THE WORK & SKILLS EDITION

EUROPEAN PUBLIC AFFAIRS

DIGEST | MARCH 2023

Ipsos

TABLE OF CONTENT

INTRODUCTORY
EDITORIAL

A warm welcome to this edition of the Ipsos European Public Affairs (EPA) digest, the first of 2023.

As ever, the early part of the year has been a busy one for our team as we embark on a host of new and interesting studies, whilst putting the finishing touches to projects launched in 2022. The latter covered topics as diverse as political values, consumer behaviour, wellbeing, the economy, the digital transformation, sustainability, and the ever-evolving world of work and skills. In this edition of our digest, we hone in on the last of these themes, work and skills, which has been a particularly salient one for our clients over the last 12 months, as reflected in the European Commission's decision to make 2023 the European Year of Skills.

The Year of Skills is aimed at giving fresh impetus to lifelong learning, thereby ensuring workers are able to access better job opportunities and contribute to the economic recovery, as well as to the green and digital transitions. In our first article, we reflect on what our recent research across the EU has uncovered about skills, with a particular focus on how workers themselves perceive the digital transition and their preparedness for it.

Workers perspectives' are also a focus of our second article, in which we interview Ipsos' Employee Experience (EX) experts about wider macro trends that are shaping the world of work, as well as latest best practice approaches and tools to deliver accurate insights on the employee experience that can directly inform HR policy and practice.

Elsewhere in this edition, our publications section provides details of two of our team's most recent studies in the work and skills space: A large-scale survey on occupational health and safety in post-pandemic workplaces for EU-OSHA; and an exploration of entrepreneurship among young people, on behalf of the European Commission. A round up of other relevant publications and thought pieces from across the Ipsos group is provided in our news and events section, including a look at trials of a four-day working week in the UK, and at the experiences and priorities of remote workers in the US.

Putting this edition of the digest together gave us pause to reflect on how Ipsos itself is performing when it comes to ensuring a positive employee experience and supporting staff to fulfil their potential. The picture is an encouraging one: Last year, a large majority of staff reported being satisfied with their jobs, and with learning opportunities available to them. They spent 3.6% of their time in training (vs 2.5% in 2021), meaning that each spent an average of 68 hours in corporate learning during the year. Of course, in a sense, this drive to learn should come as no surprise – after all, what is a researcher but a curious individual with an urge to explore and discover! I hope you enjoy reading this edition of the digest. As ever, we would very much welcome your feedback and any suggestions for future content.

Contact the Author

Christine Tresignie
Managing Director
Ipsos European Public Affairs
christine.tresignie@ipsos.com

THE EU'S DIGITAL PUSH: ARE EMPLOYEES READY?

Guided by [an ambitious EU policy agenda to digitise the economy,](#) businesses across the EU are increasingly adopting digital technologies and tools. While important in fostering a more resilient, sustainable and future-proof European economy, the digital push is also set to profoundly change workers' relationship with their jobs. This raises the question: do EU employees feel they are ready for the transition?
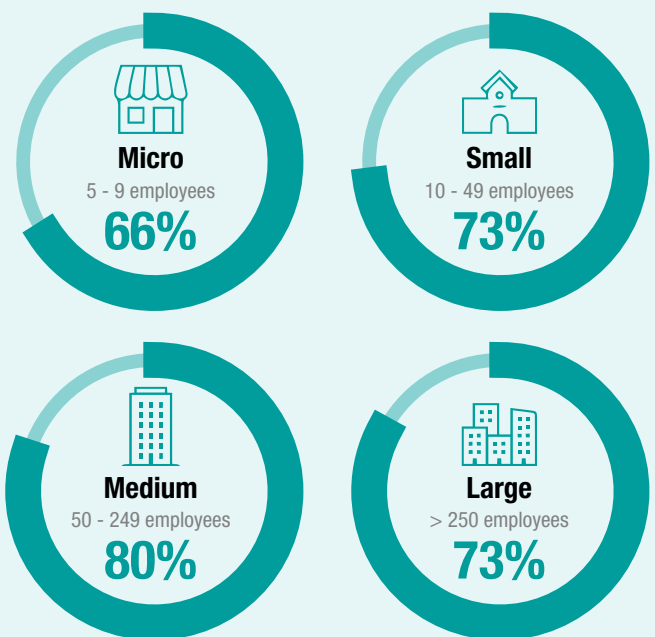
THE EU'S DIGITAL PUSH

