

# The human factor

People and companies in the new  
global dynamics of work

*#ChangeLives*





## Introduction

Having the right compass is fundamental for those entering the world of work. Orientation and decisions about one's career path come from understanding the context one is approaching, its dynamics, and its most recent trends.

This paper aims to highlight **the most important ongoing transformations** in the world of work, through the concrete experience of those already involved, and with an international perspective that compares some of the world's leading countries. The result is a clear picture of the recent evolution of the labour market. We will analyse **the current satisfaction of workers**, the changes over the past few years, **the main factors influencing it, and the priorities** that a worker highlights regarding ideal employment.

The analysis is the result of an international survey conducted by IPSOS on behalf of Gi Group Holding in twelve countries across Europe, Asia, and South America, aimed at investigating, for each context, the working scenarios, worker satisfaction, and points of strengths and weaknesses, and potential. **The global perspective will also allow us to grasp the similarities and differences between various national scenarios.** The survey - conducted in the first months of 2023 with a sample of 3,300 in-

terviews among 24 to 40-year-old graduates with at least some work experience - also allowed for an in-depth understanding of brand awareness and reputation as an employer regarding the Gi Group Holding brand and its related global brands, following up on the first survey conducted in 2021.

# 1

## The *Context*: Scenarios and Transformations

- 1.1 The New Challenges of Workers
- 1.2 The Growth of Satisfaction
- 1.3 Satisfaction Factors: Old and New Dynamics

# 1.1

## The New *Challenges* of Workers

On a global scale, today's job market presents an unprecedented dynamism. What makes the scenario complex is a wide array of variables, each with territorial specificities but with tendencies in common to different regional contexts. Processes triggered or accelerated by the pandemic, the constant and profound **renewal of priorities and ambitions** by those involved in the world of work, and the demographic crisis – just to mention a few of the main challenges – represent factors of profound change in the world of work.

### New priorities, new horizons

In recent years, even more workers and candidates have shown a new approach to the world of work and searching for jobs. The significant recent transformations have led to a redefinition of personal priorities and an evaluation of new contextual opportunities. What happened on a global level, particularly in 2020, has indeed brought great attention to the needs of one's own family life, free time, and a more general well-being compared to career trajectories; forms of company organization that favour remote work, opportunities for professional growth and acquisition of new skills, and global career perspectives have become shared values for many workers and young people entering the job market for the first time. The search for employment – whether for a new position or the first entry into the workforce – is thus more and more linked to a sensitivity towards opportunities and

conditions, not only economic, but also in terms of organisational well-being that companies can offer. The realignment of priorities and values has occurred simultaneously with a new, highly fluid phase of the economy. The post-pandemic recovery has been characterised by a wide search for personnel by companies: the presence of open positions has fuelled mobility from one company to another, pushing workers and candidates to seek occupations more in line with their expectations.

## The Great Resignation

Thus, from 2021 onwards, first the United States and then the rest of the Western countries have addressed the phase of the Great Resignation, characterised by a **sudden and significant increase in voluntary resignations** by workers. In the United States alone, in 2021, about 48 million workers quit their jobs, and another 50.5 million did so in 2022; a first slowdown of the phenomenon was consolidated from 2023, with 30.5 million resignations by August.<sup>1</sup> The trend was observed, with minimal temporal latency, also in Europe and in Italy. In Italy, in particular, in 2021, there were over 1.9 million resignations recorded overall, and nearly 2.2 million in 2022, compared to 1.7 million resignations in 2019. Tightening the field of observation to resignations among workers with permanent contracts,

there were 1.1 million in 2021 and almost 1.3 million in 2022.<sup>2</sup> **This strong mobility was catalysed by the expansive phase undergone by the global economy after the pandemic;** companies activated wide personnel searches, further favouring the choice among workers to move towards a new occupation. The extent of the phenomenon has led to deep analyses of the factors that drove this process. Academic studies, institutional reports, and opinion surveys have identified some common causes: they include **economic factors** (the search for better salary conditions, career opportunities), **environmental factors** (better organizational well-being of the company, a more well-rounded balance between personal time and work time), and **value-based factors** (the desire for a radical change in life).

## The Demographic Crisis

Already in the short term, the job market will require an increasingly significant contribution from young people. The contribution of younger generations will not only be quantitative but most of all qualitative: the new skills, approaches, and sensitivities that young workers and candidates bring will become central within companies to address the challenges posed by innovation. Companies are forever compelled to seek young talented people with a high level of preparation, who are oriented

towards continuously strengthening their skills. One of the main critical elements for the economy is represented by the demographic crisis, whose combined effects – **falling birth rates, thinning of the youth population, progressive ageing, and increasing populations within adult and elderly age groups** – already pose a priority on the institutional agenda today. According to the most recent projections from EUROSTAT, from 2022 to 2050, the population of the European Union aged 15

50.5mln

Voluntary resignations by workers in 2022 in the USA

2.2mln

Voluntary resignations by workers in 2022 in Italy

1.7mln

Voluntary resignations by workers in 2019 in Italy

1 <https://www.uschamber.com/workforce/understanding-americas-labor-shortage-the-most-impacted-industries>

2 Developed by <https://servizi2.inps.it/servizi/osservatoristatistici/14/77/79/o/406>

3 Developed by [https://ec.europa.eu/eurostat/databrowser/product/view/proj\\_23np?category=proj\\_23np](https://ec.europa.eu/eurostat/databrowser/product/view/proj_23np?category=proj_23np)

4 Developed by [https://ec.europa.eu/eurostat/databrowser/view/jvs\\_a\\_rate\\_r2/default/table?lang=en](https://ec.europa.eu/eurostat/databrowser/view/jvs_a_rate_r2/default/table?lang=en)

5 See [https://www.ansa.it/sito/notizie/economia/2023/12/13/oc-se-giovani-italiani-andranno-in-pensione-a-71-anni\\_2f9785f8-3fb2-4b22-a95c-056fef1388d0.html](https://www.ansa.it/sito/notizie/economia/2023/12/13/oc-se-giovani-italiani-andranno-in-pensione-a-71-anni_2f9785f8-3fb2-4b22-a95c-056fef1388d0.html)

to 64 will fall by approximately 28.2 million (from 285.4 to 257.2 million people, -9.9%), while citizens aged 65 or older will increase by 35.4 million

(from 94.3 to 129.7 million people, +37.5%).<sup>3</sup> This fracture will exacerbate some already evident **weaknesses to the system:**

### *An increase in labour shortages*

The vacancy rate has indeed showed a constant increase for some time: in 2022, it reached 2.9% for the 27 countries of the European Union (in 2019, it was 2.2%, and in 2014, 1.3%), with a particular acceleration in the Euro zone where it reached 3.1% in 2022 (in 2019, it was 2.2%, and in 2014, 1.4%).<sup>4</sup>

### *Shortage of qualified personnel*

The thinning of younger age groups will also bring about a reduction in students and potentially, graduates. The integration of young talents into companies will be reduced, with consequent potential problems inside innovation challenges.

