PUBLIC POLL FINDINGS AND METHODOLOGY

These are the findings of an Ipsos poll conducted between August 26 – September 16, 2021. For this survey, a sample of 2,008 employed adults working in managerial or higher roles from the United States, France, Germany, and United Kingdom was interviewed online in English, French, or German. The poll has a credibility interval of plus or minus 2.5 percentage points for all respondents.

For full results, please refer to the following annotated questionnaire:

Full Annotated Questionnaire

1. How has your company performed overall compared to corporate expectations in each of the last two years?

Total Exceptional/Above Average Performance Summary

	Total (N=2,008)	United States (N=502)	France (N=502)	Germany (N=502)	United Kingdom (N=502)
2019	41%	57%	28%	33%	45%
2020	36%	47%	26%	30%	40%

a) In 2019

	Total	United States	France	Germany	United Kingdom
Exceptional performance	11%	18%	6%	8%	11%
Above average performance	30%	39%	22%	25%	34%
Performance met expectations	44%	33%	52%	51%	41%
Below average performance	12%	9%	16%	13%	12%
Poor performance	3%	2%	5%	4%	2%
Exceptional/Above Average (Net)	*41%*	*57%*	*28%*	*33%*	*45%*
Below Average/Poor (Net)	*15%*	*10%*	*21%*	*17%*	*14%*

b) In 2020

	Total	United States	France	Germany	United Kingdom
Exceptional performance	12%	19%	5%	7%	15%
Above average performance	24%	29%	20%	23%	25%
Performance met expectations	38%	31%	40%	46%	35%
Below average performance	22%	19%	28%	19%	20%
Poor performance	5%	3%	6%	6%	5%
Exceptional/Above Average (Net)	*36%*	*47%*	*26%*	*30%*	*40%*
Below Average/Poor (Net)	*26%*	*22%*	*35%*	*24%*	*25%*

GAME CHANGERS Ipsos

PUBLIC POLL FINDINGS AND METHODOLOGY

2. To what extent would you say your company prioritizes each of the following?*

Total Essential/High Priority Summary

	Total	United States	France	Germany	United Kingdom
Finding innovative ways to meet customer needs	67%	72%	68%	64%	62%
Meeting financial targets / Meeting shareholders needs	67%	73%	67%	61%	68%
Being agile and adapting quickly to what is going on in the world	66%	75%	64%	62%	63%
Developing employees' current skills	65%	71%	66%	63%	61%
Attracting and retaining employees	63%	74%	58%	62%	59%
Staying current with new trends and/or technology	61%	69%	63%	59%	54%
Helping employees gain new skills that can allow them to expand their long-term career	61%	68%	61%	61%	56%
Harnessing the power of data and technology for better insights	60%	70%	58%	57%	55%
Investing in infrastructure and tools to build capacity of the company	59%	69%	60%	53%	54%
Helping employees maintain a healthy work-life balance	58%	64%	56%	56%	56%
Promoting from within the company before bringing in new talent	57%	63%	57%	52%	57%
Leading the field with new trends and/or technology	55%	65%	53%	53%	48%
Having a diverse workforce	55%	63%	54%	52%	52%
Focusing on sustainability	54%	62%	54%	51%	50%

Base varies per statement. See detail tables below.

a) Finding innovative ways to meet customer needs

Base: Excludes "I don't know"	Total (N=1,985)	United States (N=499)	France (N=495)	Germany (N=495)	United Kingdom (N=496)
Essential	25%	31%	28%	21%	21%
High priority	41%	41%	40%	43%	41%
Medium priority	25%	22%	22%	28%	29%
Low priority	6%	5%	6%	6%	6%
Not a priority	2%	1%	4%	3%	2%
Essential/High priority (Net)	*67%*	*72%*	*68%*	*64%*	*62%*
Low/Not a priority (Net)	*8%*	*6%*	*10%*	*8%*	*9%*

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Jennifer Berg**
Director, US, Public Affairs, Ipsos
Email: jennifer.berg@ipsos.com
Tel: +1 312 526 4224

GAME CHANGERS

2

PUBLIC POLL FINDINGS AND METHODOLOGY

b) Attracting and retaining employees

Base: Excludes "I don't know"	Total (N=1,982)	United States (N=501)	France (N=490)	Germany (N=494)	United Kingdom (N=497)
Essential	24%	32%	22%	18%	23%
High priority	40%	42%	36%	44%	36%
Medium priority	24%	17%	24%	26%	29%
Low priority	8%	5%	11%	8%	7%
Not a priority	5%	4%	7%	4%	5%
Essential/High priority (Net)	*63%*	*74%*	*58%*	*62%*	*59%*
Low/Not a priority (Net)	*13%*	*9%*	*18%*	*12%*	*12%*

c) Developing employees' current skills

Base: Excludes "I don't know"	Total (N=1,987)	United States (N=499)	France (N=494)	Germany (N=496)	United Kingdom (N=498)
Essential	21%	26%	20%	18%	21%
High priority	44%	45%	46%	45%	40%
Medium priority	24%	22%	23%	24%	27%
Low priority	7%	4%	6%	8%	8%
Not a priority	4%	3%	5%	5%	3%
Essential/High priority (Net)	*65%*	*71%*	*66%*	*63%*	*61%*
Low/Not a priority (Net)	*11%*	*7%*	*11%*	*14%*	*11%*

d) Staying current with new trends and/or technology

Base: Excludes "I don't know"	Total (N=1,983)	United States (N=495)	France (N=494)	Germany (N=497)	United Kingdom (N=497)
Essential	23%	28%	26%	17%	21%
High priority	38%	42%	37%	41%	33%
Medium priority	27%	22%	26%	26%	33%
Low priority	9%	8%	9%	12%	9%
Not a priority	3%	1%	3%	4%	4%
Essential/High priority (Net)	*61%*	*69%*	*63%*	*59%*	*54%*
Low/Not a priority (Net)	*12%*	*9%*	*12%*	*15%*	*14%*

e) Leading the field with new trends and/or technology

Base: Excludes "I don't know"	Total (N=1,976)	United States (N=496)	France (N=494)	Germany (N=490)	United Kingdom (N=496)
Essential	20%	26%	20%	16%	17%
High priority	35%	39%	32%	38%	31%
Medium priority	28%	21%	30%	30%	32%
Low priority	12%	10%	11%	12%	15%
Not a priority	6%	5%	7%	5%	6%
Essential/High priority (Net)	*55%*	*65%*	*53%*	*53%*	*48%*
Low/Not a priority (Net)	*18%*	*14%*	*18%*	*17%*	*21%*

