

DECODING GLOBAL TALENT 2024

How Work Preferences Are Shifting in the Age of GenAI

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What a survey of 150,000
people in 188 countries
tells us about seeking and
keeping work in the face of
technological disruption.



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Changing Work Preferences In the Age of GenAI

This is the second report in a series analyzing the work preferences of global talent in 2024.

“I’m not afraid of new beginnings. If you are afraid, that can limit your abilities. I feel confident that even if I lose a job, I can find another.” That’s what Anne Granelli, a 54-year-old Swede who is currently working in Abu Dhabi in the health care field, told us. Anne is a longtime participant in our *Decoding Global Talent* series and an early adopter of technologies, including GenAI.

We have observed plenty of occasions for new beginnings in the ten years since we began to track workplace trends in our *Decoding Global Talent* series. We’ve seen ways of working change dynamically (in response to exponential shocks) and deterministically (as a result of long-term trends).

During this time frame, multiple factors—notably the race for talent, geopolitical tensions, and economic instability—have disrupted global business operations. Alongside these immediate changes, workplace priorities continue to feel the influence of longer-term macro trends: an increased focus on climate and sustainability; a renewed commitment to diversity, equity, and inclusion; major demographic shifts; and [the continuing appeal of global mobility](#). Collectively, these forces help shape a workplace that is continuously adapting to new realities and challenges. And even as these shifts proceed, workers and employers are digesting the most recent technological game changer: GenAI.

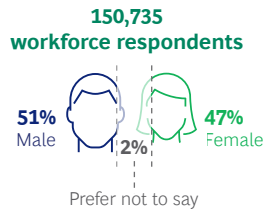
To continue attracting, retaining, and training top talent—and thereby gain a clear competitive advantage—employers must understand what matters to workers and job seekers. To find out what workers care about, we sought answers to key questions:

- How do job seekers perceive their position and negotiating power on the labor market?
- What do workers expect from an employer? What do they value most in a job?
- What are the deal breakers that would make an otherwise desirable job unacceptable?
- Do people use GenAI at work? If so, how and how much?
- What impact do they think GenAI will have on their jobs, and what plans do they have to ensure that they have marketable skills now and in the future?
- What should employers do to attract and retain workers?

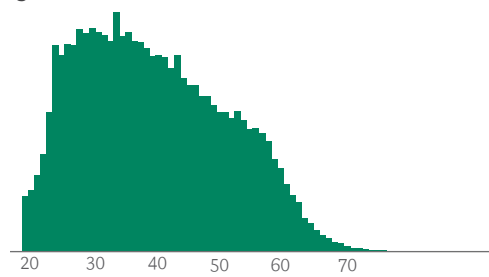
We explore the answers to these and other questions in our current study of global trends in preferred ways of working, our fourth such study since 2014. The *Decoding Global Talent* series is a collaboration of BCG, The Network (and its partners in more than 150 countries), and The Stepstone Group. It is the largest data source on the preferences of workers globally. Our cumulative data set comprises almost 900,000 responses to questions about how people want to work around the world. This year’s edition features insights derived from 150,735 survey respondents in 188 countries, as well as from the stories of several individuals whom we interviewed. (See [Exhibit 1](#) and the sidebar “[Methodology](#).”)

Exhibit 1 - A Survey of 150,735 Respondents in 188 Countries

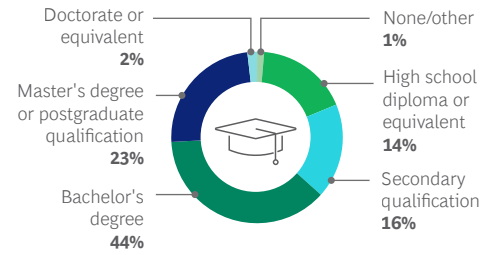
Gender



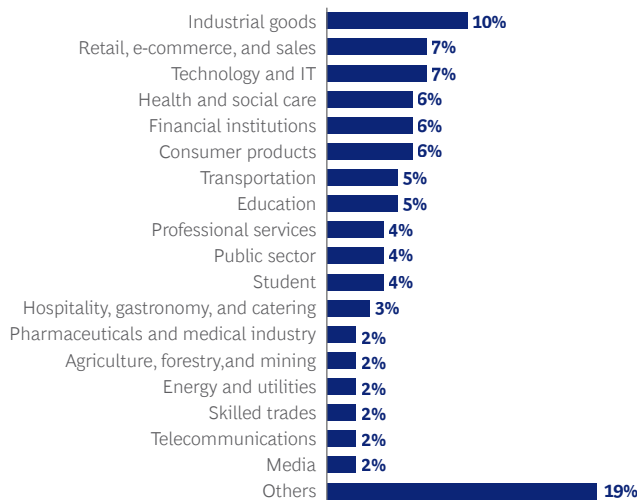
Age



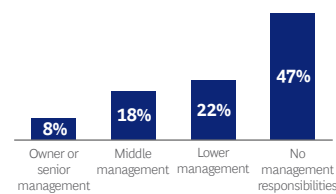
Education



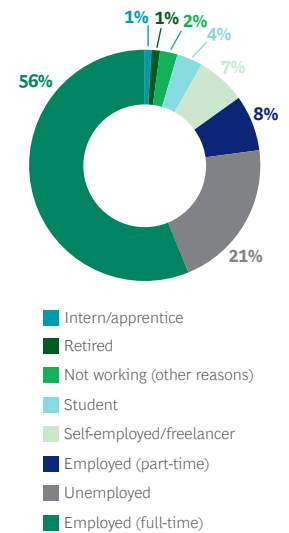
Industry



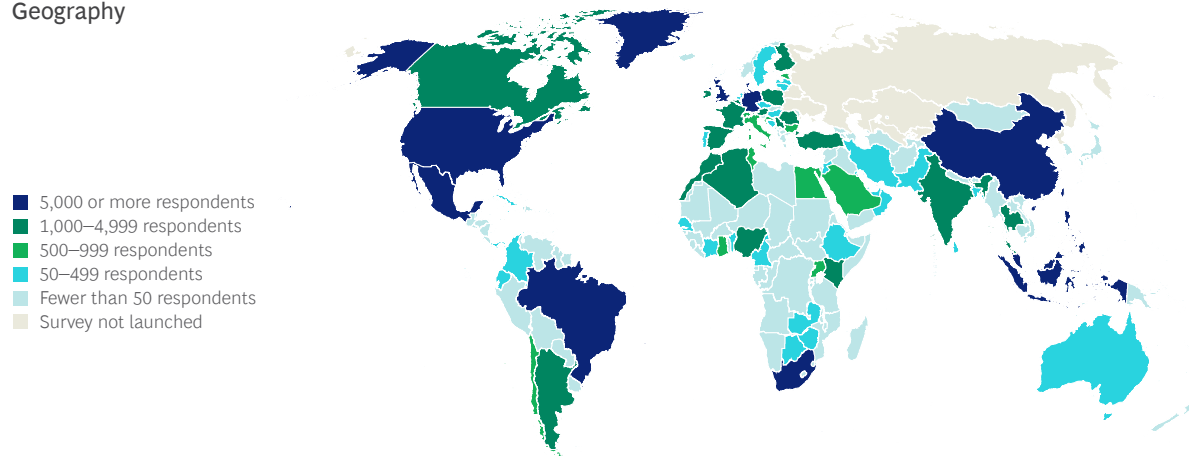
Job position



Employment status



Geography



	North America	Latin America and the Caribbean	Middle East and North Africa	Sub-Saharan Africa	Europe	East Asia and Pacific	South Asia
5,000 or more respondents	US	Brazil, Mexico		South Africa	Denmark, Germany, UK	China, Indonesia, Malaysia, Philippines	
1,000–4,999 respondents	Canada	Argentina	Algeria, Morocco	Kenya, Nigeria	Austria, Belgium, Finland, France, Ireland, Poland, Romania, Serbia, Spain, Turkey	Singapore, Thailand	India
500–999 respondents		Chile	Egypt, Saudi Arabia, Tunisia	Ghana, Uganda	Bulgaria, Estonia, Italy, Slovenia, Switzerland		
50–499 respondents		Colombia, Ecuador, Jamaica, Panama	Iran, Jordan, Kuwait, Lebanon, Oman, Qatar, United Arab Emirates	Benin, Botswana, Cameroon, Côte D'Ivoire, Ethiopia, Senegal, Zambia, Zimbabwe	Bosnia and Herzegovina, Czech Republic, Hungary, Latvia, Lithuania, Luxembourg, Netherlands, Portugal, Sweden	Australia	Bangladesh, Pakistan, Sri Lanka
Fewer than 50 respondents		Other Latin America and the Caribbean	Other Middle East and North Africa	Other sub-Saharan Africa	Other Europe	Other East Asia and Pacific	Other South Asia

Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Note: In the industry distribution, “others” includes insurance, chemical and biotech, legal, travel and tourism, and other categories not ranked in the top 18 industries by number of respondents.

Key Findings



Despite technological, geopolitical, and demographic disruptions, talent remains a critical and scarce resource at a time of low unemployment rates and talent shortages around the world.



Job seekers know their value and remain confident. More than 60% believe that they hold the upper hand in labor market negotiations.



However, people recognize that remaining employable and competitive on the labor market requires 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, too.



In a testament to resilience, many workers have embraced the GenAI revolution. Nearly 40% use GenAI tools regularly, and many of them do so for important tasks at work—particularly in emerging economies, where workers seem to be adopting the new technology especially quickly.



When it comes to GenAI's impact on jobs, talent is aware but unafraid. Although only 5% think that GenAI will replace their jobs, 60% anticipate that they will need to reskill significantly. Most say that they will need help to understand what skills to build.



To attract and retain talent, employers need to solve a complex puzzle. They must anticipate the impact of technology on their workforce and offer robust reskilling programs to help employees stay competitive. At the same time, they should cultivate a culture based on values and reach out to prospective employees through a personalized recruitment process.

Methodology

Sample Size. BCG, The Network (together with its affiliate organizations), and The Stepstone Group conducted this anonymous, online survey from October through December 2023. All told, 150,735 people in 188 countries participated. The sample includes 51% men and 49% women, most of whom work in commercial industries. Most respondents are at an early stage of their career or in mid-career, and the majority are 20 to 40 years of age. Almost three-quarters of them have a bachelor's degree or above. The question about the perceived benefits of GenAI was asked to only a subset of the sample, given constraints related to the length of the survey.

Topics Covered. The survey elicited respondents' preferences at work and their perception of GenAI and its impact. It covered topics such as evolving work preferences and attitudes, factors that might lead respondents to reject an attractive job offer, the extent to which they have adopted and now use GenAI in professional and personal contexts, perceptions of GenAI's impact on their jobs, and willingness to reskill to remain competitive. The data gathered in the survey—including a wide variety of information on participants' demographic and professional backgrounds—enabled us to analyze workers' attitudes on the basis of multiple parameters.

Interviews with Global Talent. BCG also conducted follow-up video interviews with select study participants around the world—many of whom we have interviewed before and have followed for several years. Those interviews are the source of the direct quotes that appear in this report.



Global Talent Remains Confident—with Good Reason

Over the past several years, global demand for talent has continued to grow in a work environment marked by record low unemployment rates and a high number of vacancies. As recently as January 2024, the International Labour Organization reported that in several markets—especially advanced economies—and sectors, employers continue to struggle with talent shortages. This situation is unlikely to be resolved soon, given the mismatch between skill supply and demand and the ongoing impact of an aging workforce.

Against this backdrop, most of our respondents feel that they have the upper hand when it comes to obtaining the jobs they want with the features they want. Most—64%—believe that they have a strong negotiating position and

can choose among job offers and negotiate attractive compensation packages. (See Exhibit 2.) This outlook is universal, regardless of job role. In fact, more than 55% of workers in the professions where confidence about negotiating power is less strong, such as social services, manual work, and design and art, feel that they have more power than their potential employers. (See Appendix 1.)

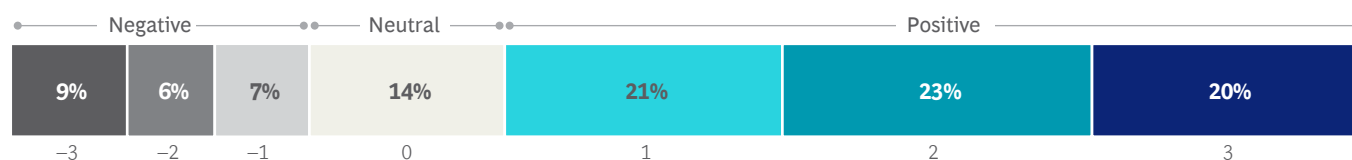
Their confidence is not unfounded. Whether they are active job seekers, passive job seekers, or not seeking a new job at all, workers say that they are approached with job offers often: 75% say that they are contacted regarding a job opportunity at least a few times per year, and 19% are contacted weekly. In such an active job market, employers must do all they can attract and appeal to prospective talent.

Exhibit 2 - Job Seekers Know Their Worth to Prospective Employers

How do you perceive your negotiating position?¹

“All power with employers; I have to take any job offer without negotiation”

“All power with me as an employee; I can choose between many offers and negotiate freely”



How often are you approached regarding a job opportunity?



