The Workforce View in Europe 2017
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Constant and rapid change is the new normal, both in the workplace and the world as a whole. The sheer speed of technological development, alongside instant communication and information sharing, means that there is always a new innovation to read about; always a new idea to try. It can be exciting, overwhelming, and exhausting in equal measure.

But as HR and HCM (Human Capital Management) specialists, there is one thing that never changes: the importance of your people. The tools will evolve and the technology will be replaced with something new, but the need to understand your workforce remains unaltered; what makes them tick, what motivates and inspires them, what they need to reach their full potential.

Here at ADP, we are dedicated to helping businesses of all sizes answer these questions, providing the framework within which to support the workforce in the best way possible. We believe that technology is only valuable as long as it helps your people be the best they can be in the workplace – a belief that drives us in everything we do.

With that in mind, The Workforce View in Europe 2017 is an enlightening study of nearly 10,000 individuals, spanning all industries within eight countries across the continent. The findings provide a unique insight into the perspectives, passions and pain points of their daily working lives.

We hope you find it useful in inspiring business strategies to meet the needs of your people today and in the years to come – putting the human back into HR.

“There is one thing that never changes: the importance of your people.”
Introduction

A melting pot of cultures, goals and economic interests, Europe is constantly evolving. With steady economic growth underway and employment on the rise, there are many reasons for optimism. Yet political uncertainty, globalisation, Brexit, immigration and demographic shifts also present ongoing challenges, with the potential to change the face of Europe forever.

Within the workplace, employers and employees are facing their own challenges and opportunities, with technology and new ways of working promising to drive increased efficiency, productivity and flexibility. These developments bring with them an evolution in employee attitudes and expectations, as new behaviours become the norm and new generations push the boundaries of what’s possible.

The Workforce View in Europe 2017 explores the views and opinions of nearly 10,000 workers across the continent, including France, Germany, Italy, the Netherlands, Poland, Spain, Switzerland, and the UK. The findings provide a broad picture of how employees feel about key aspects of the workplace, from training needs to technology frustrations, while also shining a light on emerging trends such as the gig economy and flexible working.

In a European workplace that never stands still, innovative HCM and talent strategies are constantly needed if organisations want to stay ahead. Understanding the perspective of the workforce is an ideal place to start.

About the report

‘The Workforce View in Europe in 2017’ explores the attitudes of employees towards the future of work. The findings provide important insight into business critical issues such as international talent, skills and career development, employee engagement, wellbeing and workplace technology.

The research was carried out by independent market research agency Opinion Matters, on behalf of ADP, in July 2016. The sample consisted of 9,920 working adults in eight territories across Europe, including France, Germany, Italy, the Netherlands, Poland, Spain, Switzerland, and the UK.
Executive summary

Optimism is fragile
In line with economic and employment prospects, optimism is up very slightly on 2015 (78%), with a high of 84% in Poland and a low of 71% in France. Spain and Italy have both seen a four percentage point rise in optimism since 2015, while the UK has seen the largest drop since last year (76% vs. 81%).

Going global
Those in Italy (88%), Poland (86%) and Spain (85%) are the most likely to consider job opportunities abroad, with Germany the most attractive destination (21%). Those in the UK and France are the least likely to consider a move, with almost half of workers saying this doesn’t interest them.

Stuck on the ladder
Nearly a third of workers (31%) say their employer doesn’t support their career development. Spanish employees feel the most supported (77%), with the French feeling the least (61%). Overall, age is seen as the biggest barrier to career progression, named by nearly a fifth (19%) of respondents.

Job hopping
The ‘job for life’ continues to fall out of fashion, with just a quarter of workers saying they anticipate staying with their current employer until the end of their career, a fall of 13 percentage points since 2015. Workers in Poland (15%) and the UK (21%) are the least loyal, while those in Italy are the most (33%).
Skills for today and tomorrow

Nearly one in five workers (16%) feel they don’t have the skills they need to succeed in their role, an increase of five percentage points since 2015. Technology (23%) and language (23%) skills are the most sought-after, as workers feel the impact of globalisation and digital innovation in the workplace.

All about the money

Seven in ten workers are satisfied or very satisfied in their roles, peaking in the Netherlands (76%), while the UK has the highest number of dissatisfied workers (13%). Almost half (47%) of Europe’s workforce says pay and remuneration is their biggest motivator, while one in 20 say nothing motivates them in the workplace.

