



Decoding Swiss Talent AI & ways of working

SEPT 2024

WEBINAR

Midjourney | “Generative AI”



BCG conducts annually the world's largest workforce survey

A collaboration of BCG, The Network, and The Stepstone Group

2014



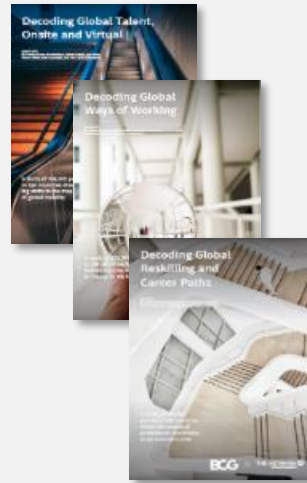
200,000 responses

2018-2019



366,000 responses

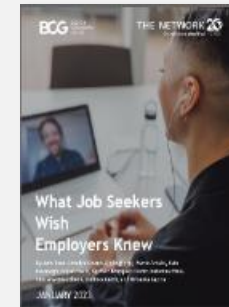
2021



209,000 responses

2023 spin-off

What Job Seekers Wish Employers Knew

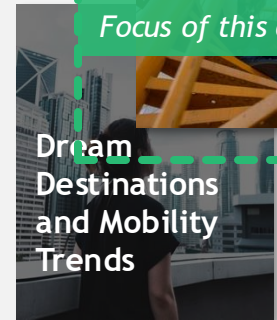


90,000 responses

2024

Shifting Work Preferences In The Age of AI

Focus of this document



Dream Destinations and Mobility Trends

150,000 responses

10 years, 1 million data points

Latest study focuses on ‘How Work Preferences Shift In The Age of GenAI’

Launched 13 June 2024 - “hot of the press”



Shifting work preferences

- **Jobseekers on the labor market:** *How often are they approached with jobs, how confident they are about their negotiating positions?*
- **What matters at work:** *How did the ranking of job preferences shift - and did GenAI have an impact?*
- **Dealbreakers for talent:** *Why would jobseekers refuse an offer - values, social impact, flexibility at work...?*



GenAI's impact and perception

- **GenAI Adoption:** *Are people using it, and for what? Which are key "GenAI user personas"?*
- **GenAI Experience:** *How are they finding GenAI, can they trust the output? What benefits are they seeing?*
- **GenAI Impact:** *How impacted do they feel by the GenAI revolution? How are they preparing for it (by re- or upskilling)?*

Key findings of 2024 study

Global insights

Talent remains a critical scarce resource, with low unemployment rates and talent shortages around the world.

Jobseekers know this and remain confident: More than 2/3rds feel that they hold the upper hand on the labor market.

However, they are aware that remaining employable and needs effort: They increasingly look for jobs that offer job security as well as learning and development opportunities.

Work-life balance, financial compensation, and relationships at work remain important - but with strong variations around the world.

When it comes to **Gen.AI**, only **5% think it will replace their jobs**, but **70% know they will need to up- or reskill**.

Swiss insights

Swiss Workforce prioritizes work-life balance (esp. younger talent), while the world gives more importance to job security

For Swiss jobseekers, **interview impression & employer's impact on society key** - with 79% negative interview impression 'dealbreaker'

Swiss talent with highest Gen.AI adoption rate in Europe: 46% using Gen.AI regularly, particularly high with young & highly educated talent