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

¹Respondents were asked to rate their negotiating power on a scale from -3 (“all power with employers”) to +3 (“all power with me”).



of respondents globally said that they are confident
about their negotiating position when looking for a job

What Matters at Work Is Shifting

We've established that the global workforce knows its worth. Given that reality, employers must understand what, in the eyes of workers, makes for an ideal workplace. What truly matters to global talent?

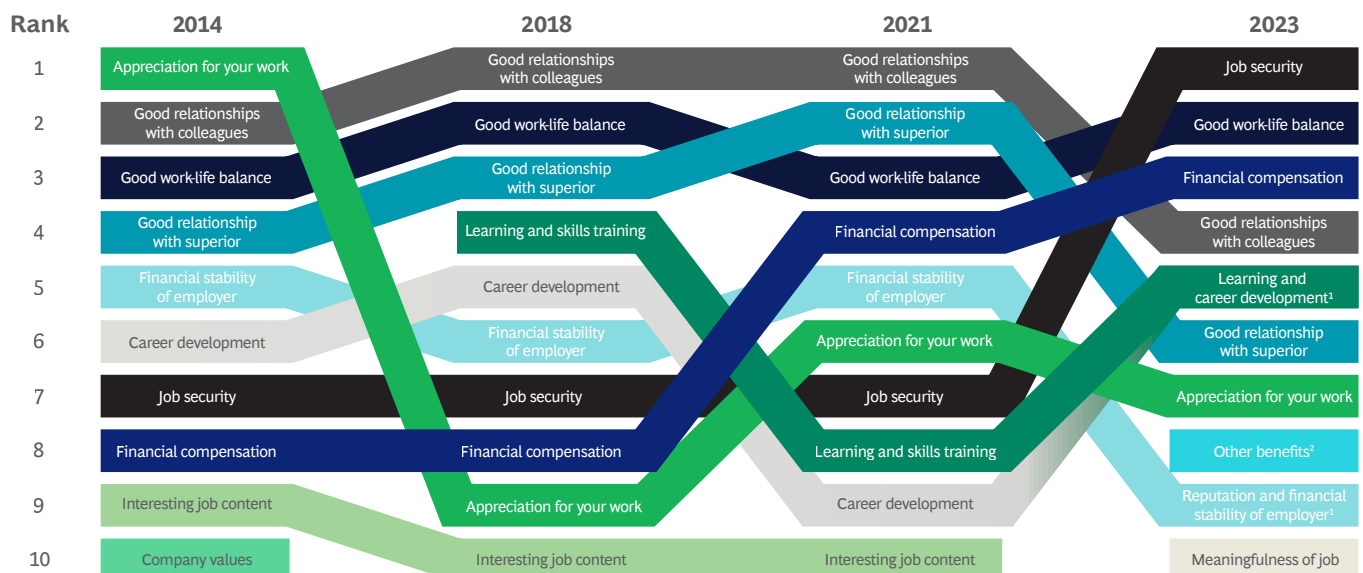
A decade ago, feeling appreciated, getting along with co-workers, and having a good work-life balance were the three workplace characteristics that people most valued. As time went on, having a good relationship with one's superior grew in importance. In 2021, amid the pandemic, people still cared about relationships and work-life balance, but financial compensation became more important, as income became less reliable for many workers.

Currently, we see several interesting shifts in what workers want. (See Exhibit 3.) (For a look at what they don't want, see the sidebar "What Factors Would Make Talent Walk Away from a Good Job Offer?")

Job security is now, for the first time since we began our series, the number one work preference overall (with some variation among regions). This might come as a surprise, given that unemployment is low, job vacancies are high, and workers are confident. Recent headlines suggest that the emphasis on job security may stem from restructuring in several industries or from increased geopolitical uncertainty. Hideo Daikoku, a 27-year-old R&D engineer from Japan told us, "Things are quite uncertain. After the pandemic, people realize that anything could happen. Having a job that wouldn't be affected by unexpected shocks is really important."

But we don't think those are the main reasons for the increased focus on job security. Instead, we believe that the response mainly reflects workers' concerns about their long-term employability—because our data connects the heightened desire for job security with increased awareness of technological disruption. Respondents who expressed concern about the impact of GenAI on their jobs were more likely to prioritize job security. (See Exhibit 4.) Technology's effect on jobs is not new, but GenAI brings disruption to a new level, affecting workers across jobs and industries and impacting not just repetitive tasks but also creative and conceptual work.

Exhibit 3 - Job Security Has Surged in Importance, as Has Learning and Career Development

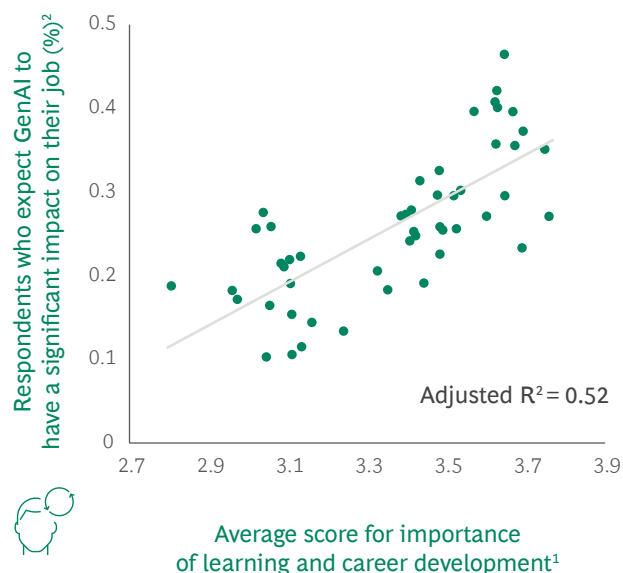
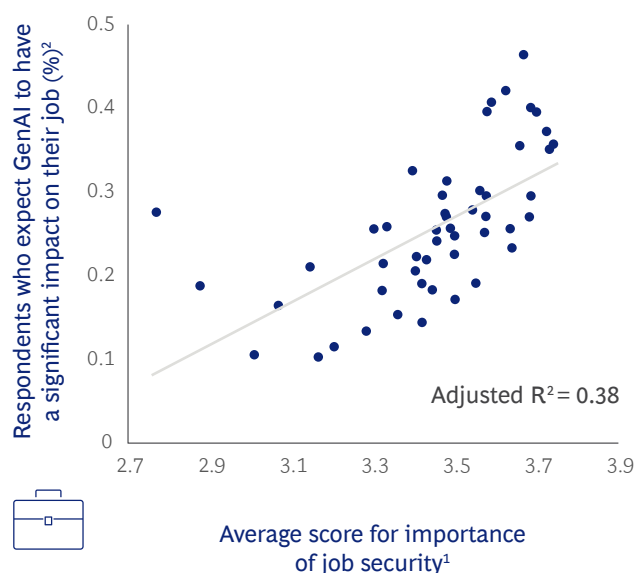


Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

¹Two related categories tracked in previous surveys were merged in the 2023 survey.

²"Other benefits" includes such benefits as retirement savings, insurance, and workplace amenities.

Exhibit 4 - GenAI Drives Respondents' Emphasis on Job Security and Learning



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Note: The dots represent countries with more than 250 respondents.

¹Respondents were asked to rate factors that matter at a job on a scale from 1 (“not at all important”) to 4 (“extremely important”).

²Respondents who think their jobs will no longer exist or will be significantly transformed because of GenAI.

Opportunities for learning and career development

are increasingly important to respondents, too. In our most recent survey, we combined two workplace characteristics from prior surveys: career development and learning and skills training. These factors, separately, ranked significantly lower during the COVID-19 crisis, when people cared more about immediate benefits. Now, emphasis on learning and career development, taken together, has bounced back, probably because workers realize that developing their skills is critical to ensuring their long-term employability. Our survey showed that those who anticipate that GenAI will have a major impact on their jobs are more likely to emphasize the importance of learning and development.

Work-life balance is now the second-most-important job attribute and the one that has most consistently received a high ranking in our surveys. Regardless of how the labor market evolves, people primarily work to live, not live to work. Patrick Byrne, 39, a lawyer and US native who now lives in Madrid, said, “For me, advancing and making money loses its purpose if you’re working so much that your outside life is not enjoyable. Work-life balance is crucial.”

Financial compensation has continued to rise in the rankings—and it’s easy to see why, given the growing emphasis on job security in workers’ thinking as well as the increasing cost of living in many countries.

Other benefits—a category that includes such things as retirement and insurance benefits—has emerged as a new priority for respondents, in tandem with their sharper focus on financial compensation.

Having a meaningful job also ranks in the top ten, reflecting the increasing importance of values at work. Manuel Millieri, a 35-year-old Italian entrepreneur now living in Paris, observed, “Having a meaningful, purposeful job that matches your values is everything. When you spend almost 12 hours per day working and commuting, money will not keep you motivated or happy. You need a purpose behind it.”

Relationships and appreciation at work have become slightly less important but remain in the top ten, indicating the continued importance of a company’s workplace culture and environment.

The growing interest in job security is universal, but top-ten job preferences differ significantly depending on respondents’ region of origin and age. (See Exhibit 5.)

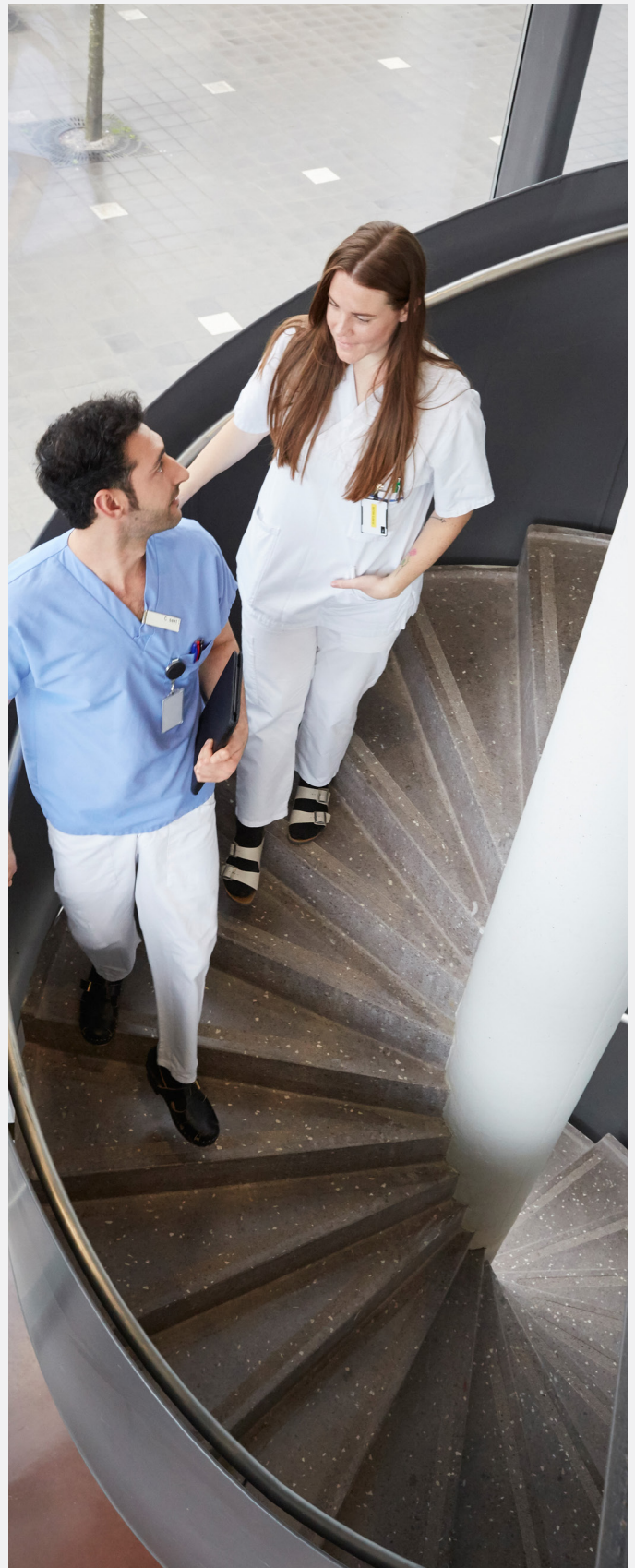


of workers would turn down an attractive job offer if they had a negative impression of the company during the interview process

What Factors Would Make Talent Walk Away from a Good Job Offer?

We asked survey respondents to imagine that they had received a job offer that ticked all the boxes on the list of what they were looking for. What would make them decline the offer anyway? What factors are so important that they would stand in the way of what would otherwise be an ideal job? (See the exhibit.) Here's what we learned:

- **Negative impressions during the recruitment process** would have a powerful impact. Nearly 70% of Europeans would refuse a good offer if they had formed such an impression during the interview process—if, for example, they were asked questions that they consider discriminatory or if they had bad chemistry with the interviewer. The same is true for nearly 60% of respondents in Latin America and the Caribbean.
- **A negative impact on society** was the next-biggest deal breaker. In fact, respondents in sub-Saharan Africa, the Middle East, and North Africa deemed it the number-one deal breaker. Globally, some 40% of workers would not join an employer whose services, activities, or products have a deleterious social effect.
- **Lack of mental health or well-being support** was another leading deal breaker, particularly among respondents from Asia-Pacific countries and sub-Saharan Africa.
- We've seen global talent give increasing weight to values, and a **lack of sustainability measures or environmental initiatives** is now a top-ten deal breaker.
- **Being able to work remotely** is not a deal breaker in many regions, although it is still fairly important among Europeans. In past editions of *Decoding Global Talent*, workers expressed a strong preference for working in a hybrid mode when asked about their ideal working arrangements. They may still prefer to do so, but in most regions this is not a make-or-break consideration. Ultimately, values and the recruitment process seem to matter more.



