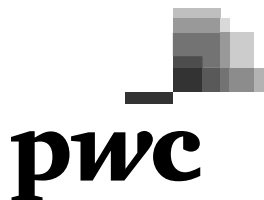strategy&

Katzenbach Center 2018 Global Culture Survey

Survey Response Readout – Europe focus

&

pwc

Executive Summary (1/3)

- **More than 2,000** respondents to the global survey, including 269 from **Europe**

- While **Europe confirms culture global trends**, somewhere with **less emphasis, potential to raise awareness on the power of culture** and help **making it more tangible** in execution

- In particular, Europe shows slightly minor respondents than global survey who agree that:
  - Culture is more important than strategy or operating model (**57%** vs **65%** globally) [*]
  - …is an important topic on agenda of company's senior leadership (**52%** vs **61**% globally)
  - …is a strong reason people join their organization (**53%** vs **60**% globally) [**]
  - …and why people leave their organization (**41%** vs **44**% globally)

- However, Europeans do show a desire for **Culture & Change** (with higher proportion of respondents saying that change in company culture was highly needed) and wish their organization Culture should further evolve and become :
  - **More collaborative** (**16%** vs. **12%** globally)
  - **More digitally savvy** (**12%** vs. **9%** globally)

Executive Summary (2/3)

- Compared to global survey, European respondents **show less attachment to their organization** and milder view on culture being a source of:

  - **PRIDE: 67%** either agree or strongly agree that they feel proud to be part of their organization versus 73% global

  - **REASON TO JOIN: 53%** either agree or strongly agree that culture is a strong reason people join their organization versus 60% global

  - **CONSISTENCY: 49%** either agree or strongly agree that the way people act every day in their organization is consistent with what they say about their culture, versus 52% global

- In general, Europe sees **Culture & Change** coming **more from outside-in** events than inside ones:

  - **Larger proportion** (**17%** vs. **14%** global) **coming from transaction / financial event (M&A)**

  - Lesser proportion (**21%** vs. **24%** global) indicating Change coming from "realization culture was our asset and need to make it better" or "culture was getting in the way of execution"

- On the topic of pursuing incremental improvements instead of revolutionary changes, 79% of **Europeans stand for the small safe increments**, versus 71% globally

- Europeans are no clear on how culture change into day-to-day activities 36% of versus 24% globally

- From the European point of view, **is more important to be collaborative than digitally savvy** …although vast majority (77%) of Europeans struggle or even avoid to adopt new technologies (such as robotics and AI)
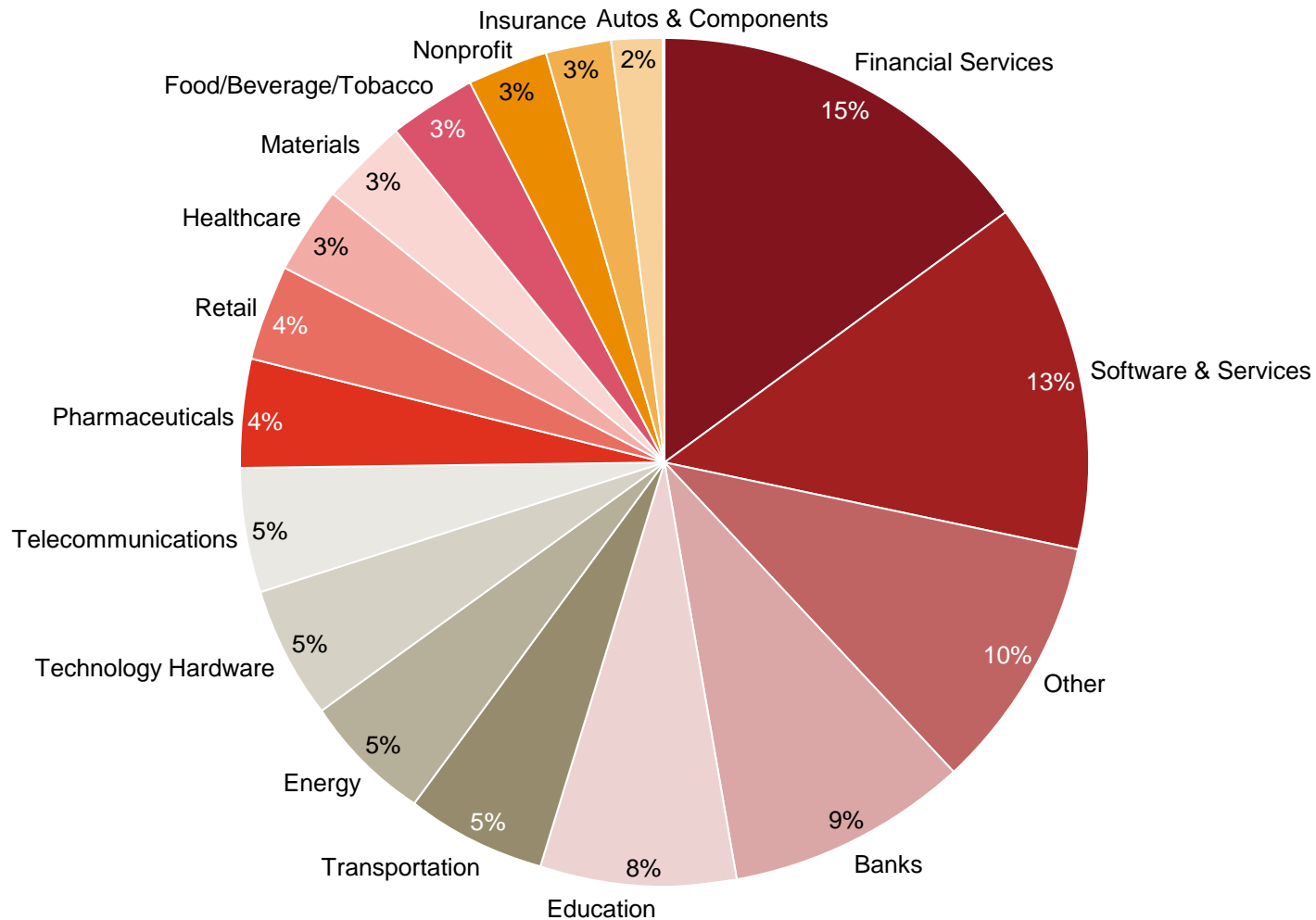
Executive Summary (3/3)

