittent/seasonal employees
- **49%** Increasing number of contingent employees
- **56%** Globalization of labor supply
- **52%** Difficulty recruiting employees with base-level skills
- **47%** Millennials entering the workforce

### Executives say...

- **47%** ...my company has an execution plan for achieving its vision of workforce management.
- **38%** ...my company has a strong vision for the workforce it wants to build in three years.
- **49%** ...workforce issues drive strategy at the board level.

### The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- **48%** of Danish employees get ample training on workplace technology; **29%** get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- **91%** of Danish companies say they are increasingly using [contingent, intermittent, seasonal, or consultant employees]; but **31%** say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- **40%** of Danish companies use quantifiable metrics and benchmarking for workforce development; **43%** know how to extract meaningful insights from that data.

### A Millennial Misunderstanding

**Millennials are different, but not as different as companies think.**

- **51%** of Danish executives say they rely on younger employees or recent graduates to fill entry-level positions, **47%** of executives say Millennials entering the workforce are impacting workforce strategy.
- Danish executives may be out of touch with what Millennials think—**46%** think Millennials are frustrated with manager quality, but just **4%** of Millennials say they are. **52%** of executives think Millennials will consider leaving their jobs due to lack of learning and development—**18%** of Millennials say they have.
What Matters Most at Work

Companies do not understand what their employees really want from them.

- 43% of Danish employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Danish employees are: competitive compensation (75%), bonuses and merit-based rewards (54%), and supplemental training programs (46%).
- 45% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: job performance and results (33%); the ability to learn and be trained quickly (32%); and substantial experience in the field (32%).

What executives are saying...

“When our employee engagement survey says one thing and our organizational health review says another, we actively take those results and ask ourselves why the results are dissimilar. Once we understand the real issues, we address them.”

—Lori Sawyer Jenson, Head of HR Functional Excellence & Transformation, Arla Foods

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 34% of Danish executives say their company plans for succession and continuity in key roles. 42% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 43% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—38% of employees say leadership at their company is equipped to lead the company to success.

Executives say...

<table>
<thead>
<tr>
<th>Executive Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our leaders are prepared to lead a diverse workforce.</td>
<td>36%</td>
</tr>
<tr>
<td>Talent available in leadership positions is sufficient to drive global growth.</td>
<td>38%</td>
</tr>
<tr>
<td>Our leadership has the skills to effectively manage talent.</td>
<td>63%</td>
</tr>
</tbody>
</table>

- 16% of employees say leadership ability is an important employee attribute at their company.
- 20% of employees say their manager delivers on leadership expectations.
- 63% of employees say their company is committed to diversity.
2020 Workforce—Denmark

Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but less than a quarter of employees expect to be proficient in cloud, mobile, and digital media in three years; 50% expect proficiency in analytics by then.
- 58% of Danish executives say their company widely offers supplemental training programs to develop new skills.
- 45% of employees say their company provides the right tools to help them grow and improve job performance.
- 43% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Denmark

- **Executive industries**: Executives come from the following industries: banking (6%); insurance (8%); retail (17%); public sector (16%); healthcare (17%); professional services (15%); consumer goods (21%).
- **Employee industries**: Employees come from the following industries: banking (4%); insurance (9%); retail (16%); public sector (16%); healthcare (19%); professional services (20%); consumer goods (16%).
- **Employees by function**: finance (16%); HR (8%); marketing (8%); sales (9%); operations (15%); production (12%); service (5%); IT (20%).
- **Executive titles**: CEOs (1%); COOs (10%); CFOs (6%); CIOs (7%); CMO (1%); Chief Human Resources Officer (9%); VP/Directors of HR (36%); VPs of Learning/Development (12%); VPs Compensation & Benefits (15%); VP Recruiting or Talent (3%).
- **Employee titles**: front line (38%) employees; mid-level managers (49%); line-of-business managers (13%).

About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about France.

France’s top 5 labor market shifts affecting workforce strategy:
- 69% Difficulty recruiting employees with base-level skills
- 69% Increasing number of intermittent/seasonal employees
- 53% Globalization of labor supply
- 53% Increasing number of contingent employees
- 45% Millennials entering the workforce

Executive say...
- 39%...my company has an execution plan for achieving its vision of workforce management.
- 34%...my company has a strong vision for the workforce it wants to build in three years.
- 46%...workforce issues drive strategy at the board level.

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 52% of French employees get ample training on workplace technology; 33% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 82% of French companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees, and 37% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 50% of French companies use quantifiable metrics and benchmarking for workforce development; 52% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 49% of French executives say they rely on younger employees or recent graduates to fill entry-level positions, but 45% of executives say Millennials entering the workforce are impacting workforce strategy.
- French executives may be out of touch with what Millennials think—64% think Millennials are frustrated with manager quality, but 8% of Millennials say they are. 52% of executives think Millennials will consider leaving their jobs due to lack of learning and development —26% of Millennials say they have.
What Matters Most at Work

Companies do not understand what their employees really want from them.

♦ 36% of French employees are satisfied or very satisfied with their jobs.

♦ The most important benefits and incentives to French employees are: competitive compensation (71%), flexible work location (54%), and retirement plans (53%).

♦ 36% of employees say higher compensation would increase loyalty and engagement with their current job.

♦ Employees think the following attributes are most important to their employer: loyalty and long-term commitment (33%); the ability to learn and be trained quickly (29%); and diverse backgrounds (29%).

What executives are saying...

“The challenge for us is to find next-generation leaders who can take the business into the future. They need to be technically ready, and we need to surround them with a network of people who trust them professionally. However, and what’s most difficult, is getting them to appropriate the business and develop it. Because that’s intangible, one of the key strategic issues is instilling this idea in younger people.”

—Frédéric Duponchel, Managing Director, Accuracy

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

♦ Just 35% of French executives say their company plans for succession and continuity in key roles. 48% say that when a senior person leaves, the company tends to fill the role from within the organization.

♦ 43% of executives say their plans for growth are being hampered by lack of access to the right leaders.

♦ Employees agree with employers when it comes to leadership—37% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but approximately a third of employees expect to be proficient in cloud and mobile technologies in three years, while more than half expect to be proficient in analytics, programming/development, and office productivity software.
- 46% of French executives say their company widely offers supplemental training programs to develop new skills.
- 48% of employees say their company provides the right tools to help them grow and improve job performance.
- 35% of employees say their company encourages continuing education and training to further career development.

Survey demographics: France

- **Executive industries**: Executives come from the following industries: banking (9%); insurance (10%); retail (18%); public sector (16%); healthcare (16%); professional services (18%); consumer goods (14%).
- **Employee industries**: Employees come from the following industries: banking (8%); insurance (10%); retail (16%); public sector (14%); healthcare (9%); professional services (18%); consumer goods (25%).
- **Employees by function**: finance (11%); HR (6%); marketing (12%); sales (14%); operations (14%); production (8%); service (18%); IT (18%).
- **Executive titles**: CEOs (6%); COOs (16%); CFOs (7%); CIOs (3%); CMO (1%); Chief Human Resources Officer (15%); VP/Managers of HR (21%); VPs of Learning/Development (13%); VPs Compensation & Benefits (8%); VP Recruiting or Talent (12%).
- **Employee titles**: front line (36%) employees; mid-level managers (52%); line-of-business managers (10%).

About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike. Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Germany.

The Looming Talent Crisis

- The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.
- Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.
- This fact sheet outlines key survey findings about Germany.

Germany’s top 5 labor market shifts affecting workforce strategy:

- **Globalization of labor supply** (56%)
- **Aging workforce** (51%)
- **Increasing number of intermittent/seasonal employees** (49%)
- **Employee expectations are changing** (51%)
- **Difficulty recruiting employees with base-level skills** (59%)

Executives say...

- ...my company has an execution plan for achieving its vision of workforce management.
- ...my company has a strong vision for the workforce it wants to build in three years.
- ...workforce issues drive strategy at the board level.

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- **48%** of German employees get **ample training on workplace technology**; **53%** get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- **79%** of German companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; **37%** say that this requires **changing HR policy**. Overall, executives are rethinking compensation, training, and HR technology.
- **46%** of German companies use **quantifiable metrics and benchmarking** for workforce development; **45%** know how to **extract meaningful insights** from that data.

A Millennial Misunderstanding

**Millennials are different, but not as different as companies think.**

- **54%** of German executives say they rely on **younger employees or recent graduates** to fill entry-level positions, but **41%** of executives say **Millennials entering the workforce** are impacting workforce strategy.
- German executives may be out of touch with what Millennials think—**71%** of executives think Millennials are **frustrated with manager quality**, while **16%** of Millennials say they are. **56%** of executives say **Millennials think business processes are too bureaucratic**, while just **31%** of Millennials say that’s true.
**Workforce 2020—Germany**

**What Matters Most at Work**

*Companies do not understand what their employees really want from them.*

- 39% of German employees are satisfied or very satisfied with their jobs.
- The **most important benefits and incentives** to German employees are: competitive compensation (76%), bonuses and merit-based rewards (53%), and retirement plans (53%).
- 30% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: a high level of education and/or institutional training (32%); the ability to learn and be trained quickly (29%); and self-directed learning (28%).