Negative Impressions During Recruitment and Negative Impacts on Society Are Top Deal Breakers

Respondents would refuse an otherwise attractive offer from an employer if...

North America

- 49% They had a negative impression during the interviews
- 39% They had a bad experience during the recruitment process
- 33% The employer's services, activities, or products have a negative impact on society

Europe

- 68% They had a negative impression during the interviews
- 47% They had a bad experience during the recruitment process
- 42% The employer doesn't offer options to work remotely or from home¹

East Asia and Pacific

- 48% They had a negative impression during the interviews
- 45% The employer doesn't offer mental health or well-being benefits
- 40% The employer doesn't offer attractive, family-friendly benefits

Latin America and the Caribbean

- 58% They had a negative impression during the interviews
- 42% The employer's services, activities, or products have a negative impact on society
- 41% The employer doesn't offer mental health or well-being benefits

Middle East and North Africa

- 42% The employer's services, activities, or products have a negative impact on society
- 36% The employer doesn't have a diverse or inclusive environment
- 34% They had a negative impression during the interviews

South Asia

- 41% The employer's services, activities, or products have a negative impact on society
- 36% The employer doesn't offer mental health or well-being benefits
- 34% The employer doesn't offer attractive, family-friendly benefits

Sub-Saharan Africa

- 44% The employer's services, activities, or products have a negative impact on society
- 42% The employer doesn't offer mental health or well-being benefits
- 35% The employer doesn't offer attractive, family-friendly benefits

Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

¹This deal breaker was offered as an option only to respondents whose jobs don't require their physical presence in the workplace.

Exhibit 5 - Region and Age Shape Work Preferences

Region						
East Asia and Pacific	Europe	Latin America and the Caribbean	Middle East and North Africa	North America	South Asia	Sub-Saharan Africa
Job security	Good work-life balance	Learning and career development	Learning and career development	Financial compensation	Job security	Learning and career development
Financial compensation	Good relationships with colleagues	Job security	Job security	Job security	Learning and career development	Job security
Good work-life balance	Financial compensation	Good relationship with superior	Appreciation for your work	Good work-life balance	Opportunities to lead and take responsibility	Opportunities to lead and take responsibility
Other benefits ¹	Good relationship with superior	Appreciation for your work	Reputation and financial stability of employer	Other benefits ¹	Good work-life balance	Reputation and financial stability of employer
Learning and career development	Appreciation for your work	Financial compensation	Opportunities to lead and take responsibility	Appreciation for your work	Good relationships with colleagues	Creative environment
Reputation and financial stability of employer	Interesting job content	Good relationships with colleagues	Good relationships with colleagues	Reputation and financial stability of employer	Financial compensation	Good relationships with colleagues
Good relationships with colleagues	Job security	Other benefits ¹	Good work-life balance	Meaningfulness of job	Reputation and financial stability of employer	Meaningfulness of job
Good relationship with superior	Amount of paid time off/holidays	Reputation and financial stability of employer	Creative environment	Amount of paid time off/holidays	Creative environment	Appreciation for your work
Amount of paid time off/holidays	Learning and career development	Opportunities to lead and take responsibility	Interesting job content	Company values	Good relationship with superior	Good relationship with superior
Appreciation for your work	Meaningfulness of job	Good work-life balance	Meaningfulness of job	Good relationship with superior	Meaningfulness of job	Financial compensation

Age					
≤20	21–30	31–40	41–50	51–60	>60
Job security	Job security	Job security	Good work-life balance	Good relationships with colleagues	Good relationships with colleagues
Learning and career development	Learning and career development	Good work-life balance	Financial compensation	Good relationship with superior	Appreciation for your work
Good work-life balance	Good work-life balance	Financial compensation	Job security	Appreciation for your work	Good relationship with superior
Good relationships with colleagues	Financial compensation	Learning and career development	Good relationship with superior	Good work-life balance	Interesting job content
Appreciation for your work	Other benefits ¹	Other benefits ¹	Good relationships with colleagues	Interesting job content	Meaningfulness of job
Financial compensation	Good relationships with colleagues	Good relationships with colleagues	Appreciation for your work	Financial compensation	Financial compensation
Creative environment	Appreciation for your work	Good relationship with superior	Learning and career development	Job security	Good work-life balance
Good relationship with superior	Reputation and financial stability of employer	Appreciation for your work	Other benefits ¹	Meaningfulness of job	Company values
Meaningfulness of job	Good relationship with superior	Reputation and financial stability of employer	Reputation and financial stability of employer	Reputation and financial stability of employer	Reputation and financial stability of employer
Reputation and financial stability of employer	Creative environment	Amount of paid time off/holidays	Interesting job content	Company values	Job security

Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

¹“Other benefits” includes such benefits as retirement savings, insurance, and workplace amenities.

The region in which respondents reside has a big influence on their work preferences:

- Europeans care significantly less than people in other regions about job security. Instead, they prioritize work-life balance. In keeping with that perspective, they care more than respondents in other regions about paid time off and holidays. They also particularly value interesting job content as well as relationships at work.
- North Americans and East Asians are most concerned about compensation. They also emphasize “other benefits”—elements such as retirement, insurance, and workplace amenities. They care less than others about relationships with colleagues.
- Africans and residents of the Middle East emphasize the reputation and stability of the employer, along with opportunities to grow and assume greater responsibility. Work-life balance ranks much lower for talent from these two regions.
- South Asians care more than others about taking on new responsibilities and leadership roles.
- Latin Americans are more concerned than others about their relationship with their superior.

We also see major differences in what matters most to respondents at work by age group:

- Learning and development is critical for workers who are 30 or younger, but then gradually decreases in importance until it vanishes from the top ten among respondents who are older than 50.
- Appreciation for one’s work matters a lot to members of younger cohorts, drops slightly among members of the middle age groups, and then becomes more important again for people over 50—especially for those over 60.
- Good relationships with managers and colleagues are more important to older generations than younger ones. Having meaningful work is also more important to older generations.
- Concern about work-life balance peaks in the age interval from 31 to 50, which makes sense because this is when most people are building their families or pursuing other significant personal plans.

The GenAI Revolution as Perceived by Workers Around the World

The emergence of GenAI (among other things) seems to have altered what matters to people at work. It has brought attention to the importance of long-term job security and the need for flexibility in learning and development. To understand how workers imagine their future careers, employers need to investigate their employees’ sentiments about and relationships to this disruptive technology. Employers may also want to know how to maximize possible productivity improvements and how to help their workers adjust to the new world of work.

With that in mind, we include in this year’s report a deep dive into workers’ perceptions of GenAI. Matej Hrapko, a 44-year-old living in Austria, has been one of our interviewees since we launched the series. Asked about the impact of this new technology, he observed, “It’s like when Google came out or when we changed from landlines to mobile phones. We needed to adapt back then, and we still do.”

We explored several GenAI-related questions in our research.

Are Workers Using GenAI?

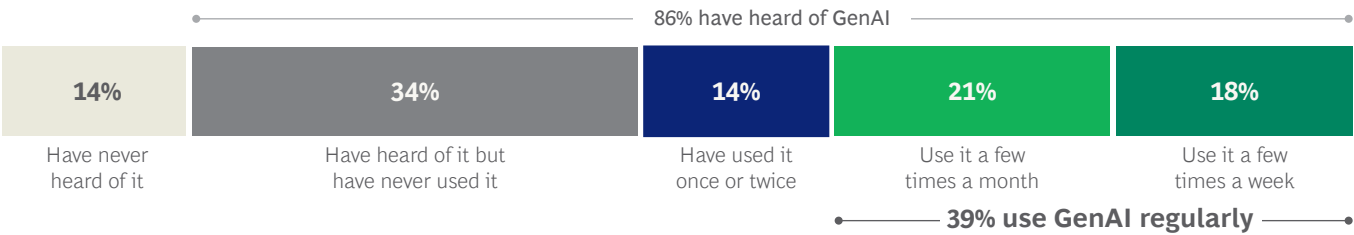
An exceptionally large share of respondents (86%) said that they have heard about GenAI. Usage, whether for work or for personal activities, is impressive as well: more than 50% of respondents said that they have experimented with it at least once recently, including about 39% who we define as regular users—they use it either a few times a month (21%) or several times a week (18%). (See Exhibit 6.) In the analysis that follows, we will focus on these regular users.

Although most demographic factors, such as education and gender, have little impact on workers’ likelihood of using GenAI, age does play a role. Respondents who are 30 or younger have the highest adoption rates, and 49% of them use GenAI regularly. In contrast, people older than 50 are much less likely to use GenAI regularly.

Job-related factors play a role as well. (See Exhibit 7.) People in digital and IT roles are the most likely to be regular users of GenAI, followed by those in marketing, media, and design job roles.

The picture for industries is similar. Tech and IT leads the way, followed by media, and then science and research. Other industry areas that heavily leverage GenAI are sustainability (an emerging field generally open to innovation) and education and teaching (where GenAI could play a major role in modernizing and personalizing learning).

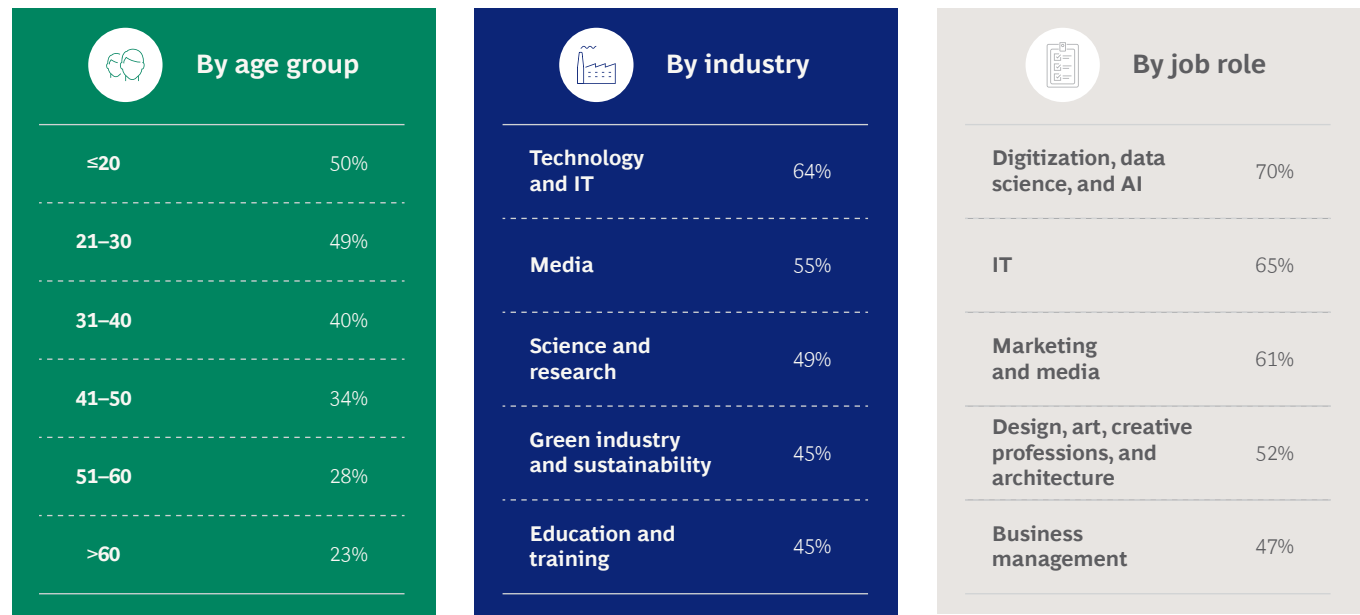
Exhibit 6 - Respondents' Awareness and Use of GenAI Are High



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Exhibit 7 - Regular Use of GenAI Varies by Age, Industry, and Job