PUBLIC POLL FINDINGS AND METHODOLOGY

f) Meeting financial targets / Meeting shareholders needs

Base: Excludes "I don't know"	Total (N=1,954)	United States (N=493)	France (N=486)	Germany (N=478)	United Kingdom (N=497)
Essential	27%	34%	29%	18%	26%
High priority	40%	39%	37%	44%	42%
Medium priority	22%	21%	20%	26%	20%
Low priority	5%	3%	6%	6%	6%
Not a priority	6%	3%	7%	7%	6%
Essential/High priority (Net)	*67%*	*73%*	*67%*	*61%*	*68%*
Low/Not a priority (Net)	*11%*	*6%*	*14%*	*13%*	*12%*

g) Helping employees maintain a healthy work-life balance

Base: Excludes "I don't know"	Total (N=1,983)	United States (N=498)	France (N=496)	Germany (N=493)	United Kingdom (N=496)
Essential	22%	28%	19%	17%	23%
High priority	36%	36%	37%	39%	33%
Medium priority	28%	24%	27%	30%	31%
Low priority	8%	7%	8%	9%	8%
Not a priority	6%	5%	8%	5%	5%
Essential/High priority (Net)	*58%*	*64%*	*56%*	*56%*	*56%*
Low/Not a priority (Net)	*14%*	*12%*	*17%*	*15%*	*13%*

h) Promoting from within the company before bringing in new talent

Base: Excludes "I don't know"	Total (N=1,968)	United States (N=494)	France (N=493)	Germany (N=488)	United Kingdom (N=493)
Essential	19%	26%	19%	11%	20%
High priority	38%	37%	38%	41%	37%
Medium priority	29%	27%	27%	31%	30%
Low priority	8%	5%	9%	11%	8%
Not a priority	6%	5%	8%	7%	5%
Essential/High priority (Net)	*57%*	*63%*	*57%*	*52%*	*57%*
Low/Not a priority (Net)	*14%*	*10%*	*16%*	*18%*	*14%*

i) Being agile and adapting quickly to what is going on in the world

Base: Excludes "I don't know"	Total (N=1,985)	United States (N=499)	France (N=490)	Germany (N=497)	United Kingdom (N=499)
Essential	25%	31%	23%	20%	24%
High priority	41%	44%	41%	42%	39%
Medium priority	25%	20%	25%	27%	29%
Low priority	6%	5%	8%	7%	7%
Not a priority	3%	0%	4%	4%	1%
Essential/High priority (Net)	*66%*	*75%*	*64%*	*62%*	*63%*
Low/Not a priority (Net)	*9%*	*5%*	*12%*	*11%*	*8%*

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Jennifer Berg**
Director, US, Public Affairs, Ipsos
Email: jennifer.berg@ipsos.com
Tel: +1 312 526 4224

GAME CHANGERS

4

PUBLIC POLL FINDINGS AND METHODOLOGY

j) Helping employees gain new skills that can allow them to expand their long-term career

Base: Excludes "I don't know"	Total (N=1,983)	United States (N=495)	France (N=496)	Germany (N=495)	United Kingdom (N=497)
Essential	21%	25%	21%	19%	20%
High priority	40%	42%	40%	42%	36%
Medium priority	27%	23%	24%	27%	33%
Low priority	8%	6%	11%	7%	7%
Not a priority	5%	4%	4%	5%	5%
Essential/High priority (Net)	*61%*	*68%*	*61%*	*61%*	*56%*
Low/Not a priority (Net)	*12%*	*10%*	*15%*	*13%*	*12%*

k) Having a diverse workforce

Base: Excludes "I don't know"	Total (N=1,975)	United States (N=497)	France (N=490)	Germany (N=496)	United Kingdom (N=492)
Essential	20%	26%	19%	14%	20%
High priority	36%	36%	35%	38%	33%
Medium priority	27%	23%	28%	28%	31%
Low priority	10%	8%	12%	13%	9%
Not a priority	7%	7%	6%	8%	8%
Essential/High priority (Net)	*55%*	*63%*	*54%*	*52%*	*52%*
Low/Not a priority (Net)	*17%*	*15%*	*18%*	*20%*	*17%*

l) Focusing on sustainability

Base: Excludes "I don't know"	Total (N=1,968)	United States (N=491)	France (N=494)	Germany (N=491)	United Kingdom (N=492)
Essential	20%	23%	22%	13%	19%
High priority	35%	39%	32%	38%	31%
Medium priority	28%	25%	26%	30%	32%
Low priority	11%	9%	13%	11%	12%
Not a priority	6%	4%	7%	8%	6%
Essential/High priority (Net)	*54%*	*62%*	*54%*	*51%*	*50%*
Low/Not a priority (Net)	*17%*	*13%*	*20%*	*19%*	*18%*

m) Harnessing the power of data and technology for better insights

Base: Excludes "I don't know"	Total (N=1,979)	United States (N=495)	France (N=494)	Germany (N=494)	United Kingdom (N=496)
Essential	22%	29%	21%	18%	21%
High priority	38%	40%	37%	39%	34%
Medium priority	28%	20%	28%	30%	33%
Low priority	9%	8%	9%	10%	9%
Not a priority	4%	2%	5%	3%	4%
Essential/High priority (Net)	*60%*	*70%*	*58%*	*57%*	*55%*
Low/Not a priority (Net)	*13%*	*10%*	*15%*	*14%*	*13%*

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

n) Investing in infrastructure and tools to build capacity of the company

Base: Excludes "I don't know"	Total (N=1,969)	United States (N=490)	France (N=495)	Germany (N=489)	United Kingdom (N=495)
Essential	20%	27%	22%	12%	19%
High priority	39%	43%	38%	41%	35%
Medium priority	28%	21%	27%	32%	32%
Low priority	9%	8%	9%	10%	10%
Not a priority	4%	2%	4%	5%	4%
Essential/High priority (Net)	*59%*	*69%*	*60%*	*53%*	*54%*
Low/Not a priority (Net)	*13%*	*10%*	*13%*	*15%*	*14%*

3. To what extent, if at all, have the following had an impact on disrupting your company's success?*

Total Major/Moderate Impact Summary

	Total	United States	France	Germany	United Kingdom
Disruption to business caused by COVID-19	69%	73%	73%	58%	69%
Not able to hire new people with the technical skills we need	59%	55%	63%	61%	59%
Not enough skilled employees to meet demand	59%	57%	63%	63%	55%
Inefficient processes, systems, or procedures	53%	48%	54%	59%	51%
Not enough new or repeat sales and/or customers	53%	46%	58%	53%	53%
Not able to get our employees trained on new trends and/or technology	52%	50%	54%	55%	48%
Important projects have been delayed or are at risk due to employee skill gaps	52%	49%	56%	54%	51%
High employee turnover (too many employees quitting)	51%	47%	57%	52%	50%
A lack of investment in infrastructure, tools, and data analysis	51%	48%	57%	52%	48%
Digital transformation progress held back by lack of employee adoption or engagement	50%	47%	53%	50%	50%
Digital transformation progress held back by lack of employee skills	50%	47%	54%	50%	50%
Leadership is not willing to take risks	49%	44%	53%	53%	48%
Not able to keep up with customers' demand for innovation	48%	46%	52%	49%	45%
Innovation pipeline held back or delayed due to employee skill gaps	48%	47%	50%	49%	47%
Our employees are not interested in getting job skills for the future	47%	42%	51%	49%	45%

Base varies per statement. See detail tables below.

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

a) Not able to hire new people with the technical skills we need

Base: Excludes "I don't know"	Total (N=1,956)	United States (N=494)	France (N=489)	Germany (N=486)	United Kingdom (N=497)
Major impact	26%	22%	34%	27%	22%
Moderate impact	33%	34%	29%	34%	37%
Minor Impact	23%	26%	24%	22%	21%
No impact at all	17%	19%	13%	17%	21%
Major/Moderate impact (Net)	*59%*	*55%*	*63%*	*61%*	*59%*
Minor/No impact at all (Net)	*41%*	*45%*	*37%*	*39%*	*41%*

b) Not able to get our employees trained on new trends and/or technology

Base: Excludes "I don't know"	Total (N=1,964)	United States (N=495)	France (N=493)	Germany (N=484)	United Kingdom (N=492)
Major impact	18%	18%	19%	20%	17%
Moderate impact	33%	32%	35%	35%	31%
Minor Impact	28%	27%	28%	26%	31%
No impact at all	21%	23%	18%	20%	21%
Major/Moderate impact (Net)	*52%*	*50%*	*54%*	*55%*	*48%*
Minor/No impact at all (Net)	*49%*	*50%*	*47%*	*45%*	*52%*

c) High employee turnover (too many employees quitting)

