

GAME CHANGERS



ARE YOU IN?

2nd edition

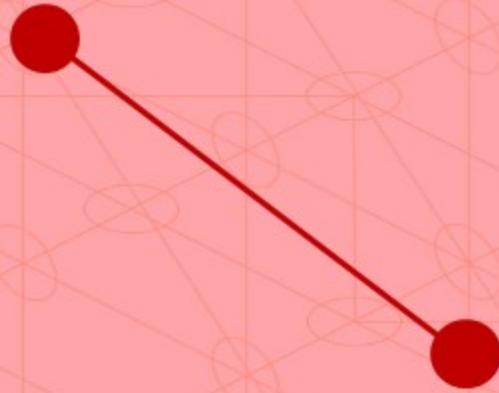
COEUR DÉFENSE
21st & 22nd NOV 2017

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ON@WORK**

BY PARIS LA DEFENSE

INDIVIDUALS AND COMPANIES...



... FEARS AND
EXPECTATIONS

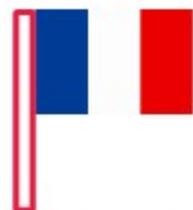


METHODOLOGY



4

countries



target

= employees



1000

respondents in each
country, interviewed in
September 2017



results

representative
of national
workforces



**average
age**

42



**all
sectors**



**all
levels**

THE REVOLUTION@WORK IS UNDER WAY

- Over **three in four** respondents expect the ongoing changes in the workplace to have a **significant impact**
17% don't have an opinion, 6% expect a transformation of limited impact
- **80%** think we will **work differently** in 10 years' time
14% disagree, 6% don't know
- **61%** believe having **multiple jobs simultaneously** will become the standard
26% disagree, 13% don't know

WHAT EMPLOYEES SAY OPPORTUNITIES



Efficiency and added value

- Enabling technology
- “Working smarter, not harder”

Flexibility and autonomy

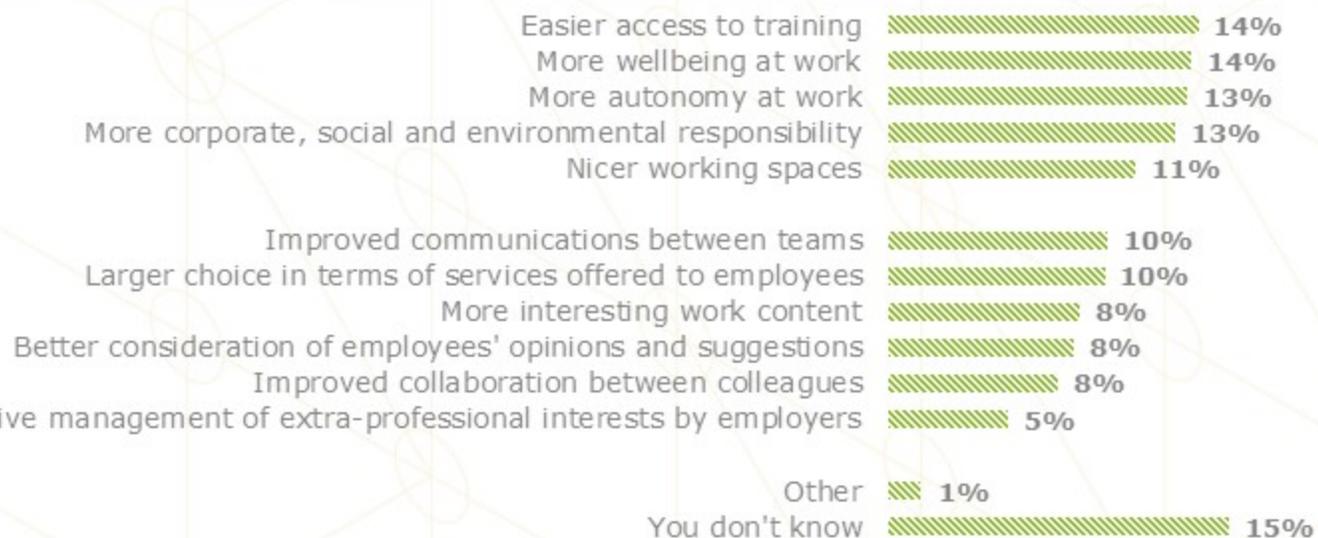
- Time management
- Team work improvement