The European Commission is pursuing a rapid digitisation of the European economy, and sees businesses as important allies in this regard. Under the [Digital Decade agenda](#), it has set a target of nine in ten European SMEs implementing digital technologies by 2030, and three-quarters of all EU companies using AI, Big Data or Cloud technologies. While these targets are ambitious, available research indicates that enterprises have been making real progress towards digitisation over the last decade. For example, between 2014 and 2021, the proportion of companies using cloud computing [more than doubled](#) (from 18% to 41%) and, as of 2022, a large majority [of EU enterprises were storing and analysing data](#). [A survey](#) that Ipsos conducted for the European Commission in 2020 found six in ten enterprises were either using some type of AI technology or planned to do so in the coming years. Not surprisingly, the COVID-19 pandemic has had a considerable impact on this steady evolution: [In a survey](#) we conducted for the Commission in 2020, a majority of large and small businesses told us that the pandemic had accelerated their adoption of digital technologies.
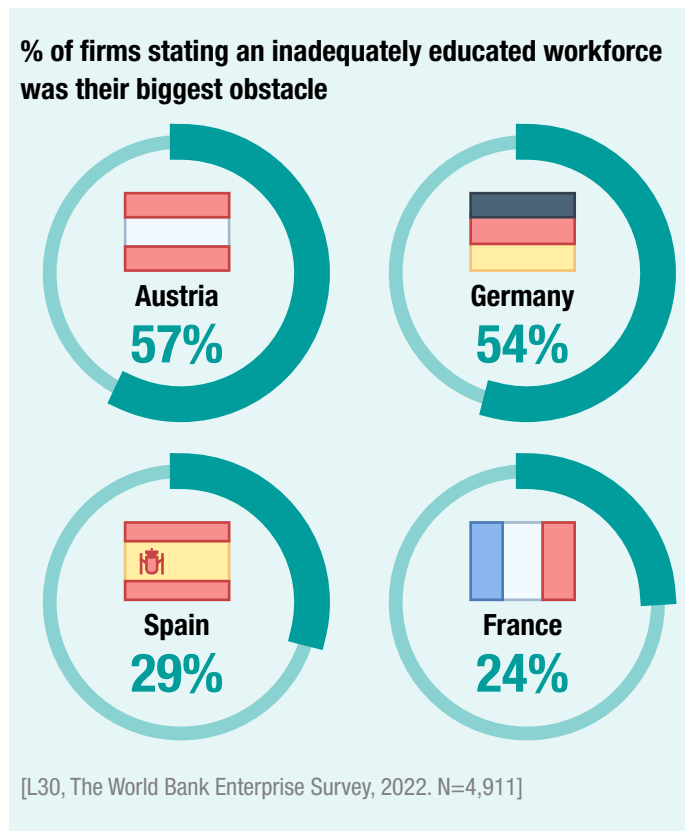
Impact of COVID-19 on European firms' use of ICT, by firm size

The COVID-19 pandemic has accelerated our firm's adoption of digital technologies

Micro
5 - 9 employees
66%

Small
10 - 49 employees
73%

Medium
50 - 249 employees
80%

Large
> 250 employees
73%

[Q9, Survey on the contribution of ICT to the environmental sustainability actions of EU enterprises, 2020. N=8,537]

The push towards a digital economy of course brings an ever-increasing need for suitably skilled employees and, indeed, as part of the Digital Decade agenda, the EU has set a target of building a workforce of 20 million ICT specialists in the coming years and ensuring that 70% of working-age Europeans are ready to carry out at least basic digital tasks. Such targets will no doubt be very welcome among businesses, who consistently tell us about challenges they face finding employees with the right skills. In the 2022 wave of the annual World Bank enterprise survey, for example, between a quarter and more than half of companies in the four EU Member States surveyed reported that an inadequately educated workforce was an obstacle to their operations. Such findings are replicated time and again in analyses of the European business context. For example, a 2022 survey of Businesses on the data economy found that the main internal barriers preventing enterprises from analysing data were a lack of suitable human resources, followed by a lack of business skills and not having the right IT/coding skills to analyse data.