Base: Excludes "I don't know"	Total (N=1,962)	United States (N=498)	France (N=490)	Germany (N=482)	United Kingdom (N=492)
Major impact	23%	23%	29%	20%	21%
Moderate impact	28%	24%	28%	32%	29%
Minor Impact	25%	25%	27%	25%	23%
No impact at all	24%	28%	17%	23%	27%
Major/Moderate impact (Net)	*51%*	*47%*	*57%*	*52%*	*50%*
Minor/No impact at all (Net)	*49%*	*53%*	*43%*	*48%*	*50%*

d) Not enough skilled employees to meet demand

Base: Excludes "I don't know"	Total (N=1,960)	United States (N=492)	France (N=488)	Germany (N=490)	United Kingdom (N=490)
Major impact	27%	26%	32%	28%	23%
Moderate impact	32%	31%	31%	35%	32%
Minor Impact	23%	24%	23%	21%	25%
No impact at all	18%	19%	15%	17%	20%
Major/Moderate impact (Net)	*59%*	*57%*	*63%*	*63%*	*55%*
Minor/No impact at all (Net)	*41%*	*43%*	*37%*	*37%*	*45%*

PUBLIC POLL FINDINGS AND METHODOLOGY

e) Our employees are not interested in getting job skills for the future

Base: Excludes "I don't know"	Total (N=1,956)	United States (N=491)	France (N=489)	Germany (N=489)	United Kingdom (N=487)
Major impact	17%	15%	20%	19%	15%
Moderate impact	29%	27%	30%	30%	30%
Minor Impact	28%	27%	30%	29%	25%
No impact at all	26%	31%	20%	22%	31%
Major/Moderate impact (Net)	*47%*	*42%*	*51%*	*49%*	*45%*
Minor/No impact at all (Net)	*54%*	*58%*	*50%*	*51%*	*55%*

f) Inefficient processes, systems, or procedures

Base: Excludes "I don't know"	Total (N=1,947)	United States (N=490)	France (N=480)	Germany (N=487)	United Kingdom (N=490)
Major impact	19%	20%	23%	18%	17%
Moderate impact	34%	29%	32%	40%	35%
Minor Impact	30%	32%	31%	26%	30%
No impact at all	17%	20%	15%	16%	19%
Major/Moderate impact (Net)	*53%*	*48%*	*54%*	*59%*	*51%*
Minor/No impact at all (Net)	*47%*	*52%*	*46%*	*42%*	*49%*

g) Leadership is not willing to take risks

Base: Excludes "I don't know"	Total (N=1,944)	United States (N=493)	France (N=476)	Germany (N=484)	United Kingdom (N=491)
Major impact	20%	17%	23%	20%	19%
Moderate impact	30%	27%	30%	33%	29%
Minor Impact	27%	29%	27%	26%	28%
No impact at all	23%	27%	21%	21%	24%
Major/Moderate impact (Net)	*49%*	*44%*	*53%*	*53%*	*48%*
Minor/No impact at all (Net)	*51%*	*56%*	*48%*	*47%*	*52%*

h) Not able to keep up with customers' demand for innovation

Base: Excludes "I don't know"	Total (N=1,948)	United States (N=495)	France (N=477)	Germany (N=487)	United Kingdom (N=489)
Major impact	16%	16%	20%	14%	15%
Moderate impact	32%	30%	32%	35%	29%
Minor Impact	29%	27%	31%	29%	30%
No impact at all	23%	28%	17%	22%	26%
Major/Moderate impact (Net)	*48%*	*46%*	*52%*	*49%*	*45%*
Minor/No impact at all (Net)	*52%*	*54%*	*48%*	*51%*	*56%*

PUBLIC POLL FINDINGS AND METHODOLOGY

i)   Not enough new or repeat sales and/or customers

Base: Excludes "I don't know"	Total (N=1,932)	United States (N=493)	France (N=477)	Germany (N=481)	United Kingdom (N=481)
Major impact	21%	19%	27%	19%	20%
Moderate impact	31%	28%	31%	34%	33%
Minor Impact	27%	32%	24%	27%	25%
No impact at all	21%	22%	18%	20%	22%
Major/Moderate impact (Net)	*53%*	*46%*	*58%*	*53%*	*53%*
Minor/No impact at all (Net)	*48%*	*54%*	*42%*	*47%*	*47%*

j)   Disruption to business caused by COVID-19

Base: Excludes "I don't know"	Total (N=1,978)	United States (N=497)	France (N=496)	Germany (N=492)	United Kingdom (N=493)
Major impact	39%	47%	44%	27%	38%
Moderate impact	30%	26%	30%	32%	31%
Minor Impact	21%	19%	18%	23%	22%
No impact at all	11%	8%	9%	19%	9%
Major/Moderate impact (Net)	*69%*	*73%*	*73%*	*58%*	*69%*
Minor/No impact at all (Net)	*32%*	*27%*	*27%*	*42%*	*31%*

k)   A lack of investment in infrastructure, tools, and data analysis

Base: Excludes "I don't know"	Total (N=1,946)	United States (N=494)	France (N=482)	Germany (N=479)	United Kingdom (N=491)
Major impact	19%	18%	23%	20%	16%
Moderate impact	32%	30%	34%	32%	32%
Minor Impact	29%	29%	28%	29%	31%
No impact at all	20%	23%	15%	19%	21%
Major/Moderate impact (Net)	*51%*	*48%*	*57%*	*52%*	*48%*
Minor/No impact at all (Net)	*49%*	*52%*	*43%*	*48%*	*52%*

l)   Important projects have been delayed or are at risk due to employee skill gaps

Base: Excludes "I don't know"	Total (N=1,964)	United States (N=496)	France (N=491)	Germany (N=483)	United Kingdom (N=494)
Major impact	19%	18%	24%	18%	17%
Moderate impact	33%	31%	32%	36%	34%
Minor Impact	28%	29%	26%	29%	27%
No impact at all	20%	22%	18%	17%	23%
Major/Moderate impact (Net)	*52%*	*49%*	*56%*	*54%*	*51%*
Minor/No impact at all (Net)	*48%*	*51%*	*44%*	*46%*	*49%*

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

m) Innovation pipeline held back or delayed due to employee skill gaps

Base: Excludes "I don't know"	Total (N=1,944)	United States (N=493)	France (N=487)	Germany (N=478)	United Kingdom (N=486)
Major impact	17%	15%	20%	17%	18%
Moderate impact	31%	32%	30%	33%	30%
Minor Impact	29%	30%	28%	27%	30%
No impact at all	23%	24%	23%	23%	23%
Major/Moderate impact (Net)	*48%*	*47%*	*50%*	*49%*	*47%*
Minor/No impact at all (Net)	*52%*	*53%*	*50%*	*51%*	*53%*

n) Digital transformation progress held back by lack of employee adoption or engagement

Base: Excludes "I don't know"	Total (N=1,944)	United States (N=490)	France (N=488)	Germany (N=479)	United Kingdom (N=487)
Major impact	18%	18%	18%	17%	20%
Moderate impact	32%	29%	34%	34%	30%
Minor Impact	28%	28%	29%	27%	26%
No impact at all	23%	25%	18%	23%	24%
Major/Moderate impact (Net)	*50%*	*47%*	*53%*	*50%*	*50%*
Minor/No impact at all (Net)	*50%*	*53%*	*47%*	*50%*	*51%*

o) Digital transformation progress held back by lack of employee skills

Base: Excludes "I don't know"	Total (N=1,952)	United States (N=497)	France (N=486)	Germany (N=478)	United Kingdom (N=491)
Major impact	17%	17%	19%	14%	16%
Moderate impact	34%	30%	35%	36%	34%
Minor Impact	28%	30%	28%	29%	27%
No impact at all	22%	23%	18%	22%	23%
Major/Moderate impact (Net)	*50%*	*47%*	*54%*	*50%*	*50%*
Minor/No impact at all (Net)	*50%*	*53%*	*46%*	*50%*	*50%*

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

4. To what extent do you agree or disagree with the following statements about your company's responsibilities regarding employee training and upskilling?