### *Ageing of the workforce*

Within companies, workers from different generations will increasingly coexist, with prolonged employee retention due to the combination of an ageing population and an increase in the retirement age; companies will need to review their organizational models. OECD estimates indicate, for instance, that for a newly hired young person (in 2022) in Italy, the retirement age will be 71 years, similar to the Netherlands and Sweden, while in Denmark, it will reach 74 years.<sup>5</sup>

## Participation of Young People and Women in the Labour Market

Young people and women can be particularly important profiles that companies can focus on. Increasing the involvement of these segments of the population within companies also allows to compensate for some of the challenges imposed by the demographic crisis: full participation of young people and women in the labour market, facilitated by adequate tools and initiatives, would allow, **at least in part, to address the workforce shortage**, but above all would bring about an **increase in the inclusion** of valuable segments of the population. A first challenge is represented by **NEETs**, young people who are neither in education, nor employment. In 2022, according to EUROSTAT data, 11.7% of youths aged 15-29 in the European Union were not enrolled in education or employment; the situa-

tion varies significantly depending on the countries, with a minimum of 4.2% in the Netherlands and a maximum of 19.8% in Romania.<sup>6</sup>

The second aspect concerns the **participation of women in the labour market**: according to EUROSTAT, in 2022, the gender employment gap (the difference between the employment rate of men and women in the 20-64 age group) stood at 10.7 percentage points, only 0.2 percentage points less than in 2021.<sup>7</sup> Specifically, the employment rate for men is 80%, compared to 69.3% for women; the widest gap is found in Greece, Italy, and Romania. Among the main causes is the responsibility of caring for the family that mainly falls on women, leading to more frequent exits from the workforce.

11.7%

NEETs aged 15-29 in European Union in 2022

69.3%

Women employed in European Union in 2022

80%

Men employed in European Union in 2022

<sup>6</sup> See [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Statistics\\_on\\_young\\_people\\_neither\\_in\\_employment\\_nor\\_in\\_education\\_or\\_training](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Statistics_on_young_people_neither_in_employment_nor_in_education_or_training)

<sup>7</sup> See <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20231128-1>



*Letter* by Maria Luisa Cammarata  
Global Chief People Officer at Gi Group Holding

We are facing an unprecedented period in complexity and dynamism in the world of work: digitalization, artificial intelligence, demography, low birth rates, are just some of the numerous factors that are transforming our way of working.

This paper is specifically aimed at younger individuals, offering **a compass and concrete testimony** to those who are entering - or have recently entered - the world of work.

Searching for a job, facing the first interview, integrating into an organization for the first time, and maintaining high motivation are crucial moments in the professional development of every individual, especially if young and with little experience.

Through concrete testimonies of young people and adults collected in some of the world's leading countries, we want to **share real experiences and tell the changes in progress**.

The combination of this information and its organic re-elaboration can represent a valuable **benchmark** for increasing awareness and clarity about what the work path for new generations might be.

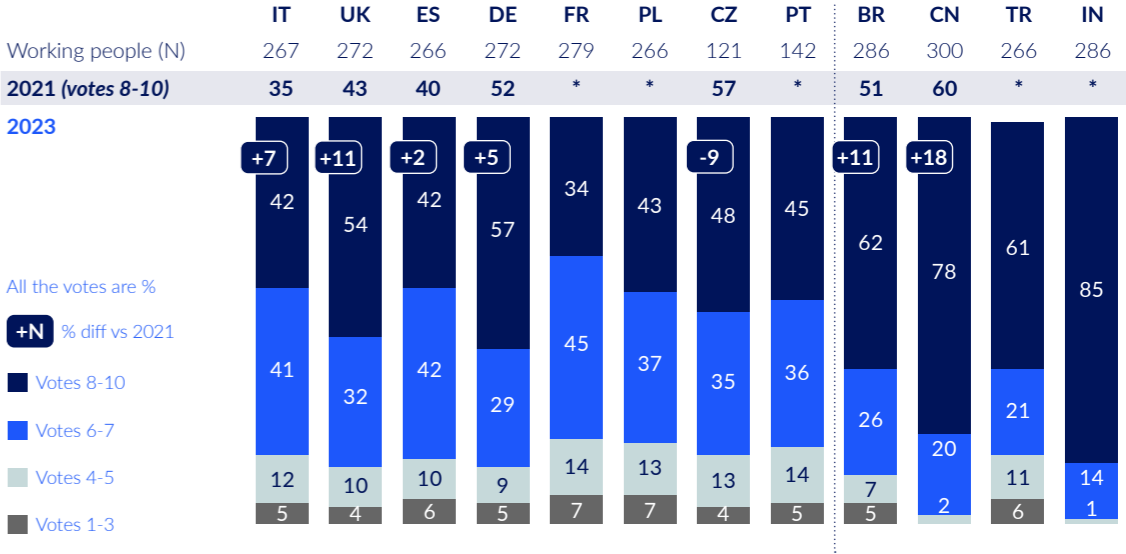
How is work changing and how will it change in the near future? What aspects should one focus on during the job search? What are the most effective tools for finding work? Is word of mouth, networking, or a human resources specialized company more important? How can I best utilise my skills and develop new ones? Question after question, answer after answer, the paper takes a careful look at those values that increasingly characterize work experience: corporate culture, inclination towards sustainability and inclusion, the attractiveness of a company. At the same time, it clearly emerges what factors drive worker satisfaction today: alongside traditional attention to compensation, there is an increasingly clear sensitivity to the balance between life and work, time management, sharing common values, internationalization. The story that emerges is one of a dynamic picture. In a world of work characterized by increasing speed, it will be increasingly necessary to have a perspective and skills that allow us to face the changes that continuously arise on the horizon. Acquiring awareness of the ongoing transformations today is the best investment for one's future. Professional and personal.

# 1.2

## The Growth of *Satisfaction*

The survey conducted by Ipsos for Gi Group Holding clearly highlights some key elements regarding the perception of the world of work and one's employment. Firstly, **satisfaction with one's work situation is positive and increasing compared to the previous survey in 2021**. Full satisfaction - those rating between 8 and 10 - is increasing in all the countries analysed, with the sole exception of the Czech Republic (-9%). Particularly, satisfaction growth ranges from +5% in Germany to +18% in China; the highest satisfaction indices emerge in Asian countries (61% in Turkey, 78% in China, 85% in India), while in Europe there's a slight gap between the Mediterranean region (34% satisfaction in France, 42% in Spain and Italy) and countries like the United Kingdom (54%) and Germany (57%). Negative judgments remain limited. A higher incidence of lower scores (ratings 1-3) is seen in France (7%), Poland (7%), Spain (6%), and Turkey (6%), while in no other country does it exceed 5%.

**Tab 1**  
**Satisfaction with the current personal work situation is good** in all the countries, with positive peaks in China, India, Brazil and Turkey. The trend is improving everywhere except for the Czech Republic, where however satisfaction remains within the range of sufficiency.  
**Question:** Overall, how satisfied are you with your current working situation?



Work satisfaction or dissatisfaction can be driven by specific personal conditions, such as gender, age, educational background, and qualification.

Comparing different national contexts provides useful insights to identify **targets who experience their work with greater satisfaction**.



### The most satisfied targets

#### Young people

From an age perspective, the main differences emerge regarding the **24-31 age group in India** (90% of workers in this age group express high satisfaction, compared to the 85% average), **China** (84%, compared to an average of 78%), **and Poland** (48%, compared to an average of 43%).

#### Roles of responsibility

The main common factor among the countries considered concerns the position within the company: satisfaction indices are higher among those with **roles responsible for managing collaborators**; this evidence emerges in all countries except the **Czech Republic**.