Opportunities and skill development

- Wide range of experiences
- Opportunities to retrain

WHAT EMPLOYEES ANTICIPATE POSITIVE SIDE

Which positive changes are most likely to occur in the coming 10 years? (3 answers possible)



WHAT EMPLOYEES SAY FEARS



Automation and digital

- Human dimension at risk
- Robots “taking over”

Pressure and acceleration

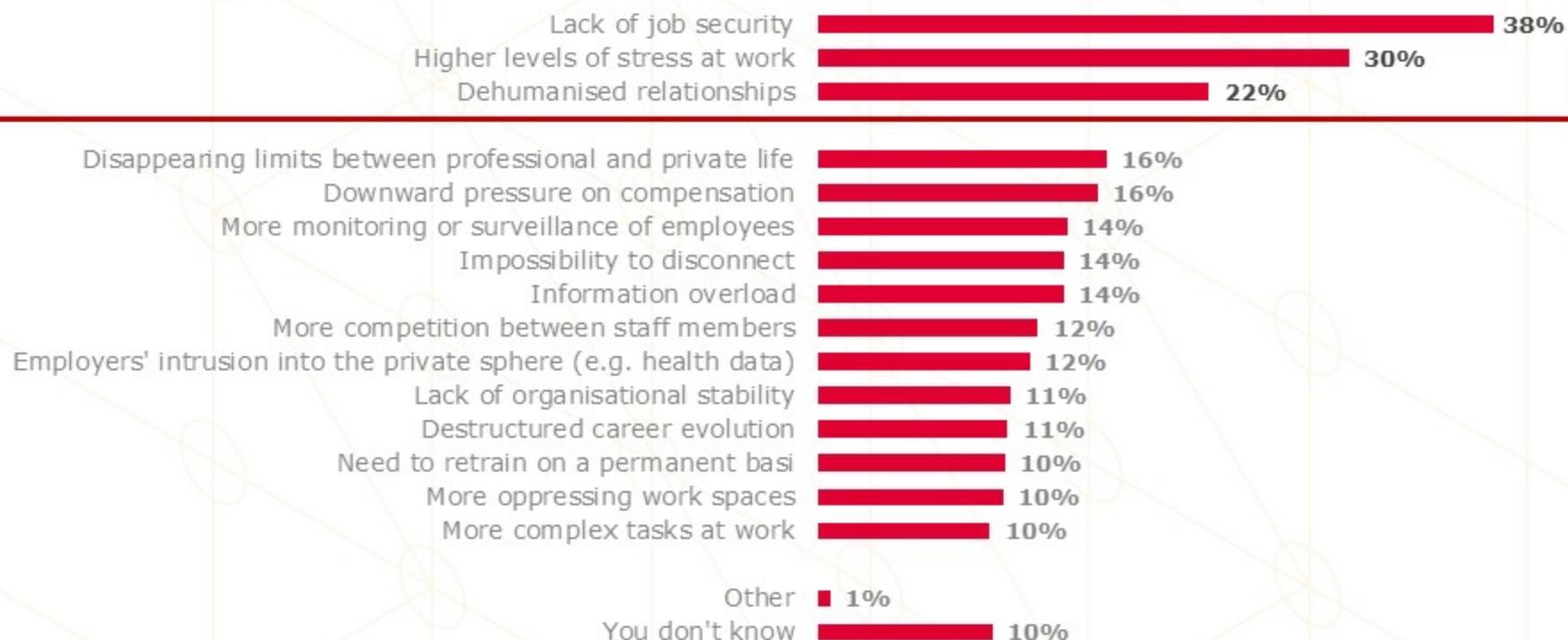
- Work-related stress
- More to do in less time

Instability and precarity

- “More gigs, less security”
- Impact on working conditions and benefits

WHAT EMPLOYEES ANTICIPATE NEGATIVE SIDE

Which negative changes are most likely to occur in the coming 10 years? (3 answers possible)



FINDINGS

Mixed feelings are registered when it comes to the nature and the impact of changes