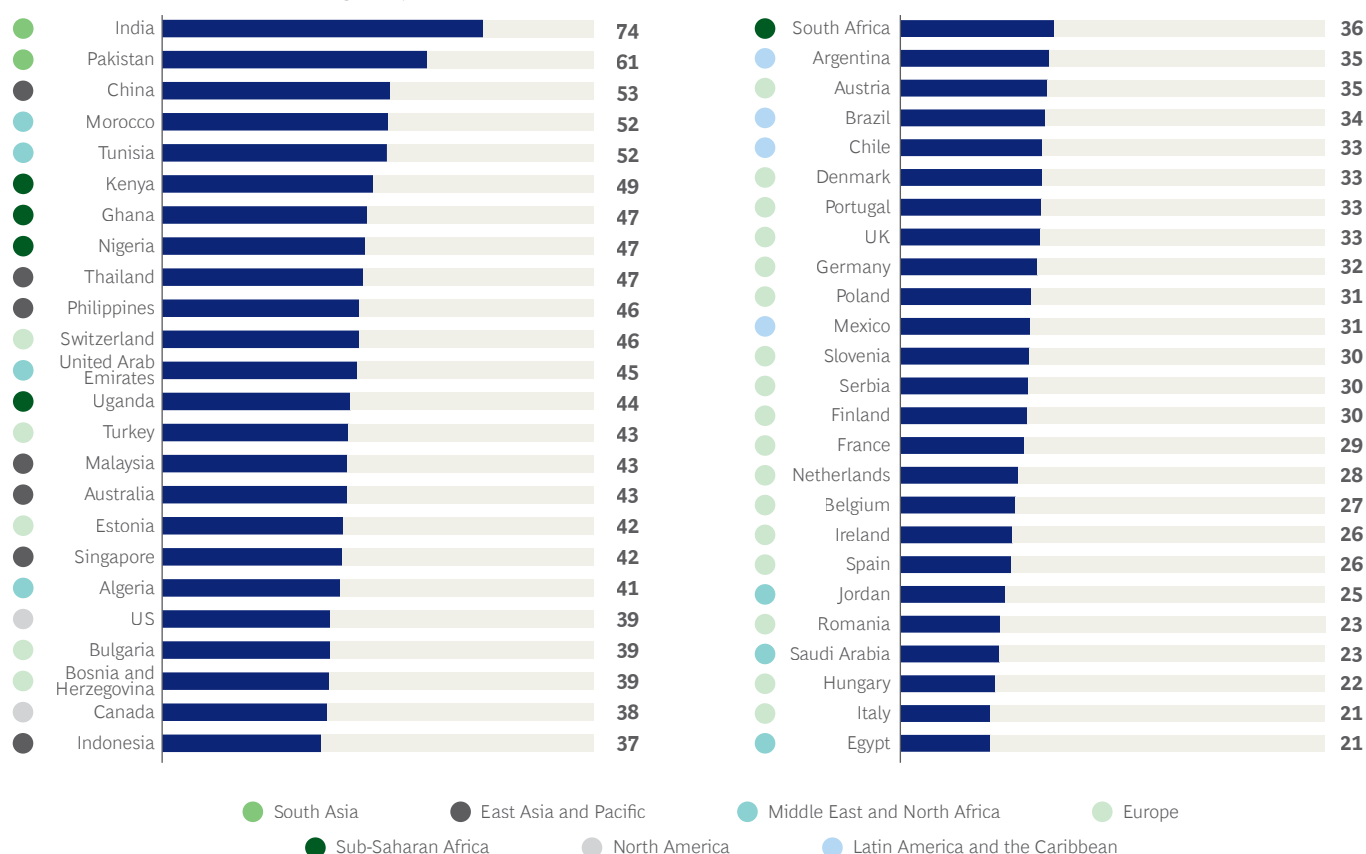
Respondents who use GenAI regularly



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Exhibit 8 - Emerging Economies Lead the Way in GenAI Adoption

Respondents who use GenAI regularly (%)



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Note: Data is for countries with at least 250 respondents. Ranking is similar when controlled for age, job role, or industry. Respondents who said that they regularly use GenAI but did not indicate what they use it for have been excluded.

We also noticed a striking difference in GenAI adoption by geography. (See [Exhibit 8](#) and [Appendix 2](#).)

Workers in emerging economies seem to be embracing GenAI more quickly than those elsewhere. The top ten countries by percentage of people who use GenAI regularly consists entirely of lower-income, non-Western countries. This is the case not because these countries have younger populations or more respondents in digital fields; we obtained similar results when controlling for age, profession, or industry.

High adoption rates also correlate with countries that emphasize the importance of learning and development. Among higher-income economies, a handful show relatively high adoption rates: Switzerland, Australia, Estonia, and Singapore all tend to rank high in various indices assessing the digital economy and digital government. The US ranks exactly in the middle. The remaining high-income countries, most of which are European, have below-average adoption rates. The bottom ten is dominated by countries in Europe and the Middle East. This may reflect stronger regulations and a greater perception of potential threats and risks.

What Do People Use GenAI For?

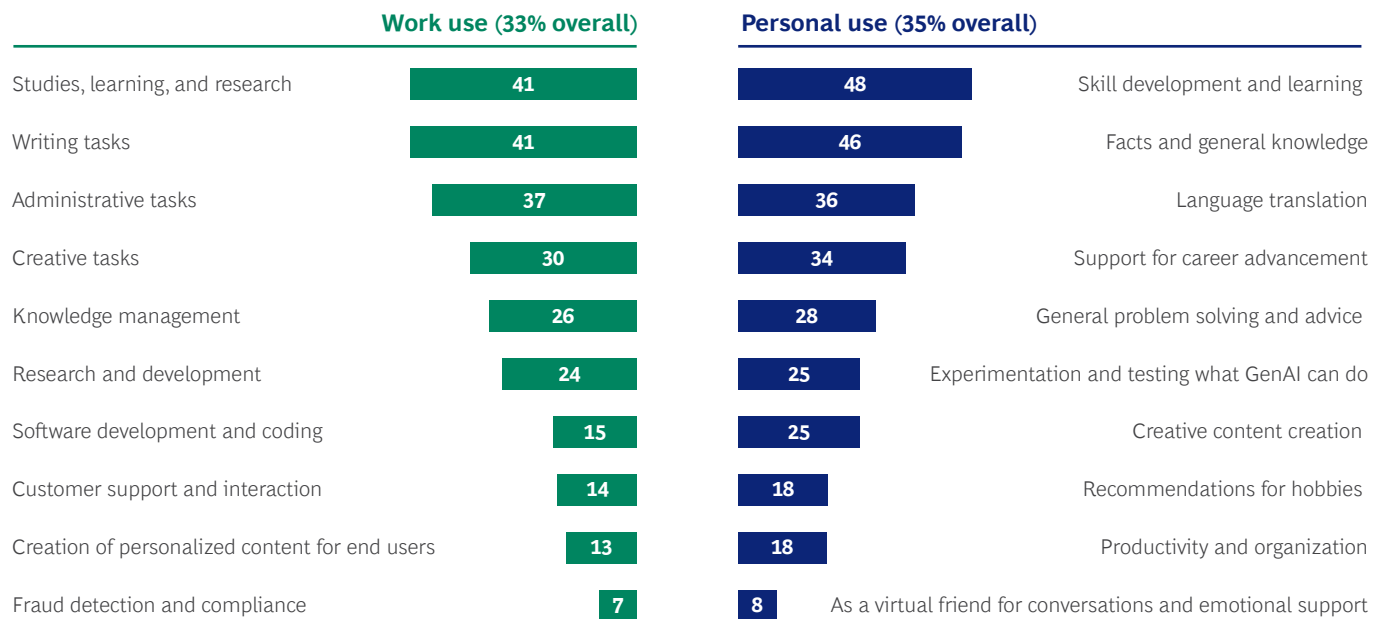
Most respondents who regularly use GenAI do so both for work and for personal pursuits. Most use it for simple activities such as research, administration, and translation—uses that are akin to replacing Google with GenAI. (See [Exhibit 9](#).)

Overall, 33% of respondents use GenAI regularly at work. Those in office-based, management, and administrative jobs are most likely to do so, to accomplish administrative and writing tasks more quickly. A fair share of IT professionals use GenAI for coding (36%), and many marketing specialists (41%) and design professionals (47%) use it for creative tasks. Evidently, respondents who use GenAI the most frequently are now leveraging it for their core work tasks, not just for general administrative work and research. (See [Appendix 3](#).)

Personal GenAI applications most often involve finding facts and gaining general knowledge (approximately 40%), developing skills and learning (about 38%), or translating material from other languages (about 33%). People also turn to GenAI to support their career advancement goals and job searches, using it to develop résumés and cover letters, for example.

Exhibit 9 - Respondents Most Often Use GenAI for Information, Writing, and Administrative Work

Respondents who use GenAI regularly for specific tasks shown (%)



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Note: The data reported here excludes respondents who reported that they regularly use GenAI but did not clarify what they use it for.

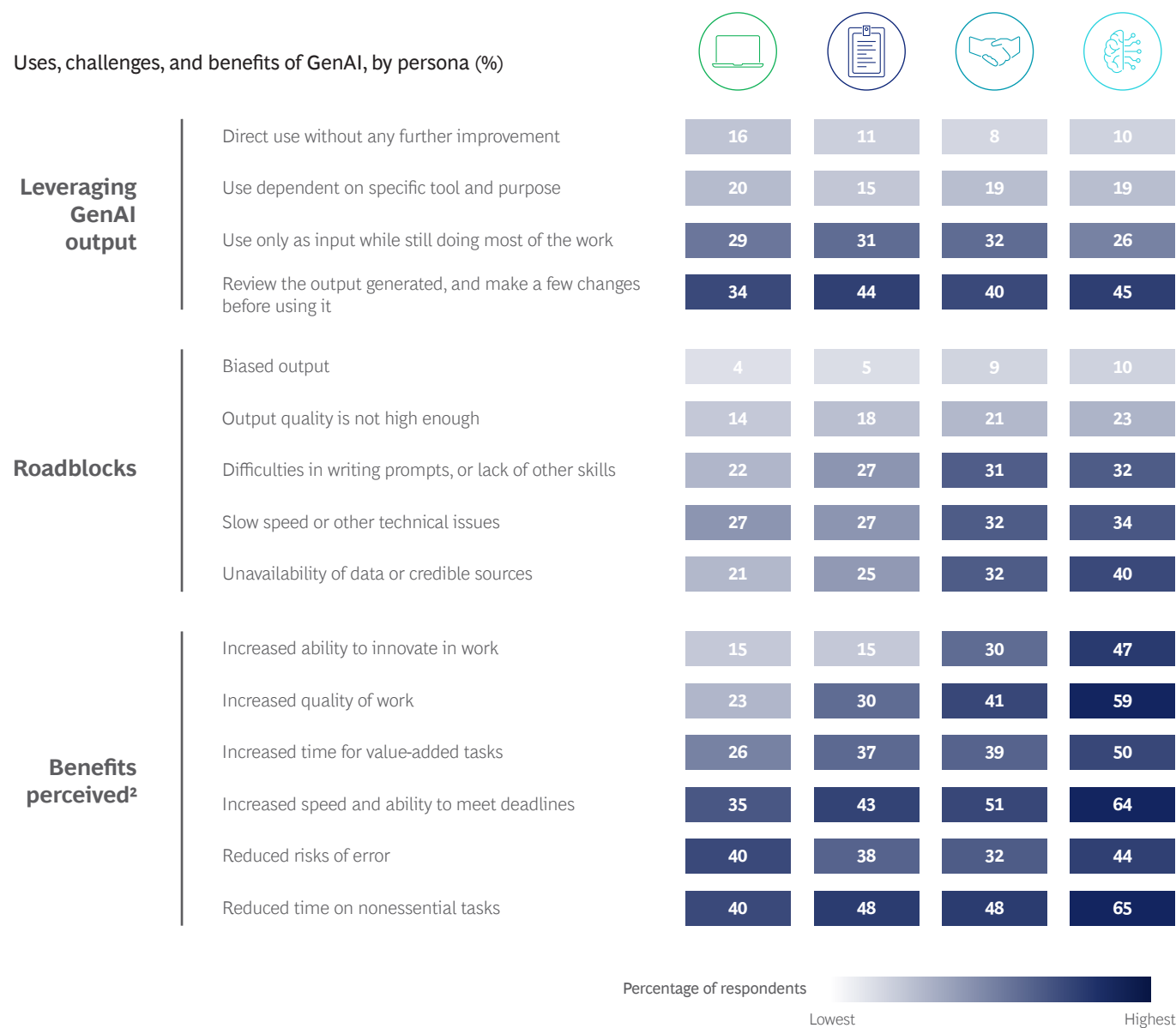
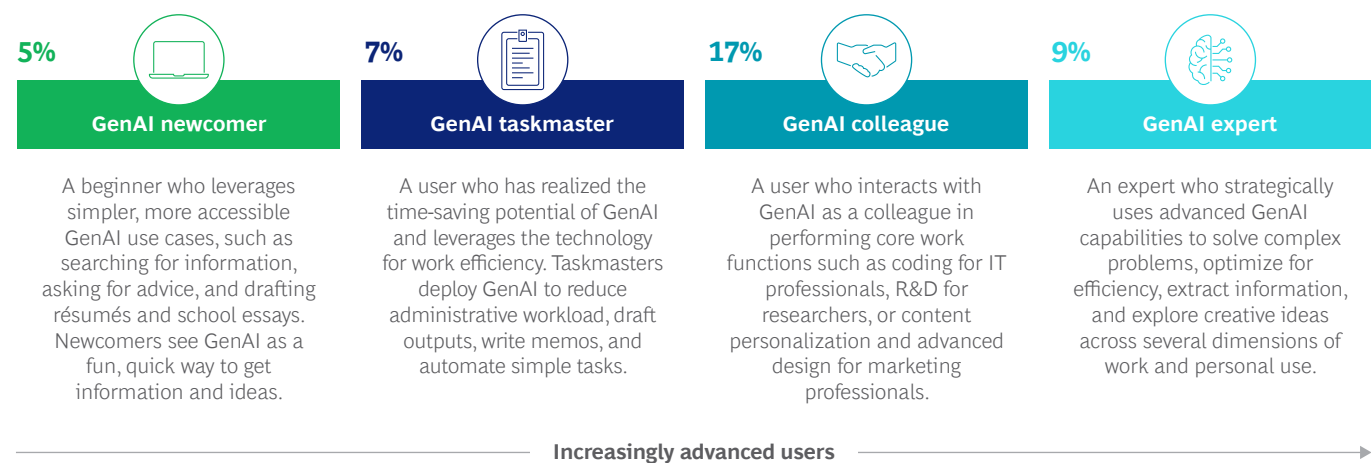
How Do People Use GenAI? Personas, Challenges, and Benefits

With an eye toward future uptake, we've created four GenAI personas to capture the notably different ways in which people who regularly use GenAI—39% of the respondents in our survey—interact with the technology (see Exhibit 10 and Appendix 4):

- The GenAI Newcomer.** Members of this group treat GenAI as if it were just the new Google. They use it for fun, to search for information, and to draft documents. Notably, this persona does not represent the largest group of users among respondents who are regular GenAI users.
- The GenAI Taskmaster.** Users in this category put GenAI to work as an assistant, turning over boring, routine tasks to the technology and thereby saving time and improving efficiency.
- The GenAI Colleague.** This persona likewise consists of users who put GenAI to work, but they adopt a more comprehensive approach than taskmasters do, assigning core parts of their workload to it. For example, IT professionals may use it to perform coding, and marketing managers may use it to create personalized content. This persona claims the largest number of respondents, indicating that many people already use GenAI in a meaningful way.
- The GenAI Expert.** The advanced users in this persona leverage GenAI strategically for many different purposes in different areas of their lives. In our survey, they listed at least seven use cases, including complex tasks.