#### Economic and legal studies

Regarding educational background, satisfaction differs for those who have **studied in the economic-legal field**. This is particularly evident in **Brazil** (69% of workers with this background are very satisfied, compared to an average of 62%), **Germany** (66%, compared to an average of 57%), **the United Kingdom** (63%, compared to an average of 54%), **and Spain** (50%, compared to an average of 42%).

#### Male workers

Looking at the most positive ratings (i.e., those who expressed satisfaction between 8 and 10), in some countries, the gender difference is significant: **male workers in Germany** (68%, compared to an average of 57%), **the United Kingdom** (68%, compared to an average of 54%), **Spain** (51%, compared to an average of 42%), **and France** (42%, compared to an average of 34%) are more satisfied, while in **Turkey**, female workers stand out in satisfaction (77%, compared to an average of 61%)

Tab 2

To oversee collaborators increases the satisfaction across countries, as it was reported also in 2021

Question: Overall, how satisfied are you with your current working situation?

\* target composed mainly of managers and middle managers

	IT	UK	ES	DE	FR	PL	CZ	PT	BR	CN	TR	IN
Working people (N)	267	272	266	272	279	266	121	142	286	300	266	286
2023 (votes 8-10, in %)	42	54	42	57	34	43	48	45	62	78	61	85
Gender		Male 68%	Male 51%	Male 68%	Male 42%						Female 77%	
Age						24-31 48%				24-31 84%		24-31 90%
In charge of collaborators*	Yes 59%	Yes 65%	Yes 62%	Yes 68%	Yes 55%	Yes 51%		Yes 52%	Yes 76%	*	Yes 69%	*
Field of study		Economic + Legal 63%	Economic + Legal 50%	Economic + Legal 66%					Economic + Legal 69%			

Female employment still suffers from a significant gap in much of the globe. The guidelines to focus on are to change course - and those on which **Women4**, a project by Gi Group Italy to strengthen **female participation in the labour market**, works on - are in particular the strengthening of female em-

ployment in traditionally male-dominated sectors, the creation of professional opportunities for all women by debunking commonplaces and gender stereotypes, the encouragement of training, and paths of growth for female workers in collaboration with companies and institutions.

# 1.3

## Satisfaction *Factors*: Old and New Dynamics

Compared to the situation depicted by the first survey in 2021, some changes appear profound. The search for an ideal job appears to be particularly driven by certain aspects increasingly central in the new **value framework** shared by most workers. The possibility of **good pay** remains among the top factors in choosing a job today, but with a preference substantially unchanged compared to 2021. Gaining more weight now are instead the aspects closely connected to one's **life horizon**: workers pay more attention to the possibility of spending periods of their career abroad and having roles capable of engaging with global contexts, but also to the centrality of **welfare and corporate well-being programmes** and to the creation of a **positive atmosphere** within the work environment. The image emerges of an ideal job that can combine various aspects: the economic side, career trajectory and a focus on training, the sharing of common values, and the strengthening of organisational well-being.

### A Bridge to Abroad

Today, increasingly, workers and candidates give more value to internationalisation. **The importance of foreign experience or a corporate role with a global vision and operation** appears to be increasing in all countries where comparison is possible, with growth of at least 5 percentage points compared to 2021 and particularly high peaks in the United Kingdom (where the increase approaches 20 percentage points, perhaps also driven by the effects of Brexit) and in China. Being able to spend part of one's career abroad and work in collaboration with foreign company structures will increasingly become an **added value**, both in terms of **professional skills** as well as **personal growth**. This is

a dynamic already evident in terms of study paths, with the constant growth of Erasmus exchanges and university mobility.

+5pp  
Respondents considering the importance of foreign experience or a corporate role with a global vision and operation

### Good pay, but not only

How much does good pay matter? The strictly economic aspect remains among the elements that workers pay high attention to, albeit with slight variations compared to 2021: its importance actually decreases significantly in Italy (it is very important for 66% of workers, in 2021 it was 74%), in Spain (from 76% to 69%), and in the Czech Republic

(from 72% to 64%), with a significant increase only in China (from 63% to 76%); more specifically, the remuneration aspect is at the forefront only in the United Kingdom, Spain (on par with recognition of merit and work-life balance), and Brazil. The focus is increasingly on **aspects that are complementary to salary**.

60%  
Respondents considering continuous training the most important aspect, with higher peaks in

Portugal  
China  
Brasil

### Building growth paths, valuing merit

If the job market is dynamic and professions undergo continuous transformations, workers feel the **need to constantly deepen and update their skills**, both for internal growth within the company and for any transition to another company. Alongside factors such as rapid career development and good career opportunities, there is a good consensus on the importance of **continuous training**: this aspect is very important for about 60% of respondents, with higher peaks in Portugal (71%), China (78%), and Brazil (80%).

Skill development is indeed an element that is solidly linked to other components that are now crucial in defining job satisfaction: workers and candidates with more qualified profiles tend to have greater chances of being involved in **professional growth** paths (internal mobility), thus seeing the recognition of **valuing merit**. Merit recognition is also a factor of primary importance, with particularly high incidence in Italy (it is the factor that receives the most consensus in this country) and Spain (the first factor along with salary and work-life balance).

### Sharing values

In recent years, there has been an increasing focus on the **values promoted and shared by a company**. Sharing a common set of values makes the work experience more rewarding, encourages proactive engagement, cements a bond not only professional between the worker and the company, allows the

company to generate a livelier interest from a candidate. From the perspective of a worker or a candidate, it means being in tune with the ethical, moral, and cultural principles promoted by the company. These values should not only be stated but also concretely practiced in the production chain, in the

company's organisation, in the relationship with customers and suppliers. Themes such as a propensity for **environmental sustainability, inclusivity, organisational well-being**, and **social responsibility** are now elements through which a worker looks at a company and thus factors of **reputation** and **attractiveness**, on which corporate governance is called to act to **strengthen its position** and **compete for new talents**.

### Continuous Training

The fast pace of the working world and the increased propensity for professional growth now make the decisive role of continuous training evident, an element to which workers and candidates must pay very strong attention. **Upskilling** and **reskilling**, processes aimed at improving one's skills or acquiring new ones, are essential for developing a professional growth trajectory within the same company or within other companies, or for facing more drastic career changes. Occupational mobility is therefore closely connected to a constant revision of one's professionalism. In this context, **the possibility of being included in continuous training programmes** has become a very frequent request or expectation among wor-

In the countries analysed, over 60% of respondents attach great importance to the sharing of common values by the company; compared to 2021, attention is growing especially in the United Kingdom (from 55% to 60%) and in China (from 65% to 75%). An important proportion of workers and candidates, for example, attach great importance to the fact that a company guarantees equal opportunities for all (62% of respondents declare this in the United Kingdom, 66% in Portugal, 80% in Brazil).

60%

Respondents considering sharing of common values by the company very important

kers and candidates: in Europe, it is particularly highlighted among respondents in Portugal (considered very important by 71%), Italy (59%), the United Kingdom (58%), and the Czech Republic (54%, the country with the highest growth compared to 2021), while in the rest of the world it is particularly noted in Brazil (80%) and India (81%). Companies are thus called upon to **develop specific programmes dedicated to strengthening, updating, and expanding the skills of their employees**; this new orientation allows on the one hand to respond to the challenge of innovation, as it equips their personnel with new capabilities, and on the other hand to become more attractive to new talents and candidates.