Total Agree Summary

	Total	United States	France	Germany	United Kingdom
We want to improve our employees' technical skills	75%	79%	79%	68%	72%
Offering opportunities to improve skills increases overall satisfaction and happiness with the company	75%	80%	80%	66%	75%
[Split sample] Job-relevant hands-on projects enhance learning and the likelihood of mastering a new technical skill	75% (N=670)	79% (N=166)	78% (N=148)	67% (N=179)	77% (N=177)
[Split sample] Job-relevant hands-on projects enable employees to apply new technical skills faster	75% (N=669)	85% (N=175)	79% (N=182)	62% (N=156)	74% (N=156)
We have a responsibility to invest in our employees' futures	74%	81%	76%	70%	71%
Offering opportunities to improve skills encourages employees to remain at the company	74%	81%	77%	67%	72%
[Split sample] Job-relevant hands-on projects enable employees to apply new technical skills more efficiently	73% (N=669)	77% (N=161)	75% (N=172)	72% (N=167)	68% (N=169)
We would like more applicable training to have an impact on business outcomes	70%	80%	74%	63%	65%

a) We have a responsibility to invest in our employees' futures

	Total	United States	France	Germany	United Kingdom
Strongly agree	32%	44%	29%	26%	30%
Somewhat agree	42%	37%	46%	44%	40%
Neither agree nor disagree	18%	11%	16%	24%	19%
Somewhat disagree	6%	6%	6%	5%	6%
Strongly disagree	3%	2%	2%	2%	4%
Agree (Net)	*74%*	*81%*	*76%*	*70%*	*71%*
Disagree (Net)	*8%*	*8%*	*8%*	*7%*	*11%*

b) We want to improve our employees' technical skills

	Total	United States	France	Germany	United Kingdom
Strongly agree	33%	45%	32%	28%	27%
Somewhat agree	41%	33%	47%	40%	45%
Neither agree nor disagree	18%	15%	14%	22%	21%
Somewhat disagree	6%	5%	5%	8%	4%
Strongly disagree	2%	2%	3%	1%	3%
Agree (Net)	*75%*	*79%*	*79%*	*68%*	*72%*
Disagree (Net)	*8%*	*7%*	*8%*	*10%*	*7%*

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

c)   Offering opportunities to improve skills encourages employees to remain at the company

	Total	United States	France	Germany	United Kingdom
Strongly agree	32%	42%	30%	26%	32%
Somewhat agree	42%	39%	47%	41%	40%
Neither agree nor disagree	18%	14%	15%	24%	18%
Somewhat disagree	6%	3%	7%	7%	8%
Strongly disagree	2%	2%	2%	2%	3%
Agree (Net)	*74%*	*81%*	*77%*	*67%*	*72%*
Disagree (Net)	*9%*	*5%*	*9%*	*9%*	*11%*

d)   Offering opportunities to improve skills increases overall satisfaction and happiness with the company

	Total	United States	France	Germany	United Kingdom
Strongly agree	34%	43%	33%	27%	31%
Somewhat agree	42%	37%	47%	39%	43%
Neither agree nor disagree	17%	13%	12%	24%	19%
Somewhat disagree	6%	5%	5%	8%	4%
Strongly disagree	2%	2%	3%	2%	2%
Agree (Net)	*75%*	*80%*	*80%*	*66%*	*75%*
Disagree (Net)	*8%*	*7%*	*7%*	*10%*	*7%*

e)   We would like more applicable training to have an impact on business outcomes

	Total	United States	France	Germany	United Kingdom
Strongly agree	27%	36%	27%	23%	23%
Somewhat agree	43%	44%	46%	40%	42%
Neither agree nor disagree	21%	14%	18%	27%	26%
Somewhat disagree	6%	5%	5%	7%	6%
Strongly disagree	3%	2%	3%	3%	3%
Agree (Net)	*70%*	*80%*	*74%*	*63%*	*65%*
Disagree (Net)	*8%*	*6%*	*9%*	*10%*	*9%*

f)   **[Split sample]** Job-relevant hands-on projects enhance learning and the likelihood of mastering a new technical skill

	Total (N=670)	United States (N=166)	France (N=148)	Germany (N=179)	United Kingdom (N=177)
Strongly agree	31%	42%	26%	24%	32%
Somewhat agree	44%	37%	51%	43%	45%
Neither agree nor disagree	18%	15%	15%	24%	17%
Somewhat disagree	5%	4%	5%	8%	4%
Strongly disagree	2%	2%	3%	1%	2%
Agree (Net)	*75%*	*79%*	*78%*	*67%*	*77%*
Disagree (Net)	*7%*	*6%*	*7%*	*10%*	*6%*

GAME CHANGERS

g) **[Split sample]** Job-relevant hands-on projects enable employees to apply new technical skills faster

	Total (N=669)	United States (N=175)	France (N=182)	Germany (N=156)	United Kingdom (N=156)
Strongly agree	31%	42%	28%	23%	31%
Somewhat agree	44%	42%	52%	39%	44%
Neither agree nor disagree	17%	12%	14%	26%	19%
Somewhat disagree	6%	3%	6%	10%	4%
Strongly disagree	2%	1%	2%	3%	3%
Agree (Net)	*75%*	*85%*	*79%*	*62%*	*74%*
Disagree (Net)	*8%*	*3%*	*7%*	*13%*	*7%*

h) **[Split sample]** Job-relevant hands-on projects enable employees to apply new technical skills more efficiently

	Total (N=669)	United States (N=161)	France (N=172)	Germany (N=167)	United Kingdom (N=169)
Strongly agree	28%	38%	24%	24%	25%
Somewhat agree	45%	39%	51%	48%	43%
Neither agree nor disagree	18%	16%	15%	19%	21%
Somewhat disagree	7%	4%	6%	8%	9%
Strongly disagree	3%	4%	4%	2%	2%
Agree (Net)	*73%*	*77%*	*75%*	*72%*	*68%*
Disagree (Net)	*9%*	*8%*	*10%*	*10%*	*11%*

5. Which, if any, of the following is most important for your current employees? Please select up to three.

	Total	United States	France	Germany	United Kingdom
Providing training for technical skills (specialized knowledge and expertise needed to accomplish complex actions, tasks, and processes relating to computational and physical technology)	48%	52%	45%	44%	52%
Providing training on how to work more productively and/or efficiently	38%	44%	39%	32%	38%
Providing training for analytical skills (ability to collect and analyze information, problem-solve, and make decisions)	32%	42%	28%	25%	33%
Providing training for better communication	32%	37%	27%	34%	30%
Providing training for how to work in a team	31%	31%	32%	33%	31%
Providing training for marketing skills	18%	20%	16%	16%	19%
Providing training for presentation skills	18%	21%	14%	19%	20%
Other	1%	1%	1%	1%	1%
None of these	7%	5%	6%	10%	8%

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Jennifer Berg**
Director, US, Public Affairs, Ipsos
Email: jennifer.berg@ipsos.com
Tel: +1 312 526 4224

GAME CHANGERS Ipsos

13

PUBLIC POLL FINDINGS AND METHODOLOGY

6. Does your company currently offer any learning and development opportunities to employees?

	Total	United States	France	Germany	United Kingdom
Yes	77%	75%	79%	77%	77%
No	20%	23%	18%	19%	20%
I'm not sure	3%	2%	3%	4%	4%

7. **[Asked if Q6 = Yes]** How successful would you say your learning and development programs have been at your company?