**What executives are saying...**

“Our manufacturing processes require a lot of knowledge and a lot of experience, which is gained by long years in production. So if we lose our oldest people and our experienced workforce, we also lose their experience. By doing things like letting retired employees come to the plant to work once a week or a couple of times a month or during peak periods, we’ve been able to retain their knowledge in the business. This is the sort of flexibility that will be increasingly necessary in managing the workforce.”

—Dr. Rupert Felder, Head of Global Human Resources, HeidelburgerDruckmaschinen

**The Leadership Cliff**

*Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.*

- Just 43% of German executives say their company plans for succession and continuity in key roles. 53% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 42% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—42% of employees say leadership at their company is equipped to lead the company to success.

<table>
<thead>
<tr>
<th>Executives say...</th>
<th>%</th>
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<tbody>
<tr>
<td>Our leaders are prepared to lead a diverse workforce.</td>
<td>34%</td>
</tr>
<tr>
<td>Talent available in leadership positions is sufficient to drive global growth.</td>
<td>43%</td>
</tr>
<tr>
<td>Our leadership has the skills to effectively manage talent.</td>
<td>50%</td>
</tr>
</tbody>
</table>

- 18% of employees say leadership ability is an important employee attribute at their company.
- 26% of executives say leadership is an important employee attribute.
- 43% of executives say their company is committed to diversity.
- 52% of employees say their manager delivers on leadership expectations.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but a limited number of employees expect to gain proficiency. More than half expect to be proficient in analytics in three years, but under one-third expect to be proficient in cloud and mobile.
- 53% of German executives say their company widely offers supplemental training programs to develop new skills.
- But only 48% of employees say their company provides the right tools to help them grow and improve job performance.
- 39% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Germany

- Executive industries: Executives come from the following industries: banking (8%); insurance (8%); retail (19%); public sector (16%); healthcare (18%); professional services (19%); consumer goods (12%).
- Employee industries: Employees come from the following industries: banking (11%); insurance (11%); retail (28%); public sector (17%); healthcare (11%); professional services (14%); consumer goods (7%).
- Employees by function: finance (13%); HR (9%); marketing (7%); sales (16%); operations (15%); production (6%); service (14%); IT (18%).
- Executive titles: CEOs (2%); COOs (7%); CFOs (7%); CIOs (8%); CMOs (2%); Chief Human Resources Officer (7%); VP/Directors of HR (24%); VPs of Learning/Development (15%); VPs Compensation & Benefits (11%); VP Recruiting or Talent (17%).
- Employee titles: front line (38%) employees; mid-level managers (50%); line-of-business managers (10%).

About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about India.

### The Looming Talent Crisis

- The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.
- Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.
- This fact sheet outlines key survey findings about India.

### Indias top 5 labor market shifts affecting workforce strategy:

- **Globalization of labor supply**
  - 47%
- **Aging workforce**
  - 36%
- **Change in work models (e.g., telecommuting, flex time)**
  - 46%
- **Difficulty recruiting employees with base-level skills**
  - 31%
- **Millennials entering the workforce**
  - 66%

### Executives say...

- **...my company has an execution plan for achieving its vision of workforce management.**
  - 58%
- **...my company has a strong vision for the workforce it wants to build in three years.**
  - 25%
- **...workforce issues drive strategy at the board level.**
  - 64%

### The New Face of Work

**Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.**

- 43% of Indian employees get ample training on workplace technology; 21% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 80% of Indian companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 24% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 23% of Indian companies use quantifiable metrics and benchmarking for workforce development; 37% know how to extract meaningful insights from that data.

### A Millennial Misunderstanding

**Millennials are different, but not as different as companies think.**

- 47% of Indian executives say they rely on younger employees or recent graduates to fill entry-level positions; 66% of executives say Millennials entering the workforce are impacting workforce strategy.
- Indian executives may be out of touch with what Millennials think—42% of executives say Millennials will consider leaving their job due to lack of learning and development, but just 2% of Millennials say they have done so.
Workforce 2020 —India

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 54% of Indian employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Indian employees are: competitive compensation (66%), bonuses and merit-based rewards (61%), and vacation time (46%).
- 49% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: job performance and results (48%); substantial experience in the field (45%); and a high level of education and/or institutional training (34%).

What executives are saying...

“What some people become the leaders by sheer determination, enthusiasm, passion, and they really get the rest of the people to learn. I think the majority of the learning really happens through work and not through formal programs. Once people start to collaborate and more people join in, it builds the culture by doing.”

—Aadesh Goyal, Global Head of Human Resources, Tata Communications

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 17% of Indian executives say their company plans for succession and continuity in key roles. 27% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 38% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—44% of employees say leadership at their company is equipped to lead the company to success.

Executives say...

- 30% of executives say leadership ability is an important employee attribute.
- 19% of executives say leadership is an important employee attribute.
- 11% of employees say leadership ability is an important employee attribute at their company.
- 57% of employees say their manager delivers on leadership expectations.
- 20% of employees say their company is committed to diversity.
Bridging the Talent Gap—The Learning Mandate

**Better training and education opportunities would benefit employees and businesses alike.**

- The need for technology skills (e.g., analytics, cloud) will grow, but less than one-fifth of employees expect to be proficient in some of these areas in three years, including cloud and mobile.
- 67% of Indian executives say their company widely offers supplemental training programs to develop new skills.
- But only 32% of employees say their company provides the right tools to help them grow and improve job performance.
- 42% of employees say their company encourages continuing education and training to further career development.

Survey demographics: India

- **Executive industries:** Executives come from the following industries: banking (11%); insurance (8%); retail (18%); public sector (16%); healthcare (14%); professional services (18%); consumer goods (15%).
- **Employee industries:** Employees come from the following industries: banking (7%); insurance (10%); retail (13%); public sector (12%); healthcare (16%); professional services (18%); consumer goods (26%).
- **Employees by function:** finance (13%); HR (12%); marketing (14%); sales (15%); operations (9%); production (15%); service (10%); IT (15%).
- **Executive titles:** CEOs (0%); COOs (4%); CFOs (1%); CIOs (19%); CMO (6%); Chief Human Resources Officer (6%); VP/Directors of HR (24%); VPs of Learning/Development (14%); VPs Compensation & Benefits (11%); VP Recruiting or Talent (15%).
- **Employee titles:** front line (39%) employees; mid-level managers (41%); line-of-business managers (20%).

**Annual company revenue:**
- $10 m–$49 m: 28%
- $50 m–$299 m: 24%
- $300 m–$499 m: 15%
- $500 m–$1 bn: 17%
- Over $1 bn: 18%

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Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Japan.

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 54% of Japanese employees get ample training on workplace technology; 31% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

- 79% of Japanese companies say they are increasingly using contingent, seasonal, intermittent, or consultant employees; but 18% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

- 25% of Japanese companies use quantifiable metrics and benchmarking for workforce development; 27% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 50% of Japanese executives say they rely on younger employees or recent graduates to fill entry-level positions, but 65% of executives say Millennials entering the workforce are impacting workforce strategy.

- Japanese executives may be out of touch with what Millennials think—35% of executives say Millennials are frustrated with manager quality, but only 6% of Millennials say this is true.
Workforce 2020—Japan

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 46% of Japanese employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Japanese employees are: bonuses and merit-based rewards (60%), competitive compensation (50%), and flexible schedule (41%).
- 56% of employees say more comprehensive benefits would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: a high level of education and/or institutional training (66%); loyalty and long-term commitment (51%); and the ability to learn and be trained quickly (41%).

What employees say is important

- Competitive compensation: 50%
- Flexible work location: 40%
- Flexible schedule: 41%
- Supplemental training programs: 35%
- Access to social media: 19%

What executives say their company widely offers

- Competitive compensation: 13%
- Flexible work location: 30%
- Flexible schedule: 29%
- Supplemental training programs: 76%
- Access to social media: 11%

What executives are saying...

“For me, Japan’s foremost workforce challenge was, is, and will be how to find, recruit, and retain top talent able to face the globalization challenge.”

—Jun Kabigting, Managing Director, HR Central K.K.

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 28% of Japanese executives say their company plans for succession and continuity in key roles. 34% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 25% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—39% of employees say leadership at their company is equipped to lead the company to success.

Executives say…

- Our leaders are prepared to lead a diverse workforce: 18%
- Talent available in leadership positions is sufficient to drive global growth: 19%
- Our leadership has the skills to effectively manage talent: 36%

- 12% of employees say leadership ability is an important employee attribute at their company.
- 6% of executives say leadership is an important employee attribute.
- 61% of employees say their manager delivers on leadership expectations.
- 28% of employees say their company is committed to diversity.
Workforce 2020—Japan

Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but 37% of employees expect to gain proficiency in analytics in three years; 30% expect proficiency in cloud by then.
- 76% of Japanese executives say their company widely offers supplemental training programs to develop new skills.
- But only 28% of employees say their company provides the right tools to help them grow and improve job performance.
- 32% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Japan

- **Executive industries**: Executives come from the following industries: banking (9%); insurance (10%); retail (19%); public sector (16%); healthcare (16%); professional services (24%); consumer goods (6%).
- **Employee industries**: Employees come from the following industries: banking (13%); insurance (18%); retail (28%); public sector (13%); healthcare (11%); professional services (16%); consumer goods (3%).
- **Employees by function**: finance (16%); HR (15%); marketing (14%); sales (13%); operations (7%); production (7%); service (15%); IT (15%).
- **Executive titles**: CEOs (3%); COOs (12%); CFOs (8%); CIOs (34%); CMOs (8%); Chief Human Resources Officer (13%); VP/Directors of HR (6%); VPs of Learning/Development (5%); VPs Compensation & Benefits (10%); VP Recruiting or Talent (1%).
- **Employee titles**: front line (36%) employees; mid-level managers (42%); line-of-business managers (21%).