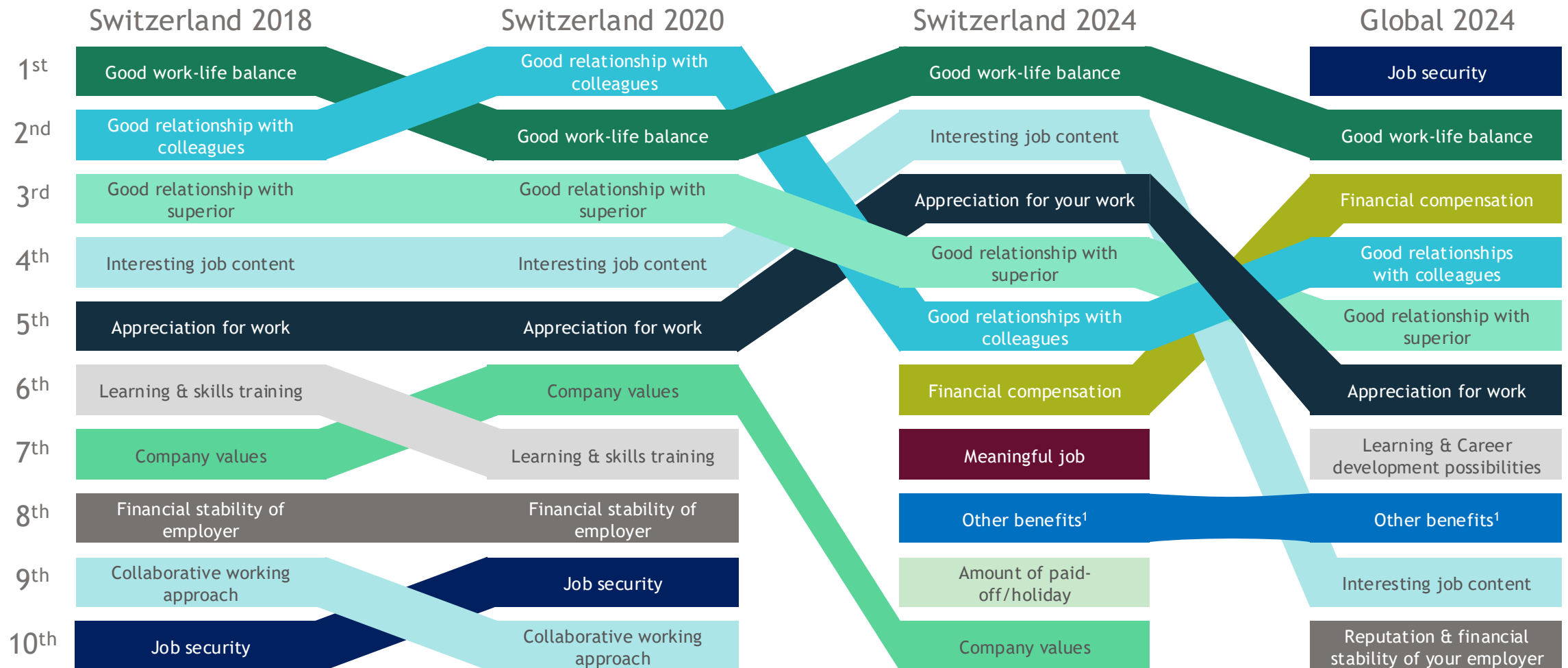
Gen.AI mostly used by Swiss workforce for writing and administrative tasks - with unavailability of data and slow speed being main pain points

Swiss talent with below average willingness to re-skill (52%) amid fast changing work environment, with key barriers lack of time and support by employer



What matters to Swiss workers

Swiss Workforce prioritizes work-life balance, while the world gives more importance to job security



¹ Other benefits such as retirement, insurance, workplace amenities, etc.
 Source: 2023 BCG/The Network proprietary web survey and analysis

Good work-life balance especially key for younger Swiss talent

	Younger than or equal to 20	21-30	31-40	41-50	51-60	Older than 60
1 st	Good work-life balance	Good work-life balance	Good work-life balance	Good work-life balance	Interesting job content	Interesting job content
2 nd	Job security	Interesting job content	Appreciation for your work	Good relationship with superior	Good work-life balance	Appreciation for your work
3 rd	Good relationships with colleagues	Appreciation for your work	Financial compensation	Interesting job content	Appreciation for your work	Good relationships with colleagues
4 th	Interesting job content	Good relationships with colleagues	Interesting job content	Appreciation for your work	Good relationship with superior	Meaningful job
5 th	Financial compensation	Financial compensation	Good relationship with superior	Good relationships with colleagues	Good relationships with colleagues	Good relationship with superior
6 th	Appreciation for your work	Amount of paid-off/holiday	Good relationships with colleagues	Financial compensation	Other benefits	Good work-life balance
7 th	Values	Other benefits	Amount of paid-off/holiday	Meaningful job	Meaningful job	Creative environment
8 th	Opportunities to lead and take responsibility	Learning and career development	Learning and career development	Values	Financial compensation	Financial compensation
9 th	Other benefits/Learning and career development	Good relationship with superior	Meaningful job	Amount of paid-off/holiday	Values	Values
10 th	Good relationship with superior/Creative environment	Job security	Other benefits	Other benefits	Creative environment	Reputation & financial stability of employer/Other benefits

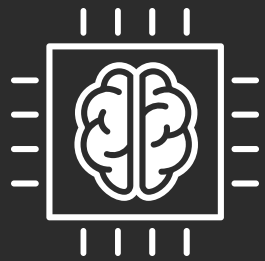
For Swiss jobseekers, interview impression & employer's impact on society key

Swiss talents would refuse an otherwise attractive offer from an employer if...