% of firms stating an inadequately educated workforce was their biggest obstacle

Austria
57%

Germany
54%

Spain
29%

France
24%

[L30, The World Bank Enterprise Survey, 2022. N=4,911]

But how do workers themselves feel about the digitisation of the workplace and their preparedness it? And what do they anticipate the impacts will be for their jobs and their day-to-day working conditions?
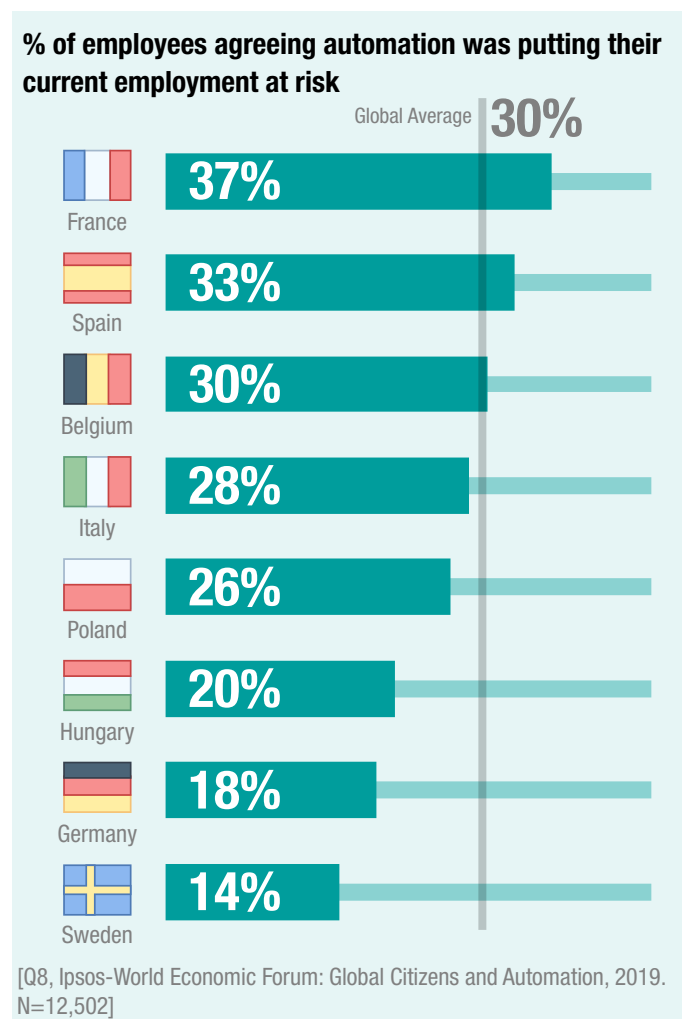
ADAPTING TO THE DIGITAL WORKPLACE

A 2020 Eurobarometer survey found that more than four in five EU citizens considered themselves sufficiently skilled in the digital technologies they needed for their jobs. This confidence was strong across all age groups but peaked among younger people aged 15-24. A study Ipsos conducted at around the same time, however, found that a sizeable proportion of European workers did anticipate needing to expand their digital skills for their profession. The figure varied by country and was especially high in Bulgaria and Sweden. Notably, only a minority of all respondents in the same survey expected employers to help them improve their digital skills, with most of them not seeing this as employers' responsibility.

AUTOMATION AND JOB LOSS

Alongside the aforementioned perspectives, significant proportions of Europeans appear to worry about potential impacts of automation on jobs. In a 2019 survey we conducted for the World Economic Forum, half of employees globally expressed a view that automation will make their job completely different in the next 10 years, and three in ten stated that automation was putting their current employment at risk. In European countries, the results broadly reflected these global averages, though concern about risks to current employment was higher in France and lower in Hungary, Germany and Sweden.