Exhibit 10 - GenAI Personas Perceive Distinct Benefits and Challenges

Regular users (39% of all users) fall into four personas¹



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

¹Approximately 1% of the respondents who reported that they regularly use GenAI did not clarify what they use it for; we have excluded them from the personas we developed.

²Because of constraints on survey length, the data on benefits is based on a subset of the total sample.

Leveraging Output. Most respondents use GenAI predominantly as a catalyst or an aid in performing their tasks rather than as a full-on replacement for their own participation. This is the case regardless of the particular respondent's role, type of work, or persona.

Moreover, confidence in GenAI output is not yet high. Most respondents within each persona subject GenAI to extensive review before using it (34% to 45%) or use it primarily for preliminary concepts while continuing to handle the bulk of the workload personally (26% to 32%).

GenAI newcomers are the most open to applying the output directly (16%); the share of other personas that use GenAI's outputs without further rework is much lower.

Constanze Freyberger, 27, a consultant from Germany who now works in Australia, summed up the sentiment: "GenAI takes away the super basic capabilities that you need to have, but instead you need to be able to think more strategically about what the AI is telling you, double-checking whether it's correct and whether it's something you can trust."

Challenges. When asked about key challenges, about 50% of respondents said that they haven't faced any major difficulties with GenAI. For expert users, the percentage climbs to 61%.

Among respondents who have encountered challenges, the main complaints involve a lack of available data or credible sources. This shortcoming is especially bothersome to advanced users: 40% of experts complained about it, whereas only 21% of newcomers did.

About 30% of users across all personas cited technical issues and the lack of skills to use GenAI to its fullest. Observed Matej Hrapko, "You need to find a way to communicate with the AI, how to give it an order, how to tweak it in order to get certain results. So yes, you will have to change your thinking."

Most users are not at all concerned about biased output when working with GenAI. Newcomers and taskmasters are especially nonchalant regarding this aspect of the technology; only 4% and 5%, respectively, identified this as a concern. More experienced users, however, are more aware of this issue.

Benefits. Respondents recognize that using GenAI positively affects their job performance. Generally, the more advanced users are, the more benefits they unlock:

- Expert users report major improvements across all dimensions, with 50% or more citing increased time for value-added tasks, greater speed, and better quality.
- For newcomers and taskmasters, benefits take the form of fewer errors and less time spent on nonessential tasks.

Our interviewee Anne Granelli noted some very specific benefits: "I specialize in doing echography and ultrasound on babies' hearts, and very few people have the skills to do this. A wonderful thing with AI is that there are new technologies coming out that can help simplify ultrasounds. Those technologies will be super helpful and benefit many, since we have only a certain amount of people who know how to do this. I welcome the help from AI. And of course, we would then need people to interpret it."

Tomilola Abiodun, 32, originally from Nigeria and now working as a product manager and running her own start-up in the US, concurs: "It's really helped me be faster. It helped jog my memory and think through things differently. I see it like a helper, which is a good thing because AI is here to stay."

How Global Talent Plans to Stay Competitive in the Age of GenAI

In general, people who use GenAI feel that it benefits them at work, in their personal lives, or both. This highlights exciting opportunities for new job creation and the evolution of traditional roles, encouraging a dynamic integration of technology and talent. However, it can put workers' skills to the test.

The good news is that GenAI doesn't appear to be a major threat to livelihoods, as many have feared. Most workers aren't terribly worried about AI pushing them out of their jobs: only 5% of survey respondents believe that their roles will become obsolete. Medtech worker Anne Granelli stated, "AI can help facilitate your work, but not replace you."

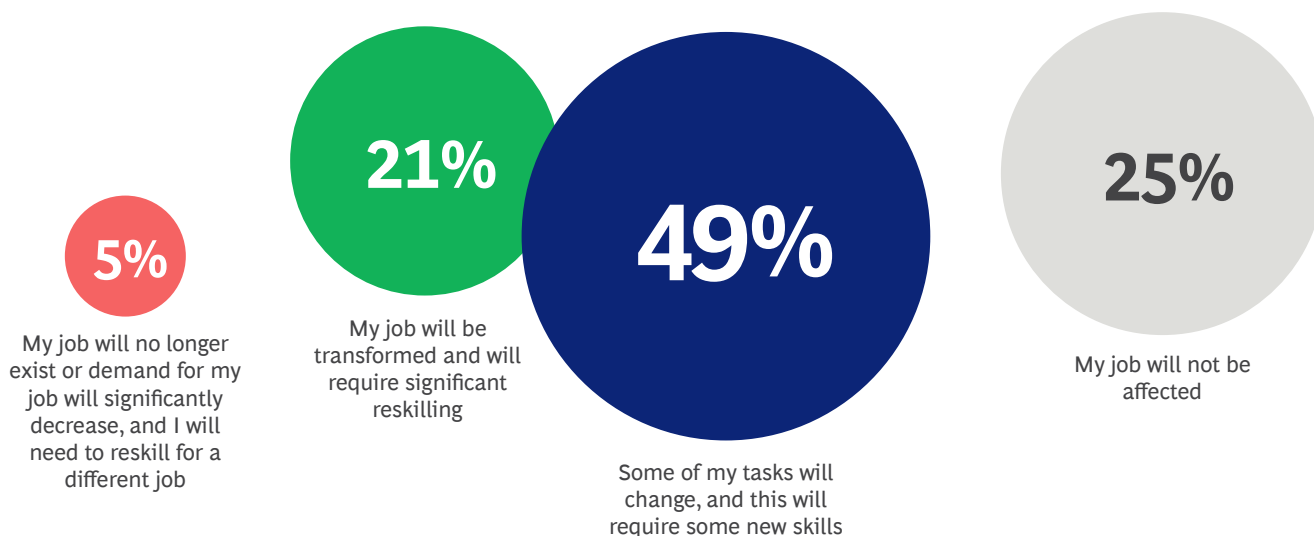
But respondents don't view the situation through rose-colored glasses, either. Most anticipate that certain aspects of their jobs will change, requiring them to develop new skills. Only about a quarter of respondents think that GenAI will not affect their jobs at all. (See Exhibit 11.)

Workers in emerging economies such as Kenya, Nigeria, and Mexico show the greatest awareness of the potential for jobs to be lost or significantly transformed. Those are the same countries where the share of regular GenAI users is especially high. It makes sense that people who use GenAI more often are more aware of its potential impact on their jobs and skills. Conversely, respondents in countries such as Germany, Austria, and Denmark exhibit the least worry, perhaps because of the economic resilience and labor market protections in their geographical area. (See Exhibit 12.)

Respondents' views also differ dramatically by profession. Those in financial services, design jobs, and sales and customer service are the most likely to anticipate changes in their roles; social workers and people who perform manual work are the least likely to do so.

Exhibit 11 - Global Talent Is Aware but Unafraid of Technological Disruption

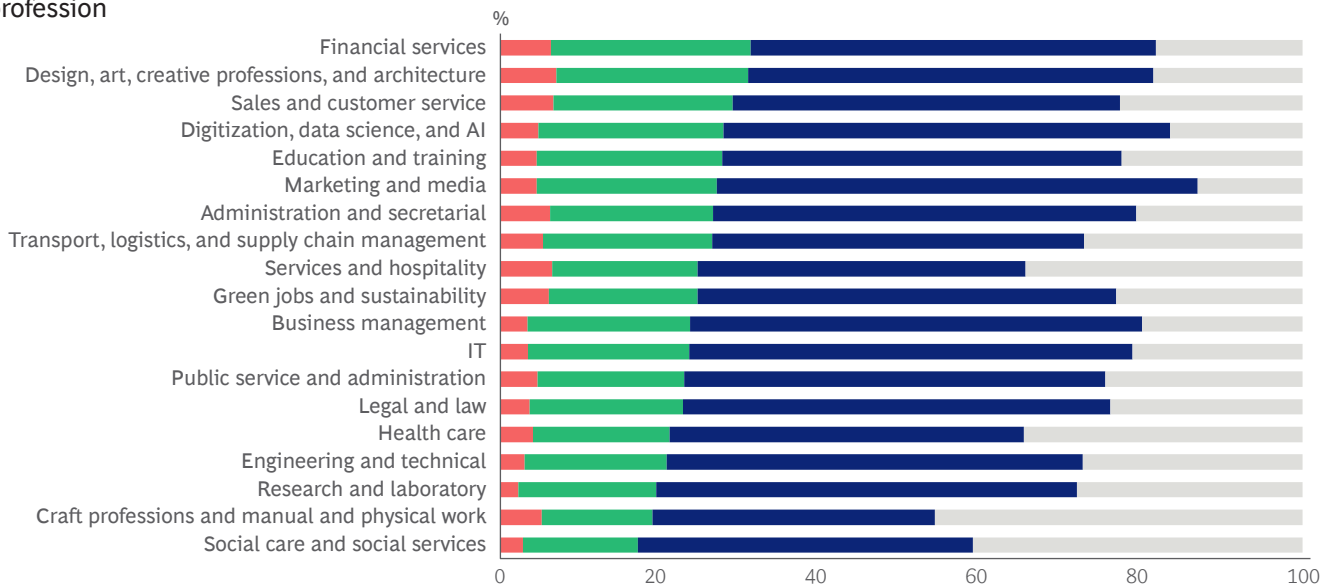
How respondents expect GenAI to impact their job in the future



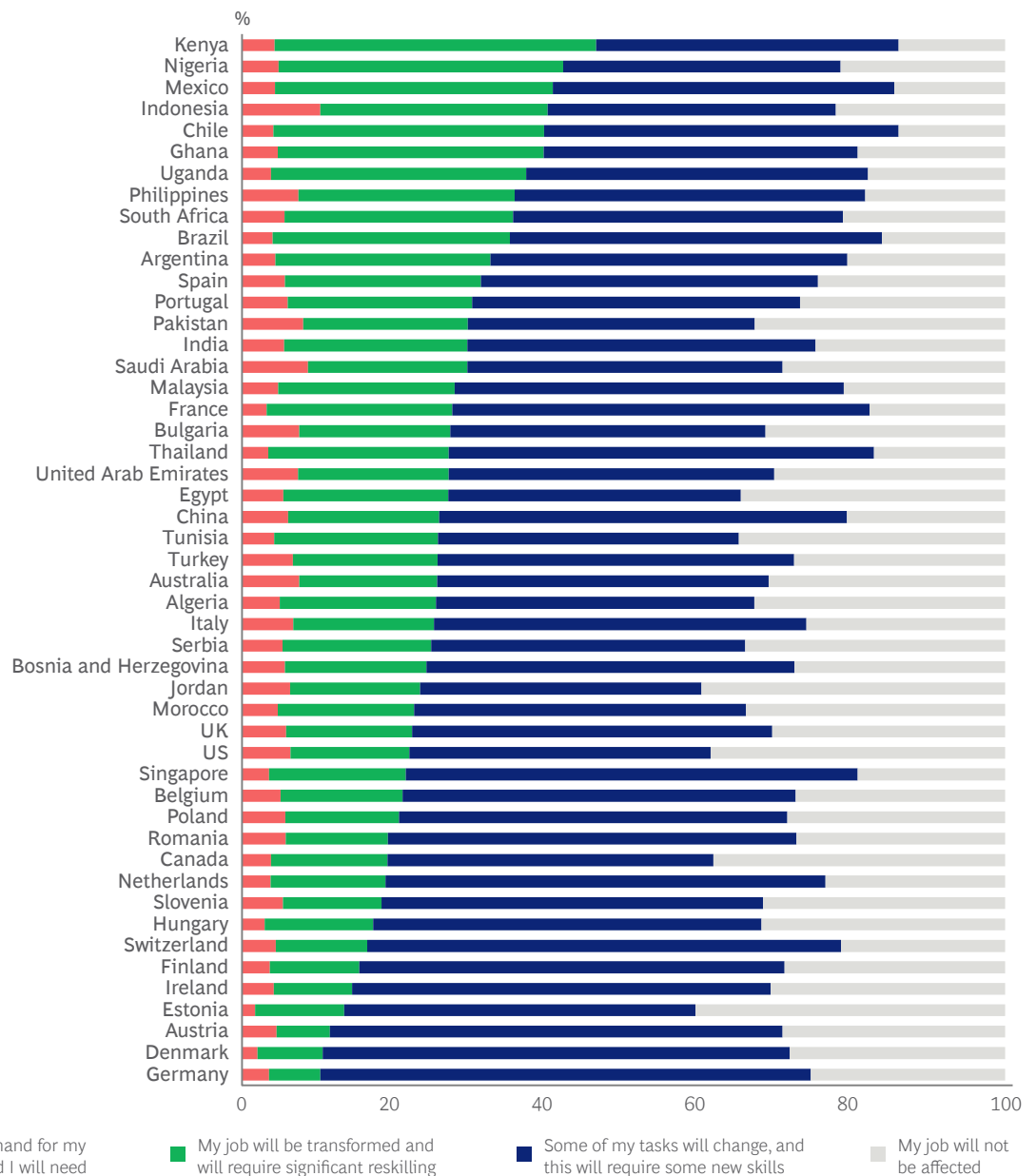
Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Exhibit 12 - Perceptions of GenAI's Impact, by Profession and by Country

By profession



By country



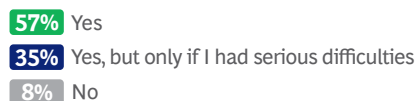
Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

How Willing Are Workers to Reskill?