70%

Respondents considering the possibility of hybrid solutions very important, with higher peaks in

Germany  
France  
Czech Republic  
India

### The Importance of Smart Working

**Good balance between work and life**, therefore the reconciliation between the time dedicated to the profession and the time reserved for the personal sphere, is the factor that on average receives the most consensus in the countries analysed, and in particular it is the variable at the top in Spain (on par with good pay and recognition of merit), Germany (on par with hybrid work), Portugal, China, and Turkey.

Among the most profound changes in the labour market is the centrality of hybrid solutions. The acceleration imposed by the pandemic has led to a full affirmation of **smart working**, spreading among workers a strong awareness of its **potential**. It is an aspect that also combines with the attention paid to the balance between work and private life, as the possibility of remote work profoundly changes daily work life, with positive repercussions especially for those engaged in family care activities (parents,

caregivers) or for those who commute (eliminating the time and cost of travel).

It is evidently no coincidence that the possibility of hybrid solutions is on average the second variable with the highest consensus in the countries under investigation: 70% of respondents consider this factor very important. Specifically, the possibility of hybrid solutions is the most important element in the samples from Germany (reported by 68% of respondents, on par with work-life balance), France (77%), the Czech Republic (83%), India (83%, on par with company values sharing and contact with different people). It is precisely hybrid solutions that respondents have observed the greatest progress in over the past 2-3 years: consensus is common particularly in all European countries and is reported with percentages ranging from 26% in Poland to 41% in the United Kingdom.



### Harmony in the Workplace Setting

The company cannot be seen and experienced solely as a simple workplace: workers and candidates require it to be a **work environment characterised by a spirit of collaboration and good relationships with colleagues and superiors**. The importance of collaboration among colleagues, in particular, emerges as one of the most ascending factors compared to the 2021 survey: a significant increase in relevance is reported in the United Kingdom (where this factor is now considered very important by 48% of respondents, compared to the previous 42%), in Spain (from 43% to 52%), in

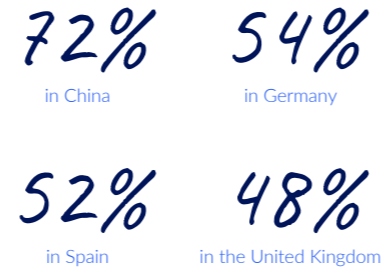
Germany (from 48% to 54%), and in China (from 61% to 72%). Collaboration with colleagues, i.e., peers, is considered even more important than collaboration with one's superiors. A corporate culture that fosters good relationships among its employees brings overall benefits: being integrated into a work environment characterised by a good level of human relations is believed to generate various advantages, represented by **increased efficiency and productivity**, and by **strengthening the sense of belonging to the company**.

### Welfare and Well-being

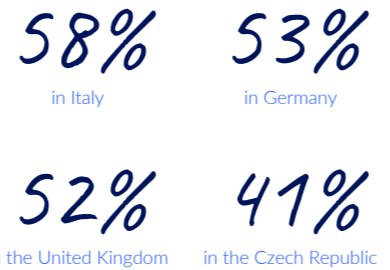
Among the opportunities that a company can offer, programmes dedicated to welfare and well-being seem particularly relevant. The search for a job, the choice to stay in the company or evaluate new positions can also be influenced by the existence of these programmes, reinforcing the consideration of how people increasingly value remuneration as not only economic. Corporate welfare programmes respond to the demand to provide employees with facilities dedicated to prevention and care, placing the value of health at the centre, in a vision even more appreciated after the pandemic. The presence of welfare programmes demonstrates to be particularly appreciated by respondents in Italy (58% indicate this factor as very important for their satisfaction) and in significant growth in the United Kingdom (from 44%

in 2021 to 52% in 2023), in Germany (from 46% to 53%), and in the Czech Republic (from 33% to 41%). A more recent and interestingly rising approach concerns corporate programmes dedicated to well-being, aimed at promoting a healthy lifestyle and sports practices: this prospect, in addition to having positive effects on health, can also create pleasant **team-building** opportunities. In parallel, there is growing sensitivity among workers: attention to the presence of well-being programmes as a factor of professional satisfaction is significantly increasing in Italy (defined as very important by 36% of workers, compared to 37% in 2021), the United Kingdom (from 41% to 52%), Spain (from 46% to 51%), Germany (from 35% to 44%), Brazil (from 73% to 78%), and China (from 56% to 74%).

Respondents considering harmony in the workplace setting very important



Respondents indicating the presence of welfare programmes as a very important factor



#### Legend

- ≤ 5% compared to 2021
- ≥ 5% compared to 2021

Merit recognition	78	69	65	67	63	69	66	63		56		53	62	59		71	80	82	73	76		74		79
A good fixed income	74	66	72	72	76	69	63	62		54		59	72	64		69	81	85	63	76		76		78
A good work life balance	68	65	70	71	69	69	62	68		59		57	69	66		78	80	83	73	81		78		82
Good career opportunities	66	63	64	67	63	66	49	48		40		49	53	55		66	79	77	70	80		74		79
Continuous training, keep up to date	61	59	58	58	58	54	50	44		42		43	48	54		71	77	80	67	78		73		81
Corporate welfare programmes	55	58	44	52	57	56	46	53		44		46	33	41		50	72	75	75	78		74		76
Hybrid work solution*		56		61		58		64		52		52		55		68		77		72		65		83
A company whose values I share	61	55	55	60	57	58	52	54		45		41	48	48		73	78	78	65	75		70		83
Social issues commitment	53	53	52	54	44	49	44	51		33		34	30	30		61	72	77	53	76		71		78
Collaboration among colleagues**	58	52	42	48	43	52	48	54		36		42	35	36		59	73	77	61	71		72		77
Rapid career development		52		54		53		41		40		47		44		61		77		75		72		82
Everyone has the same opportunity	66	51	61	62	57	58	45	52		39		40	41	39		66	78	80	68	71		73		81
Environmental sustainability commitment	50	50	45	49	46	51	35	45		36		33	32	34		54	71	75	54	73		66		82
Continuous all round training	57	49	49	51	53	53	36	41		37		44	36	46		58	74	78	55	75		69		78
Internal mobility	47	48	54	53	53	53	34	39		42		40	34	38		61	71	75	56	73		69		79
A share of variable pay and benefits	53	48	49	52	53	54	38	45		43		46	61	56		58	74	78	70	76		77		78
A contact with people different from me	51	48	45	50	38	45	38	42		39		35	28	35		55	66	77	55	74		68		83
Corporate well being programmes	37	46	41	52	46	51	35	44		31		37	28	38		55	73	78	56	74		65		79
Collaboration with the relevant manager*		44		48		41		44		35		38		37		45		73		71		70		81
An experience abroad	36	43	25	43	29	39	31	37		29		30	24	34		40	60	70	35	70		67		78
A career abroad	31	41	22	42	32	41	28	36		26		28	21	32		35	59	63	34	68		65		75

\* New item 2023 \*\* In 2022 it was a bit different: "That it is an activity based on collaboration"

**Tab 3:** In almost all countries an experience or a career abroad becomes more relevant than in 2021, but they remain at the bottom of the ranking  
**Question:** Thinking about your ideal workplace, and what you are looking for in a job and in a prospective employer, how important are the following aspects?