About the project

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The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Kenya.

Kenya’s top 5 labor market shifts affecting workforce strategy:
- 60% Millennials entering the workforce
- 61% Globalization of labor supply
- 49% Increasing number of intermittent/seasonal employees
- 44% Increasing number of contingent employees
- 44% Increasing number of consultant employees

Executives say...
- ...my company has an execution plan for achieving its vision of workforce management.
- ...my company has a strong vision for the workforce it wants to build in three years.
- ...workforce issues drive strategy at the board level.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.
- 57% of Kenyan executives say they rely on younger employees or recent graduates to fill entry-level positions, 60% of executives say Millennials entering the workforce are impacting workforce strategy.
- Kenyan executives may be out of touch with what Millennials think—55% of executives say Millennials will consider leaving their job due to lack of learning and development, but only 4% of Millennials say they have.

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.
- 53% of Kenyan employees get ample training on workplace technology; 37% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 85% of Kenyan companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; but 23% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 38% of Kenyan companies use quantifiable metrics and benchmarking for workforce development; 38% know how to extract meaningful insights from that data.
Workforce 2020—Kenya

What Matters Most at Work

Companies do not understand what their employees really want from them.

资管% of Kenyan employees are satisfied or very satisfied with their jobs.

资管% The most important benefits and incentives to Kenyan employees are: competitive compensation (68%), bonuses and merit-based rewards (58%), and flexible schedule (45%).

资管% 42% of employees say defined opportunities for career development would increase loyalty and engagement with their current job.

资管% Employees think the following attributes are most important to their employer: substantial experience in the field (40%); the ability to learn and be trained quickly (37%); and job performance and results (36%).

What executives are saying...

“Workforce development is seen by the board as a strategic priority as it’s critical to meeting corporate objectives and growing the business. The effort is arrayed around key areas, including strategies for systems, for the organization, and for teams and individuals. The approach is based on learning and development, which enables us to retain the workers we hire and train.”

— Kevina Wepukhulu, Chief Manager, Human Resource and Administration, Kenya Power and Lighting Co.

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

资管% Just 32% of Kenyan executives say their company plans for succession and continuity in key roles. 26% say that when a senior person leaves, the company tends to fill the role from within the organization.

资管% 42% of executives say their plans for growth are being hampered by lack of access to the right leaders.

资管% Employees agree with employers when it comes to leadership—43% of employees say leadership at their company is equipped to lead the company to success.

Executives say...

Our leaders are prepared to lead a diverse workforce. 32%

Talent available in leadership positions is sufficient to drive global growth. 33%

Our leadership has the skills to effectively manage talent. 55%

资管% of employees say leadership ability is an important employee attribute at their company.

资管% of executives say leadership is an important employee attribute.

资管% of employees say their manager delivers on leadership expectations.

资管% of employees say their company is committed to diversity.
Workforce 2020—Kenya

Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but 43% of employees expect to gain proficiency in analytics in three years, while 21% expect to be proficient in cloud by then.
- 54% of Kenyan executives say their company widely offers supplemental training programs to develop new skills.
- But only 34% of employees say their company provides the right tools to help them grow and improve job performance.
- 26% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Kenya

- **Executive industries**: Executives come from the following industries: banking (7%); insurance (8%); retail (15%); public sector (16%); healthcare (18%); professional services (16%); consumer goods (20%).
- **Employee industries**: Employees come from the following industries: banking (4%); insurance (8%); retail (15%); public sector (16%); healthcare (21%); professional services (20%); consumer goods (16%).
- **Employees by function**: finance (15%); HR (13%); marketing (6%); sales (12%); operations (11%); production (11%); service (20%); IT (12%).
- **Executive titles**: CEOs (5%); COOs (11%); CFOs (5%); CIOs (5%); CMO (3%); Chief Human Resources Officer (8%); VP/Directors of HR (19%); VPs of Learning/Development (16%); VPs Compensation & Benefits (12%); VP Recruiting or Talent (13%).
- **Employee titles**: front line (47%) employees; mid-level managers (38%); line-of-business managers (15%).

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This fact sheet outlines key survey findings about Malaysia.

**Malaysia’s top 5 labor market shifts affecting workforce strategy:**
- **51%** Globalization of labor supply
- **42%** Increasing number of contingent employees
- **58%** Millennials entering the workforce
- **35%** Aging workforce
- **48%** Increasing number of intermittent/seasonal employees

**Executives say...**
- **61%** ...my company has an execution plan for achieving its vision of workforce management.
- **77%** ...workforce issues drive strategy at the board level.
- **30%** ...my company has a strong vision for the workforce it wants to build in three years.

**The Looming Talent Crisis**
- 51% of Malaysian employees get ample training on workplace technology; 32% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 89% of Malaysian companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; but 12% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 33% of Malaysian companies use quantifiable metrics and benchmarking for workforce development; 34% know how to extract meaningful insights from that data.

**A Millennial Misunderstanding**
- Millennials are different, but not as different as companies think.
  - 51% of Malaysian executives say they rely on younger employees or recent graduates to fill entry-level positions, and 58% of executives say Millennials entering the workforce are impacting workforce strategy.
  - Malaysian executives may be out of touch with what Millennials think—while 39% say Millennials will consider leaving their jobs due to lack of learning and development and 38% say Millennials are frustrated with manager quality, 0% of Millennials say this is true.

**Millenials vs. Non-Millenials**
- I expect more feedback than I currently receive.
  - Millennials: 22% Non-Millenials: 26%
- I am interested in quality of life over career path.
  - Millennials: 51% Non-Millenials: 43%
- I frequently collaborate with colleagues in other areas of the company.
  - Millennials: 47% Non-Millenials: 53%
Workforce 2020—Malaysia

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 59% of Malaysian employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Malaysian employees are: competitive compensation (69%), bonuses and merit-based rewards (60%), and flexible schedules (39%).
- 53% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: the ability to learn and be trained quickly (46%); job performance and results (37%); and diverse backgrounds (34%).

What executives are saying...

“We are unique in the region in that we separate the talent organization from HR. We do this because of our strategic focus on talent, more than in most other companies we know of. It’s also a message to our stakeholders on the importance we place on talent management—that we have the Talent Management organization reporting directly to the GCEO.”

— Badrunnisa Mohd Yasin Khan, Group Chief Talent Officer, Axiata

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 33% of Malaysian executives say their company plans for succession and continuity in key roles. 27% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 32% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—40% of employees say leadership at their company is equipped to lead the company to success.

Executives say...

- Our leaders are prepared to lead a diverse workforce. 33%
- Talent available in leadership positions is sufficient to drive global growth. 34%
- Our leadership has the skills to effectively manage talent. 34%

- 9% of employees say leadership ability is an important employee attribute at their company.
- 18% of executives say leadership is an important employee attribute.
- 67% of employees say their manager delivers on leadership expectations.
- 26% of employees say their company is committed to diversity.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g. analytics, cloud) will grow, but less than one-fifth of employees expect to be proficient in skills like mobile and cloud in three years.
- 66% of Malaysian executives say their company widely offers supplemental training programs to develop new skills.
- But only 39% of employees say their company provides the right tools to help them grow and improve job performance.
- 37% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Malaysia

- Executive industries: Executives come from the following industries: banking (7%); insurance (6%); retail (18%); public sector (14%); healthcare (14%); professional services (13%); consumer goods (28%).
- Employee industries: Employees come from the following industries: banking (5%); insurance (8%); retail (16%); public sector (14%); healthcare (18%); professional services (20%); consumer goods (21%).
- Employees by function: finance (13%); HR (11%); marketing (14%); sales (12%); operations (13%); production (7%); service (8%); IT (23%).
- Executive titles: CEOs (1%); COOs (8%); CFOs (5%); CIOs (33%); CMO (5%); Chief Human Resources Officer (11%); VP/ Directors of HR (14%); VPs of Learning/Development (11%); VPs Compensation & Benefits (5%); VP Recruiting or Talent (7%).
- Employee titles: front line (43%) employees; mid-level managers (41%); line-of-business managers (15%).

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This fact sheet outlines key survey findings about Mexico.

Mexico’s top 5 labor market shifts affecting workforce strategy:

- Increasing number of consultant employees (65%)
- Difficulty recruiting employees with base-level skills (67%)
- Globalization of labor supply (56%)
- Employee expectations are changing (49%)
- Difficulty recruiting specialized employees (47%)

Executives say...

- “…my company has a strong vision for the workforce it wants to build in three years.” (35%)
- “…my company has an execution plan for achieving its vision of workforce management.” (34%)
- “…workforce issues drive strategy at the board level.” (39%)

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 51% of Mexican employees get ample training on workplace technology; 34% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

- 82% of Mexican companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 46% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

- 54% of Mexican companies use quantifiable metrics and benchmarking for workforce development; 47% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 53% of Mexican executives say they rely on younger employees or recent graduates to fill entry-level positions, but 35% of executives say Millennials entering the workforce are impacting workforce strategy.