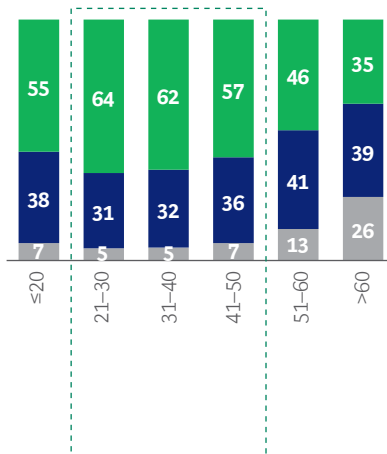
People are open to reskilling—and not just because of GenAI. Overall, 57% of respondents are willing to retrain to stay competitive. Those with low- or mid-level education tend to be more flexible than more highly educated people, and older people are less open to reskilling in general. Matej Hrapko has adopted a practical attitude toward the need to reskill in the face of GenAI: “I’m still fairly young and able to learn this new technology now. For the next one that will come, I would probably have more trouble.” (See Exhibit 13.)

Here, again, respondents in emerging economies appear more flexible and open than those in developed Western countries. In Kenya and Mexico, for example, 80% or more of people express readiness to reskill, whereas in Denmark and Germany, less than 40% are willing to reskill. (See Appendix 5.)

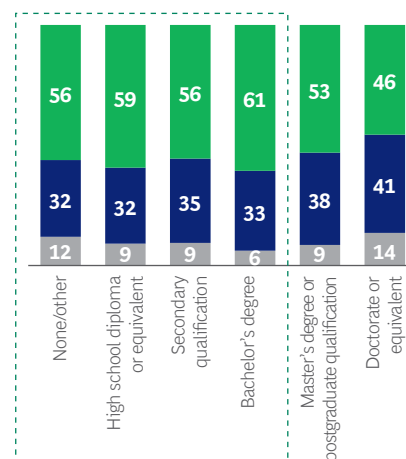
Exhibit 13 - Most Workers Are Willing to Reskill



Respondents in their peak working years are especially willing to reskill



Professionals with low to moderate levels of education are more willing to reskill



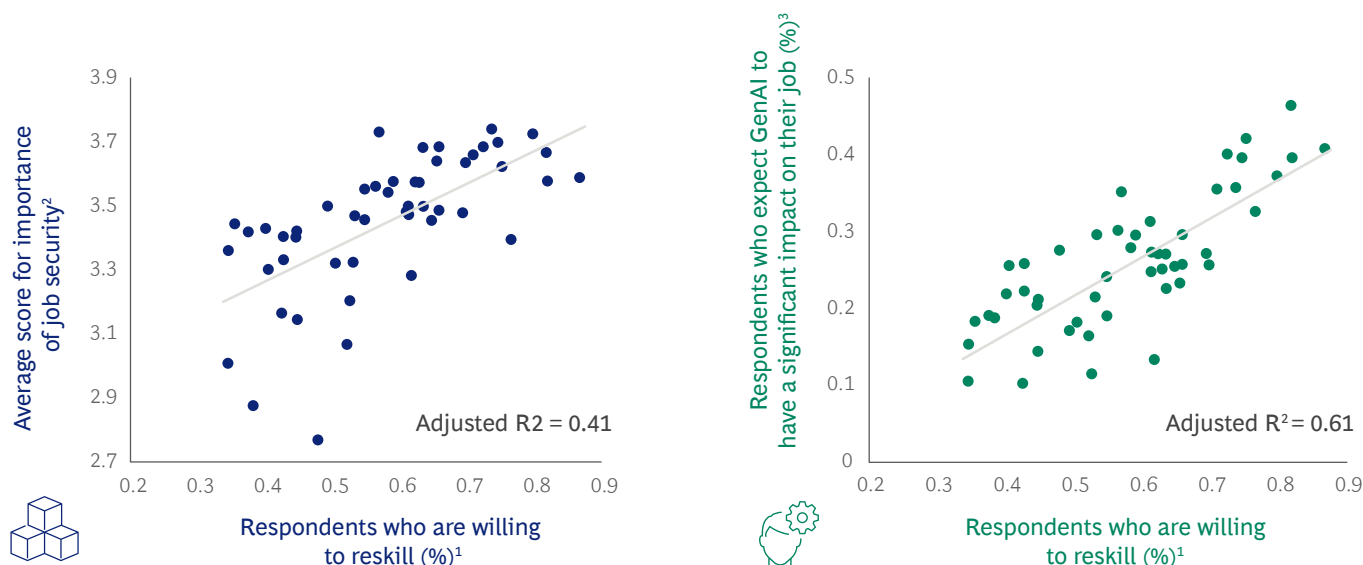
Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Note: Data is for countries with at least 250 respondents.

Various factors drive openness to reskilling. Respondents who live in countries where job security is especially important are more likely to be open to reskilling, likely motivated by a desire to ensure their long-term employability. Similarly, respondents who believe that GenAI will have a large impact on their jobs are more willing to reskill—perhaps as a preventive move so that they can switch to a different job altogether if necessary. (See Exhibit 14.)

We also asked respondents what positions they believe they could transition into with six months of retraining. (See Exhibit 15.) Most said that they were confident they could move into administrative and business management roles, with education and training roles as a close second. Not surprisingly, workers also seemed most certain about their ability to shift to professions closely aligned with or directly related to their current fields. For example, IT professionals see themselves transitioning most smoothly to digitization roles, and those in the legal field consider public service and administration as viable next steps.

Exhibit 14 - Respondents' Willingness to Reskill Is Linked to the Importance of Job Security and the Perceived Impact of GenAI



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

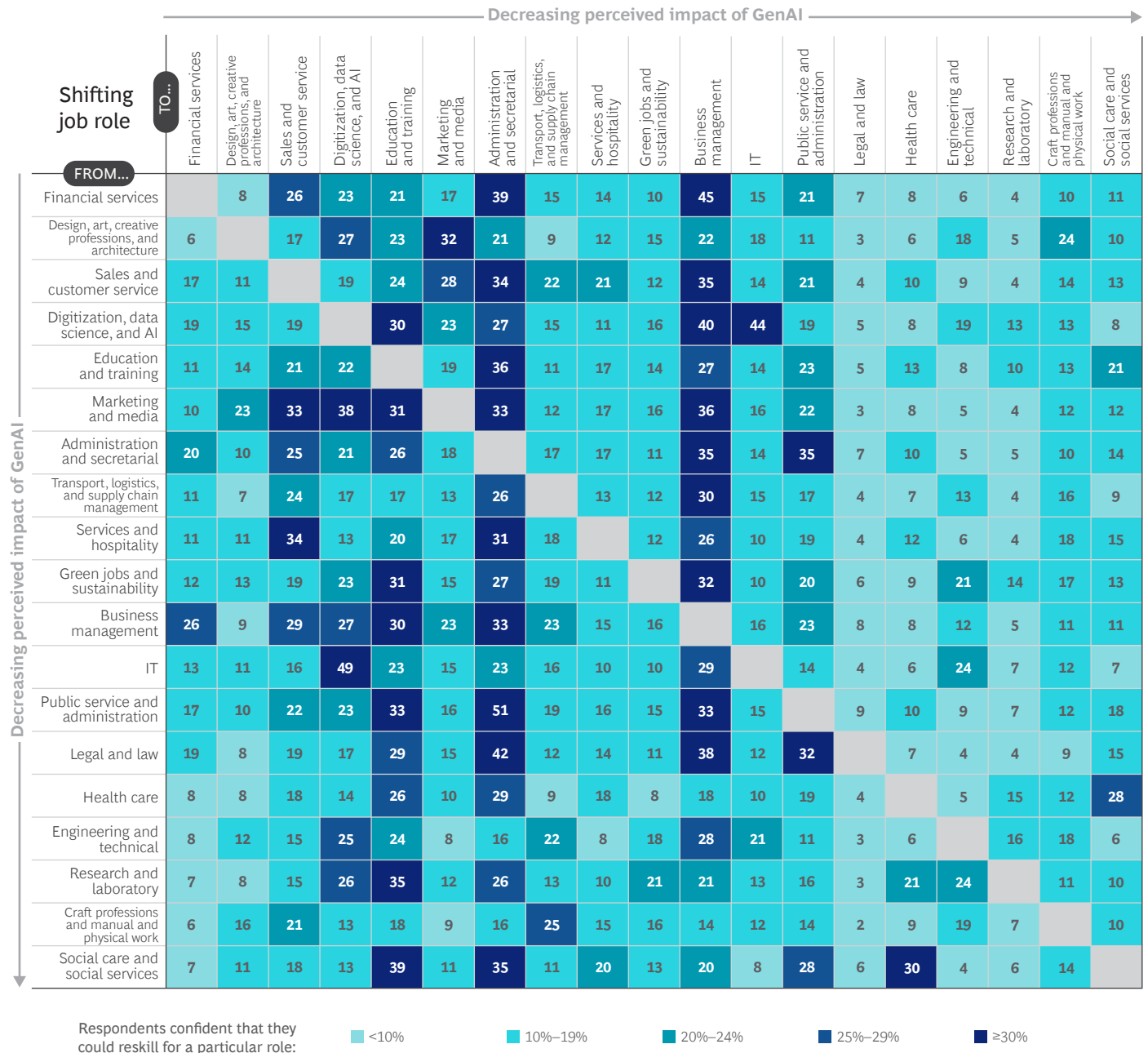
Note: The dots represent countries with more than 250 respondents.

¹Respondents who said that they would want to reskill to stay competitive.

²Respondents were asked to rate factors that matter at a job on a scale from 1 (“not at all important”) to 4 (“extremely important”).

³Respondents who think that their jobs will no longer exist or will be significantly transformed by GenAI.

Exhibit 15 - Professions That Respondents Believe They Could Realistically Reskill to Within Six Months



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

What Support Do Workers Need in Order to Reskill?

Respondents summed up one challenge that accompanies rapid technological change in their answer to our question about what they need in order to reskill. Their most pressing need, they said, is to know which skills they must acquire. That, in turn, raises the need for access to well-designed learning programs that address most critical skills. Other needs for reskilling include support from employers (in the form of reskilling programs at work and career guidance, for example), more time, and financial resources.

Respondents from the East Asia-Pacific region, South Asia, and sub-Saharan Africa prioritize financial support. Those from Europe and North America emphasize the need for time. These findings underscore the distinct challenges that face employees and employers in different regions as they adopt new technologies. (See Exhibit 16.)

Hideo Daikoku, the R&D engineer, suggests some concrete ways for employers to support workers in reskilling: “One thing companies can do is provide education programs where employees can take courses for free or at a really discounted price. Another thing is encouraging people to see the value in learning these new skills and showing them that it isn’t all that hard, whether that’s through workshops or discussions or just having a project that requires you to use some of these new tools. Also, they can allow employees to set aside some time to just explore. At my employer, this is considered part of paid office hours. Basically, the company is paying us to learn something new.”

Recommendations for Employers

Committing to an existing or new employer is a decision that workers won’t make lightly, especially in turbulent times. Employers can gain an advantage in the race for talent by maintaining a workplace that provides a sense of security, good work-life balance, strong relationships, and opportunities for development. To fill talent gaps, employers can optimize the talent cycle—from anticipating talent needs to attracting, developing, and engaging suitable talent.

ANTICIPATING TALENT NEEDS

Forecast the impact of technology on the organization’s workforce. A critical task for employers involves quantifying how new technologies will impact their need for workers and skills—and how that demand will extend across organizations and industries, thus affecting the competition for talent.

Organizations can benefit from treating strategic workforce planning as a regular process. As part of that planning, they should consider tasks (which are most likely to be automated?), skills (which will become outdated or emerge anew?), and capabilities (what new ones will be needed?). They should also take into account the effects of regulatory changes and technology improvements.

The next step is to compare their assessment of employment demand with a forecast of talent supply, considering retirement ages and turnover. Supply-and-demand forecasts should extend across a period of three to five years. Understanding the gaps uncovered through this analytical process will help guide appropriate reskilling strategies.