	Total (N=1,545)	United States (N=378)	France (N=396)	Germany (N=387)	United Kingdom (N=384)
Very successful	37%	39%	37%	41%	30%
Moderately successful	44%	45%	43%	37%	50%
Slightly successful	18%	14%	17%	19%	20%
Not at all successful	1%	1%	1%	2%	0%
I don't know	1%	1%	2%	1%	0%
Very/ Moderately successful (Net)	*80%*	*84%*	*79%*	*78%*	*80%*
Slightly / Not at all successful (Net)	*19%*	*15%*	*18%*	*21%*	*20%*

8. **[Asked if Q6 = Yes]** Is it mandatory for your employees to participate in the learning and development program you provide?

	Total (N=1,545)	United States (N=378)	France (N=396)	Germany (N=387)	United Kingdom (N=384)
Yes	60%	67%	57%	56%	62%
No	37%	32%	38%	43%	37%
I'm not sure	2%	1%	5%	1%	2%

9. **[Asked if Q8 = No]** How many of your employees use the learning and development options provided?

	Total (N=575)	United States (N=120)	France (N=150)	Germany (N=165)	United Kingdom (N=140)
The majority of/all employees	33%	30%	24%	43%	34%
About half of employees	41%	43%	47%	35%	39%
Less than half of employees	21%	20%	23%	20%	21%
I don't know	5%	7%	6%	2%	6%

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

10. **[Asked if Q6 = Yes]** What kind(s) of learning and development options do you provide your employees? Please select all that apply.

	Total (N=1,545)	United States (N=378)	France (N=396)	Germany (N=387)	United Kingdom (N=384)
Hands-on training on the job	58%	64%	58%	51%	58%
Coaching	46%	48%	36%	52%	50%
Access to online learning platforms (i.e. Coursera, Udemy, PluralSight, DataCamp, etc.)	45%	54%	34%	45%	48%
Mentoring	38%	52%	21%	29%	51%
Conferences	37%	45%	33%	33%	35%
Task/ Job rotations	32%	42%	25%	30%	31%
Job shadowing	29%	32%	30%	15%	38%
Office hours	26%	27%	28%	25%	26%
Other	5%	3%	6%	7%	3%
None of these	0%	1%	1%	1%	0%

11. **[Asked if Q10 = "Access to online learning platforms"]** Does the digital learning platform you use include any of the following? Please select all that apply.

	Total (N=694)	United States (N=205)	France (N=133)	Germany (N=173)	United Kingdom (N=183)
Instructional videos	61%	66%	60%	52%	64%
Practice exercises	55%	54%	59%	53%	56%
Certification	51%	52%	52%	49%	53%
Course was taught by a leader in the field	42%	42%	41%	43%	41%
Personalized learning dashboard	40%	42%	40%	33%	44%
Digital textbooks	39%	46%	38%	37%	32%
Exams	37%	36%	29%	43%	36%
Personalized feedback	36%	37%	27%	40%	36%
Personalized contact for when I had questions	34%	39%	26%	39%	30%
Mentors	32%	40%	24%	35%	28%
None of these	1%	1%	2%	1%	2%

PUBLIC POLL FINDINGS AND METHODOLOGY

12. How important, if at all, are the following for enhancing employees' ability to learn new skills?

Total Important Summary

	Total	United States	France	Germany	United Kingdom
Building skills that can be used on the job and/or projects right away	85%	90%	88%	81%	83%
Hands-on learning assignments similar to a workplace situation	83%	89%	85%	78%	78%
Content that is interactive and engaging	82%	87%	85%	75%	83%
Learning from an expert in the field or on a subject	82%	87%	88%	75%	80%
Learning how to apply theory to real-world problems	82%	84%	88%	76%	81%
Having a clear syllabus	80%	80%	88%	74%	78%
Receiving personalized feedback on coursework	80%	81%	81%	77%	79%
Having a mentor to help with assignments and to provide direct feedback	78%	80%	81%	76%	74%
Learning the theory behind the subject	78%	83%	79%	73%	76%
Having the chance to implement feedback and resubmit coursework until mastery is demonstrated	77%	83%	78%	74%	72%
Employees need to choose what courses they take	73%	76%	77%	65%	72%

a) Content that is interactive and engaging

	Total	United States	France	Germany	United Kingdom
Very important	40%	50%	34%	31%	44%
Somewhat important	43%	36%	51%	43%	39%
A little important	14%	11%	10%	22%	13%
Not important at all	4%	3%	5%	4%	4%
Important (Net)	*82%*	*87%*	*85%*	*75%*	*83%*
Not Important (Net)	*18%*	*14%*	*15%*	*26%*	*17%*

b) Having a clear syllabus

	Total	United States	France	Germany	United Kingdom
Very important	37%	40%	42%	32%	33%
Somewhat important	43%	39%	45%	42%	45%
A little important	16%	14%	10%	22%	17%
Not important at all	5%	6%	2%	4%	5%
Important (Net)	*80%*	*80%*	*88%*	*74%*	*78%*
Not Important (Net)	*20%*	*20%*	*12%*	*26%*	*22%*

PUBLIC POLL FINDINGS AND METHODOLOGY

c) Employees need to choose what courses they take

	Total	United States	France	Germany	United Kingdom
Very important	28%	32%	24%	26%	30%
Somewhat important	44%	43%	53%	39%	42%
A little important	21%	16%	18%	28%	21%
Not important at all	7%	9%	5%	7%	7%
Important (Net)	*73%*	*76%*	*77%*	*65%*	*72%*
Not Important (Net)	*28%*	*25%*	*23%*	*35%*	*28%*

d) Hands-on learning assignments similar to a workplace situation

	Total	United States	France	Germany	United Kingdom
Very important	41%	50%	42%	36%	37%
Somewhat important	41%	38%	44%	42%	41%
A little important	14%	8%	11%	19%	18%
Not important at all	4%	3%	3%	4%	4%
Important (Net)	*83%*	*89%*	*85%*	*78%*	*78%*
Not Important (Net)	*18%*	*11%*	*15%*	*22%*	*22%*

e) Receiving personalized feedback on coursework

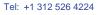|	Total	United States	France	Germany	United Kingdom
Very important	34%	41%	25%	35%	33%
Somewhat important	46%	40%	55%	42%	46%
A little important	16%	14%	16%	18%	15%
Not important at all	5%	4%	4%	4%	6%
Important (Net)	*80%*	*81%*	*81%*	*77%*	*79%*
Not Important (Net)	*21%*	*19%*	*20%*	*23%*	*21%*

f) Having a mentor to help with assignments and to provide direct feedback

	Total	United States	France	Germany	United Kingdom
Very important	33%	41%	27%	32%	30%
Somewhat important	45%	39%	53%	44%	44%
A little important	18%	16%	17%	20%	21%
Not important at all	4%	4%	3%	4%	6%
Important (Net)	*78%*	*80%*	*81%*	*76%*	*74%*
Not Important (Net)	*23%*	*20%*	*20%*	*25%*	*26%*

g) Learning from an expert in the field or on a subject

	Total	United States	France	Germany	United Kingdom
Very important	40%	47%	35%	38%	39%
Somewhat important	43%	39%	53%	37%	41%
A little important	14%	10%	9%	21%	16%
Not important at all	4%	4%	3%	4%	4%
Important (Net)	*82%*	*87%*	*88%*	*75%*	*80%*
Not Important (Net)	*18%*	*14%*	*12%*	*25%*	*20%*