- Mexican executives are more in touch with Millennials than executives in most other countries. However, 66% of executives think Millennials are frustrated with manager quality, while only 32% of Millennials say this is so.
What Matters Most at Work

Companies do not understand what their employees really want from them.

- 25% of Mexican employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Mexican employees are: competitive compensation (70%), retirement plans (66%), and up-to-date technology (58%).
- 33% of employees say more opportunities to receive training would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: the ability to learn and be trained quickly (33%); interest in the wider business and its goals (30%); and willingness to let others lead (29%).

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 48% of Mexican executives say their company plans for succession and continuity in key roles. 57% say that when a senior person leaves, the company tends to fill the role from within the organization—a higher percentage than most other countries. Mexican executives are more likely than others to consider leadership ability an important employee attribute.
- 48% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—61% of employees say leadership at their company is equipped to lead the company to success.

Executives say...

- Our leaders are prepared to lead a diverse workforce. 38%
- Talent available in leadership positions is sufficient to drive global growth. 39%
- Our leadership has the skills to effectively manage talent. 55%
- Of employees say leadership ability is an important employee attribute at their company. 26%
- Of executives say leadership is an important employee attribute. 29%
- Of employees say their manager delivers on leadership expectations. 42%
- Of employees say their company is committed to diversity. 52%
Workforce 2020—Mexico

Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g. analytics, cloud) will grow, but 45% expect to gain proficiency in analytics in three years. 33% expect proficiency in cloud by then.
- 46% of Mexican executives say their company widely offers supplemental training programs to develop new skills.
- 70% of Mexican employees—a higher percentage than in most other countries—say their company provides the right tools to help them grow and improve job performance.
- 45% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Mexico

- **Executive industries**: Executives come from the following industries: Banking (8%); insurance (10%); retail (18%); public sector (16%); healthcare (18%); professional services (22%); consumer goods (8%).
- **Employee industries**: Employees come from the following industries: Banking (8%); insurance (10%); retail (17%); public sector (10%); healthcare (15%); professional services (17%); consumer goods (23%).
- **Employees by function**: Finance (9%); HR (11%); marketing (15%); sales (15%); operations (14%); production (9%); service (9%); IT (18%).
- **Executive titles**: CEOs (6%); COOs (24%); CFOs (14%); CIOs (5%); CMO (2%); Chief Human Resources Officer (17%); VP/Directors of HR (14%); VPs of Learning/Development (5%); VPs Compensation & Benefits (6%); VP Recruiting or Talent (7%).
- **Employee titles**: Front-line (34%) employees; mid-level managers (41%); line-of-business managers (25%).

About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about the Netherlands.

**Netherlands’ top 5 labor market shifts affecting workforce strategy:**

- **56%** Globalization of labor supply
- **49%** Increasing number of intermittent/seasonal employees
- **66%** Difficulty recruiting employees with base-level skills
- **52%** Employee expectations are changing
- **47%** Changing work models (e.g., telecommuting, flex time)

**Executives say...**

- **50%** ...my company has an execution plan for achieving its vision of workforce management.
- **31%** ...my company has a strong vision for the workforce it wants to build in three years.
- **47%** ...workforce issues drive strategy at the board level.

**The New Face of Work**

*In some areas, HR is out of touch with workers and out of the loop with business leaders.*

- **50%** of Dutch employees get ample training on workplace technology; **31%** get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- **90%** of Dutch companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees, and **33%** say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- **44%** of Dutch companies use quantifiable metrics and benchmarking for workforce development; **45%** know how to extract meaningful insights from that data.

**A Millennial Misunderstanding**

*Millennials are different, but not as different as companies think.*

- **53%** of Dutch executives say they rely on younger employees or recent graduates to fill entry-level positions, but **40%** of executives say Millennials entering the workforce are impacting workforce strategy.
- Dutch executives may be out of touch with what Millennials think—**50%** of executives say Millennials will consider leaving their jobs due to lack of learning and development, but only **6%** of Millennials say they have done so.
Workforce 2020—Netherlands

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 44% of Dutch employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Dutch employees are: **competitive compensation** (77%), **bonuses and merit-based rewards** (48%), and **benefit plans for families** (44%). Dutch companies are significantly more aligned with employee needs when it comes to benefits and incentives.
- 46% of employees say **higher compensation** would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: **job performance and results** (41%); **the ability to learn and be trained quickly** (40%); and **diverse backgrounds** (33%).

What executives are saying...

“The most important challenge is finding employees with not only competence with the current job but who are able to develop new skills and to do it quickly. Because changes will come faster and faster, we need agile people who can grow with us.”

—Suzanne Jungjohann, Director, Performance Management at Randstad

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 42% of Dutch executives say their company plans for succession and continuity in key roles. 50% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 47% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—37% of employees say leadership at their company is equipped to lead the company to success.
Workforce 2020—Netherlands

Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but just 48% of employees expect to be proficient in analytics in three years, and just 22% expect to be proficient in cloud.
- 50% of Dutch executives say their company widely offers supplemental training programs to develop new skills.
- But only 36% of employees say their company provides the right tools to help them grow and improve job performance.
- 33% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Netherlands

- Executive industries: Executives come from the following industries: banking (6%); insurance (10%); retail (20%); public sector (16%); healthcare (14%); professional services (20%); consumer goods (14%).
- Employee industries: Employees come from the following industries: banking (6%); insurance (9%); retail (10%); public sector (13%); healthcare (22%); professional services (25%); consumer goods (15%).
- Employees by function: finance (15%); HR (14%); marketing (9%); sales (16%); operations (8%); production (5%); service (14%); IT (19%).
- Executive titles: CEOs (3%); COOs (16%); CFOs (6%); CIOs (7%); CMOs (2%); Chief Human Resources Officer (6%); VP/Directors of HR (25%); VPs of Learning/Development (17%); VPs Compensation & Benefits (7%); VP Recruiting or Talent (11%).
- Employee titles: front line (43%) employees; mid-level managers (39%); line-of-business managers (18%).

About the project

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The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Poland.

Poland’s top 5 labor market shifts affecting workforce strategy:
- Increasing number of intermittent/seasonal employees (54%)
- Globalization of labor supply (63%)
- Aging workforce (52%)
- Employee expectations are changing (52%)
- Millennials entering the workforce (50%)

Executives say...
- ...my company has an execution plan for achieving its vision of workforce management.
- ...my company has a strong vision for the workforce it wants to build in three years.
- ...workforce issues drive strategy at the board level.
- 49% of Polish executives say they rely on younger employees or recent graduates to fill entry-level positions, and 50% of executives say Millennials entering the workforce are impacting workforce strategy.
- Polish executives may be out of touch with what Millennials think—53% say Millennials will consider leaving their jobs due to lack of learning and development, but just 10% of employees say they have done so.
- Unlike most countries surveyed, Millennials in Poland are significantly different than non-Millennials.

The New Face of Work
Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.
- 56% of Polish employees get ample training on workplace technology; 30% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 81% of Polish companies say they are increasingly using contingent, seasonal, intermittent, or consultant employees, and 25% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 48% of Polish companies use quantifiable metrics and benchmarking for workforce development; 50% know how to extract meaningful insights from that data.

A Millennial Misunderstanding
Millennials are different, but not as different as companies think.
- 49% of Polish executives say Millennials are different, but not as different as companies think.
- 56% of Polish employees expect more feedback than they currently receive.
- 70% of Polish employees frequently collaborate with colleagues in other areas of the company.
Workforce 2020—Poland

What Matters Most at Work
Companies do not understand what their employees really want from them.

- 41% of Polish employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Polish employees are: competitive compensation (59%), bonuses and merit-based rewards (58%), and flexible work location (48%).
- 38% of employees say more comprehensive benefits would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: the ability to learn and be trained quickly (34%) and loyalty and long-term commitment (31%).

What executives are saying...
“Most of the experience in our company comes from self-education and formal learning and the ability to assimilate global experiences. In a sense, that’s why everybody is a coach in our company. A trainee can coach a colleague, if he or she has something specific and valuable to share. Even our shareholders are actively participating in coaching groups of employees.”
—Martina Zimkute, Director of HR, Avia Solutions Group

The Leadership Cliff
Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 38% of Polish executives say their company plans for succession and continuity in key roles. 56% say that when a senior person leaves, the company tends to fill the role from within the organization—a higher percentage than the rest of the world. Polish executives are also more likely than worldwide respondents to say leadership is an important employee attribute.
- 45% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—50% of employees say leadership at their company is equipped to lead the company to success.

Executives say...
- Our leaders are prepared to lead a diverse workforce: 36%
- Talent available in leadership positions is sufficient to drive global growth: 39%
- Our leadership has the skills to effectively manage talent: 46%

- 22% of employees say leadership ability is an important employee attribute at their company.
- 30% of employees say their manager delivers on leadership expectations.
- 53% of employees say the company is committed to diversity.
- 29% of executives say leadership is an important employee attribute.
Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but just 50% of employees expect to be proficient in analytics in three years and only 15% say they will be proficient in cloud.
- 51% of Polish executives say their company widely offers supplemental training programs to develop new skills.
- 48% of employees say their company provides the right tools to help them grow and improve job performance.
- 50% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Poland

- **Executive industries**: Executives come from the following industries: banking (8%); insurance (8%); retail (16%); public sector (17%); healthcare (17%); professional services (14%); consumer goods (20%).
- **Employee industries**: Employees come from the following industries: banking (6%); insurance (8%); retail (16%); public sector (17%); healthcare (19%); professional services (20%); consumer goods (14%).
- **Employees by function**: finance (11%); HR (15%); marketing (9%); sales (12%); operations (19%); production (9%); service (8%); IT (17%).
- **Executive titles**: CEOs (9%); COOs (23%); CFOs (21%); CIOs (10%); CMOs (3%); Chief Human Resources Officer (9%); VP/ Directors of HR (10%); VPs of Learning/Development (8%); VPs Compensation & Benefits (3%); VP Recruiting or Talent (4%).
- **Employee titles**: front line (38%) employees; mid-level managers (50%); line-of-business managers (12%).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Russia.