% of employees agreeing automation was putting their current employment at risk

Global Average **30%**

France **37%**
Spain **33%**
Belgium **30%**
Italy **28%**
Poland **26%**
Hungary **20%**
Germany **18%**
Sweden **14%**

[Q8, Ipsos-World Economic Forum: Global Citizens and Automation, 2019. N=12,502]

Concern about risks to current employment of automation further varied by sector and type of job – ranging from 38% among workers in the farming, forestry and fishing sector, to 36% among those in the administrative and support services sector, and 23% in the healthcare and social services sector.
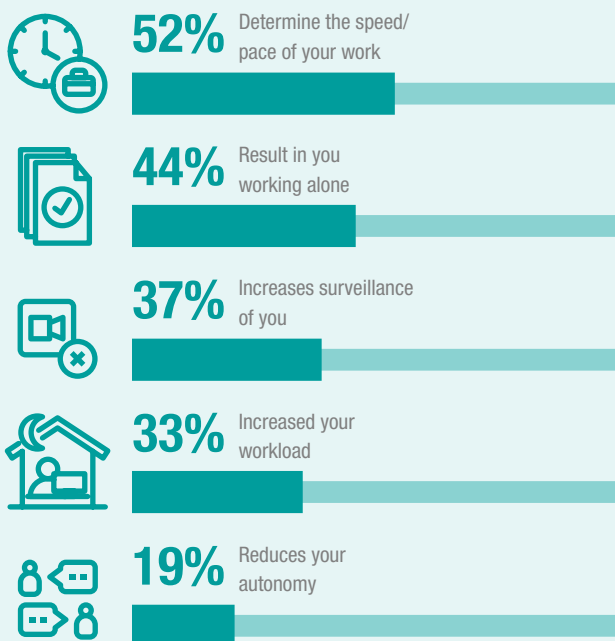
CHANGING WORKING CONDITIONS

The question of job security notwithstanding, workers appear to see both advantages and disadvantages of new technology for their day-to-day working experiences. A global study we conducted for BCG Gamma (which covered France, Germany and Spain) found that a clear majority of employees in companies using AI-enabled tools recognised several benefits of these tools, particularly when it came to improving their effectiveness, their results and how their work was organised. On the other hand, in a recent Flash Eurobarometer survey we undertook for EU-OSHA we found that significant proportions of employees felt the use of digital technologies in their workplace resulted in their working alone and being under increased surveillance. A third also felt the technologies served to increase their workload.

Perceived impacts of digital technologies in European workplaces

52% Determine the speed/pace of your work

44% Result in you working alone

37% Increases surveillance of you

33% Increased your workload

19% Reduces your autonomy

[A1, Flash Eurobarometer 840 – OSH Pulse Survey, 2022. N = 25,683]

In all then, the latest research points to a level of ambivalence among employees' when it comes to the digitisation of work. On the one hand they appear to feel that they currently have the technological skills they need to do their jobs and see real benefits of digitisation for their personal effectiveness and output. On the other hand they do recognise that they may need to improve upon their skills in the future, with many also concerned about potential impacts of developments like automation on their current employment, or at least on the quality of their day-to-day working experience. The European Commission has formulated a set of Digital Rights and Principles that it has vowed to abide by in its digital push, which include solidarity, inclusion, and an intention to put people and their rights first. Such initiatives will be key to ensuring workers remain 'on board' with the transformation and are able to contribute productively. Of course, individual employers also have an important role to play in easing the process for workers. In particular, it will be crucial that they consistently take stock of how their workforce is experiencing the digital transformation, so that they are able to respond appropriately.

Contact Authors

Jonah Rys
Senior Research Manager
Ipsos European Public Affairs
jonah.rys@ipsos.com

María Fernanda Gómez
Senior Research Expert
Ipsos European Public Affairs
mariafernanda.gomez@ipsos.com

MEASURING EMPLOYEE EXPERIENCE:
WHY, HOW AND WHAT?