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

h) Learning the theory behind the subject

	Total	United States	France	Germany	United Kingdom
Very important	33%	43%	25%	32%	34%
Somewhat important	44%	39%	54%	41%	42%
A little important	19%	14%	19%	22%	19%
Not important at all	4%	3%	3%	5%	5%
Important (Net)	*78%*	*83%*	*79%*	*73%*	*76%*
Not Important (Net)	*23%*	*17%*	*21%*	*27%*	*24%*

i) Having the chance to implement feedback and resubmit coursework until mastery is demonstrated

	Total	United States	France	Germany	United Kingdom
Very important	33%	43%	26%	33%	30%
Somewhat important	44%	40%	52%	41%	43%
A little important	19%	12%	19%	23%	22%
Not important at all	5%	5%	3%	4%	6%
Important (Net)	*77%*	*83%*	*78%*	*74%*	*72%*
Not Important (Net)	*24%*	*17%*	*22%*	*27%*	*28%*

j) Building skills that can be used on the job and/or projects right away

	Total	United States	France	Germany	United Kingdom
Very important	44%	51%	40%	42%	42%
Somewhat important	42%	39%	48%	39%	41%
A little important	12%	8%	9%	15%	14%
Not important at all	3%	3%	2%	4%	3%
Important (Net)	*85%*	*90%*	*88%*	*81%*	*83%*
Not Important (Net)	*15%*	*10%*	*12%*	*20%*	*17%*

k) Learning how to apply theory to real-world problems

	Total	United States	France	Germany	United Kingdom
Very important	41%	48%	35%	38%	43%
Somewhat important	41%	37%	53%	38%	38%
A little important	14%	12%	10%	18%	15%
Not important at all	4%	4%	2%	5%	4%
Important (Net)	*82%*	*84%*	*88%*	*76%*	*81%*
Not Important (Net)	*18%*	*16%*	*12%*	*24%*	*19%*

GAME CHANGERS Ipsos

PUBLIC POLL FINDINGS AND METHODOLOGY

13. How effective are your organization's current learning and development efforts in…?*

Total Effective Summary

	Total	United States	France	Germany	United Kingdom
Giving employees new skills	71%	74%	70%	67%	71%
Providing skills that can be immediately applied to workplace situations	71%	78%	69%	65%	73%
Providing skills that can generate specific business results	65%	72%	63%	58%	68%

Base varies per statement. See detail tables below

a) Giving employees new skills

Base: Excludes "Don't know"	Total (N=1,972)	United States (N=496)	France (N=493)	Germany (N=487)	United Kingdom (N=496)
Very effective	31%	37%	27%	29%	30%
Somewhat effective	40%	37%	43%	38%	41%
Neither effective nor ineffective	15%	13%	15%	16%	17%
Somewhat ineffective	9%	7%	10%	12%	9%
Very ineffective	5%	6%	5%	5%	3%
Effective (Net)	*71%*	*74%*	*70%*	*67%*	*71%*
Ineffective (Net)	*14%*	*13%*	*15%*	*17%*	*12%*

b) Providing skills that can be immediately applied to workplace situations

Base: Excludes "Don't know"	Total (N=1,978)	United States (N=498)	France (N=496)	Germany (N=486)	United Kingdom (N=498)
Very effective	31%	39%	30%	24%	33%
Somewhat effective	40%	40%	40%	41%	40%
Neither effective nor ineffective	14%	9%	14%	16%	18%
Somewhat ineffective	9%	7%	11%	13%	6%
Very ineffective	5%	5%	6%	5%	4%
Effective (Net)	*71%*	*78%*	*69%*	*65%*	*73%*
Ineffective (Net)	*14%*	*12%*	*17%*	*19%*	*10%*

c) Providing skills that can generate specific business results

Base: Excludes "Don't know"	Total (N=1,949)	United States (N=498)	France (N=480)	Germany (N=481)	United Kingdom (N=490)
Very effective	27%	36%	23%	21%	28%
Somewhat effective	38%	36%	40%	37%	40%
Neither effective nor ineffective	20%	14%	22%	23%	19%
Somewhat ineffective	11%	10%	11%	12%	10%
Very ineffective	5%	5%	4%	7%	4%
Effective (Net)	*65%*	*72%*	*63%*	*58%*	*68%*
Ineffective (Net)	*15%*	*14%*	*15%*	*19%*	*14%*

GAME CHANGERS Ipsos

PUBLIC POLL FINDINGS AND METHODOLOGY

14. **[Asked if Q6 = Yes]** What challenges exist with your current learning and development efforts? Please select all that apply.

	Total (N=1,545)	United States (N=378)	France (N=396)	Germany (N=387)	United Kingdom (N=384)
Lack of employee availability to participate	36%	33%	44%	30%	37%
Low engagement among employees	32%	35%	33%	28%	33%
Subject areas are not directly applicable to role tasks and responsibilities	27%	25%	29%	25%	29%
Lack of management priority	25%	25%	25%	21%	27%
Low learning effectiveness	22%	25%	19%	20%	24%
Ineffective learning management systems	22%	26%	19%	24%	21%
Ineffective learning tools	21%	27%	21%	17%	20%
Other	2%	2%	1%	2%	2%
None of the above	13%	13%	7%	19%	14%

15. Does your company offer reimbursement for tuition/educational courses?

	Total	United States	France	Germany	United Kingdom
Yes	59%	61%	55%	70%	51%
No	35%	36%	36%	25%	42%
I'm not sure	6%	3%	8%	6%	7%

16. Are you offering/using the following more or less than before the pandemic?*

Total More than before the pandemic summary

	Total	United States	France	Germany	United Kingdom
Using video conferencing (i.e. Skype, Zoom, etc.)	60%	65%	58%	58%	61%
Employees working remotely / from home	57%	62%	57%	53%	55%
Using workgroup software (i.e. Teams, Slack, etc.)	52%	55%	52%	48%	52%
Doing more tasks digitally (i.e. brainstorm sessions, filling out forms, weekly meetings, etc.)	47%	52%	41%	44%	52%
Providing online training courses	44%	46%	42%	46%	43%
Switched from an in-office process to a remote process (i.e. running payroll, project management, etc.)	44%	50%	48%	37%	41%
Using cloud-based collaborative suites (i.e. G Suite, Office 365, etc.)	40%	45%	35%	38%	43%
Having virtual social activities (i.e. happy hour, trivia night, etc.)	39%	47%	30%	34%	42%

*Base varies per statement. See detail tables below

PUBLIC POLL FINDINGS AND METHODOLOGY

a) Providing online training courses

Base: Excludes "N/A"	Total (N=1,767)	United States (N=444)	France (N=432)	Germany (N=435)	United Kingdom (N=456)
More than before the pandemic	44%	46%	42%	46%	43%
About the same as before the pandemic	45%	45%	43%	44%	49%
Less than before the pandemic	11%	8%	15%	10%	8%

b) Employees working remotely / from home

Base: Excludes "N/A"	Total (N=1,765)	United States (N=439)	France (N=440)	Germany (N=429)	United Kingdom (N=457)
More than before the pandemic	57%	62%	57%	53%	55%
About the same as before the pandemic	33%	29%	30%	37%	35%
Less than before the pandemic	10%	9%	13%	10%	10%

c) Using video conferencing (i.e. Skype, Zoom, etc.)