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 45% of Russian employees get ample training on workplace technology; 30% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

- 78% of Russian companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees, and 23% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

- 23% of Russian companies use quantifiable metrics and benchmarking for workforce development; 38% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 47% of Russian executives say they rely on younger employees or recent graduates to fill entry-level positions, and 58% of executives say Millennials entering the workforce are impacting workforce strategy.

- Russian executives are more in touch with Millennials than executives in many other countries, but Millennials may not be as dissatisfied with manager quality as executives think. 31% of executives say Millennials are frustrated with manager quality, but only 4% of Millennials say they are.
Workforce 2020—Russia

What Matters Most at Work
Companies do not understand what their employees really want from them.

- 40% of Russian employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Russian employees are: bonuses and merit-based rewards (60%), competitive compensation (50%), and retirement plans (46%).
- 49% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: job performance and results (42%); substantial experience in the field (40%); and diverse backgrounds (35%).

What executives are saying...
“Over the last five years, our workforce has changed considerably. And by 2018, the profile of our staff will have changed significantly, once again. The expectations of employees regarding career and achievements will change as well. Material incentives will not be enough for the next generation of employees. The opportunity for self-fulfillment will be very important, along with work/life balance, autonomy in decision-making, and a positive work environment.”
—Alexey Mekhonoshin, Vice President of HR, Sberbank

The Leadership Cliff
Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 23% of Russian executives say their company plans for succession and continuity in key roles. 23% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 34% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—28% of employees say leadership at their company is equipped to lead the company to success.
Workforce 2020—Russia

Bridging the Talent Gap—The Learning Mandate

*Better training and education opportunities would benefit employees and businesses alike.*

- The need for technology skills (e.g. analytics, cloud) will grow, but just 38% of employees expect to be proficient in analytics in the next three years, and only 13% say they will be proficient in cloud.
- 63% of Russian executives say their company widely offers supplemental training programs to develop new skills.
- But only 43% of employees say their company provides the right tools to help them grow and improve job performance.
- 24% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Russia

- **Executive industries**: Executives come from the following industries: banking (8%); insurance (8%); retail (18%); public sector (14%); healthcare (16%); professional services (24%); consumer goods (12%).
- **Employee industries**: Employees come from the following industries: Banking (13%); insurance (11%); retail (27%); public sector (15%); healthcare (15%); professional services (14%); consumer goods (6%).
- **Employees by function**: finance (23%); HR (11%); marketing (6%); sales (16%); operations (11%); production (11%); service (7%); IT (15%).
- **Executive titles**: CEOs (0%); COOs (6%); CFOs (8%); CIOs (15%); CMOs (7%); Chief Human Resources Officer (5%); VP/Directors of HR (10%); VPs of Learning/Development (13%); VPs Compensation & Benefits (18%); VP Recruiting or Talent (11%).
- **Employee titles**: front line (39%) employees; mid-level managers (44%); line-of-business managers (18%).

About the project

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Workforce 2020

Country Fact Sheet: Saudi Arabia

The Looming Talent Crisis

- The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

- Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

- This fact sheet outlines key survey findings about Saudi Arabia.

Saudi Arabia’s top 5 labor market shifts affecting workforce strategy:

- Millennials entering the workforce (55%)
- Aging workforce (42%)
- Difficulty recruiting employees with base-level skills (56%)
- Employee expectations are changing (42%)
- Changing work models (38%)

Executives say...

- "...my company has a strong vision for the workforce it wants to build in three years."
- "...my company has an execution plan for achieving its vision of workforce management."
- "...workforce issues drive strategy at the board level."

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 48% of Saudi Arabian employees get ample training on workplace technology; 25% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see "Bridging the Talent Gap").

- 75% of Saudi Arabian companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; but 19% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

- 17% of Saudi Arabian companies use quantifiable metrics and benchmarking for workforce development; 36% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 40% of Saudi Arabian executives say they rely on younger employees or recent graduates to fill entry-level positions, and 55% of executives say Millennials entering the workforce are impacting workforce strategy.

- Saudi Arabian executives may be out of touch with what Millennials think—53% of executives think Millennials are frustrated with manager quality, but 4% of Millennials say they are. 24% of executives think Millennials will consider leaving their jobs due to lack of learning and development, but 0% of Millennials said they have done so.
What Matters Most at Work

Companies do not understand what their employees really want from them.

- 31% of Saudi Arabian employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Saudi Arabian employees are: bonuses and merit-based rewards (55%), education (44%), and flexible schedule (40%). Saudi companies are more aligned with their employees when it comes to benefits and incentives compared to worldwide respondents.
- 43% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: job performance and results (38%); substantial experience (34%); and the ability to learn and be trained quickly (33%).

What executives are saying...

“A major hurdle is communication; whether it’s communicating strategy or communicating business results or simply communicating achievements. When executives don’t share information, the second-tier managers don’t feel like they are involved in decision-making.”

—Dr. Ahmed Saad Gabbani, Director, Xenel Group

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 16% of Saudi Arabian executives say their company plans for succession and continuity in key roles. 32% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 40% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—33% of employees say leadership at their company is equipped to lead the company to success.

Executives say...

- Our leaders are prepared to lead a diverse workforce. 28%
- Talent available in leadership positions is sufficient to drive global growth. 16%
- Our leadership has the skills to effectively manage talent. 35%

- 27% of employees say leadership ability is an important employee attribute at their company.
- 21% of employees say their manager delivers on leadership expectations.
- 17% of employees say their company is committed to diversity.
Bridging the Talent Gap—The Learning Mandate

**Better training and education opportunities would benefit employees and businesses alike.**

- The need for technology skills (e.g., analytics, cloud) will grow, but **less than a third** of employees expect to gain proficiency in areas like cloud, mobile, and social media.
- **55%** of Saudi Arabian executives say their company widely offers supplemental training programs to develop new skills.
- But only **40%** of employees say their company provides the **right tools** to help them grow and improve job performance.
- **40%** of employees say their company encourages continuing education and training to further career development.

Survey demographics: Saudi Arabia

- **Executive industries:** Executives come from the following industries: banking (8%); insurance (12%); retail (18%); public sector (18%); healthcare (16%); professional services (17%); consumer goods (12%).
- **Employee industries:** Employees come from the following industries: banking (6%); insurance (8%); retail (14%); public sector (13%); healthcare (29%); professional services (16%); consumer goods (14%).
- **Employees by function:** finance (12%); HR (14%); marketing (7%); sales (11%); operations (13%); production (11%); service (14%); IT (19%).
- **Executive titles:** CEOs (0%); COOs (2%); CFOs (4%); CIOs (9%); CMO (2%); Chief Human Resources Officer (6%); VP/Directors of HR (23%); VPs of Learning/Development (26%); VPs Compensation & Benefits (18%); VP Recruiting or Talent (10%).
- **Employee Titles:** front line (35%) employees; mid-level managers (43%); line-of-business managers (23%).

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The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about South Africa.

South Africa’s top 5 labor market shifts affecting workforce strategy:
- 54% Globalization of labor supply
- 40% Difficulty recruiting employees with base-level skills
- 59% Millennials entering the workforce
- 43% Changing work models
- 40% Increasing number of intermittent/seasonal employees

Executives say...
- ...my company has an execution plan for achieving its vision of workforce management.
- ...my company has a strong vision for the workforce it wants to build in three years.
- ...workforce issues drive strategy at the board level.

The New Face of Work
Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.
- 42% of Australian employees get ample training on workplace technology; 31% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 80% of South African companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; but 27% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 28% of South African companies use quantifiable metrics and benchmarking for workforce development; 38% know how to extract meaningful insights from that data.

A Millennial Misunderstanding
Millennials are different, but not as different as companies think.
- 51% of South African executives say they rely on younger employees or recent graduates to fill entry-level positions; 59% of executives say Millennials entering the workforce are impacting workforce strategy.
- South African executives may be out of touch with what Millennials think—38% of executives think that Millennials are frustrated with manager quality, but only 2% of Millennials say they are. 53% of executives think Millennials have considered leaving their jobs due to a lack of learning and development, but only 2% of Millennials say that.
What Matters Most at Work

Companies do not understand what their employees really want from them.

- 53% of South African employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to South African employees are: bonuses and merit-based rewards (63%), competitive compensation (62%), and supplemental training programs (42%).
- 57% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: job performance and results (42%); the ability to learn and be trained quickly (40%); and substantial experience (39%).

What executives are saying...

“The return on investment in terms of doing learning more dynamically is not obvious yet. The way we want to do that is not obvious yet. So, the board will not provide us with funds for something that’s not clear. It’s always tough to motivate for HR money in any business. And I don’t think our HR strategy has been fully annunciated to allow for a very strong commitment from the board.”