	IT		UK		ES		DE		FR		PL		CZ		PT		BR		CN		TR		IN	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Merit recognition	78	69	65	67	63	69	66	63		56		53	62	59		71	80	82	73	76		74		79
A good fixed income	74	66	72	72	76	69	63	62		54		59	72	64		69	81	85	63	76		76		78
A good work life balance	68	65	70	71	69	69	62	68		59		57	69	66		78	80	83	73	81		78		82
Good career opportunities	66	63	64	67	63	66	49	48		40		49	53	55		66	79	77	70	80		74		79
Continuous training, keep up to date	61	59	58	58	58	54	50	44		42		43	48	54		71	77	80	67	78		73		81
Corporate welfare programmes	55	58	44	52	57	56	46	53		44		46	33	41		50	72	75	75	78		74		76
Hybrid work solution*		56		61		58		64		52		52		55		68		77		72		65		83
A company whose values I share	61	55	55	60	57	58	52	54		45		41	48	48		73	78	78	65	75		70		83
Social issues commitment	53	53	52	54	44	49	44	51		33		34	30	30		61	72	77	53	76		71		78
Collaboration among colleagues**	58	52	42	48	43	52	48	54		36		42	35	36		59	73	77	61	71		72		77
Rapid career development		52		54		53		41		40		47		44		61		77		75		72		82
Everyone has the same opportunity	66	51	61	62	57	58	45	52		39		40	41	39		66	78	80	68	71		73		81
Environmental sustainability commitment	50	50	45	49	46	51	35	45		36		33	32	34		54	71	75	54	73		66		82
Continuous all round training	57	49	49	51	53	53	36	41		37		44	36	46		58	74	78	55	75		69		78
Internal mobility	47	48	54	53	53	53	34	39		42		40	34	38		61	71	75	56	73		69		79
A share of variable pay and benefits	53	48	49	52	53	54	38	45		43		46	61	56		58	74	78	70	76		77		78
A contact with people different from me	51	48	45	50	38	45	38	42		39		35	28	35		55	66	77	55	74		68		83
Corporate well being programmes	37	46	41	52	46	51	35	44		31		37	28	38		55	73	78	56	74		65		79
Collaboration with the relevant manager*		44		48		41		44		35		38		37		45		73		71		70		81
An experience abroad	36	43	25	43	29	39	31	37		29		30	24	34		40	60	70	35	70		67		78
A career abroad	31	41	22	42	32	41	28	36		26		28	21	32		35	59	63	34	68		65		75

**Tab 4:** Thanks to smartworking after Covid, the hybrid work solution is the aspect that has improved the most in the last 2/3 years in almost all countries

**Question:** Thinking about the world of work and companies in general, in which of the following aspects have you seen progress in the last 2-3 years? Tell me at most 3 aspects

	IT	UK	ES	DE	FR	PL	CZ	PT	BR	CN	TR	IN
At least one improved	91%	93%	93%	91%	92%	90%	93%	92%	95%	99%	97%	99%
Merit recognition	28	41	34	36	40	26	33	31	26	12	15	15
A good fixed income	15	12	14	12	14	7	13	15	11	12	16	14
A good work life balance	14	18	18	21	26	18	20	18	13	12	17	14
Good career opportunities	14	11	8	14	8	12	9	13	14	17	9	19
Continuous training, keep up to date	13	9	7	9	9	13	8	14	14	18	8	14
Corporate welfare programmes	12	12	11	10	11	7	15	11	13	13	7	11
Hybrid work solution*	11	8	9	9	6	9	8	8	8	16	9	8
A company whose values I share	10	13	15	13	9	11	10	19	11	16	12	10
Social issues commitment	10	7	10	11	9	10	10	6	12	16	14	10
Collaboration among colleagues**	10	15	11	6	6	8	8	8	13	12	13	16
Rapid career development	10	8	9	7	8	13	20	9	12	17	14	18
Everyone has the same opportunity	10	18	11	13	8	9	11	14	14	10	8	17
Environmental sustainability commitment	8	5	7	5	6	7	7	8	8	14	11	14
Continuous all round training	8	7	10	5	7	10	2	8	11	11	11	13
Internal mobility	8	14	15	13	12	10	16	13	12	9	14	12
A share of variable pay and benefits	7	8	8	5	8	12	7	10	11	10	11	12
A contact with people different from me	7	8	14	8	10	14	13	13	12	17	15	11
Corporate well being programmes	7	6	4	4	4	6	10	5	8	10	8	9
Collaboration with the relevant manager*	6	7	5	7	9	8	4	5	9	8	12	8
An experience abroad	6	8	6	12	10	12	9	7	10	14	15	12
A career abroad	4	7	6	7	4	6	6	4	5	8	7	7

Legend

The most mentioned option



# 2

## Finding a *Job*: Where Supply Meets Demands

- 2.1 How to search for a job, what is effective
- 2.2 HR specialists: employment agencies

### 2.1

40%

Respondents considering  
online job searches and sending  
CVs the most common methods

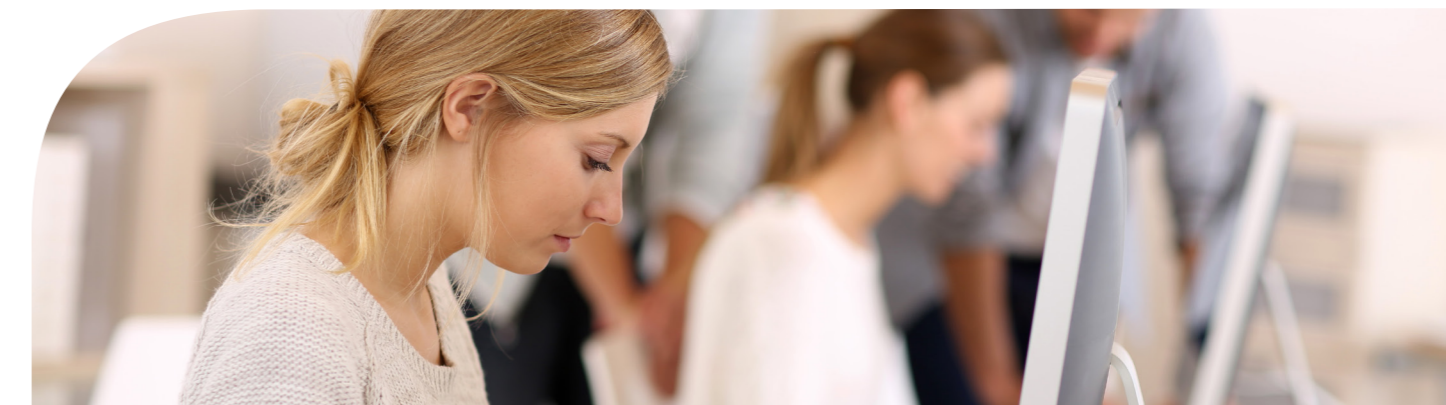
### How to *search for a job*, what is effective

#### Between innovation and tradition

**But how does one search for a job?** This is a huge challenge for all industry analysts: understanding, for each market, **the peculiarities of job recruitment channels**. The survey provides a composite picture, with local specificities, but also with a common background that interlinks innovation and tradition: **online job searches and sending CVs in response to job advertisements stand out as the most common methods** among respondents; in both cases, more than 40% of the sample indicates using these channels to find work. Specifically, the use of job search websites is the most frequent choice in the United Kingdom (57% of the sample), Germany (42%), Czech Republic (55%), Brazil (47%), Turkey (40%), and India (44%), while sending CVs in response to job advertisements prevails

in Italy (44%), Spain (43%), France (46%), Poland (56%), and Portugal (56%).