Employee experience (EX) has become something of a buzz phrase over recent years among researchers and HR professionals alike. But why should we be measuring it, what specifically should we be focusing on when we do, and what's the best way to go about this to generate meaningful, usable insights? We spoke with CEO of international EX research at Ipsos James Tarbit to get his perspective.

James Tarbit
CEO International EX Research
Ipsos

James, we are living in unusually uncertain and dynamic times at the moment. What would you say are the most significant macro trends currently shaping the world of work and the employee experience?

Polycrisis is the big word at the moment. It captures the idea that not one but multiple concurrent crises – the war in Ukraine, the economy, climate change – are impacting us at present. On top of that, automation and AI are continuing to disrupt how we behave as consumers, employees and humans. In such times of change and uncertainty, people tend to respond in one of two ways: seeking to exert what control they can over their environment or embracing the ambiguity and perceiving it as an opportunity. We can see the desire for control in a rising sense of nostalgia, a craving for simplicity and attempts to retain boundaries. This was illustrated in Ipsos' recent Global Trends survey, where we found that 83% of people thought the World was changing too fast.

A desire for control is showing up in four key ways in the world of work. Firstly, an increased focus on pay and reward, driven by concerns over rapidly rising inflation. Secondly, an emphasis on reclaiming boundaries in the workplace. The COVID-19 pandemic was incredibly disruptive in terms of where and how people work, and it impacted the work-life balance and mental health of many. Now the pandemic is receding, employees are looking to redress that balance. Wellbeing is an increasing driver of employee positivity, and hybrid work is now an absolute expectation among new joiners. Thirdly, mirroring wider societal trends, workers also increasingly expect their workplace and its leadership to adhere to values that are similar to their own, especially when it comes to social issues. Finally, and underlying these various trends, we are seeing decreased public trust in institutions and senior leadership. This is a considerable challenge for employers, particularly as they make efforts to support employees through ongoing disruption, or changes in technology that are starting to impact thinking, as well as doing, tasks.

Against such a backdrop, what methods and approaches are most effective for tapping into employees' experiences and delivering meaningful insights?

I think of best practice in EX research as reflecting a combination of principles on the one hand, and methods on the other. By principles I mean that the research should be

timely, relevant to employees and, critically, actionable – there is no point listening to your employees and then not doing anything about what they say. With regard to methods, its crucial that employers listen to employees frequently and using a variety of approaches. This means not just relying on a traditional, one-off annual staff survey but undertaking regular, topic-specific research. Lifecycle research is also crucial – understanding the experience of employees at critical junctures in their careers, such as during onboarding, promotion, return from maternity leave and exit.

It's also important to understand that EX research doesn't just mean 'more surveys'. Technological developments mean that today's employers have multiple opportunities to undertake unstructured listening – analysing social media conversations (on Teams, Workplace, Slack channels, etc.) and other ambient data such as HR, operational or customer data. The use of ambient data is especially key as it enables organisations to view their employees' experience as part of a broader value chain – a good employee experience is both a desired state per se and an essential ingredient for the achievement of customer satisfaction, or wider organisational objectives.

And, having selected the methods and data sources, what should we be seeking to find out in EX research?

Traditionally employee research has centred on employee engagement – positive sentiment towards an employee's organisation, often characterised by pride, advocacy or dedication. That's useful, but it's also important to situate engagement in the wider employee experience. This offers a more holistic view of an employee's evaluation of their employer derived from key touchpoints and experiences. These might relate to organisational foundations (processes, policies, tools, communications), day-to-day individual experiences, and also cultural experiences or the working environment. At Ipsos, our research deliberately takes account of these different dimensions, to provide for a more rounded understanding of employee perspectives and make the insights more actionable. This is not to say we favour an off-the-shelf approach – on the contrary. It is critical that any EX measurement framework is tailored to the realities of each organisation's individual context to ensure directly relevant, insightful and actionable outcomes.

> "It is critical that any EX measurement framework is tailored to the realities of each organisation's individual context."

Can you tell us more about that – what does good practice look like when it comes to converting EX research outcomes into tangible actions?