— Shani Naidoo, HR Director, The Foschini Group

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 40% of South African executives say their company plans for succession and continuity in key roles. 31% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 42% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—35% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap—The Learning Mandate

**Better training and education opportunities would benefit employees and businesses alike.**

- The need for technology skills (e.g. analytics, cloud) will grow, but few employees expect to gain proficiency in most of these areas—14% expect to be proficient in cloud in three years, and 35% expect to be proficient in analytics.
- 53% of South African executives say their company widely offers supplemental training programs to develop new skills.
- But only 30% of employees say their company provides the right tools to help them grow and improve job performance.
- 41% of employees say their company encourages continuing education and training to further career development.

### Survey demographics: South Africa

- **Executive industries:** Executives come from the following industries: Banking (8%); insurance (10%); retail (17%); public sector (16%); healthcare (15%); professional services (18%); consumer goods (13%).
- **Employee industries:** Employees come from the following industries: Banking (8%); insurance (7%); retail (14%); public sector (11%); healthcare (13%); professional services (18%); consumer goods (28%).
- **Employees by function:** Finance (13%); HR (9%); marketing (12%); sales (13%); operations (18%); production (16%); service (17%); IT (5%).
- **Executive titles:** CEOs (2%); COOs (9%); CFOs (2%); CIOs (8%); CMOs (2%); Chief Human Resources Officer (5%); VP/Directors of HR (24%); VPs of Learning/Development (19%); VPs Compensation & Benefits (14%); VP Recruiting or Talent (15%).
- **Employee titles:** front-line (53%) employees; mid-level managers (26%); line-of-business managers (19%).

### About the project

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The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Spain.

**Spain’s top 5 labor market shifts affecting workforce strategy:**
- Millennials entering the workforce: 55%
- Increasing number of intermittent/seasonal employees: 48%
- Globalization of labor supply: 67%
- Aging workforce: 49%
- Employee expectations are changing: 48%

**Executives say...**
- "my company has an execution plan for achieving its vision of workforce management." 63%
- "my company has a strong vision for the workforce it wants to build in three years." 29%
- "workforce issues drive strategy at the board level." 46%

**The New Face of Work**
Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.
- 50% of Spanish employees get ample training on workplace technology; 36% say they get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 78% of Spanish executives say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 34% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 42% of Spanish companies use quantifiable metrics and benchmarking for workforce development; 37% know how to extract meaningful insights from that data.

**A Millennial Misunderstanding**
*Millennials are different, but not as different as companies think.*
- 61% of Spanish executives say they rely on younger employees or recent graduates to fill entry-level positions; 55% of executives say Millennials entering the workforce are impacting workforce strategy.
- Spanish executives may be out of touch with what Millennials think—42% of executives think Millennials are frustrated with manager quality, but only 10% of Millennials say they are. 64% of executives think Millennials will consider leaving their jobs due to lack of learning and development, but only 12% of Millennials say that.
Workforce 2020 — Spain

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 38% of Spanish employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Spanish employees are: competitive compensation (64%), bonuses and merit-based rewards (60%), and supplemental training programs (47%).
- 40% of employees say more comprehensive benefits would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: the ability to learn and be trained quickly (34%); loyalty and long-term commitment to the company (34%); and high level of education (33%).

What executives are saying...

“We are working in a consistent and overall program in which managers analyze the results of engagement measures and improvement initiatives trying to find the cause/effect of the measures we implement and the results we achieve.”

— Joseba Arano, HR Director, Calidad Pascual

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 40% of Spanish executives say their company plans for succession and continuity in key roles. 45% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 47% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—46% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but only 15% of Spanish employees expect to be proficient in cloud in three years, while 49% expect to be proficient in analytics by then.
- 50% of Spanish executives say their company widely offers supplemental training programs to develop new skills.
- But only 45% of employees say their company provides the right tools to help them grow and improve job performance.
- 42% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Spain

- **Executive industries**: Executives come from the following industries: banking (8%); insurance (8%); retail (18%); public sector (14%); healthcare (18%); professional services (22%); consumer goods (12%).
- **Employee industries**: Employees come from the following industries: banking (10%); insurance (11%); retail (20%); public sector (24%); healthcare (17%); professional services (12%); consumer goods (6%).
- **Employees by function**: finance (11%); HR (6%); marketing (13%); sales (14%); operations (11%); production (9%); service (20%); IT (17%).
- **Executive titles**: CEOs (0%); COOs (12%); CFOs (9%); CIOs (7%); CMO (2%); Chief Human Resources Officer (9%); VP/Directors of HR (25%); VPs of Learning/Development (14%); VPs Compensation & Benefits (12%); VP Recruiting or Talent (11%).
- **Employee titles**: front-line (42%) employees; mid-level managers (40%); line-of-business managers (19%).

About the project

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The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Sweden.

42% of Swedish employees get ample training on workplace technology; 32% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

88% of Swedish executives say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 37% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

33% of Swedish companies use quantifiable metrics and benchmarking for workforce development; but just 43% know how to extract meaningful insights from that data.

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

42% of Swedish employees get ample training on workplace technology; 32% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

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33% of Swedish companies use quantifiable metrics and benchmarking for workforce development; but just 43% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

60% of Swedish executives say they rely on younger employees or recent graduates to fill entry-level positions, and 49% of executives say Millennials entering the workforce are impacting workforce strategy.

Swedish executives may be out of touch with what Millennials think—51% of executives think Millennials are frustrated with manager quality, but only 6% of Millennials say they are. 52% of executives think Millennials will consider leaving their jobs due to a lack of learning and development, but only 4% of Millennials say so.
Workforce 2020—Sweden

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 47% of Swedish employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Swedish employees are: competitive compensation (72%), bonuses and merit based rewards (56%), and flexible work location (43%).
- 50% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: the ability to learn and be trained quickly (35%); high level of education (31%); and job performance and results (31%).

What executives are saying...

“We need to have a strategic plan. We need to go out more and meet [younger workers] in the universities and promote our organization more, and also have communication with the students now so we know what kind of conversation they would like to have in the future.”

—Lise-Lotte Björkman Averbo, HR Manager, Skatteverket

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 34% of Swedish executives say their company plans for succession and continuity in key roles. 36% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 45% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—44% of employees say leadership at their company is equipped to lead the company to success.
Workforce 2020—Sweden

Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but employees expect to gain proficiency in most of these areas slowly. 38% expect to be proficient in analytics in three years, while just 29% expect to be proficient in cloud.
- 60% of Swedish executives say their company widely offers supplemental training programs to develop new skills.
- But only 36% of employees say their company provides the right tools to help them grow and improve job performance.
- 34% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Sweden

- **Executive industries**: Executives come from the following industries: banking (8%); insurance (9%); retail (17%); public sector (17%); healthcare (14%); professional services (19%); consumer goods (19%).
- **Employee industries**: Employees come from the following industries: banking (10%); insurance (9%); retail (16%); public sector (24%); healthcare (17%); professional services (12%); consumer goods (11%).
- **Employees by function**: finance (7%); HR (8%); marketing (11%); sales (21%); operations (24%); production (8%); service (8%); IT (15%).
- **Executive titles**: CEOs (3%); COOs (13%); CFOs (4%); CIOs (5%); CMO (2%); Chief Human Resources Officer (5%); VP/ Directors of HR (17%); VPs of Learning/Development (15%); VPs Compensation & Benefits (22%); VP Recruiting or Talent (14%).
- **Employee titles**: front-line (44%) employees; mid-level managers (37%); line-of-business managers (17%).

About the project

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The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about Switzerland.

50% of Swiss employees get ample training on workplace technology; 31% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

80% of Swiss executives say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 23% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

36% of Swiss companies use quantifiable metrics and benchmarking for workforce development; 39% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 64% of Swiss executives say they rely on younger employees or recent graduates to fill entry-level positions, and 64% of executives say Millennials entering the workforce are impacting workforce strategy.

- Swiss executives may be out of touch with what Millennials think—37% of executives think Millennials are frustrated with manager quality, but only 2% of Millennials say they are. 57% of executives think Millennials will consider leaving their jobs due to lack of learning and development, but only 2% of Millennials say they’ve considered it.
What Matters Most at Work

Companies do not understand what their employees really want from them.

- 50% of Swiss employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Swiss employees are: competitive compensation (65%), bonuses and merit-based rewards (57%), and benefit plans for employees’ families (49%).
- 45% of employees say more comprehensive benefits would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: the ability to learn and be trained quickly (39%); high level of education/training (39%); and loyalty and long-term commitment to the company (35%).

What executives are saying...

“We are currently thinking of having an age diversity concept. We think about how we can involve the older workforce with the younger workforce—maybe bring them explicitly together in projects where the older workforce acts more as mentors.”