The flex factor

While 84% of Europe’s employees have a good work-life balance, 17% experience excessive levels of stress. Flexible working is still a dream for many, with 65% working fixed hours and 58% from a fixed location. Polish workers have the lowest levels of work-life balance (81%), experience the most stress (22%), and are the least likely to work flexibly (only 31%).

In the slow lane

Slow (30%) and outdated (22%) technologies are the biggest IT frustrations for Europe’s workforce, followed by slow internet specifically (22%). Mobile technology is top of Europe’s wish list, with a third saying they need a laptop (32%) and a fifth (21%) in need of smartphones and tablets (21%).
In line with economic and employment prospects, employee optimism has risen very slightly across Europe, with over three quarters (78%) of respondents saying they feel very or quite optimistic about the next five years in the workplace. This is one per cent higher than in 2015.

The most optimistic countries tend to be those displaying the strongest economic outlook. Poland is the most optimistic of all countries surveyed, with a significant rise on last year, followed by Germany, the Netherlands and then Switzerland. However, even among the less optimistic nations, we can see an improvement, with Spain and Italy’s optimism rising by four percentage points each on 2015 (up from 76% to 80%, and 68% to 72% respectively).

The sharpest fall in optimism is amongst British employees (down from 81% to 76%), perhaps influenced by uncertainty following the recent EU referendum. Meanwhile, optimism in France has also fallen from 75% to 71%, with weak economic and employment growth likely to be affecting employee attitudes.

Comparing industries, optimism levels are highest within the IT and telecoms sector, where 85% feel positive about the next five years, compared to just 71% working within Arts & Culture.

Interestingly, men are slightly more optimistic than women (80% to 75%), while younger workers have a more positive outlook than their older counterparts. Among the 16-24 age group, 85% of workers say they are very or quite positive, compared to just 72% of the over 55s.

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**Employee optimism across Europe**

![Employee optimism chart](chart.png)
Europe is unique in its attitudes and laws regarding free movement of labour, making it easy for workers to reside, work, or study within the single market. Yet despite the ease of movement, the findings reveal stark differences between some of Europe’s employees when it comes to working abroad.

Those with fewer employment or career opportunities in their home country are the most likely to consider moving elsewhere, with Italian, Polish, and Spanish workers the most attracted to this option (88%, 86%, and 85% respectively). In contrast, those in the UK and France are the least likely to consider a move, with almost half of workers saying the opportunity to work abroad doesn’t interest them (43% and 46%).

There are also contrasts across industry sectors, with IT and telecoms workers most likely to consider international opportunities (87%) – perhaps due to high demand for their transferable skills – compared to only 63% in healthcare who would consider this option.

Between the genders, men are significantly more likely to consider opportunities to work abroad than women (82% vs. 64%), while the likelihood of considering opportunities abroad reduces as workers get older, with 87% of 16 to 24 years olds saying it would interest them, compared to just 56% of over 55s.

As the largest economy in Europe, Germany is seen as the most attractive country for career opportunities overall. One in five European employees (21%) say they would consider relocating to Germany – a proportion that rises amongst Spanish (35%), Polish (33%) Italian (31%), and Dutch (29%) employees.

Language is clearly an influencing factor, with many workers prioritising countries with a common tongue. Switzerland is popular amongst German, French and Italian workers; Austria is the most popular choice for Germans, while Germany and France are popular with the Swiss. Despite the language barrier, UK workers are most likely to consider opportunities in Spain, perhaps attracted by the more favourable climate.

Interestingly, employees who are most keen to work abroad – namely those from Italy, Poland and Spain – are also those who say improving their languages skills is important, suggesting a desire to seek international opportunities may be behind this.
The UK underwent a seismic shift in June 2016, as the country unexpectedly voted to leave the European Union. As the research was carried out following the referendum, the findings give an indication of how the result impacted on the psyche of the workforce.

Most notably, Brexit seems to have knocked the confidence of employees, with the UK experiencing the biggest fall in optimism across the study, down from 81% to 76% year-on-year. As the UK is one of the strongest economies in Europe, with high employment levels, the referendum result is the most likely explanation for this dip.