Base: Excludes "N/A"	Total (N=1,843)	United States (N=466)	France (N=460)	Germany (N=447)	United Kingdom (N=470)
More than before the pandemic	60%	65%	58%	58%	61%
About the same as before the pandemic	30%	28%	29%	33%	31%
Less than before the pandemic	10%	7%	13%	10%	8%

d) Using cloud-based collaborative suites (i.e. G Suite, Office 365, etc.)

Base: Excludes "N/A"	Total (N=1,738)	United States (N=460)	France (N=416)	Germany (N=412)	United Kingdom (N=450)
More than before the pandemic	40%	45%	35%	38%	43%
About the same as before the pandemic	49%	48%	49%	50%	50%
Less than before the pandemic	11%	8%	16%	13%	7%

e) Using workgroup software (i.e. Teams, Slack, etc.)

Base: Excludes "N/A"	Total (N=1,747)	United States (N=441)	France (N=432)	Germany (N=419)	United Kingdom (N=455)
More than before the pandemic	52%	55%	52%	48%	52%
About the same as before the pandemic	39%	38%	35%	43%	38%
Less than before the pandemic	10%	7%	13%	9%	10%

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

f) Doing more tasks digitally (i.e. brainstorm sessions, filling out forms, weekly meetings, etc.)

Base: Excludes "N/A"	Total (N=1,820)	United States (N=456)	France (N=454)	Germany (N=447)	United Kingdom (N=463)
More than before the pandemic	47%	52%	41%	44%	52%
About the same as before the pandemic	42%	39%	44%	45%	40%
Less than before the pandemic	11%	9%	15%	11%	8%

g) Having virtual social activities (i.e. happy hour, trivia night, etc.)

Base: Excludes "N/A"	Total (N=1,498)	United States (N=386)	France (N=352)	Germany (N=360)	United Kingdom (N=400)
More than before the pandemic	39%	47%	30%	34%	42%
About the same as before the pandemic	44%	42%	44%	48%	42%
Less than before the pandemic	18%	12%	26%	18%	16%

h) Switched from an in-office process to a remote process (i.e. running payroll, project management, etc.)

Base: Excludes "N/A"	Total (N=1,715)	United States (N=435)	France (N=429)	Germany (N=408)	United Kingdom (N=443)
More than before the pandemic	44%	50%	48%	37%	41%
About the same as before the pandemic	45%	42%	37%	51%	51%
Less than before the pandemic	11%	8%	16%	13%	7%

17. Thinking to the future, do you plan to continue offering/using these options?*

Total More than we do now summary

	Total	United States	France	Germany	United Kingdom
Providing online training courses	32%	39%	32%	29%	27%
Using video conferencing (i.e. Skype, Zoom, etc.)	32%	38%	27%	31%	31%
Doing more tasks digitally (i.e. brainstorm sessions, filling out forms, weekly meetings, etc.)	31%	35%	26%	29%	33%
Using cloud-based collaborative suites (i.e. G Suite, Office 365, etc.)	30%	36%	26%	28%	31%
Using workgroup software (i.e. Teams, Slack, etc.)	30%	37%	29%	24%	30%
Employees working remotely / from home	29%	36%	27%	27%	25%
Having virtual social activities (i.e. happy hour, trivia night, etc.)	28%	34%	28%	26%	23%
Switched from an in-office process to a remote process (i.e. running payroll, project management, etc.)	27%	33%	27%	24%	24%

*Base varies per statement. See detail tables below

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

a) Providing online training courses

Base: Excludes "N/A"	Total (N=1,767)	United States (N=444)	France (N=432)	Germany (N=435)	United Kingdom (N=456)
More than we do now	32%	39%	32%	29%	27%
About the same as now	59%	54%	55%	62%	63%
Less than we do now	10%	7%	13%	9%	10%

b) Employees working remotely / from home

Base: Excludes "N/A"	Total (N=1,765)	United States (N=439)	France (N=440)	Germany (N=429)	United Kingdom (N=457)
More than we do now	29%	36%	27%	27%	25%
About the same as now	52%	42%	52%	58%	55%
Less than we do now	20%	22%	22%	16%	20%

c) Using video conferencing (i.e. Skype, Zoom, etc.)

Base: Excludes "N/A"	Total (N=1,843)	United States (N=466)	France (N=460)	Germany (N=447)	United Kingdom (N=470)
More than we do now	32%	38%	27%	31%	31%
About the same as now	55%	50%	55%	58%	55%
Less than we do now	14%	12%	17%	11%	14%

d) Using cloud-based collaborative suites (i.e. G Suite, Office 365, etc.)

Base: Excludes "N/A"	Total (N=1,738)	United States (N=460)	France (N=416)	Germany (N=412)	United Kingdom (N=450)
More than we do now	30%	36%	26%	28%	31%
About the same as now	62%	62%	62%	61%	62%
Less than we do now	8%	3%	12%	11%	6%

e) Using workgroup software (i.e. Teams, Slack, etc.)

Base: Excludes "N/A"	Total (N=1,747)	United States (N=441)	France (N=432)	Germany (N=419)	United Kingdom (N=455)
More than we do now	30%	37%	29%	24%	30%
About the same as now	59%	57%	57%	64%	60%
Less than we do now	11%	6%	14%	12%	10%

f) Doing more tasks digitally (i.e. brainstorm sessions, filling out forms, weekly meetings, etc.)

Base: Excludes "N/A"	Total (N=1,820)	United States (N=456)	France (N=454)	Germany (N=447)	United Kingdom (N=463)
More than we do now	31%	35%	26%	29%	33%
About the same as now	57%	57%	59%	58%	55%
Less than we do now	12%	8%	15%	13%	12%

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

g) Having virtual social activities (i.e. happy hour, trivia night, etc.)

Base: Excludes "N/A"	Total (N=1,498)	United States (N=386)	France (N=352)	Germany (N=360)	United Kingdom (N=400)
More than we do now	28%	34%	28%	26%	23%
About the same as now	56%	51%	51%	59%	62%
Less than we do now	16%	15%	21%	14%	15%

h) Switched from an in-office process to a remote process (i.e. running payroll, project management, etc.)

Base: Excludes "N/A"	Total (N=1,715)	United States (N=435)	France (N=429)	Germany (N=408)	United Kingdom (N=443)
More than we do now	27%	33%	27%	24%	24%
About the same as now	59%	55%	55%	66%	62%
Less than we do now	14%	12%	18%	10%	14%

18. Have you experienced the following regarding employee management in the past 6 months (since spring 2021)?

Total Yes Summary

	Total	United States	France	Germany	United Kingdom
Difficulty hiring new employees with the amount of experience needed for the job	56%	57%	64%	52%	52%
Difficulty finding new employees with the right technical skills	54%	57%	59%	50%	51%
Increased competition when retaining or hiring high performing/highly skilled employees	50%	50%	50%	47%	52%
We have had to hire new employees who do not have the skills needed for the job and plan to train them on the job	50%	53%	52%	44%	51%
Trouble filling technical roles at your company	48%	45%	55%	44%	48%
Delay in projects due to not having enough talent	46%	44%	47%	42%	48%
Employee turnover hindering your company's ability to achieve goals	44%	44%	49%	42%	42%
Inability to meet innovation goals due to inability to find the right talent	43%	46%	46%	41%	40%
Inability to complete key projects due to not having enough talent	42%	44%	43%	38%	44%
Needed to outsource some jobs because we don't have enough people with the right skills	42%	46%	41%	37%	45%
We are losing good employees to high-tech companies (Facebook, Amazon, Apple, Netflix, and Alphabet, formally known as Google)	35%	34%	37%	32%	36%
Had to let employees go because they lack technology skills	33%	39%	28%	32%	34%