Exhibit 16 - Understanding Which Skills Are Needed and Finding Learning Programs Are the Top Learning Needs

Learning needs	Better understanding of what skills to learn	Better availability of learning programs	More support from my employer	More time	Additional financial resources	More support from the government	Better/more reliable access to the internet
East Asia and Pacific	1	2	4	5	3	6	7
Europe	1	3	4	2	5	6	7
Latin America and the Caribbean	2	1	4	5	3	7	6
Middle East and North Africa	2	1	5	4	3	7	6
North America	1	2	4	3	5	6	7
South Asia	1	2		6	4	7	5
Sub-Saharan Africa	1	2	4	6	3	7	5
Global	1	2	3	4	5	6	7

Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Shift to skills-based human resource management.

A static college degree seems less relevant in an environment where rapid technological change requires employees to dynamically acquire new and evolving skills. Hiring and promoting on the basis of skills—as opposed to degrees, university prestige, or years of experience—will unlock a larger and more diverse talent pool, enabling employers to fill workforce gaps more creatively. This also includes recruiting from new countries. As our *Decoding Global Talent* series has shown, people in emerging economies are highly mobile, ready to learn, and comfortable with new technologies. Their skills and potential make them a great option for filling workforce gaps in aging and shrinking economies.

The [paper ceiling is eroding](#) slowly, however. Implementing skills-based hiring means fundamentally rethinking how to define talent. Organizations must adopt a new approach to collecting and interpreting data about people's skills—one that encourages recruiters and managers to look beyond degrees and formal qualifications. In many instances, this effort will entail a major shift in organizational culture.

ATTRACTING TALENT

Know who to target and how to customize offers.

When it comes to the employee value proposition, one size does not fit all. The workplace attributes that people value most vary considerably depending on age, region, job role, and so on.

Employers can segment these priorities into personas with distinctive needs, differentiated employee value propositions, and customized recruitment journeys. It may be helpful to think of potential employees as customers, understanding the needs of different segments and adjusting the recruitment approach accordingly. By gathering data from various sources (research on talent trends, surveys of new hires, and focus groups, for example), employers can shape talent personas (senior professionals with high expectations, for example, or young digital experts) and then reimagine the recruitment journey to make it optimally attractive to each persona.

Employers can also identify and emphasize the characteristics that make their organization unique and that match the expectations of their target segments. Salary is important, of course, but it isn't everything. Employers that can't compete on financials can still win over talent with opportunities for learning, good relationships at work, a healthy work-life balance, or positive societal impact. [Showcasing AI readiness](#) can be another point of attraction for talent, as a study by The Stepstone Group has shown.

Modernize and personalize recruitment. The recruitment process matters to workers. Ensuring a responsive, smooth, fair process is essential, and technology can help if used properly. As The Stepstone Group has reported, companies and job boards are already [augmenting traditional recruitment processes](#) with AI, such as in creating job posts, personalizing applications for specific jobs, and handling intelligent interview scheduling. AI can also help to enhance communication with candidates by providing timely, context-specific updates throughout the recruitment process to keep candidates informed and engaged.

Attracting talent is an increasingly demanding task, but [automation](#) could save recruiters 10 to 12 hours weekly, according to a recent study by The Stepstone Group. Organizations can use GenAI tools to improve the efficiency of the hiring process so that candidates and employers can focus on the human interaction. BCG research has shown that personal contact remains imperative. Job seekers want to judge an organization's culture when talking to interviewers, and they want to test shared values and chemistry with their prospective managers throughout the interview process.

DEVELOPING TALENT

Shift from traditional training to strategic skilling.

Faced with rapid advances in technology, shortages of talent, and major changes in the way people work, employers must shift from traditional training methods to strategic upskilling and reskilling. Recent [research](#) by BCG and *Harvard Business Review* found that five paradigm shifts are necessary for such a change. These include ensuring that skilling programs closely align with business goals, that business leaders (besides HR) champion them, and that the organization provides various incentives and enablers for program participants and their managers. Organizations must also shift the narrative from “learning as an expense” to “skill building as an investment” and ensure that employees can take sufficient time to pursue needed learning.

Organizations that embrace this new approach to skilling will win the allegiance of employees who seek job security and opportunities for learning and development. Employers do not have to do this alone: they can collaborate with educational institutions, other employers, trade unions, and other stakeholders to build and run such programs.

Enhance GenAI adoption at work. Although many workers are experimenting with GenAI, fewer are truly adopting it. This situation seems to be especially common in Western markets, which trail emerging economies in use of GenAI. To capture the full value of GenAI, more workers should be able to use the technology for advanced tasks that have a real impact on their work.

Organizations can adopt several practices to support this shift. Employers could start by [showcasing the benefits](#) and potential use cases of AI. Then, as our respondents mentioned, workers need to know what skills they should learn. Guided learning platforms can provide personalized, relevant training customized to individual employees. Employees also need high-quality learning programs, ideally [integrated into their workflow](#), with real-life examples and applications. Finally, strong leadership support is critical to inspire adoption—it's the key people-related factor that differentiates [top performers](#) in GenAI.

ENGAGING TALENT

Help employees process and manage uncertainty.

Doing so starts with fostering open and transparent communication about the company's future and the likely impact of technology and other megatrends. They should engage employees in discussions and planning.

To retain and optimally leverage talent, and to give employees a long-term perspective on their careers, organizations can establish a robust internal job mobility system. By proactively identifying and training employees for relevant future roles, companies can reassure employees about their future within the organization. Finally, services to support mental health and well-being are an increasingly important and clearly articulated need of workers; the lack of such services is the second-most-frequently-cited deal breaker in our research. Access to professionals and personalized content on topics such as stress management, psychological safety, and emotional well-being shouldn't be seen as merely a "nice to have" anymore.

Help people find joy in their work. People care a lot about work-life balance, relationships, and working for an employer that has a positive impact on society. Employees who [enjoy their work](#) are 49% less likely to seek new employment than those who don't. If used judiciously, GenAI can help, improving workloads and engagement by automating nonessential tasks and thereby enabling people to reallocate their time toward more satisfying and meaningful activities. Of course, technology alone can't optimize a company's culture. Establishing flexible policies on working hours and having managers who support a healthy work-life balance, promote learning and development, and foster good relationships at work are equally critical.

Our data shows that the workforce is open to change. We see this in respondents' willingness to reskill and in their eagerness to embrace GenAI. As entrepreneur Manuel Milliere puts it, "I think people need change. Evolution, not change. The prospect of evolving along with the company is really appealing."

For Hideo Daikoku, the R&D engineer, that prospect is already a reality. In his job, he says, "I get to have some autonomy and creative control over the things I do. I can devote time to explore new topics that are related to the company's larger goals."

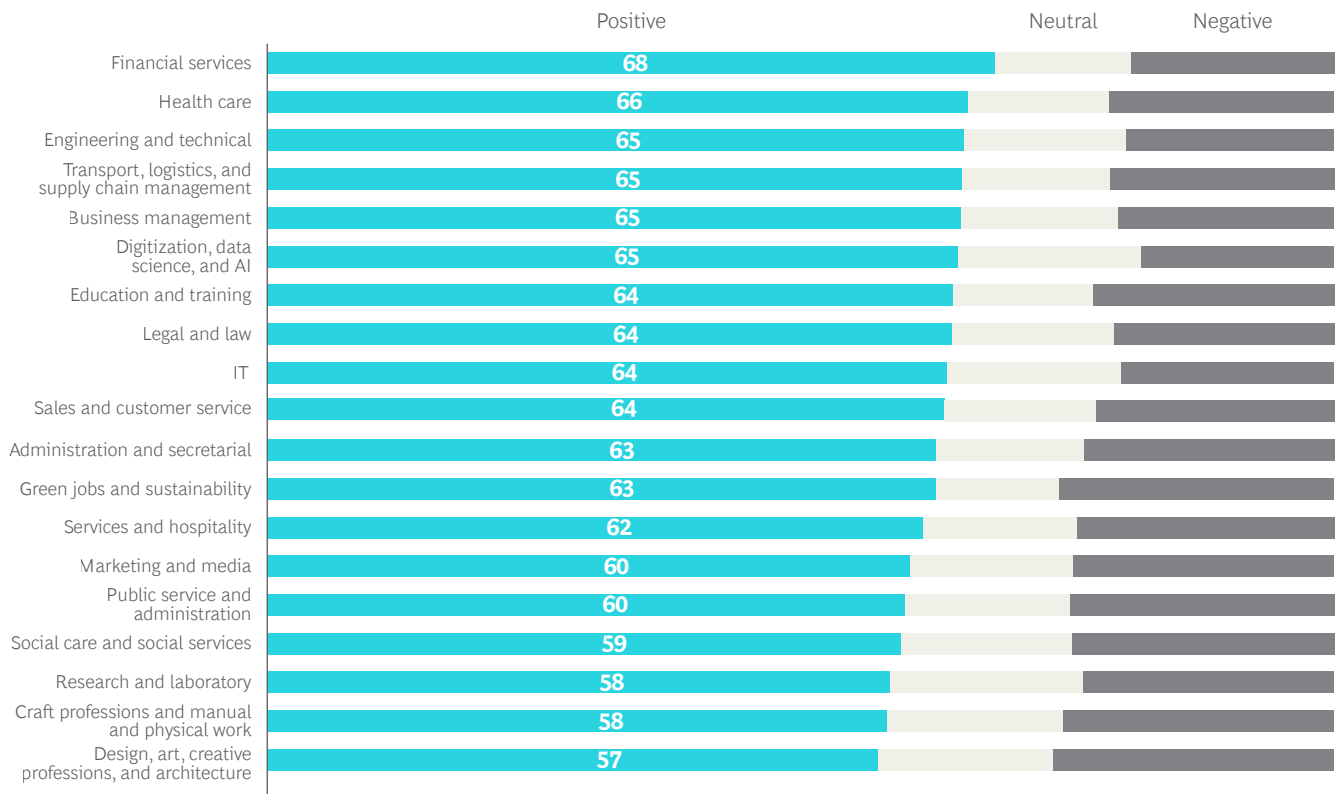
Of course, given talent's affinity for mobility, the quest for evolution often means looking for new job opportunities. Tomilola Abiodun offers this advice: "There are many companies out there, many opportunities, and lots of things that you can do to make a difference. To think that you are stuck in a specific path or role would be a myopic view."

Employers that can meet the evolving expectations of the workforce will gain a critical advantage in attracting and retaining talent in the highly mobile global labor market.

Appendices

Appendix 1 - Confidence and Being Approached with Offers, by Job

Respondents' perception of their negotiating position (%)



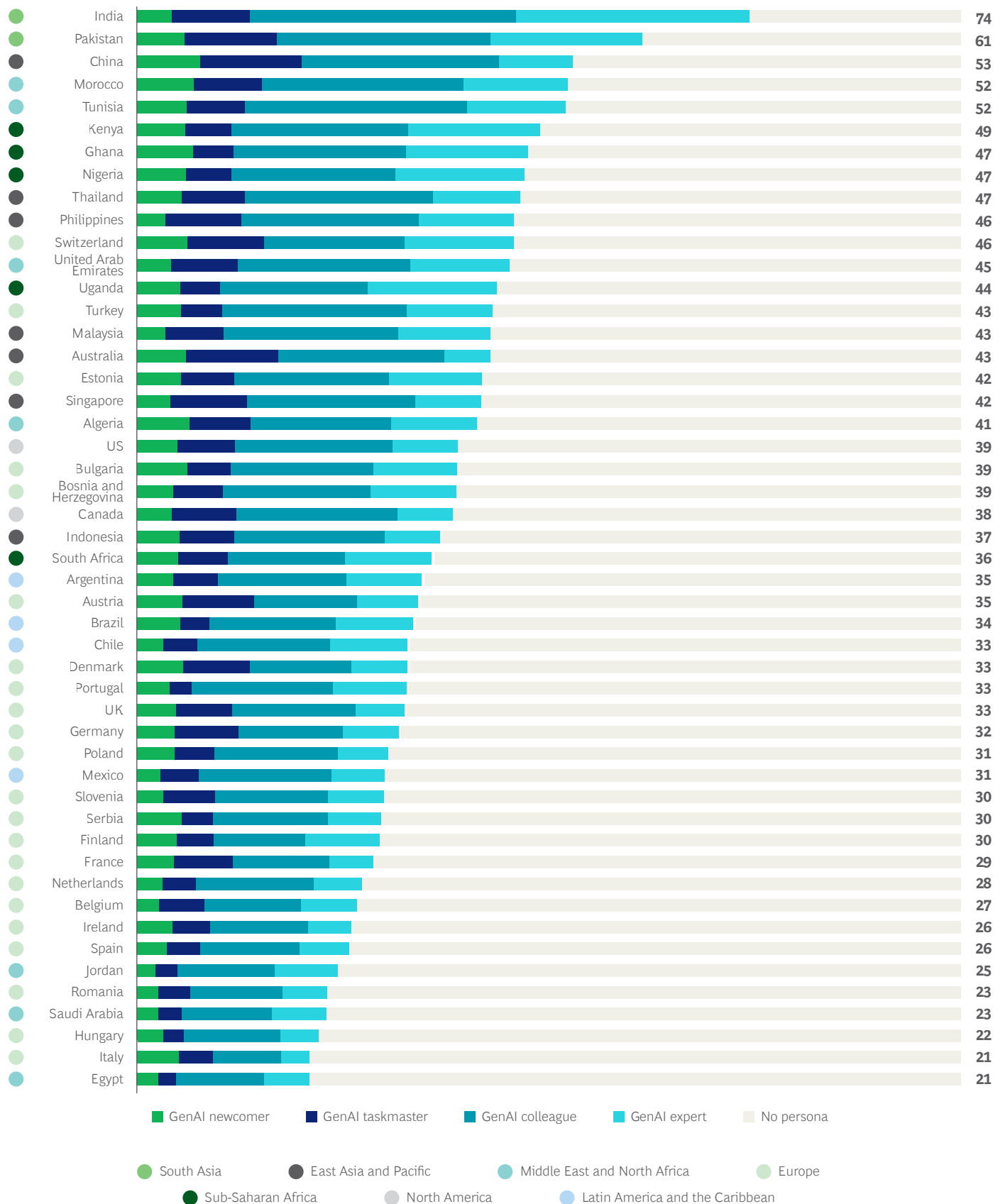
Respondents who say that they are approached regarding a job opportunity at least a few times per year (%)