It is also likely that the vote impacted the area considered most attractive to work. The UK was pushed into second place by Germany despite the arguably comparable, if not better, opportunities in the UK, and English being the more widely spoken language compared with German. With language skills one of the most sought-after skills across Europe, this could also have been influenced by the potential loss of the UK as a leading employment destination.
Career progression is a key factor in engagement and retention of employees, so it is concerning that almost a third (31%) of European workers say that their employer doesn’t support their career progression very well, or doesn’t support it at all.

Some countries fare better than others, with Dutch, Spanish, Swiss and UK workers feeling the most supported in their career development. At the other end of the scale, 39% of French workers say they are not supported, the highest of all countries surveyed, followed by Italy (35%) and Germany (34%).

The wealth of opportunity in the IT and telecoms sector is once again evident, as employees in these industries are the most likely to feel supported (81%) in their careers. In contrast, those in retail, catering and leisure feel the least supported, with 36% saying their employer doesn’t help them with career progression, perhaps due to the prevalence shorter tenure and/or zero-hours contracts in these industries.

The findings reveal that age has a significant influence on the availability of career opportunities, with workers feeling much less supported as they get older. Furthermore, age was also given as the biggest factor hindering career progression overall, named by a fifth (19%) of workers.

This perception was shared by all age groups, but perhaps unsurprisingly, age is a greater issue amongst older workers, peaking at 46% of over 55s. Overall, workers in the Netherlands (24%) and Switzerland (21%) are the most likely to quote age as being a barrier to career progression.

While men feel they are significantly better supported than women (72% vs. 65%), they are more likely to feel that age is a barrier to their career progression (20% vs. 17%). In contrast, more women than men admit they don’t want to progress further in their career (8% vs. 6%), while 4% of women believe their lack of career progression is due to gender discrimination.

Other key factors preventing career progression were favouritism (7%), and a lack of opportunities with a current employer (7%). Companies in Italy and Spain have the biggest problems with favouritism (12% and 11% respectively), while Spanish employees were the most likely to cite the economic environment as a barrier, twice the European average (8% vs. 4% average).

On the other hand, it is interesting to note that 7% of employees across Europe say that they have no interest in progressing in their career, rising to one in six (16%) for the over 55s. The proportion of employees with this view is high in the UK and Germany, where 13% are content staying at their current level.
The rise of the gig economy

Self-employment and freelancing are increasingly popular career options across Europe, with new technology and more flexible working practices giving people the freedom to choose a different way of life. In fact, the research shows that over two thirds (68%) of European employees would consider self-employment and/or freelance work, with more than a quarter (26%) saying they are actively planning a move in this direction.

Dutch and Spanish employees are the most likely to consider freelancing or self-employment, with a third of workers actively thinking about it (34% and 33%). In contrast, German and French employees are the least tempted, with around half (49% and 43%) of employees saying it doesn’t interest them.

As a new trend, the freelancing lifestyle is more popular amongst millennials, with 37% of 16-24 year olds and 36% of 25-34 year olds actively considering making the shift. In addition, more men than women are attracted by this option (29% vs. 22%), despite the flexibility it could potentially offer to both genders.

The advantages of the independent lifestyle are highlighted by the views of those currently self-employed, who report higher levels of job satisfaction (75% vs. 70%). What motivates this group also suggests why they may have chosen this career path: aside from pay, 39% highlight the ability to work where and when they want, while 30% emphasise good work-life balance.
‘Job for life’ continues decline

The ‘job for life’ continues to fall out of fashion, with only a quarter of workers saying they expect to be with their employer until the end of their career. This is a drop of five percentage points since last year. Meanwhile, 13% expect to leave their employer within a year, exactly the same proportion as last year.

There are significant differences between individual countries when it comes to tenure. Those in Poland and the UK are the least likely to envisage being in their job for life (15% and 21% respectively), while in Italy one in three employees (33%) expect to still be working for their current employer by the end of their career, along with 30% in Germany and Spain.

The UK and Poland also have the highest proportion of employees who expect to leave within the next 12 months (15% for both nations), while Germany has the lowest (10%). Interestingly, in Italy and France, the proportion of workers who expect to leave within a year has actually increased compared with last year, suggesting workers are feeling more positive about the buoyancy in the job market, and ready to make a move.