- **Flexibility is the key concept**

On the positive side, this applies to both working hours and work location, facilitating a better work/life balance
On the negative side, close to 40% are concerned with the lack of job security

- **Tech (and concrete) aspects are predominant**

On the positive side, improved tools and an easier access to job-related information are expected
On the negative side, stress levels are likely to rise

- **Automation tends to worry employees**

Artificial intelligence at work is a threat to most employees for 35% of respondents, while it is perceived as an opportunity by 15%
The risk of dehumanised relationships at work was one of the top themes in the respondents' comments in all countries

FLEXIBILITY AT THE CENTRE



WORKING HOURS
WORK LOCATION



LACK OF JOB SECURITY



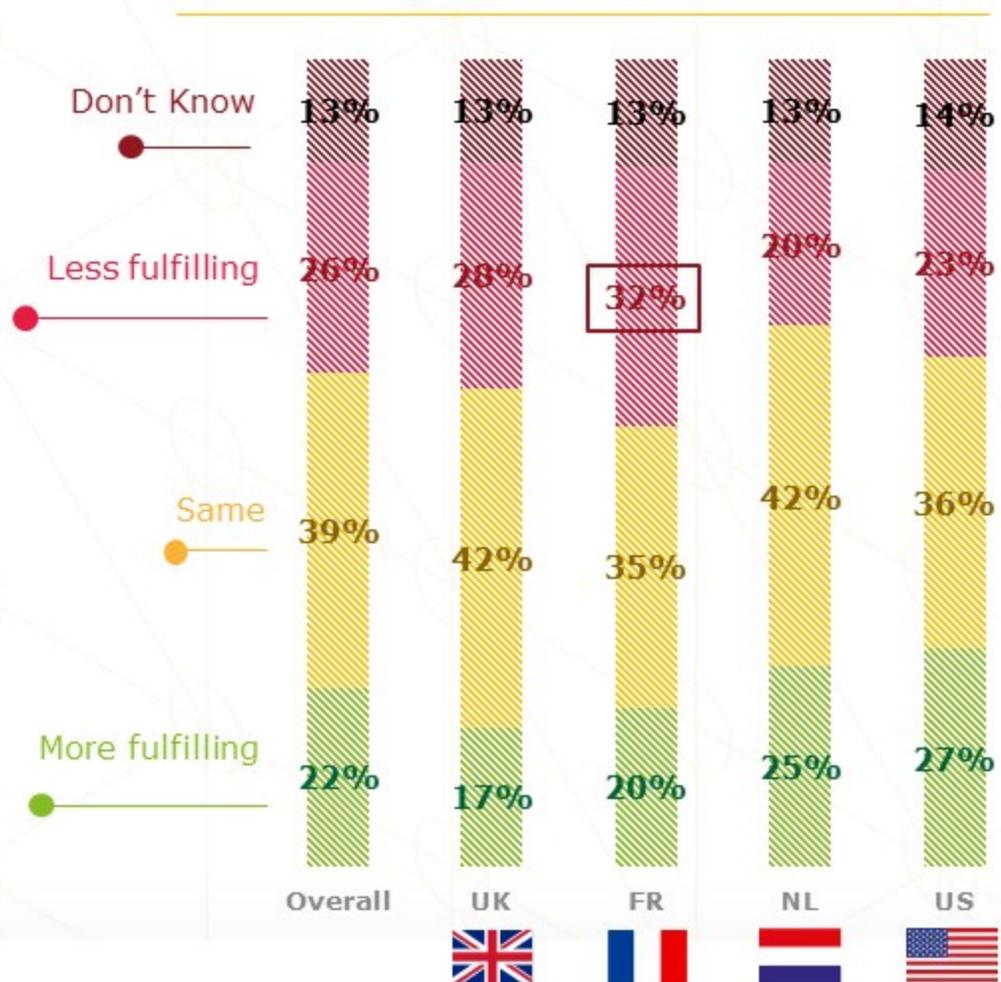
SENSE OF FULFILLMENT AT WORK

Will the overall work experience be more fulfilling in 10 years?