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Appendix 2 - Regular Use of GenAI and Large Shares of GenAI Experts and Colleagues Are More Prominent in Developing Countries

Respondents who use GenAI regularly (%)

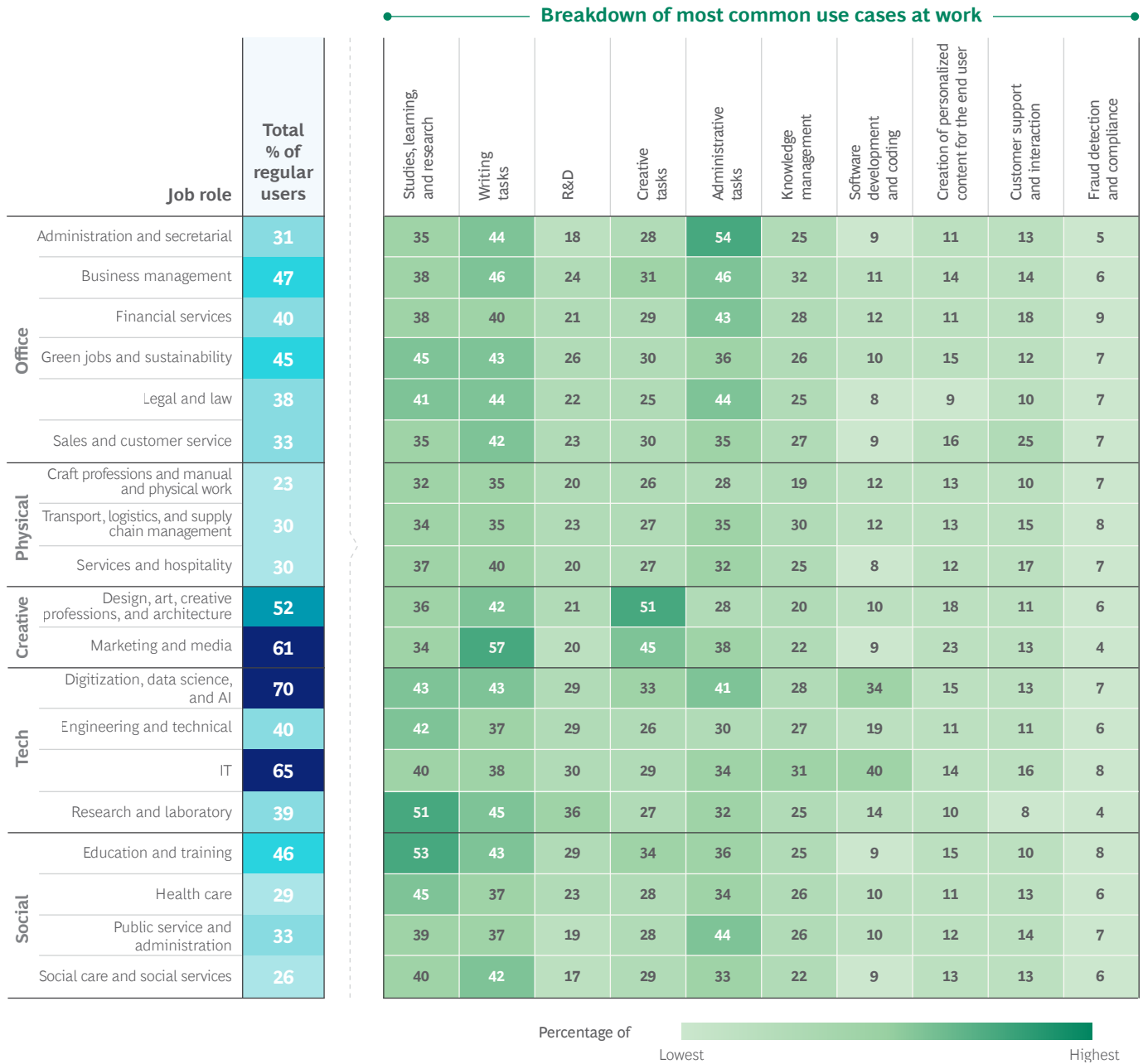


Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

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.

Appendix 3 - Work Use Differs Across Professions

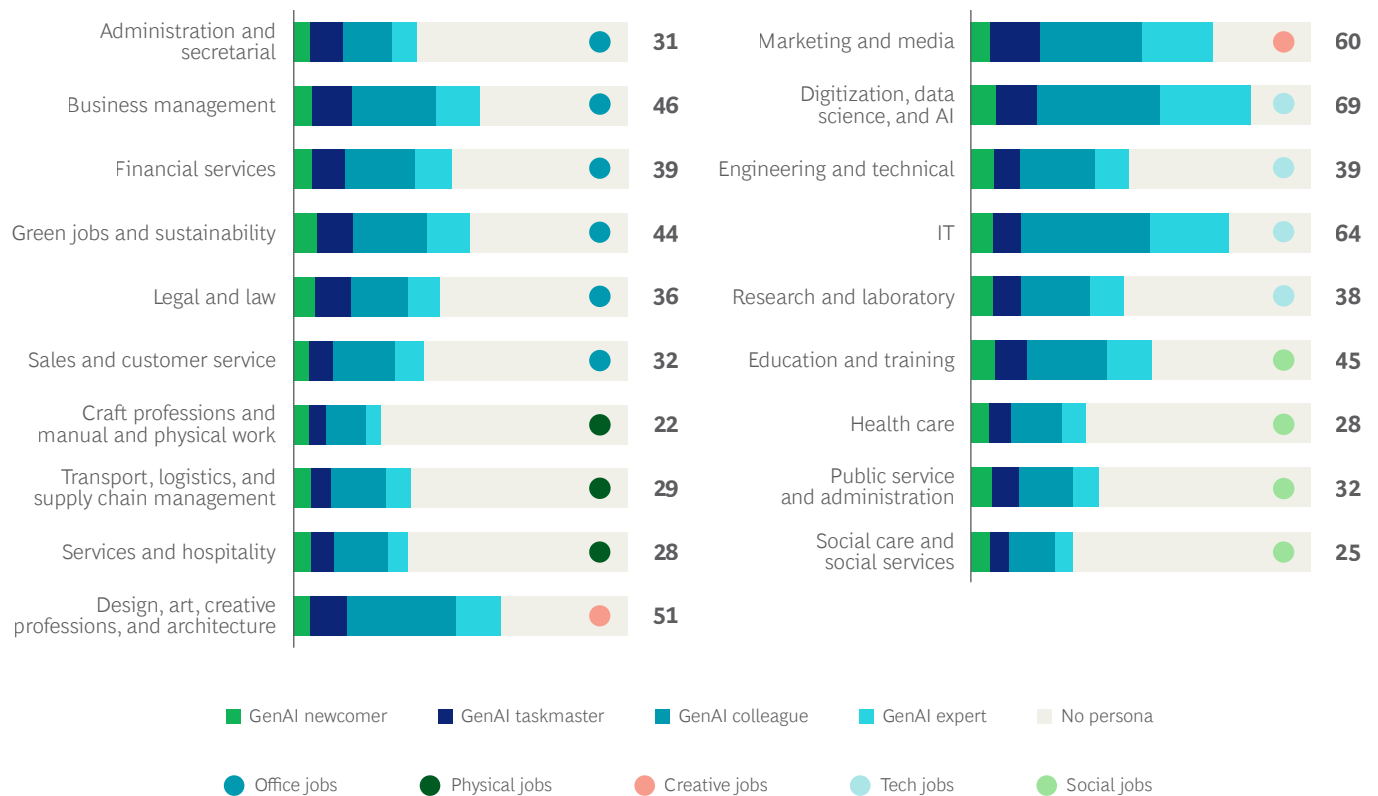
Use cases for respondents who use GenAI regularly for work (%)



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Appendix 4 - GenAI Personas Across Professions

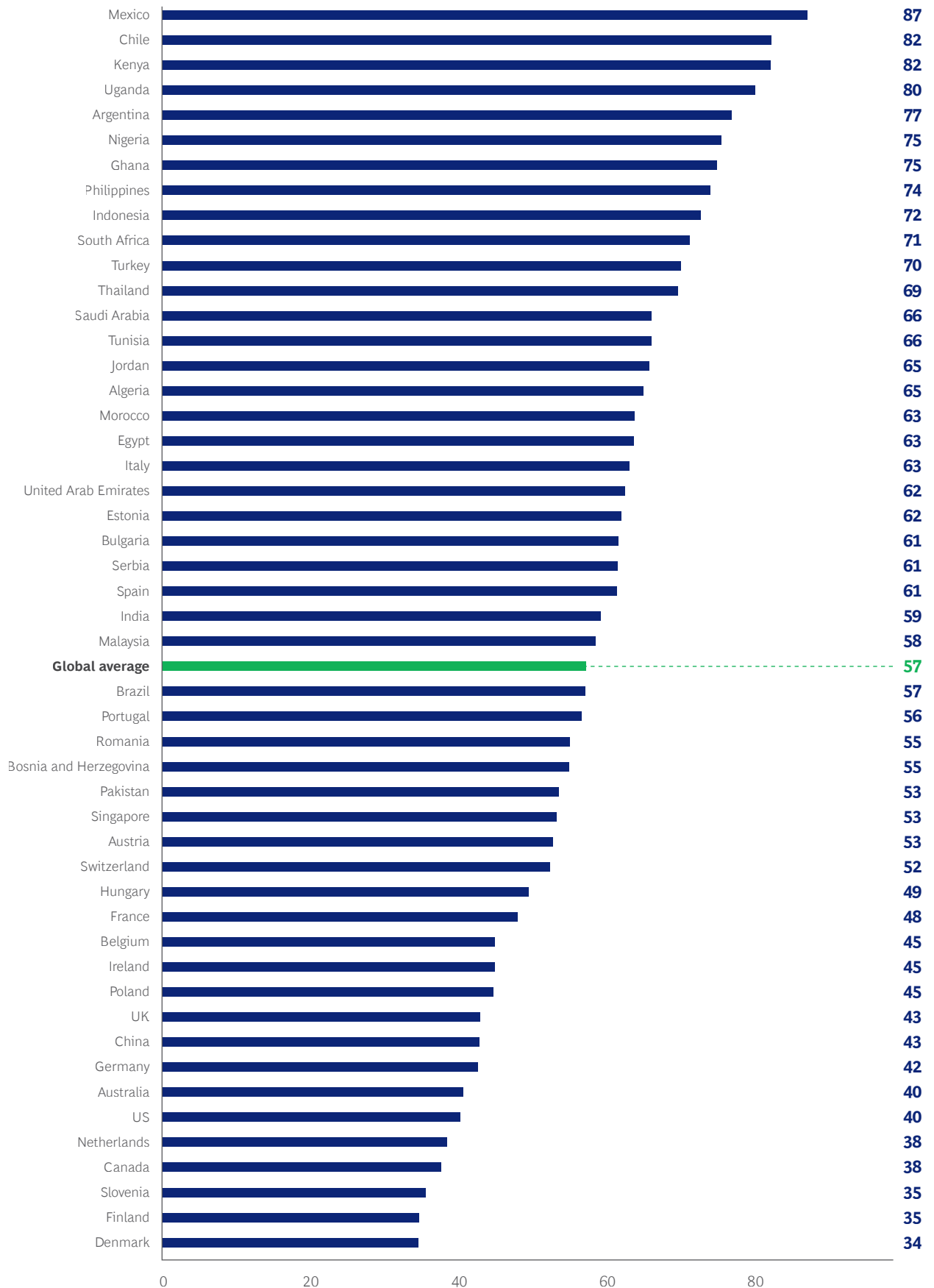
Respondents who use GenAI regularly, by profession and persona (%)



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Appendix 5 - The Appetite for Reskilling Is Generally High but Varies by Country

Respondents willing to reskill to stay competitive (%)



Source: BCG/The Network/The Stepstone Group proprietary web survey (conducted Q4 2023) and analysis.

Note: Data is for countries with at least 250 respondents. Countries appear in order by percentage answering “Yes, in any case” to the question “Are you willing to re-train to stay competitive?”

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The Network is a global alliance of more than 60 leading recruitment websites, committed to finding the best talent in over 130 countries. Founded in 2002, The Network has become the global leader in online recruitment, serving more than 2,000 global corporations. We offer these corporations a single point of contact in their home countries, and allow them to work in a single currency and with a single contract—while giving them access to a global workforce. The recruitment websites in The Network attract almost 200 million unique visitors each month. For more information, please visit www.the-network.com.

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