—Franziska Stadelmann, Head People & Organisational Development, Bank Vontobel

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 32% of Swiss executives say their company plans for succession and continuity in key roles. 24% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 44% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—35% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but approximately a quarter of employees expect to gain proficiency in areas like cloud, digital media, mobile, and social collaboration in three years. 58% expect to be proficient in analytics by then.
- 58% of Swiss executives say their company widely offers supplemental training programs to develop new skills.
- But only 22% of employees say their company provides the right tools to help them grow and improve job performance.
- 31% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Switzerland

- **Executive industries**: Executives come from the following industries: banking (10%); insurance (10%); retail (19%); public sector (13%); healthcare (16%); professional services (21%); consumer goods (12%).
- **Employee industries**: Employees come from the following industries: banking (10%); insurance (10%); retail (12%); public sector (9%); healthcare (11%); professional services (21%); consumer goods (27%).
- **Employees by function**: finance (10%); HR (13%); marketing (15%); sales (14%); operations (14%); production (6%); service (13%); IT (15%).
- **Executive titles**: CEOs (2%); COOs (16%); CFOs (12%); CIOs (6%); CMOs (4%); Chief Human Resources Officer (6%); VP/Directors of HR (8%); VPs of Learning/Development (10%); VPs Compensation & Benefits (25%); VP Recruiting or Talent (11%).
- **Employee titles**: front line (45%) employees; mid-level managers (45%); line-of-business managers (10%).

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This fact sheet outlines key survey findings about Turkey.

The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

47% of Turkish employees get ample training on workplace technology; 31% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

78% of Turkish companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; but 20% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

26% of Turkish companies use quantifiable metrics and benchmarking for workforce development; 31% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

54% of Turkish executives say they rely on younger employees or recent graduates to fill entry-level positions, and 61% of executives say Millennials entering the workforce are impacting workforce strategy.

Turkish executives may be out of touch with what Millennials think—31% of executives think Millennials are frustrated with manager quality, while only 2% of Millennials say they are. 52% of executives think Millennials will consider leaving their jobs due to lack of learning and development—but 10% of Millennials say they have.

The Looming Talent Crisis

Turkey’s top 5 labor market shifts affecting workforce strategy:

- Increasing number of contingent employees: 42%
- Aging workforce: 40%
- Millennials entering the workforce: 61%
- Globalization of labor supply: 41%
- Difficulty recruiting employees with base-level skills: 38%

Executives say...

...my company has an execution plan for achieving its vision of workforce management.

...my company has a strong vision for the workforce it wants to build in three years.

...workforce issues drive strategy at the board level.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 54% of Turkish executives say they rely on younger employees or recent graduates to fill entry-level positions, and 61% of executives say Millennials entering the workforce are impacting workforce strategy.

- Turkish executives may be out of touch with what Millennials think—31% of executives think Millennials are frustrated with manager quality, while only 2% of Millennials say they are. 52% of executives think Millennials will consider leaving their jobs due to lack of learning and development—but 10% of Millennials say they have.

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- 54% of Turkish executives say they rely on younger employees or recent graduates to fill entry-level positions, and 61% of executives say Millennials entering the workforce are impacting workforce strategy.

- Turkish executives may be out of touch with what Millennials think—31% of executives think Millennials are frustrated with manager quality, while only 2% of Millennials say they are. 52% of executives think Millennials will consider leaving their jobs due to lack of learning and development—but 10% of Millennials say they have.
Workforce 2020—Turkey

What Matters Most at Work

Companies do not understand what their employees really want from them.

- 41% of Turkish employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to Turkish employees are: competitive compensation (65%), bonuses and merit-based rewards (64%), and supplemental training programs (42%).
- 42% of employees say higher compensation would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: the ability to learn and be trained quickly (46%); job performance and results (41%); and high level of education (41%).

What executives are saying...

“We are really focused on the workforce development, from the top executives in the group to those in the group companies. We are focused on who their successors will be and the most efficient ways that we can develop their capabilities. We are using an assessment process to define high potential for executive level. Successful employees with high level leadership skills are trained for their future positions proactively. HR is in charge at the operational level, but top management has made workforce development a strategic goal.”

—Damla Tamakan, HR Coordinator, Koç Holding

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 35% of Turkish executives say their company plans for succession and continuity in key roles. 26% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 39% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—34% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g. analytics, cloud) will grow, but 18% of employees expect to be proficient in cloud in three years, while 50% expect to be proficient in analytics by then.
- 70% of Turkish executives say their company widely offers supplemental training programs to develop new skills.
- But only 36% of employees say their company provides the right tools to help them grow and improve job performance.
- 39% of employees say their company encourages continuing education and training to further career development.

Survey demographics: Turkey

- Executive industries: Executives come from the following industries: Banking (8%); insurance (10%); retail (18%); public sector (18%); healthcare (16%); professional services (18%); consumer goods (12%).
- Employee industries: Employees come from the following industries: Banking (10%); insurance (14%); retail (19%); public sector (26%); healthcare (17%); professional services (9%); consumer goods (6%).
- Employees by function: Finance (17%); HR (9%); marketing (13%); sales (11%); operations (16%); production (7%); service (11%); IT (17%).
- Executive titles: CEOs (1%); COOs (6%); CFOs (6%); CIOs (9%); CMO (5%); Chief Human Resources Officer (4%); VP/Directors of HR (19%); VPs of Learning/Development (17%); VPs Compensation & Benefits (23%); VP Recruiting or Talent (11%).
- Employee titles: front line (42%) employees; mid-level managers (45%); line-of-business managers (14%).

About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
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This fact sheet outlines key survey findings about the United Arab Emirates.

**The New Face of Work**

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 44% of Emirati employees get ample training on workplace technology; 17% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 82% of Emirati companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; but 11% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 21% of Emirati companies use quantifiable metrics and benchmarking for workforce development; 41% know how to extract meaningful insights from that data.

**A Millennial Misunderstanding**

**Millennials are different, but not as different as companies think.**

- 31% of Emirati executives say they rely on younger employees or recent graduates to fill entry-level positions, and 54% of executives say Millennials entering the workforce are impacting workforce strategy.
- Emirati executives may be out of touch with what Millennials think—46% of executives think Millennials are frustrated with manager quality, but just 2% of Millennials say they are. 27% of executives think Millennials will consider leaving their jobs due to a lack of learning and development—but only 2% of Millennials say they have considered this.
What Matters Most at Work

Companies do not understand what their employees really want from them.

- 32% of Emirati employees are satisfied or very satisfied with their jobs.

- The most important benefits and incentives to Emirati employees are: bonuses and merit-based rewards (55%), education (52%), and supplemental training programs (45%).

- 44% of employees say higher compensation would increase loyalty and engagement with their current job.

- Employees think the following attributes are most important to their employer: high level of education (35%); loyalty and long-term commitment (33%); and substantial experience (32%).

What executives are saying...

“For the last two years, we’ve been successful in changing the way we see our people and the way we see engagement. Naturally there will be other resistance. But when we show the long-term effects and tell how much more efficient things become, it creates a positive view from management and from employees. So, the stronger the voice in HR, the stronger the engagement.”

—Afsal Abdulla, HR Officer, Western International Group

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 32% of Emirati executives say their company plans for succession and continuity in key roles. 44% say that when a senior person leaves, the company tends to fill the role from within the organization.

- 39% of executives say their plans for growth are being hampered by lack of access to the right leaders.

- Employees agree with employers when it comes to leadership—34% of employees say leadership at their company is equipped to lead the company to success.
Bridging the Talent Gap—The Learning Mandate

Better training and education opportunities would benefit employees and businesses alike.

- The need for technology skills (e.g., analytics, cloud) will grow, but approximately a third of employees expect to be proficient in analytics, social media, and digital media in three years. 24% expect to be proficient in cloud by then.
- 45% of Emirati executives say their company widely offers supplemental training programs to develop new skills.
- 55% of employees say their company provides the right tools to help them grow and improve job performance.
- 39% of employees say their company encourages continuing education and training to further career development.

Survey demographics: United Arab Emirates

- Executive industries: Executives come from the following industries: banking (7%); insurance (7%); retail (16%); public sector (14%); healthcare (16%); professional services (13%); consumer goods (27%).
- Employee industries: Employees come from the following industries: banking (6%); insurance (8%); retail (16%); public sector (14%); healthcare (16%); professional services (19%); consumer goods (21%).
- Employees by function: finance (11%); HR (11%); marketing (11%); sales (16%); operations (7%); production (9%); service (13%); IT (23%).
- Executive titles: CEOs (0%); COOs (7%); CFOs (10%); CIOs (21%); CMOs (4%); Chief Human Resources Officer (6%); VP/Directors of HR (14%); VPs of Learning/Development (9%); VPs Compensation & Benefits (25%); VP Recruiting or Talent (4%).
- Employee titles: front line (42%) employees; mid-level managers (34%); line-of-business managers (25%).

About the project

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This fact sheet outlines key survey findings about the United Kingdom.

The New Face of Work
Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 42% of UK-based employees get ample training on workplace technology; 30% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).
- 84% of UK-based companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; but 32% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.
- 41% of UK-based companies use quantifiable metrics and benchmarking for workforce development; 41% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 54% of UK-based executives say they rely on younger employees or recent graduates to fill entry-level positions, but 46% of executives say Millennials entering the workforce are impacting workforce strategy.
- UK-based executives may be out of touch with what Millennials think—45% of executives think Millennials are frustrated with manager quality, but 8% of Millennials say they are. 46% of executives think Millennials will consider leaving their jobs due to lack of learning and development—but only 18% of Millennials say they have.

Executive say...

...my company has a strong vision for the workforce it wants to build in three years.

...my company has an execution plan for achieving its vision of workforce management.

...workforce issues drive strategy at the board level.