- **Again, mixed results are registered...**
26% of employees expect a less fulfilling experience than today, 22% expect a more fulfilling one
- **... with significant differences by country, position and age**
French employees are the most pessimistic in this regard
Senior managers are 3 times more positive than blue collars on this topic
Respondents under 25 are 3 times more positive than 50+ respondents as well

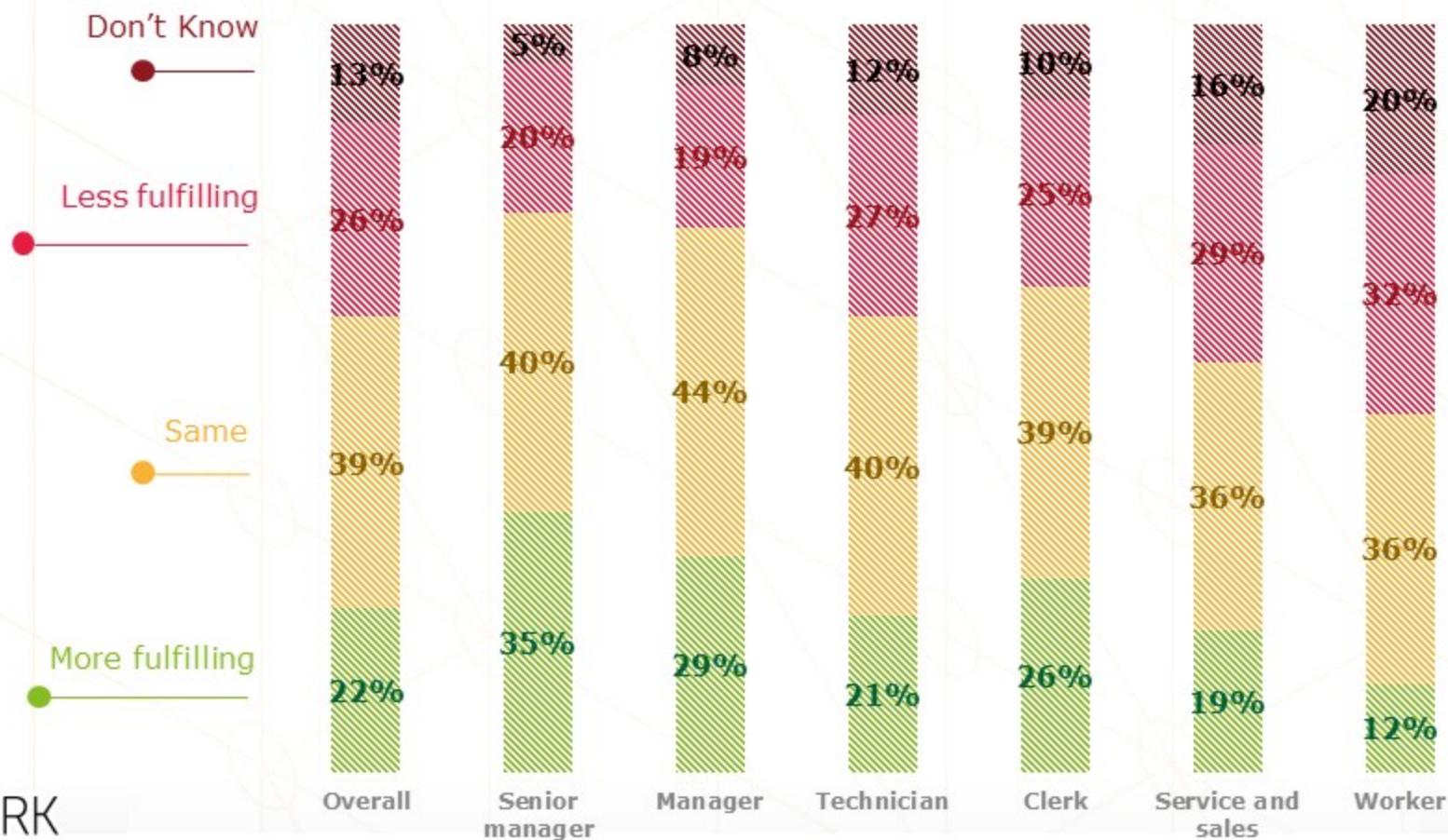
SENSE OF FULFILLMENT: TREND BY COUNTRY

In your opinion, the overall work experience in 10 years will be...