In recent years, some specific channels have seen growth, as evidenced by the comparison between the results of the 2021 survey and the 2023 survey: the use of LinkedIn increases especially among candidates in Spain (where its usage increases from 32% to 37%), Germany (from 20% to 25%), and Brazil (from 28% to 38%); although remaining generally at lower levels, the choice to send one's CV to head hunters specialised in one's sector also intensifies, with more significant trends in the United Kingdom (where it increases from 16% to 22%), Spain (from 11% to 17%), Czech Republic (from 10% to 17%), Brazil (from 17% to 25%), and China (from 25% to 39%).



**Tab 5:** Sending CVs or job search websites are the most used channels to find a job in almost all countries. Employment agencies are more used in non-European countries and in Italy

**Question:** When you first looked for work or when you tried to change jobs, which channels did you use? Tell me all the channels you used

	IT		UK		ES		DE		FR		PL		CZ		PT		BR		CN		TR		IN	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Sending CVs in response to job advertisements	44	44	45	39	46	43	37	31		46		56	47	45		56	35	38	36	32		40		36
Sending CVs directly to companies, also, not in response to advertisements	40	40	17	20	43	36	21	20		30		31	27	23		46	31	35	25	27		26		37
Job search websites	43	38	58	57	49	38	42	42		44		52	59	55		49	45	47	64	35		40		44
LinkedIn	35	34	33	30	32	37	20	25		29		17	25	26		39	28	38	22	24		24		37
Word of mouth from friends/acquaintances	32	31	22	24	29	30	25	22		26		28	29	36		38	42	32	41	31		34		26
Use of Employment Agencies	26	28	26	21	21	20	9	12		15		12	21	20		18	20	25	17	29		35		33
Participation in public competitions	27	26	3	6	20	18	12	15		14		11	6	8		27	34	25	28	32		18		29
Word of mouth from work colleagues	17	20	12	13	18	17	12	15		15		14	18	15		13	20	22	24	25		21		28
Use of job centres (former employment offices)	20	19	10	13	26	21	21	21		14		19	26	20		12	13	14	15	24		17		26
Sending CVs to headhunters specialising in your sector	12	14	16	22	11	17	13	16		14		12	10	17		31	17	25	25	39		22		27
University carrer days	13	13	9	12	10	11	12	16		9		6	14	11		3	9	12	18	18		18		22

- Legend
- The highest values
- ≤ 5% compared to 2021
- ≥ 5% compared to 2021

Is word of mouth the most effective way?

EU respondents consider word of mouth the most effective channel, with peaks in

84%

Germany

77%

France

58%

Italy

The survey's perspective allows us to analyse another perspective, perhaps even more crucial for understanding the choices of workers and candidates: if so far the framework has been outlined on how to search for a job, it is fundamental to understand which method is considered the most effective in reaching the desired job position. To delve into this aspect, the conversion rate has been taken into consideration, namely the percentage ratio between effectiveness (how suitable each channel is considered to achieve the goal) and usage (how frequently that channel is used) of each job search method.

**In Europe, word of mouth - especially among friends and acquaintances - is considered the most effective channel.** In fact, in every European country analysed, this method highlights the highest conversion rate, ranging from 42% in Portugal to 84% in Germany; above 50% are also Czech Republic (51%), Spain (55%), United Kingdom (55%), Poland (56%), Italy (58%), and France (77%).

There can be multiple factors that consolidate such belief across Europe. **A significant role is determined by personal experience:** those looking for a job, especially if entering the market for the first time, tend to rely on the experiences of friends or family. This network of friends or family, the social capital that each can rely on, can facilitate a direction towards a specific job position, but can also offer insights into companies: **what is the company's organization, what is the work culture, what are the available opportunities.**

Outside of Europe, however, the situation varies from country to country, without the emergence of a homogeneous situation: word of mouth highlights the highest conversion rate in Brazil (55%); in China, the most effective method is considered to be sending CVs to specialised sector head hunters (49%); direct submission of CVs to companies, also not in response to specific job advertisements, is instead the most effective channel according to respondents in Turkey (49%); LinkedIn, on the other hand, excels in India (43%).

### CV Submission

Despite a society increasingly focused on the web, classical methods seem to maintain a prominent role in job search. In addition to word of mouth, **in Europe, the dynamics of job advertisements and CV submission remain central.** Indeed, the majority of European countries covered in the survey indicate sending CVs in response to a job advertisement as the second or third most effective channel (with values exceeding 40% or in some cases even 50%), or even in the absence of job advertisements (leveraging, in this case, the value of one's skills and the possibility that there are still job positions available).

The widespread use of this method must therefore be accompanied by dual attention. **The candidate is advised to pay particular attention to the competition, enhancement, and constant updating of their CV:** a fundamental process, the first calling card to capture the attention of those involved in personnel recruitment. If sending CVs is indeed

a popular channel, the competition is high. It is therefore crucial to be able - also with the help of professionals - to present one's skills and training, talents and abilities, past experiences, and personal qualities in the best possible way.

At the same time, if job searching involves submitting an application in response to a company's advertisement, it is necessary to develop an effective ability to identify these opportunities. Therefore, it is necessary to know the different channels through which companies publish their advertisements, as well as - even in the case where sending the CV is independent of an advertisement - being able to reach out to companies to propose an application.

An Italian peculiarity - probably linked to a certain tradition of public employment, a job considered secure and stable - is **participation in public competitions**, a recruitment channel that achieves a conversion rate of 49%, thus with a significant ratio between usage and effectiveness.

EU respondents consider sending CVs in response to job advertisements the second or third most effective method, with peaks in

56%

Poland

52%

Germany

51%

France

### A social network for finding work: the case of *LinkedIn*

30%

Respondents using LinkedIn for finding work

In recent years, there has been a growing role for social channels and the internet in general as a means to find employment. One notable example is LinkedIn. Launched in 2003, LinkedIn is a free social network with premium paid services. It allows users to publish and share their CV, post updates, and interact with other users within a framework heavily focused on professional experience. Within this platform, companies can post job openings for users to apply to, and through a filtering system, targeted searches can be conducted to identify talents or positions that align with one's background. As of November 2023, LinkedIn has surpassed one

billion users worldwide. This social network thus becomes one's professional showcase, a dynamic and constantly updated CV open to all. Looking at its adoption rate rather than its conversion rate, LinkedIn is used on average by 30% of respondents, with higher rates in Portugal (39%), Brazil (38%), India (37%), Spain (37%), and Italy (34%), making it the fourth most used method for job searching overall. In European countries, the conversion rate swings from 25% to 36%, with more effectiveness observed among respondents from the Czech Republic and Italy, while India reports the highest values globally (43%).