Perhaps unsurprisingly, younger workers expect to be in their job the least time, with over quarter (26%) of 16-24 year olds saying they plan to leave in less than a year, along with 16% of 25-34 year olds. In contrast, only 10% of those in the older age groups feel this way.

The most loyal employees can be found in the healthcare sector, with a third of workers saying they will be in their job for life. The shortest expected tenure is amongst arts and culture workers, where over a fifth (22%) expect to leave within a year.
5 key factors preventing career progression in Europe

- **Age**: 19%
- **Favouritism**: 7%
- **Lack of opportunities with current employer**: 7%
- **Lack of qualifications**: 5%
- **Family needs**: 5%
Employee training is critical to ensuring workers have the skills employers need now and in the future, while also aiding engagement and retention within the workforce. While 84% of respondents say they do have the skills they need to succeed in their role, this represents a fall of five percentage points compared to 2015 and leaves more than one in ten (16%) with concerns over their skills level.

Confidence levels vary considerably, from 91% amongst Spanish employees and 83% in the UK, to 82% in Germany and just 75% in Poland. Every country except Spain and Italy has seen a significant fall in skills confidence since last year, suggesting this is an area where employers need to focus their attention.

Men are slightly more confident than women when it comes to their skill level (86% vs. 81%). And again, we can see the impact of age on the findings, with respondents becoming less confident as they get older. While 85% of 16-24 year olds and 88% of 25-34 year olds feel they have the skills to succeed, this drops to 80% for the over 55s. This could be due to rapid changes in the workplace and new technology, or a reduced focus on upskilling older workers. However, with the ageing population and rising retirement age, this should give employers some food for thought.

Across the industries, those in IT and telecoms (90%), as well as architecture, engineering and building (89%) are the most confident about their skills level. However, those in sales, media and marketing (79%), and retail, catering and leisure (79%) are the least confident, suggesting a lack of investment in training.

Employee training is critical to ensure workers have the skills employers need now and into the future.
Development needs for now and the future

Skills for the new world
Technology and globalisation are having a significant impact on the workplace and the skills that employees are looking to develop. Language and advanced IT skills are currently the most sought after, with almost a quarter of workers (23%) saying they need help with these areas. A fifth also say they would like training in using new technology and devices.

Language skills are most desired amongst those with the greatest intention to work abroad, namely Polish (35%), Spanish (31%) and Italian (29%) employees. Workers in the UK and Netherlands are the least likely to say they need help with language skills (15% and 7% respectively).

Looking ahead 10 years, IT skills still dominate. Just over two fifths (41%) anticipate the need for new technology and devices training, while 37% believe employees will need advanced IT skills training. A further 31% say they anticipate needing help with their language skills in the future, with globalisation set to continue.

European employees also anticipate a greater need for more entrepreneurial focused skills in the future, including self-motivation (22%), productivity (22%), creativity (21%) and self-management (21%). This reflects the growing popularity of self-employment and freelancing as a career option, which looks set to continue in the years ahead.
Getting serious about employee engagement

With research showing that engaged employees are more productive, loyal and enthusiastic, it is no surprise that employee engagement is a key focus for employers. It is therefore encouraging that nearly three quarters (70%) of Europe’s employees describe themselves as very or fairly satisfied in their current role, with less than one in ten (9%) claiming to be dissatisfied or very dissatisfied.

Satisfaction levels peak in the Netherlands (76%), Poland (74%) and Switzerland (73%), and these countries also have the most optimistic employees. Satisfaction levels are the lowest in Italy, where just two thirds (65%) describe themselves as very or fairly satisfied. However, the UK has the highest proportion of dissatisfied employees (12%), in line with their lower level of optimism elsewhere in the survey.

Once again, IT and telecoms workers are the most positive, with the highest proportion of satisfied employees of any industry (79% describe themselves as very or fairly satisfied), whilst only 65% in the retail and leisure sector describe themselves in this way. This reflects findings elsewhere with regards to optimism, length of tenure and career development, with these two industries consistently showing contrasting perspectives.

Across the genders, men are significantly more satisfied than women (73% vs. 67%), again reflecting other findings, with female employees feeling less optimistic and less supported with their career development than their male counterparts.