Source: 2024 BCG/The Network/The Stepstone Group proprietary web survey and analysis
Note: Dealbreakers are ordered basis Global percentages

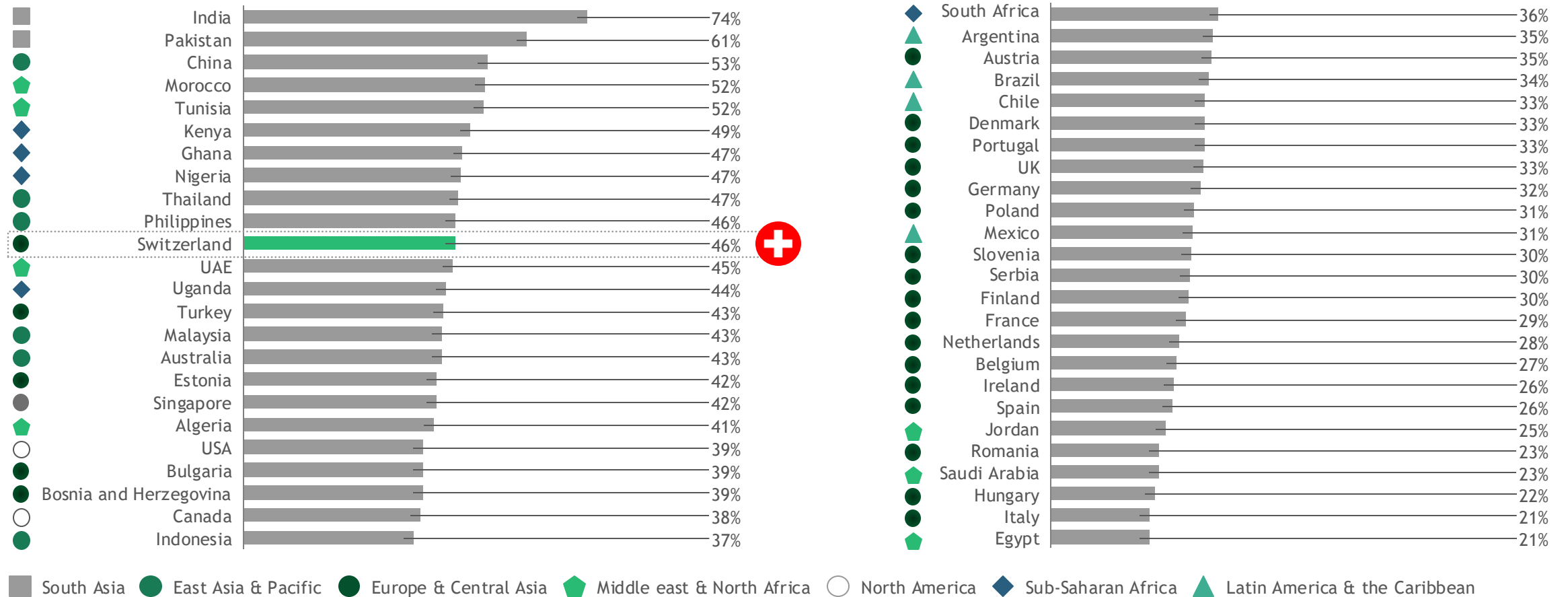
% of respondents globally



Percieved impact of Gen.AI on the workforce in Switzerland

Swiss talent with highest Gen.AI adoption rate in Europe

Countries ranked according to percentage of respondents using Gen.AI regularly, i.e, few times a week or month



Note: Data for countries with at least 250 respondents. Ranking is similar when controlled for young respondents, those in digital and IT professions, or those who use GenAI for work. Countries are ranked basis regular usage of Gen AI only (using few times a week/month). | Adoption %es on this page might differ from the regular use %es shown on next slide as respondents who regularly use GenAI but do not know what they use it for have been excluded

Source: 2024 BCG/The Network/Stepstone proprietary web survey and analysis.