PUBLIC POLL FINDINGS AND METHODOLOGY

19. When hiring new employees, what are the top five benefits new hires are looking for right now?

	Total	United States	France	Germany	United Kingdom
Flexible work hours	52%	48%	49%	56%	55%
Work-life balance	51%	46%	46%	50%	60%
Competitive pay	48%	50%	50%	37%	52%
Paid time off/ vacation time	39%	39%	41%	38%	40%
Option to work from home/remotely	36%	34%	39%	34%	36%
Positive work environment / corporate culture	36%	35%	29%	43%	37%
Tuition reimbursement/ continuing education options	35%	31%	42%	35%	33%
Overtime pay	32%	28%	40%	36%	23%
Clear career paths / advancement opportunities	31%	29%	37%	28%	31%
Retirement benefits (i.e. 401k match, etc.)	29%	40%	23%	27%	26%
Employee learning and development programs	28%	27%	23%	33%	31%
Medical, dental, and vision insurance	27%	46%	29%	20%	15%
Employee wellness programs	23%	23%	23%	22%	27%
Financial bonus	20%	16%	18%	28%	20%
Bringing a pet to work	11%	9%	9%	13%	13%
Other	1%	1%	2%	1%	1%

20. What are the top five benefits that are keeping your employees at your company right now?

	Total	United States	France	Germany	United Kingdom
Flexible work hours	47%	48%	41%	46%	51%
Work-life balance	47%	43%	47%	42%	54%
Paid time off/ vacation time	44%	44%	46%	45%	42%
Competitive pay	40%	43%	37%	33%	47%
Positive work environment / corporate culture	39%	38%	34%	43%	41%
Option to work from home/remotely	36%	34%	38%	37%	33%
Financial bonus	35%	32%	40%	35%	33%
Overtime pay	33%	30%	40%	34%	28%
Medical, dental, and vision insurance	31%	46%	32%	27%	19%
Employee learning and development programs	31%	27%	31%	34%	34%
Retirement benefits (i.e. 401k match, etc.)	29%	42%	22%	27%	27%
Clear career paths / advancement opportunities	28%	24%	34%	24%	31%
Employee wellness programs	23%	21%	21%	22%	26%
Tuition reimbursement/ continuing education options	22%	17%	22%	34%	17%
Bringing a pet to work	13%	10%	11%	15%	15%
Other	3%	2%	4%	3%	2%

GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

21. When hiring new employees, what level of jobs do you find hardest to fill right now?

	Total	United States	France	Germany	United Kingdom
Entry-level	15%	18%	9%	16%	15%
Mid-level	29%	26%	29%	34%	25%
Manager	23%	22%	33%	16%	23%
Senior Manager	13%	12%	9%	12%	18%
Director	9%	7%	8%	13%	8%
Vice President	6%	9%	5%	3%	6%
Senior executive	7%	6%	8%	7%	6%

22. When hiring new employees, what types of jobs do you find hardest to fill right now?

	Total	United States	France	Germany	United Kingdom
Operations	12%	16%	8%	11%	13%
Human Resources	10%	12%	11%	10%	9%
Sales	9%	8%	8%	10%	10%
Cybersecurity	8%	7%	10%	9%	8%
Engineering	7%	6%	8%	8%	7%
Client services	7%	8%	8%	9%	4%
Administrative	7%	6%	9%	8%	6%
Data science or analytics	6%	7%	3%	4%	8%
Artificial Intelligence/Machine Learning	6%	6%	6%	6%	6%
Research and development	6%	5%	7%	6%	6%
Digital marketing	5%	4%	4%	5%	7%
Other STEM jobs not listed (science, technology, engineering, mathematics)	4%	4%	3%	4%	4%
Mobile or web development	3%	3%	4%	1%	2%
Legal	3%	2%	3%	3%	4%
Other	7%	7%	7%	6%	6%

23. If you had to pick one of these three options, what do you believe is the best way to fill gaps in technical skills for your employees?

	Total	United States	France	Germany	United Kingdom
Creating your own internal training programs	28%	24%	29%	25%	33%
Hiring employees with the necessary skills	46%	49%	48%	44%	43%
Partnering with an external organization focused on upskilling in technical skills	26%	27%	23%	31%	25%

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Jennifer Berg**
Director, US, Public Affairs, Ipsos
Email: jennifer.berg@ipsos.com
Tel: +1 312 526 4224

GAME CHANGERS

26

PUBLIC POLL FINDINGS AND METHODOLOGY

24. Would you hire a person with technical skills your company needs if they were only able to work remotely?

	Total	United States	France	Germany	United Kingdom
Yes	58%	67%	52%	56%	58%
No	25%	21%	31%	24%	25%
I'm not sure	17%	12%	17%	21%	18%

25. Have you hired a person with relevant technical skills who did not have a college degree?

	Total	United States	France	Germany	United Kingdom
Yes	51%	56%	48%	51%	50%
No, but I would consider it	36%	34%	35%	38%	38%
No, and I would not consider it	13%	11%	17%	11%	11%

26. Which of the following would you prefer?

	Total	United States	France	Germany	United Kingdom
Invest $2,000 into an employee to teach them needed technical skills	41%	32%	42%	50%	42%
Hire a new employee who already has the technical skills needed	59%	68%	58%	50%	58%

27. There are a large number of companies that are offering their employees a raise for completing upskilling training courses **in order to close critical technical skill gaps** within the company.

Would your company be willing to provide employees access to an online upskilling course for 8 hours a week for 3 months and a 3% raise for any employee who successfully completes the course?

	Total	United States	France	Germany	United Kingdom
Definitely	21%	30%	19%	18%	18%
Probably	35%	35%	33%	34%	39%
Might or might not	25%	22%	25%	27%	26%
Probably not	8%	6%	8%	9%	7%
Definitely not	5%	3%	8%	6%	3%
I'm not sure	7%	4%	8%	7%	7%
Definitely/Probably (Net)	*56%*	*64%*	*51%*	*52%*	*57%*
Probably/Definitely not (Net)	*13%*	*10%*	*16%*	*15%*	*10%*

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Jennifer Berg**
Director, US, Public Affairs, Ipsos
Email: jennifer.berg@ipsos.com
Tel: +1 312 526 4224

GAME CHANGERS

27

PUBLIC POLL FINDINGS AND METHODOLOGY

About the Study

These are the findings of an Udacity/Ipsos poll conducted between August 26 – September 16, 2021 For this survey, a sample of 2,008 employed adults working in managerial or higher roles from the United States, France, Germany and United Kingdom was interviewed online in English, French, or German. The sample includes 502 respondents from the United States, 502 respondents from France, 502 respondents from Germany, and 502 respondents from the United Kingdom.

The sample was randomly drawn from Ipsos' online panel, partner online panel sources, and "river" sampling and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2018 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Posthoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 2.5 percentage points for all respondents. The credibility interval per country is plus or minus 5.0 percentage points. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=2,008, DEFF=1.5, adjusted Confidence Interval=+/-4.0 percentage points).

For more information on this news release, please contact:

Jennifer Berg
Director, US
Public Affairs
+1 312 526 4224
jennifer.berg@ipsos.com

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Jennifer Berg**
Director, US, Public Affairs, Ipsos
Email: jennifer.berg@ipsos.com
Tel: +1 312 526 4224

GAME CHANGERS

28

PUBLIC POLL FINDINGS AND METHODOLOGY

About Ipsos

Ipsos is the world's third largest Insights and Analytics company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Jennifer Berg**
Director, US, Public Affairs, Ipsos
Email: jennifer.berg@ipsos.com
Tel: +1 312 526 4224

GAME CHANGERS

29