### Rethinking university career days

**A critical aspect lies in the connection between education and employment.** At the end of their studies, it is crucial for young people to have the opportunity to build a bridge towards employment. However, the tools provided by universities are not particularly utilised or considered effective. **University career days rank last in the survey:** on average,

only 13% of respondents make use of them. Regarding effectiveness, only in Turkey is a conversion rate of over 20% observed (23%). This evidence should push the university system to rethink this model, gathering feedback from students and candidates and improving alignment with companies.



**Tab 6:** In European countries the perceived most effective channel to find a job is word of mouth from friends  
**Question:** And what do you think is the best, most effective channel for finding a job?

Conversion rate:  
Efficacy/Usage \*100

	IT			UK			ES			DE			FR			PL			CZ			PT		
	% Usage	% Efficacy	Conversion Rate	% Usage	% Efficacy	Conversion Rate	% Usage	% Efficacy	Conversion Rate	% Usage	% Efficacy	Conversion Rate	% Usage	% Efficacy	Conversion Rate	% Usage	% Efficacy	Conversion Rate	% Usage	% Efficacy	Conversion Rate	% Usage	% Efficacy	Conversion Rate
At least one improved	N=300			N=300			N=300			N=300			N=300			N=300			N=150			N=150		
Sending CVs in response to job advertisements	36	16	45	39	14	37	43	11	26	31	16	52	46	23	51	56	32	56	45	19	43	56	22	39
Sending CVs directly to companies, also, not in response to advertisements	33	14	44	20	8	40	36	15	43	20	6	29	30	5	17	31	10	34	23	6	27	46	12	25
Job search websites	32	7	23	57	23	41	38	8	22	42	16	38	44	13	28	52	16	31	55	22	40	49	10	21
LinkedIn	28	10	34	30	7	25	37	12	33	25	7	28	29	8	28				26	10	36	39	12	32
Word of mouth from friends/acquaintances	26	15	58	24	13	55	30	16	55	22	18	84	26	20	77	28	16	56	36	19	51	38	16	42
Use of Employment Agencies	24	6	26	21	7	35	20	8	38										20	3	13			
Participation in public competitions	21	10	49																			27	7	25
Word of mouth from work colleagues																								
Use of job centres (former employment offices)							21	2	11	21	3	16							20	5	24			
Sending CVs to headhunters specialising in your sector				22	7	34																31	7	24
University carrer days																								

Legend

■ The most mentioned options

2.2

+2pp

Growth in the employment agencies' usage compared to 2021

## HR specialists: employment agencies

### A growing role

**Employment agencies play a fundamental role in connecting supply and demand in the job market.**

Specialising in supporting the entry into employment, they constantly engage with candidates and companies to satisfy the needs of both parties, providing orientation services, skills development, up-skilling, and re-skilling. On average, 21% of respondents in the surveyed countries state they search for employment through employment agencies, indicating it as a frequently used and traditional channel. Compared to 2021—focusing on contexts where a comparison is possible—there's a growth in their usage by over 2 percentage points, with the most significant increase observed in China (from 17% to 29%) and Brazil (from 20% to 25%), while the United Kingdom reports a more noticeable decrease (from 26% to 21%).

**The sectoral scenario thus appears quite varied depending on the national context.**

Regarding effectiveness, some countries show significant results. The conversion rate reaches 38% in Spain and 35% in the United Kingdom; outside Europe, India (30%) and Turkey (44%) stand out.

**Furthermore, employment agencies perform many of the activities that respondents individually prioritise for job searches:**

they collect and distribute job advertisements, enable CV submissions in response to ads, have qualified personnel to guide candidates towards specific positions aligned with their skills and experiences, and assist in crafting an effective CV.

Employment agencies are also more valued compared to similar public institutions dedicated to connecting supply and demand: job centres—primarily managed by public administrations—are used by only 18% of respondents, with particularly low performance, especially in the United Kingdom (13%), France (14%), and Brazil (14%).

# 3

## Within Individual Countries

- 3.1 European Countries
- 3.2 Extra-EU Countries

### 3.1

#### European Countries

##### Satisfied Workers When Putting People at the Centre

45%

EU respondents expressing a very positive evaluation in job satisfaction, with higher peaks in

*Germany  
the United Kingdom*

As already mentioned, **the European context is characterised by good job satisfaction**: on average, 45% of respondents express a very positive evaluation (rating 8-10), with higher peaks in the United Kingdom (54%) and Germany (57%) and a minimum in France (34%), while the comparison with the 2021 survey indicates an overall improvement.

Although recent years have brought about an increasingly profound sensitivity, **the European job market still seems to retain some indicative elements of gender difference**, considering that it is mainly male workers who generally show higher levels of satisfaction (the most marked gap emerges in the United Kingdom, Germany, France, and Spain).

**The drivers of this satisfaction are increasingly linked to the sphere that is not strictly economic, but rather to organisational methods and a corporate culture that places the individual at the centre**: among the characteristics of the ideal workplace, the presence of solutions for hybrid work and a good work-life balance are indeed the two factors with the highest consensus in Europe (over 65%), even more so than a good, fixed salary (3rd factor), and other relevant elements are indicated in merit recognition and career trajectories. This is - as already seen on a global scale - a new repositioning of values that has undergone rapid acceleration in recent years, embodying profound cultural changes.

##### The Web, CVs, Job Advertisements, and Word of Mouth

47%

EU respondents using web portals for job advertisements as the preferred channel

Similarly to the overall picture, in Europe, the preferred channels for job search **remain the use of dedicated web portals for job advertisements** (utilised by 47% of European respondents, with a peak of 57% in the United Kingdom) and **sending CVs in response to an advertisement** (chosen by 45% of European candidates, with the highest va-

lues in Poland and Portugal, at 56%). In terms of the effectiveness of each channel, as already outlined, **in European countries, there is a strong consideration for word of mouth**: this is the method considered most effective for finding work, particularly in Germany (with a conversion rate of 84%).

## Employment Agencies: Sharing Results

When approaching the job search, just under one in five workers (18%) resort to employment agencies, with data that is substantially stable compared to the 2021 survey; a partial exception is represented by Italy, where this channel reaches 28%. However, the conversion rate, the indicator that relates the effectiveness and usage of each channel, highlights

an interesting performance of employment agencies: for example, in Spain, HR companies emerge as the third most effective method for finding employment. Highlighting the concrete results of this channel, sharing positive experiences, could increase awareness and reputation of employment agencies.

## An Element to Maintain: The Importance of Working in a Collaborative Environment

**Working in a collaborative atmosphere is crucial for consolidating the right job satisfaction.** By crossing the importance of each factor with what already happens in the companies of the interviewees, it emerges that in European countries, a current strength lies in the ability to build positive and inclusive environments. Collaboration among colleagues and with immediate superiors, along with the possibility to connect with different indi-

viduals, are central elements already present in all European contexts analysed today. **These are the primary aspects to maintain: working in a comfortable environment, with human relationships characterised by mutual respect and a cooperative approach,** allows to increase the sense of belonging to the company, consolidating talent retention and at the same time promoting greater commitment to the company.