Is it just about the money?
Motivation and employee engagement are closely intertwined, with engaged employees becoming more motivated and more productive as a result. While numerous factors are involved in employee engagement and motivation, our respondents, perhaps unsurprisingly, named pay and remuneration as the most important. Almost half (47%) of employees said this for them is the biggest motivator, far ahead of any other factor.

After salary, relationships with colleagues was the second biggest motivational factor given by almost a third (30%) of employees, followed closely by a good work-life balance (28%) and praise or recognition from
There are also some notable gender differences when it comes to motivation, with men slightly more motivated by pay than their female counterparts (49% vs. 44%). Meanwhile, women are more motivated by work-life balance than men (31 vs. 25%), perhaps due to traditionally having greater family responsibilities.

The findings also reveal some stark differences between different countries. Workers in Poland are the most motivated by pay and remuneration, with almost two thirds (65%) saying this is the biggest motivating factor for them, significantly more than the average. In contrast, only 40% of Spanish workers say money is the most important factor.

Meanwhile in the UK, employees are the most motivated by work-life balance (33%) and holiday allowance (23%), in contrast with their counterparts in the Netherlands, where less than a quarter (22%) name improving work-life balance as a critical factor.

There are also some interesting contrasts across the different industry sectors, with sales, media and marketing workers most motivated by money (53%), and employees in the education sector the least motivated by pay and remuneration (37%).
Striking the right balance

As one of the leading factors in motivation, work-life balance is crucial to ensure workers can maintain their productivity levels and don’t suffer from burnout due to long hours and stress. It’s therefore encouraging that 84% of Europe’s employees do feel they have a good work-life balance, peaking at 87% for Swiss employees and 86% amongst the Dutch.

This means that at the other end of the scale, more than one in ten (16%) European workers say they don’t have good work-life balance, rising to 19% amongst Polish workers, while overall 2% of European workers say that they have no work-life balance at all. This is most prevalent amongst employees in the retail and leisure sector (3%), while those in IT and telecoms have the best work-life balance (89%).

The stress test

A certain level of stress is normal in the workplace and it’s natural for all employees to experience stress now and again. However, if stress becomes a regular occurrence or reaches excessive levels, it can impact on employee performance, satisfaction and wellbeing, with knock on effects for retention and productivity.

The majority of respondents (73%) say they experience stress at least once a month, while over a quarter say they never experience stress. However, the findings show that 16% of Europe’s employees endure stress daily, or are stressed so often that they are considering finding another job. This is slightly higher than last year when 13% said they are constantly stressed.

The most stressed employees can be found in Poland, where more than one in five (22%) say they endure stress on a daily basis, or so often they are considering finding another job. In contrast, Spanish employees are the least stressed, with only one in ten saying it is an everyday problem and over a third (34%) saying they never experience stress.

The retail and leisure, as well as healthcare sectors, fair the worst of all the industries, with one in five (19% and 20% respectively) saying it is either a daily problem, or causing them to consider opportunities elsewhere. This is in stark contrast the IT and telecoms sector where the figure is only 11%.

Women are more likely to experience extreme stress than men, with a fifth (20%) saying they do so daily or excessively, compared to 15% of their male counterparts. The over 55s the least likely to experience stress, with nearly one in four (39%) saying they never do – perhaps due to their greater experience or reduced hours and/or responsibilities as they approach retirement.
Stress levels across Europe

The Flex Factor

New technology means that it is easier than ever to work flexibly, giving employees greater freedom over where and when they get their job done. However, despite the influence of mobile tools, the research shows that two thirds of employees (65%) still operate from one fixed work location such as an office or factory – a sharp rise compared to a year ago when the figure was 56%.

New technology means that it is easier than ever to work flexibly

This also contrasts with the desires of employees, with over a third (37%) of workers saying they would like a combination of working from an office location and from home, compared to only a fifth (21%) who actually have this flexibility. A further 17% say they would like to work purely from home, while this is a reality for just 13%.

Similarly, the majority of Europeans still work fixed hours (58%), despite the fact that only 42% say this would be their preference. In fact, over a third (35%) said they would like a mixture of fixed and flexible hours, while almost a quarter (22%) said they would like total flexibility.