SENSE OF FULFILLMENT: TREND BY FUNCTION

In your opinion, the overall work experience in 10 years will be...



FOCUS ON SENIOR MANAGERS

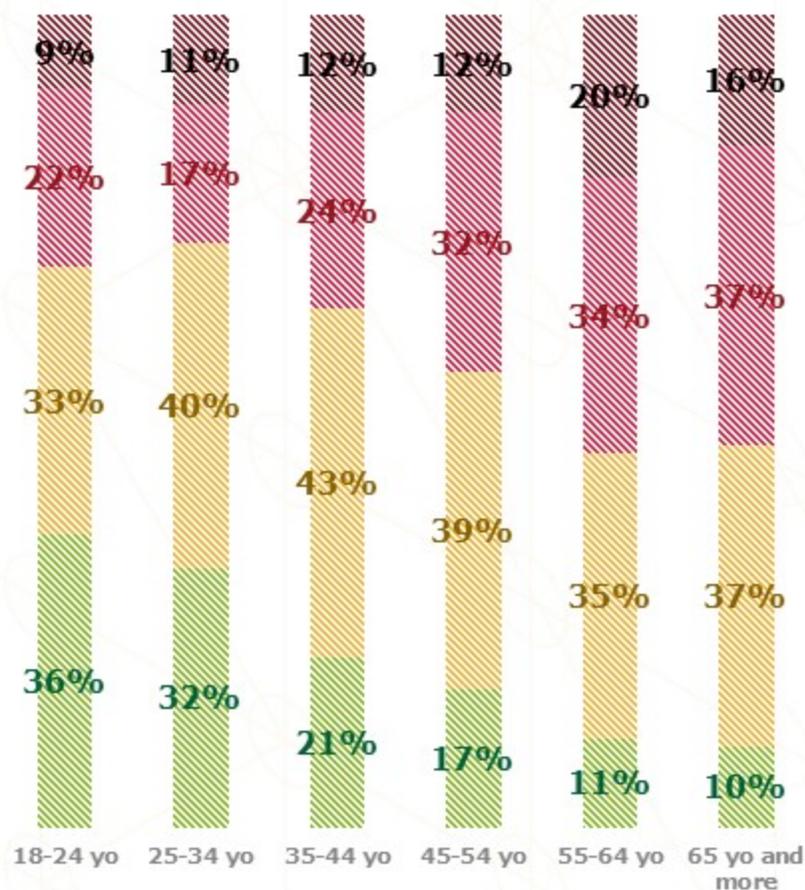
Their views tend to be more positive than average, but they are not entirely different

- **They share the main expectations and concerns concerning work flexibility**
On the positive side, more flexible working hours and work location
On the negative side, the lack of job security
- **Nevertheless, they express some additional concerns relating to...**
The impossibility to disconnect and the information overload
The increase in average working times, especially in the U.S. and France