Gen.AI usage particularly high among young and highly educated talent



Switzerland



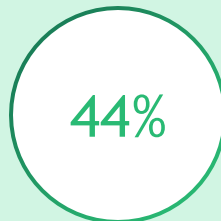
Global

Regular		Switzerland	Global
	Used few times a week in work/personal life	20%	18%
	Used few times a month in work/personal life	26%	21%
	Only once or twice	19%	14%
	Heard of these technologies but never experimented with them	31%	34%
	Not heard of these technologies	4%	14%

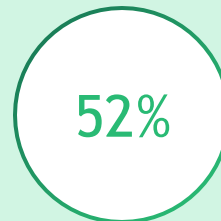
... and for talent segments* in demand



Young



Highly educated



Young



Highly educated

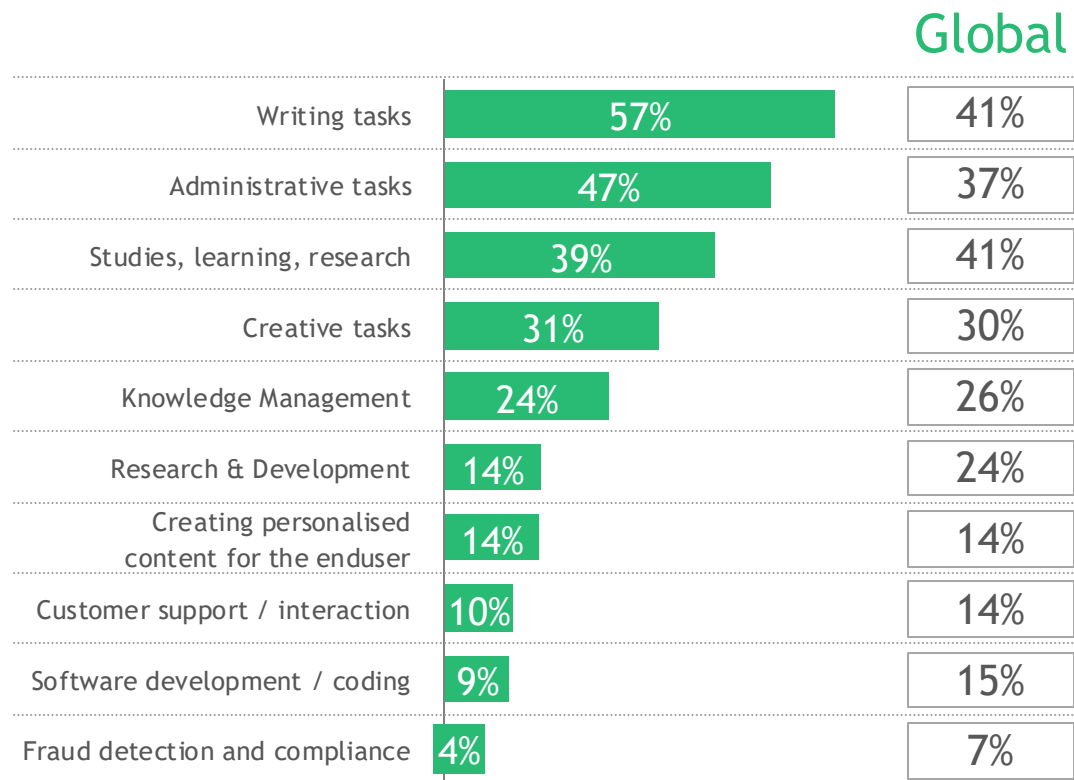


*Note: Split for young talent (<30 years) and highly educated (Masters/Diploma, Doctorate/PhD/MD) categories are amongst regular users only (using few times a week/month)