The Netherlands is the most flexible place to work with the highest proportion of home workers (20%) and those working flexible hours (33%). At the other end of the scale, Polish workers have the least location flexibility, with over two thirds (69%) working from a fixed location and less than one in ten (9%) working from home. Meanwhile, Spanish workers have the least control over their hours, with 65% working fixed hours and only 20% working flexible hours.
Tools of the trade

Technology frustrations
The majority of occupations now involve some form of technology. But as the workplace is fast moving and always-on, even the slightest IT issue can have a big impact, causing unnecessary stress to staff, customers and clients.

In fact, slow technology is the biggest IT frustration for 30% of employees across Europe, while a further 22% say a slow internet connection is a problem. The UK has the biggest problem with slow technology, where 37% of workers identify this as a frustration. In contrast, only a quarter (26%) of French and Swiss workers hold this view. Slow internet is most likely to be an issue in Italy (26%), while again Switzerland fares the best (19%).

A significant number of workers are also irritated by outdated technology (23%), a figure that rises amongst men (26%) and 16-34 year olds (26%). It is also more likely to be a problem in Poland (33%), where employees say it is even more frustrating than slow technology, while workers in Switzerland are least likely to have an issue with legacy systems (17%).

While email is still very much the primary method of business communication, employees name this as the third biggest technology frustration. One in six say they receive too many emails, rising to nearly one in five (19%) in both the Netherlands and Switzerland. Employees in the IT and telecoms sector are most likely to be overloaded by emails, with 22% saying this is a problem.

Time for an upgrade
As a large proportion of workers desire more flexible working opportunities, employees are keen for their employer to invest in technology to support this.

One in three feel their employer should invest in

Top technology frustrations

- 30% Slow technology
- 23% Outdated technology
- 22% Slow internet connection
- 15% Too many passwords
- 15% Too many emails
laptops (32%), rising to 39% amongst Polish workers, while one in five (21%) want their employer to invest in smartphones and tablets (21%).

There is also a notable drive for more specialist equipment and skills, with over a quarter or respondents (27%) saying their employer should be investing in specialist software. This rises significantly amongst Polish workers (41%), and those in the architecture, engineering and building sector (31%), or IT and telecoms (30%).

From a skills perspective, over a fifth of workers say they would like advanced IT training (23%), peaking at 29% in Poland, while a further 20% say they need help with new technology and devices, rising to 24% in Italy.

Technologies organisations should invest in

- **32%** Laptop
- **27%** Specialist software
- **21%** Smartphone
- **21%** Tablet
- **16%** Intranet

- **14%** Cloud-based file storage and sharing
- **13%** Time management system
- **11%** Video conferencing
- **11%** Virtual collaboration
- **10%** Self-service HR system
What does this mean for HR and organisations?

The Workforce View 2017 shows a Europe of mixed fortunes, with peaks and troughs of positivity across countries, industries, and demographics. And while it is encouraging that the majority of Europe’s employees are optimistic and engaged, it is important not to overlook the pockets of discontentment and areas for improvement, which are where HR should focus its attention.

One area that stands out is the thirst for career development and training opportunities, which are so central to employee engagement, retention, and preparing staff for the future. In fact, one in three (32%) workers say the provision of training is their single biggest expectation from HR, while a quarter (23%) expect HR to support them with careers advice and progression.

With employees moving roles more frequently, efficient and effective recruitment is also paramount, with a quarter of workers saying this is one of the main areas where they expect HR support. As such, employers must plan their talent needs strategically, to ensure the workforce is fully supported at all times.

As stress levels continue to rise, health and wellbeing is another key area of focus, with a fifth of workers (22%) saying this is an area where they expect HR’s support. From flexible working to stress awareness and ergonomics, there are numerous ways employers can foster a healthier and happier workforce.

Successful Human Capital Management is a careful balancing act, with numerous factors influencing the needs, behaviours and attitudes of the workforce. To do its job effectively, HR must stay in touch with these constantly shifting needs, developing smart and innovative strategies in response. And with new tools and technologies emerging all the time, HR has more opportunities than ever to make a real difference.

What do employees expect from HR?

- Training opportunities: 32%
- Recruitment of talent: 25%
- Career advice and progression: 23%
- Wellbeing and health: 22%
- Compensation and benefits: 20%
- Company culture management: 17%
About ADP (NASDAQ-ADP)
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For additional resources on The Workforce View in Europe 2017, please visit adp.co.uk/workforceview