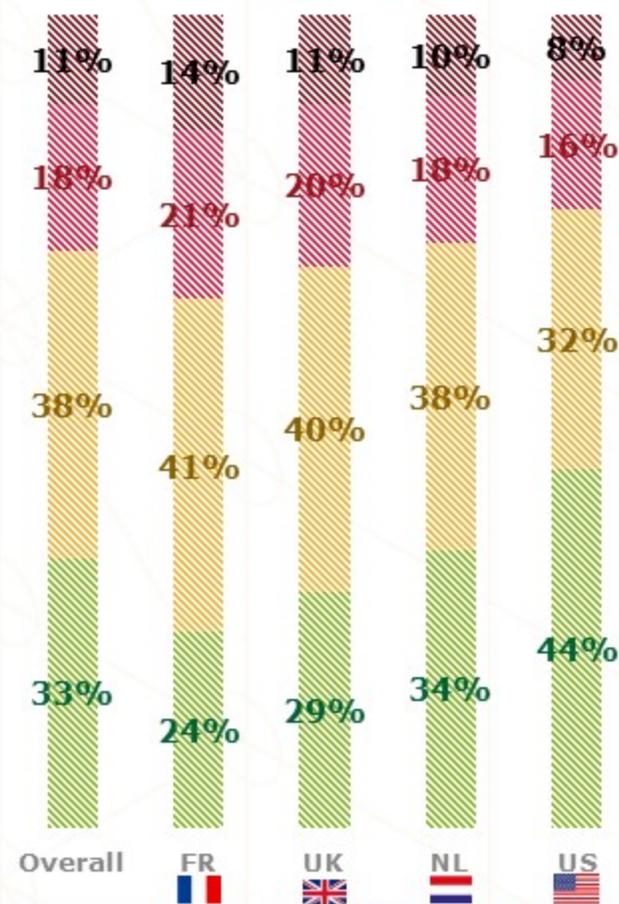
SENSE OF FULFILLMENT: TREND BY AGE

In your opinion, the overall work experience in 10 years will be...

Don't Know
 Less fulfilling
 Same
 More fulfilling



Focus < 35



FOCUS ON MILLENNIALS

Similarly to senior managers, they tend to be more positive than average, without expressing completely unique views

- **Work flexibility is once more the key aspect**

64% of employees under 35 believe having multiple jobs simultaneously will become the standard

- **A few nuances can be highlighted**

They expect nicer working spaces, more collaboration and better consideration of employees' suggestions
They are more concerned about increased competition between colleagues
Overall, they are more positive about artificial intelligence at work

FINDINGS

There are multiple challenges for employers...

Taking the debate to the next level



It is possible to capitalise on positive aspects already perceived by employees today



It is necessary to go beyond the question of flexibility

Optimising change management



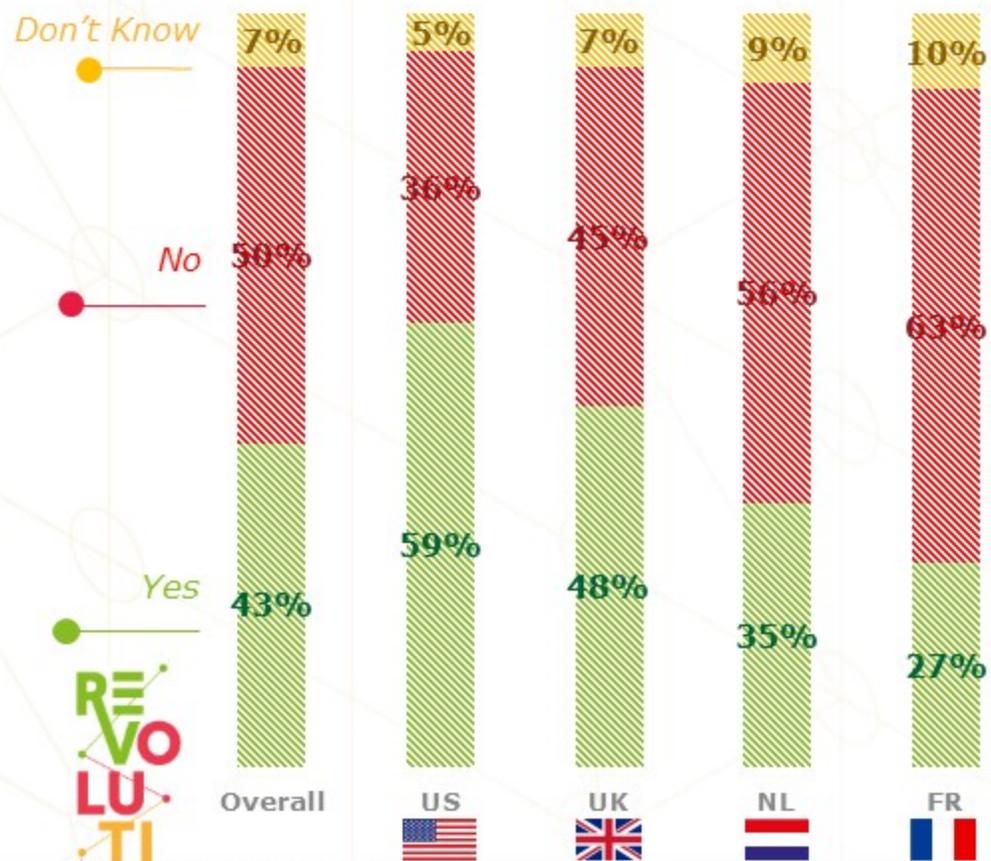
The magnitude of the transformation is understood by all employees