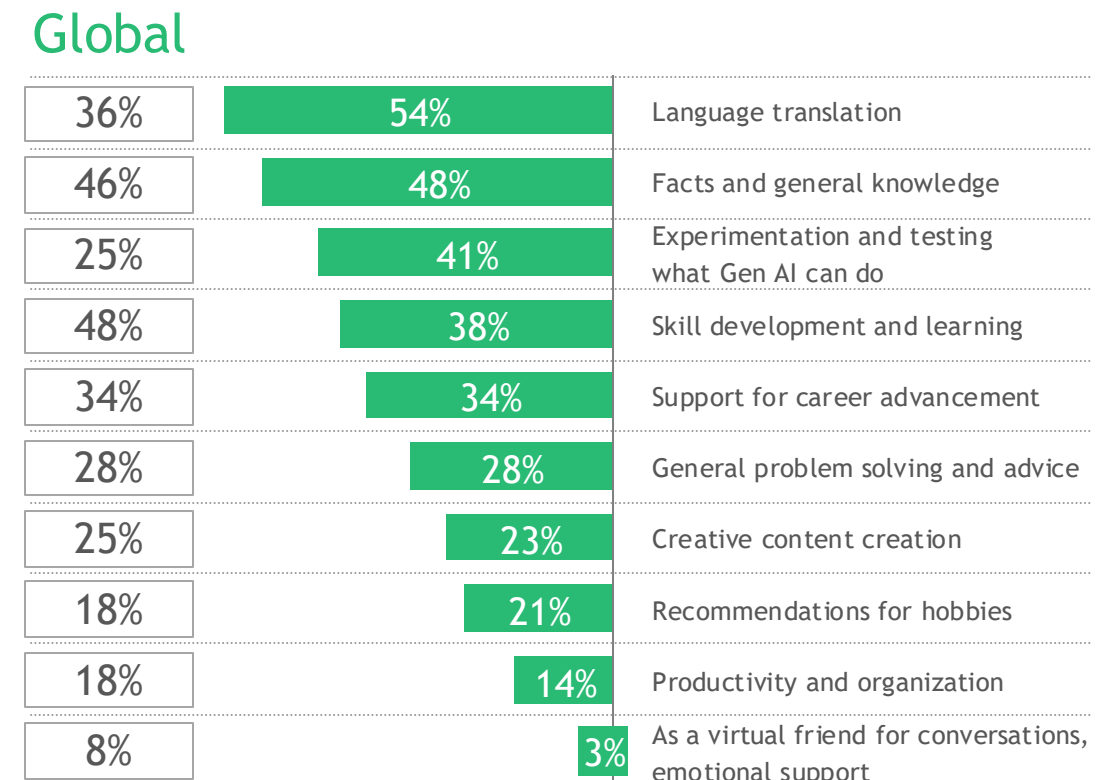
Source: 2024 BCG/The Network/The Stepstone Group proprietary web survey and analysis

Gen.AI mostly used by Swiss workforce for writing and administrative tasks

What do you use GenAI for at work?



What do you use GenAI for in your personal life?