Well, the minimum is doing something – and being seen to do something! If you are asking staff for their opinion, at the very least you need to create a feedback loop – which means going back to them to say thank you for taking part, here's what you told us and here's what we are planning to do. It sounds basic, but you'd be surprised how often organisations forget to do it.

More broadly, when we talk about activation in an EX programme, we are talking about changing an organisation's culture and/or an aspect of its operations to improve the employee experience or wider outcomes. That can take a number of forms, but these generally fall into two camps: changing employees' behaviour or changing the structure around them. I'm a big fan of the latter, which tends to be quicker, easier and more powerful than trying to change behaviour directly. That's because when changing process, you're changing the context and environment in which behaviour falls. You're setting new defaults for employees to respond to.

What are the main challenges you feel today's employers face when it comes to implementing EX research?

I think one challenge that's only going to grow is concerns over privacy. As I said earlier, there is now much greater potential for employers to undertake direct listening on their employees using social, unstructured and other ambient data. This is already accepted practice in customer experience (CX) research, and we are used to having our data and online conversations analysed by companies in order to improve our experience as customers. We tend to accept it as a necessary evil, or even an advantage if it leads to a better experience.

That's quite different in an EX context. While we might have a vague sense that our employment contract gives our employer some rights to monitor our activity, we are much less likely to view this use of data in the same way. It's an ethical and methodological argument that leaders and EX practitioners alike will need to overcome, because the benefits of being able to use data in this way are manifest.

Secondly, as EX teams and HR functions try to embed more data analytics and data science into what they do, they need to seek out a new breed of HR employee. And integrating the work of these new data-based listening experts with that of the more traditional HR specialists can also become a challenge in its own right. I guess the conversation around AI will also play a role here, particularly in relation to the first point on privacy. I'm not sure whether employees will view an algorithm analysing their data and making recommendations as positive from a privacy point of view, or slightly dehumanising!

Finally, looking to the future, how do you see EX research evolving? What are you most excited about?

I've talked about the potential to make greater use of unstructured, unsolicited data in EX research – if we can overcome the justifiable concerns, that is incredibly exciting. It reduces the burden on employees (because there is less need to survey them directly), the data is readily available and it can be analysed and utilised in a variety of ways. It holds the potential to change the EX research space dramatically, just as it did in consumer research.

> **"The potential to make greater use of unstructured, unsolicited data in EX research is incredibly exciting."**

Anything else?

There is considerable scope for EX research and CX (customer experience) or UX (user experience) research to be brought together more to deliver enhanced insights. Here too, technology is increasingly acting as an enabler – we have access to tools that allow us to import, analyse and visualise EX, CX/UX and operational data in tandem. This convergence is incredibly helpful for two reasons. Firstly, unsiloing data leads to more and better insights. Secondly, the more those insights allow organisations to see the benefit of improving the employee experience, the more they will do it – and the happier their employees will be.

Contact Authors

Dr Sara Davidson
Research Director
Ipsos European Public Affairs
sara.davidson@ipsos.com

Egle Tamosaityte
Senior Research Expert
Ipsos European Public Affairs
egle.tamosaityte@ipsos.com

OCCUPATIONAL
SAFETY AND HEALTH
IN POST-PANDEMIC WORKPLACES

Most workers have at least one health problem that they feel is caused or made worse by their work – yet, the vast majority of them are satisfied with the health and safety measures in their workplace.

In Spring 2022, the European Agency for Safety and Health at work (EU-OSHA) commissioned us to carry out a survey among employed workers across all EU Member States, plus Iceland and Norway. This study offers valuable insights into the mental and physical health stressors workers face and sheds light on the importance of safety and health measures at work.

Read more

https://osha.europa.eu/en/facts-and-figures/osh-pulse-occupational-safety-and-health-post-pandemic-workplaces?pk_campaign=sm

Among the key findings were that:

2/3 workers have at least one health problem that they feel is caused or made worse by their work. The most commonly mentioned problems are 'overall fatigue' (37%), 'headaches or eyestrain' (34%) and 'bone, joint or muscle problems/pain' (30%).

44% say that their work stress has increased as a result of the COVID-19 pandemic.