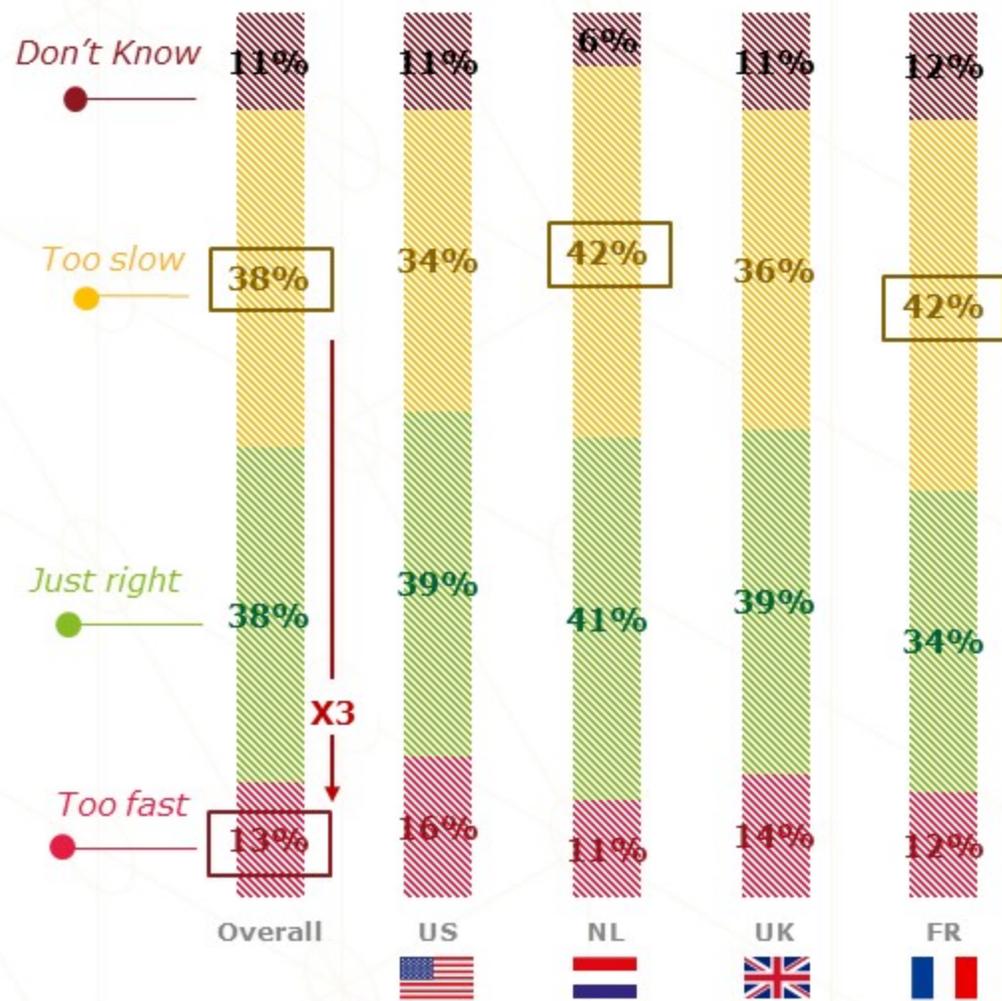
There is room for improvement in terms of pace of change and companies' readiness

CHANGE MANAGEMENT

Do you believe companies in your country are well prepared to handle this transformation?



How would you describe the pace at which companies in your country are adjusting?



FEARS AND EXPECTATIONS

Employees' views are dominated by personal aspects; corporate initiatives have limited visibility

50% declare companies in their country are **not well prepared** to face transformations

The U.S. are the only country where a majority of respondents find companies well prepared (being the home of GAFAs could explain this?)

Only a **small proportion** find the pace at which companies are adjusting **too fast** (country scores between 11 and 16%)

The proportion of employees who find the pace too slow is three times larger
Employees expect more information and implementation plans from employers to be reassured about the upcoming Revolution@Work

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