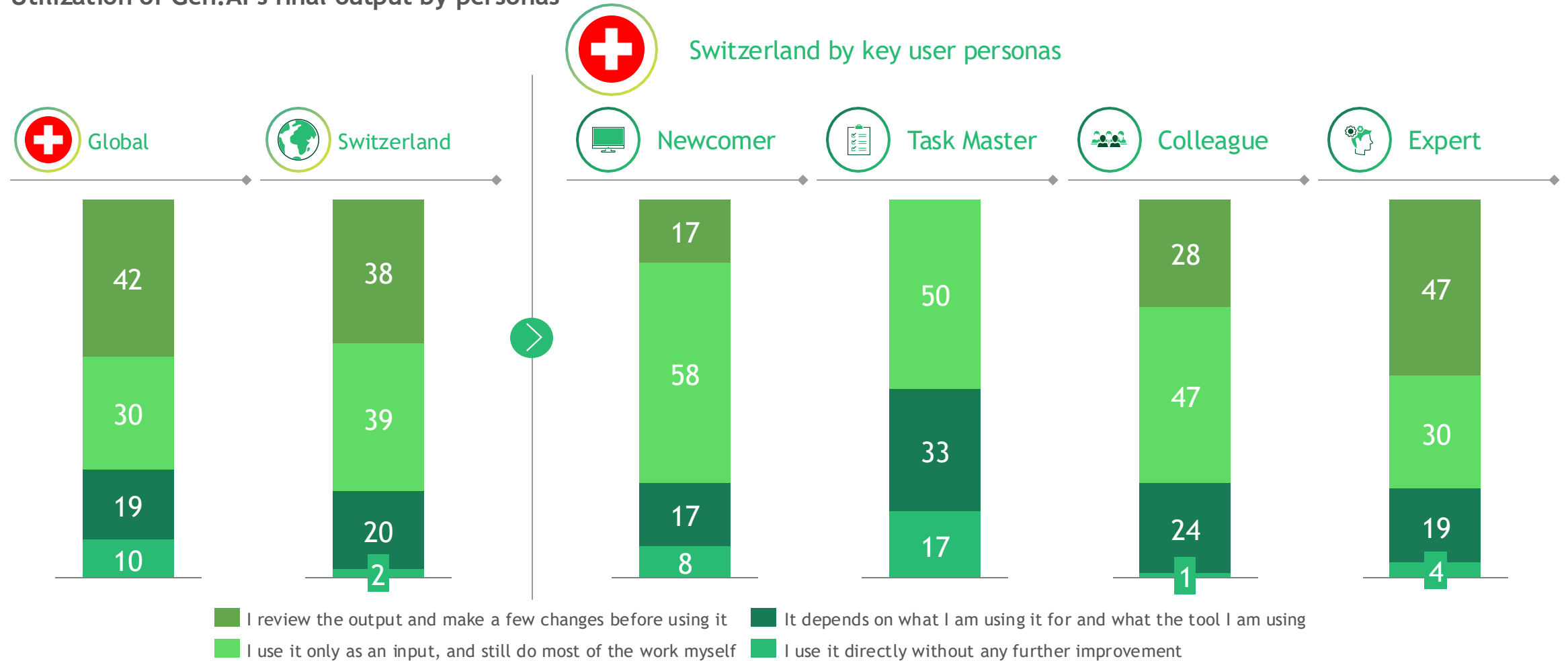


Note: Work/personal uses given only for those who do use Gen AI at work/in personal lives, respectively, amongst regular users only (using few times a week/month)

Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis

Most Gen.AI users still review output and make changes before use

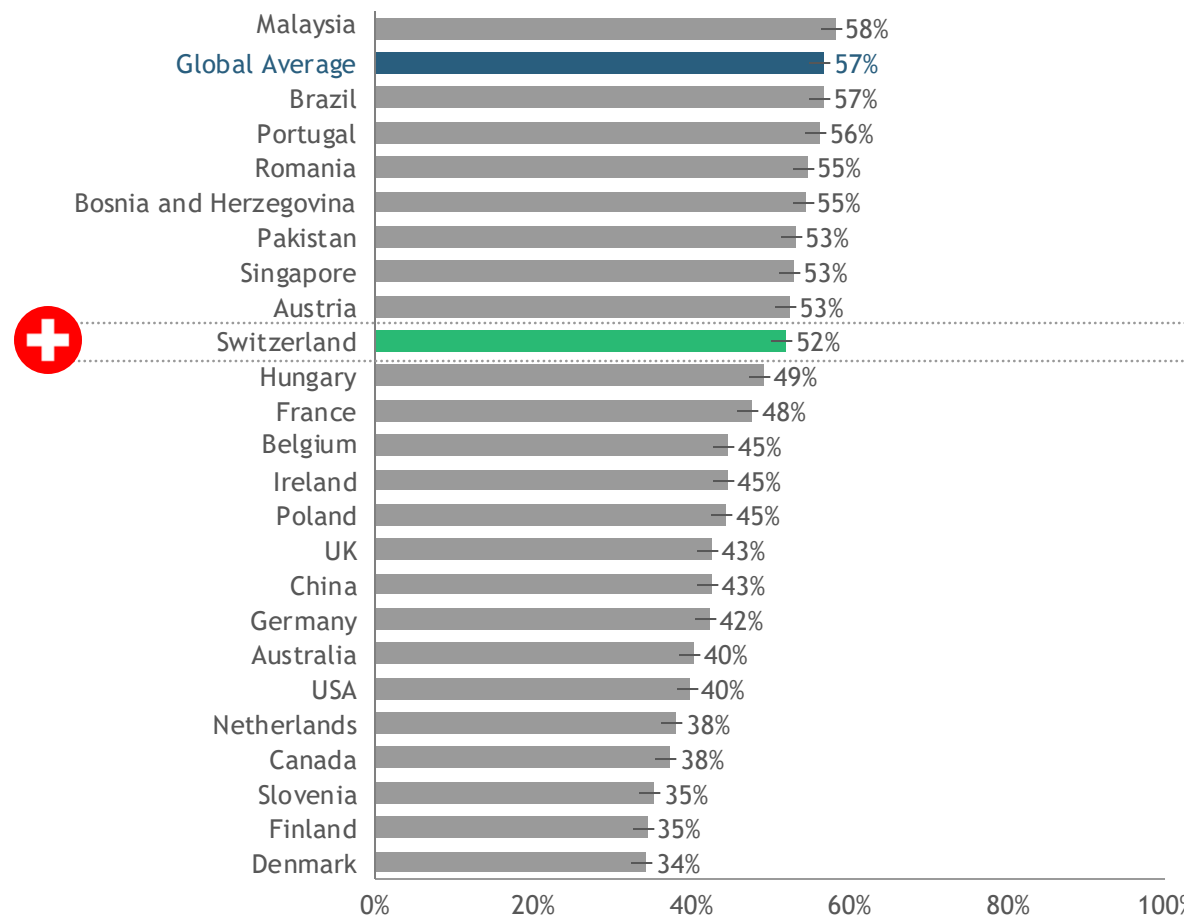
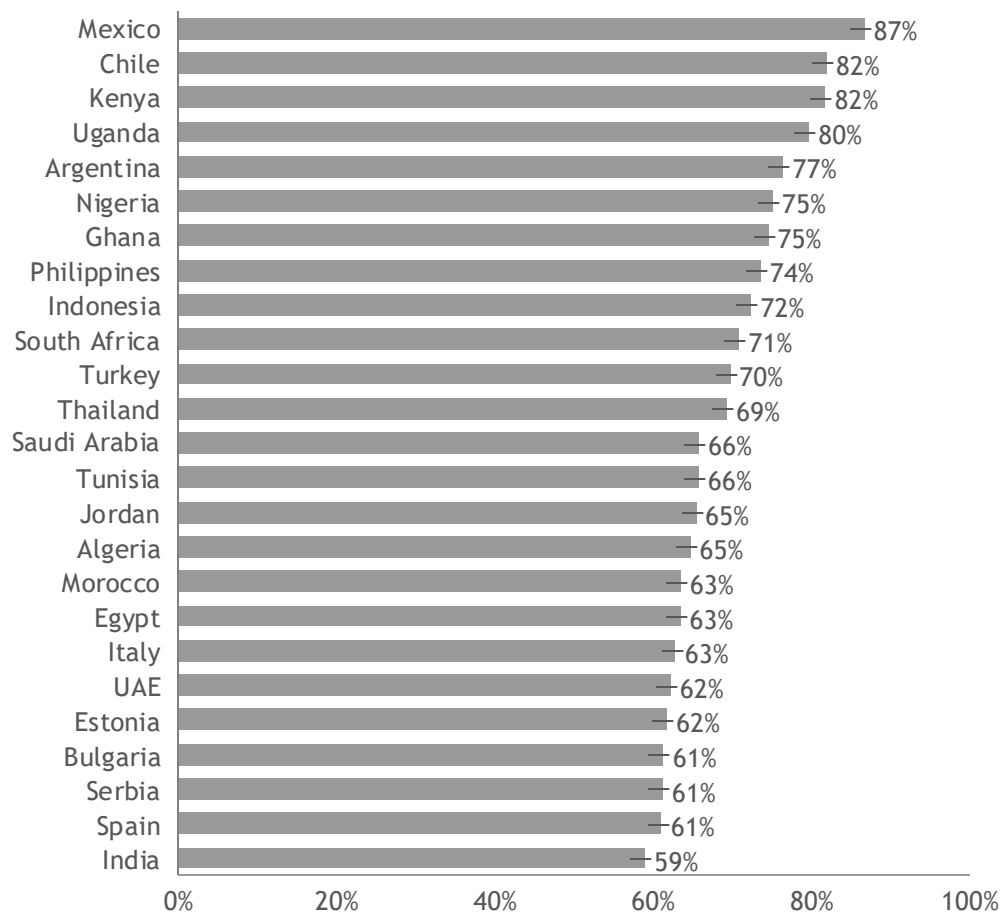
Utilization of Gen.AI's final output by personas



Overall data for utilizing output amongst regular users only (using few times a week/month)
 Source: 2024 BCG/The Network/The Stepstone Group proprietary web survey and analysis