The UK’s top 5 labor market shifts affecting workforce strategy:

- Difficulty recruiting employees with base-level skills
- Globalization of labor supply
- Changing work models (e.g., telecommuting, flex time)
- Millennials entering the workforce
- Employee expectations are changing
## Workforce 2020—United Kingdom

### What Matters Most at Work

**Companies do not understand what their employees really want from them.**

- 40% of UK-based employees are satisfied or very satisfied with their jobs.
- The **most important benefits and incentives** to UK-based employees are: competitive compensation (76%), *bonuses and merit-based rewards* (56%), and *vacation time* (51%).
- 38% of employees say **higher compensation** would increase loyalty and engagement with their current job.
- Employees think the following attributes are most important to their employer: *job performance and results* (45%); *the ability to learn and be trained quickly* (29%); and *loyalty and long-term commitment to the company* (29%).

### What executives are saying...

“**You have to find the right people and make sure that they’re trained and equipped for what they need to do. We place a major emphasis on leadership training and coaching, as the nature of our business involves leading remote and diverse teams up-country in vastly different geographies.**”

—Pamela Innes, Director of Human Resources & Organizational Development, Plan International

### The Leadership Cliff

**Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.**

- Just 43% of UK-based executives say their company plans for succession and continuity in key roles. 53% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 48% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—46% of employees say leadership at their company is equipped to lead the company to success.

![Diagram showing employee and executive perspectives on leadership](image)

**Executives say...**

- Our leaders are prepared to lead a diverse workforce: 28%
- Talent available in leadership positions is sufficient to drive global growth: 42%
- Our leadership has the skills to effectively manage talent: 68%

**Employees say...**

- 21% of employees say leadership ability is an important employee attribute at their company.
- 20% of employees say their manager delivers on leadership expectations.
- 43% of employees say their company is committed to diversity.
**Workforce 2020—United Kingdom**

**Bridging the Talent Gap—The Learning Mandate**

*Better training and education opportunities would benefit employees and businesses alike.*

- The need for technology skills (e.g. analytics, cloud) will grow, but 27% of employees expect proficiency in **cloud** in three years; 61% expect to be proficient in **analytics**; less than half expect proficiency in **mobile, social media, and digital media**.
- 55% of UK-based executives say their company widely offers **supplemental training programs** to develop new skills.
- But only 44% of employees say their company provides the **right tools** to help them grow and improve job performance.
- 46% of employees say their company **encourages continuing education and training** to further career development.

**Survey demographics: United Kingdom**

- **Executive industries**: Executives come from the following industries: Banking (10%); insurance (8%); retail (18%); public sector (18%); healthcare (18%); professional services (15%); consumer goods (16%).
- **Employee industries**: Employees come from the following industries: Banking (9%); insurance (6%); retail (15%); public sector (11%); healthcare (17%); professional services (25%); consumer goods (12%); other (6%).
- **Employees by function**: Finance (12%); HR (9%); marketing (11%); sales (11%); operations (14%); production (8%); service (14%); IT (14%).
- **Executive titles**: CEOs (3%); COOs (13%); CFOs (11%); CIOs (11%); CMO (3%); Chief Human Resources Officer (7%); VP/Directors of HR (16%); VPs of Learning/Development (13%); VPs Compensation & Benefits (14%); VP Recruiting or Talent (10%).
- **Employee titles**: front line (31%) employees; **mid-level managers** (36%); line-of-business managers (26%); executive (2%); other (5%).

**Annual company revenue:**
- $10 m–$49 m
- $50 m–$299 m
- $300 m–$499 m
- $500 m–$1 bn
- Over $1 bn

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About the project

Workforce 2020 is a large-scale global study to discover best practices and actual progress toward the creation of talent strategies for the future in the global economy. We surveyed more than 2,700 executives and 2,700 employees, and interviewed 28 executives across the following countries: Australia, Brazil, Canada, Chile, China, Colombia, the Czech Republic, Denmark, France, Germany, India, Japan, Kenya, Malaysia, Mexico, the Netherlands, Poland, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, UAE, UK, US. Survey respondents came from a variety of industries, company sizes, and age groups (49% of employee respondents are Millennials).
The workplace of the future will be the most diverse the world has ever seen. In 2020, multiple generations working together will have different skills, experiences, habits, and motivations—and more of these workers will be freelancers and contractors. All of this represents a major opportunity for employers and employees alike.

Our worldwide survey of 2,718 executives and 2,872 employees shows that most companies are not prepared to capitalize on these changes. Businesses are struggling with managing talent, cultivating leadership, encouraging learning, and understanding their employees—and they may not be making HR a priority.

This fact sheet outlines key survey findings about the US.

The Looming Talent Crisis

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The New Face of Work

Research shows priorities shifting as economies rebound globally, and companies lag in understanding these changing dynamics.

- 39% of American employees get ample training on workplace technology; 27% get access to the latest technology. Companies and workers are unprepared for the growing need for technology skills (see “Bridging the Talent Gap”).

- 83% of American companies say they are increasingly using contingent, intermittent, seasonal, or consultant employees; 58% say that this requires changing HR policy. Overall, executives are rethinking compensation, training, and HR technology.

- 50% of American companies use quantifiable metrics and benchmarking for workforce development; 47% know how to extract meaningful insights from that data.

A Millennial Misunderstanding

Millennials are different, but not as different as companies think.

- 56% of American executives say they rely on younger employees or recent graduates to fill entry-level positions, and 35% of executives say Millennials entering the workforce are impacting workforce strategy.

- American executives may be out of touch with what Millennials think—60% of executives think Millennials are frustrated with manager quality, but 18% of Millennials say they are. 62% of executives say Millennials will consider leaving their jobs due to lack of learning and development, but 31% of Millennials say they have considered this.

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America’s top 5 labor market shifts affecting workforce strategy:
- Employee expectations are changing: 47%
- Difficulty recruiting specialized employees: 50%
- Changing work models (e.g., telecommuting, flex time): 42%
- Difficulty recruiting employees with base-level skills: 41%
- Aging workforce: 41%

Executives say...

...my company has an execution plan for achieving its vision of workforce management.

...workforce issues drive strategy at the board level.

...my company has a strong vision for the workforce it wants to build in three years.
What Matters Most at Work

Companies do not understand what their employees really want from them.

- 33% of American employees are satisfied or very satisfied with their jobs.
- The most important benefits and incentives to American employees are: competitive compensation (84%), retirement plans (75%), and vacation time (62%).
- 39% of employees say higher compensation would increase loyalty and engagement with their current job.
- American companies are much more likely than worldwide respondents to offer competitive compensation.
- Employees think the following attributes are most important to their employer: job performance and results (46%); the ability to learn and be trained quickly (29%); and loyalty and long-term commitment to the company (28%).

What executives are saying...

“It’s very difficult for companies to recognize the talent they need to succeed and go forward within the future. Leaders look at what made them successful and transpose that into what they need in future leaders. One of the major roles that HR can play in many, many organizations is helping the organization see what are the right types of roles and talent we need to be successful in five years? That’s challenging.”

—George Murphy, SVP of Total Rewards, HR Technology, and Operations, Lincoln Financial Group

The Leadership Cliff

Executives and employees agree that leadership is lacking—and companies are not focused enough on developing future leaders.

- Just 51% of American executives say their company plans for succession and continuity in key roles. 48% say that when a senior person leaves, the company tends to fill the role from within the organization.
- 47% of executives say their plans for growth are being hampered by lack of access to the right leaders.
- Employees agree with employers when it comes to leadership—51% of employees say leadership at their company is equipped to lead the company to success.

Executives say...

- Our leaders are prepared to lead a diverse workforce. 44%
- Talent available in leadership positions is sufficient to drive global growth. 43%
- Our leadership has the skills to effectively manage talent. 55%
- 23% of employees say leadership ability is an important employee attribute at their company.
- 29% of employees say their manager delivers on leadership expectations.
- 37% of employees say their company is committed to diversity.
Workforce 2020 —United States

Bridging the Talent Gap—The Learning Mandate

**Better training and education opportunities would benefit employees and businesses alike.**

- The need for technology skills (e.g., analytics, cloud) will grow, but just 33% of employees expect to be proficient in cloud in three years. 43% expect proficiency in analytics, and about half expect proficiency in mobile, social media, and social collaboration.
- 51% of American executives say their company widely offers supplemental training programs to develop new skills.
- 51% of employees say their company provides the right tools to help them grow and improve job performance.
- 52% of employees say their company encourages continuing education and training to further career development.

**Survey demographics: United States**

- **Executive industries:** Executives come from the following industries: banking (12%); insurance (8%); retail (14%); public sector (11%); healthcare (20%); professional services (21%); consumer goods (6%).
- **Employee industries:** Employees come from the following industries: banking (15%); insurance (11%); retail (17%); public sector (8%); healthcare (15%); professional services (19%); consumer goods (4%).
- **Employees by function:** finance (13%); HR (16%); marketing (18%); sales (12%); operations (13%); production (3%); service (5%); IT (14%).
- **Executive titles:** CEOs (13%); COOs (22%); CFOs (11%); CIOs (6%); CMOs (1%); Chief Human Resources Officer (13%); VP/Directors of HR (14%); VPs of Learning/Development (4%); VPs Compensation & Benefits (2%); VP Recruiting or Talent (4%).
- **Employee titles:** front line (28%) employees; mid-level managers (35%); line-of-business managers (21%); executive (12%).

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