59% would feel comfortable speaking to their manager or supervisor about their mental health but a similar proportion (50%) worry that disclosing a mental health condition could have a negative impact on their career.

More than 4/5 workers feel there are good measures in place at their workplace to protect workers' health (82%), and that safety problems are addressed promptly (81%).

Contact the Author
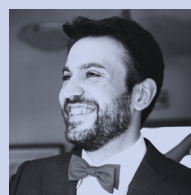
Christophe Leclerc
Senior Research Expert
Ipsos European Public Affairs
christophe.leclerc@ipsos.com

YOUNG PEOPLE AND ENTREPRENEURSHIP

A majority of young people in the EU would consider setting up a business. However, a lack of know-how and skills remain important obstacles to youth entrepreneurship.

In October 2022, we conducted a study among 15-30 year old citizens across all EU Member States, on behalf of the Directorate-General for Employment, Social Affairs and Inclusion. The study sought to shed light on the drivers and barriers to youth entrepreneurship, as well as on the type of support and training young people need in order to be able to set up in business.

Among the key findings were that:

More than two-thirds (69%) of young people would consider setting up their own business or have already taken steps towards doing so.

Almost a third (31%) identify a lack of knowledge or skills as barriers to young people becoming entrepreneurs.

The main place young people expect to receive guidance on entrepreneurship is at school or university (32%). Other sources mentioned included content creators (27%) and entrepreneurship coaches or networks (21%).
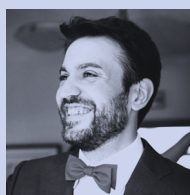
Asked what type of support they feel would be most useful to set up in business, over one in five respondents mentioned education, training, coaching and mentoring (22%); networking support to reach out to potential clients or suppliers (22%); and support with tax requirements.

Read more

https://europa.eu/eurobarometer/surveys/detail/2670

Contact the Author

Christophe Leclerc
Senior Research Expert
Ipsos European Public Affairs
christophe.leclerc@ipsos.com

NEWS & EVENTS

MORE ON OUR WORKING LIVES

A four-day working week?

The latest four-day week trials in the UK show overwhelmingly positive results, but there are still question marks about the true feasibility of it becoming the new normal working week, and are there other more immediate ways to achieve the benefits that employees are seeking? Ipsos' Employee Experience experts give their views in the latest of their insightful analysis series.

Remote working

Recent Ipsos polling for the Wall Street Journal found that for employed Americans who've had experience with remote work during the COVID-19 pandemic or who currently work remotely, access to good services, like schools and hospitals, are among the most important qualities they look for in a neighbourhood. Three in five of these workers feel appreciated by their colleagues and believe they have work-life balance. More detail on these and other findings from the poll can be accessed on our website.

Ipsos KEYS webinar

How a better understanding of cultures, countries and communities can help us make more informed decisions.

Watch now

MACRO TRENDS

Global Trends 2023: A new world disorder

As we settle into 2023, we're witnessing new world disorder filled with crises on multiple fronts. Ipsos' large-scale global trends survey seeks to provide the data needed to make decisions for a range of plausible future scenarios. We share the macro forces that will shape the next decade, review the changes we see in our global trends framework and suggest ways to react and build resilience. The interactive survey microsite and headline report tell the story of the topline data. For a deeper dive into demographic differences, regional analysis and sector- or market-specific insights please contact us for a custom analysis of this incredibly rich data source.

GLOBAL TRENDS 2023
A NEW WORLD DISORDER

headline report

Trust

Trust is the lubricant that allows modern societies to flourish, and advanced economies to perform. And we sometimes hear that it is in crisis, or that it is disappearing from our world. But our research has found that these claims just aren't true - there is nothing new about the fact that trust is low in many aspects of our lives, and there are actually some signs of a slight recovery in some places. Learn more by listening to the latest Ipsos Views podcast on Spotify or Apple, or by reading the Global Trustworthiness Monitor report.

IN WHAT WE TRUST

IPSOS VIEWS

This digest was produced by Ipsos European Public Affairs | March 2023

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THE WORK & SKILLS EDITION

EUROPEAN PUBLIC AFFAIRS

Digest | March 2023