Swiss talent with below average willingness to re-skill amid fast changing work environment, esp. driven by Gen.AI

Willingness of talent to re-skill



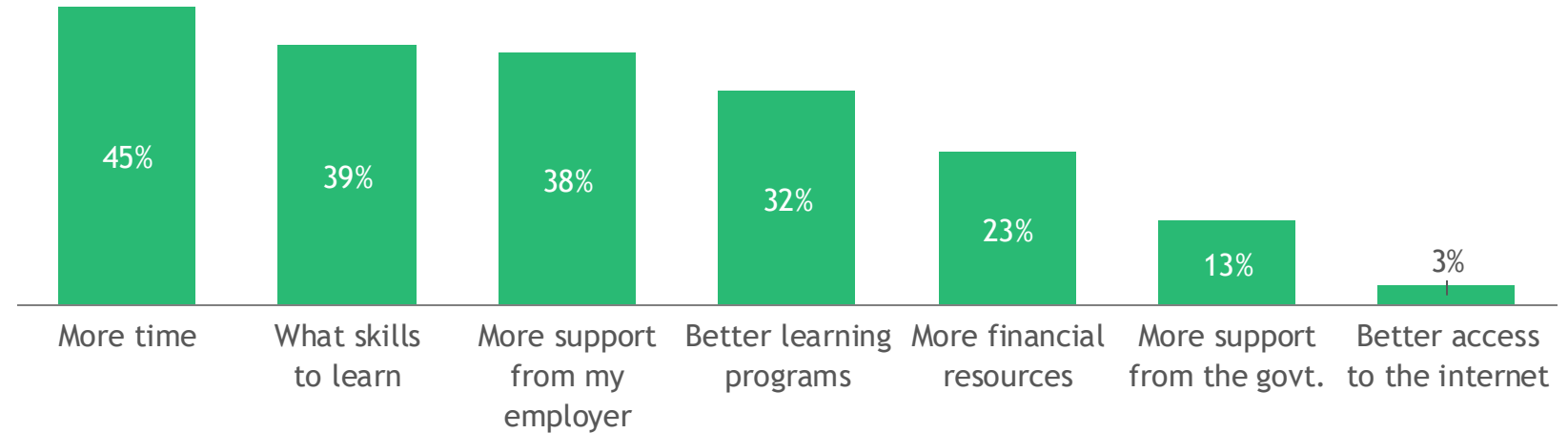
Note: Data for countries with at least 250 respondents.
 Source: 2024 BCG/The Network/Stepstone proprietary web survey and analysis.

Key barrier for Swiss talent to re-skill is lack of time and support by employer

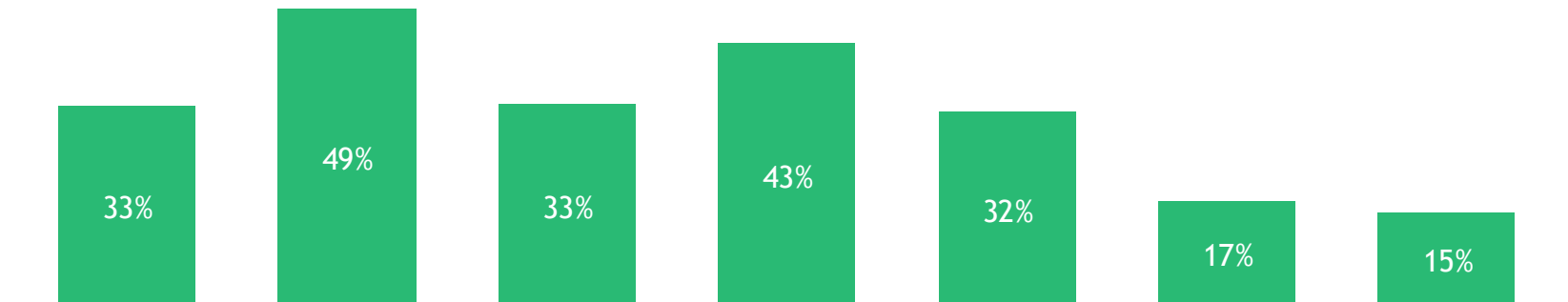
Question: What would you need to keep up with new technologies?



Switzerland



Global



QUESTIONS?