## Strengths: a good salary, shared values

**Among the factors that simultaneously show high importance and widespread current presence in workplaces, two elements are shared by all European countries: a good, fixed salary and the sharing of company values.**

The two aspects are not antithetical, but effectively represent the recent evolution of workers' orientations. **A good salary is a basic requirement indicated by the majority of people because it constitutes a primary element of social security.** Leveraging a good salary is therefore something to

preserve and something companies can focus on to attract talent, but it's not enough: in recent years, there has been an increasing focus on the values that a company promotes. **Workers and candidates look to the company seeking shared values, a shared horizon, and a means to identify with; the**

**stronger this identification is, the more a worker will be inclined to stay within the company, and a talent will be attracted to the company itself.** The survey indicates good current levels for these two indicators, which emerge as strengths to exploit in the European labour market.

## Challenges for the future: the long transition to hybrid work

**There are elements on which workers have high expectations,** linked to the high importance they attribute to them, but which are currently not fully realised within European companies. **A primary focus is the transition to agile work, which offers widespread opportunities for hybrid solutions:** this need, as seen, has been amplified by the pandemic - which has shown its potential and advantages on a very large scale - and is linked to the redefinition of new priorities in people's lives. Forms of hybrid work, made possible by technological evolution, allow for better balancing of private life and work.

**Another challenge for European companies is the development of variable earnings and a benefits system.** If, as already noted, a good, fixed salary is already a reality in much of the production system, there is also an innovative sensitivity towards variable and rewarding mechanisms. This new attention is also linked to the centrality of merit and the possibility of career paths that enhance skills and abilities, which must be remunerated proportionally. Similarly, the importance given to the presence of benefits is linked to the growing attention towards company welfare and well-being programmes.

3.2

## Extra-EU Countries

### Continuous training as a satisfaction driver

In extra-EU countries, there is a very high level of job satisfaction: a remarkable 71.5% of the employed express a value between 8 and 10, thus particularly positive.

Above all, a good balance between work and life stands out as the main factor in job satisfaction, with an average agreement of 81%. However, compared to the European context, **the question of salary remains central** and ranks second (with an agreement of 78.8%, rising to 85% in Brazil). **A peculiarity of extra-EU countries is the strong emphasis placed on continuous training:** 78% of workers consider it important, ranking it as the third factor with the highest average agreement. The relevance of continuous training could be linked to the strong dynamism of these economies:

**the continuous evolution of markets and the strong push for innovation require workers to constantly realign their skills and learn new ones,** in order to remain protagonists within companies and to develop new career trajectories. However, attention to hybrid work, welfare, and company values remain secondary. A particularly significant finding, contrary to the European scenario, is the high level of satisfaction observed among female workers in Turkey (77%), while positive indications emerge among young people: both in China and in India, workers between the ages of 24 and 31 show the highest satisfaction, with values between 84% and 90%.

### The path to finding a job? It depends on the country

In extra-EU countries, the search for employment mainly takes place **through the use of dedicated websites** (done by 42% of respondents) and **sending CVs in response to job advertisements** (37%). **Regarding the effectiveness of these channels, there is no common data, but the conversion rate varies depending on the country:** in Brazil, **word of**

**mouth** is considered the most effective tool (55%), in China, sending CVs to **head hunters** specialized in the relevant sector (49%), in Turkey, **directly sending CVs** to companies even in the absence of advertisements (49%), while a particular case is India, where **LinkedIn** is the most effective tool for finding a job (43%).

71.5%

Extra-EU respondents expressing a very positive evaluation in job satisfaction

78%

Extra-EU respondents considering continuous training important compared to EU respondents

42%

Extra-EU respondents using web portals for job advertisements as the preferred channel

### The growth of employment agencies

**Employment agencies demonstrate good performance in extra-EU countries. In fact, they are used by an average of 31% of respondents to search for jobs, a figure 13 percentage points higher than that recorded in the European area.** The 2023 survey reports an important growth trend: in Brazil, the use of employment agencies increased

by 5 percentage points, in China even by 12 points. A more in-depth analysis of the extra-EU scenario also seems to indicate an interesting degree of effectiveness of employment agencies, especially in some contexts: this is the case in Turkey, where the conversion rate reaches 44%, placing HR companies as the second most valued channel.

### An element to maintain: dynamic internal mobility

**Among the satisfaction factors that are already present with good distribution in companies in extra-EU countries today, a common element is internal mobility.** This is an important dynamic in a worker's career trajectory: **being able to change roles (horizontal mobility) or progress through promotions (vertical mobility) invigorates and strengthens the bond with the company, stimulates the proactivity of the worker, and gives the opportunity to see the employee's skills and ca-**

**pabilities valued.** If internal mobility is already at good levels of dynamism today, this also promotes attention to continuous training: it is indeed fundamental to constantly update and expand one's skills portfolio. At the same time, if internal mobility is vertical – meaning oriented towards moving the worker towards top positions – the worker also benefits economically, seeing an increase in their salary.



### A strength: the value of continuous training

Among the strengths of the labour market in extra-EU countries, one can notice the centrality of continuous training: a satisfaction factor particularly felt by workers and candidates and at the same time, an element already widely spread in corporate contexts.

The focus on continuous training, as noted, responds to two dynamics. On one hand, there is the interest from workers, who aim to continuously deepen their professional profile both to progress within the com-

pany – a dynamic very common in extra-EU contexts, as seen just above – and potentially to move to other companies. On the other hand, and as shown by the good degree of diffusion in the countries surveyed, it is also in the interest of companies to offer their employees paths for strengthening and innovating their skills, in order to find within their workforce those new resources required by the dynamism of the market and the highly rapid evolution of technologies.

### A challenge: extending corporate welfare programmes

Financial reward is no longer the only aspect that workers pay attention to when it comes to work compensation. **In extra-EU countries, it emerges that there are still ample opportunities for improvement regarding the extension of corporate welfare programmes, a satisfaction factor considered very important by workers and candidates but which at the moment does not receive adequate responses from a significant portion of companies.** Corporate welfare programmes are indeed funda-

mental for the well-being of employees and show clear positive impacts on the sense of belonging to the company and productivity. By offering benefits related to healthcare, care, and prevention, companies demonstrate significant attention to their employees, improving satisfaction and loyalty, and at the same time can enhance their corporate image and attract talents. Investing in employee welfare is crucial for the long-term success of the company.



# Conclusion

The labour market has undergone profound transformations in recent years. Understanding the opinions of workers and job seekers and comparing different national contexts allows for a comprehensive and in-depth description of these changes.

Job satisfaction has increased between 2021 and 2023, reaching overall high values on a global scale: those expressing positive evaluations are mainly young workers aged 24-31, male, those who have studied in the economic-legal field, and those in a role of responsibility managing collaborators; however, there still persists a gender gap that penalises women.

The most profound changes concern the drivers of satisfaction: the possibility of internationalising one's career, the presence of remuneration not only in monetary terms (benefits, incentives, welfare, and well-being), the valuing of merit, the sharing of common values between worker and company, continuous training, and the possibility of using smart working are becoming increasingly important.

Job search channels maintain a close interweaving between innovation and tradition: searching for open positions online and sending CVs in response to job postings remain the most commonly used methods, while in some contexts, the use of LinkedIn is gaining ground. It is word of mouth, however, that is considered the most effective channel for obtaining a job, especially in Europe.

The role of employment agencies is also growing, crucial in matching supply and demand and capable of meeting the needs of both parties, also through orientation services, up-skilling, and re-skilling.

Gaining an awareness of these transformations, in order to understand and intercept them, is the first step towards embracing the future of work.

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