- **Overall European figures of Culture Importance are lower than Global ones at different level of the pyramid**
  - top executives & board (65% Global vs 63% Europe on average)
  - non managers (45% Global vs 41% Europe)

- **Top-level employees have a stronger belief in culture relevance within the organization**
  - +70% top executives value culture as important topic in their agenda (~60% is average)
  - +60% top executives believe the way people behave is linked to culture (~50% is average)

- **In Europe, top executives & board are less hierarchical** (~36% of respondents vs 59% Global average) **and less risk-averse** (39% of respondents vs 62% Global average)

- **Across Europe Transportation and Automotive Components stand out for**
  - **a spike** in belief **of culture relevance** within the organization (78% vs 65% Global average)
  - considerable tendency towards being risk avers and following processes (76% & 72% vs 62% & 61% of Global average)

- At the opposite end of the spectrum lie Software & Services and Tech & Hardware which revolve around 10% below average on the same dimensions

As a refresher, this year's Global Culture Survey included five key categories

Category	Description
1 **Demographics**	• Country, Industry, Size, Age of Organization, Function Affiliation, Level within Organization, Revenue Growth
2 **Role of Culture**	• General questions gauging perceptions about culture in the organization
3 **Cultural Thumbprint**	• Culture thumbprint questions • Included question on what the organization is strong in (e.g., customer-centricity, diversity) • Included free-text question to describe organization's culture in one word
4 **Culture Evolution**	• Questions gauging perceptions about whether or not the organization's culture has evolved (including why or why not) • Included question on strategic aspirations for the organization
5 **Future of Work and Culture**	• Question measuring opinion on which of the four "worlds" from Workplace of the Future is most likely • Question on readiness to embrace new technologies

The plurality of European respondents work in Financial Services and Software companies

Distribution of European Respondents by Industry

Insurance — 3%
Autos & Components — 2%
Nonprofit — 3%
Food/Beverage/Tobacco — 3%
Materials — 3%
Healthcare — 3%
Retail — 4%
Pharmaceuticals — 4%
Telecommunications — 5%
Technology Hardware — 5%
Energy — 5%
Transportation — 5%
Education — 8%
Banks — 9%
Other — 10%
Software & Services — 13%
Financial Services — 15%

Additional demographic data on European respondents

Org Size

Not applicable/I don't know — 11%
$500M-1B — 8%
$1-10B — 16%
$10B and higher — 16%
$0-500M — 48%

Org Age

Less than 3 years — 8%
3-10 years old — 10%
11-20 years old — 18%
21-50 years old — 21%
More than 50 years — 42%

Revenue Growth

Prefer not to answer — 5%
I don't know — 9%
Slower — 13%
Pretty much the same — 39%
Faster — 33%

Function Affiliation

IT — 4%
R&D/PD/Engineering — 8%
Sales — 6%
Marketing — 6%
Finance — 14%
Other — 18%
HR — 16%
Executive/BU Leader — 28%

Level within Org

Member of the board — 11%
C-Suite (CFO, CIO, CTO, etc.) — 10%
Non-management — 24%
VP/Director — 23%
Manager — 32%
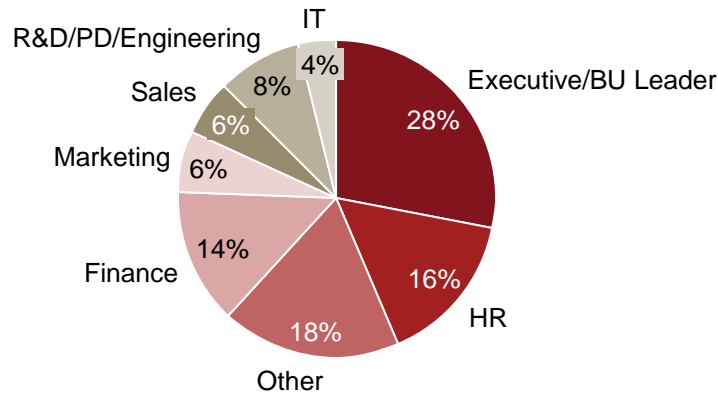
Breakdown of global responses in Role of Culture section

Role of Culture Response Breakdown – Global

65%	**… either agree or strongly agree that culture is more important than strategy or operating model**

61%	**… either agree or strongly agree that culture is an important topic on the agenda of their company's senior leadership**

60%	**… either agree or strongly agree that culture is a strong reason people join their organization**

44%	**… either agree or strongly agree that culture is a strong reason people leave their organization**

52%	**… either agree or strongly agree that the way people act every day in their organization is consistent with what they like to say about their culture**

73%	**… either agree or strongly agree that they feel proud to be part of their organization**

52%	**… either agree or strongly agree that way things get done in their organization, the real chain of command, is consistent with what's on the formal organization chart**

Breakdown of European responses in Role of Culture section

Role of Culture Response Breakdown – Europe

All responses within 10% global response rate

| 57% | … either agree or strongly agree that culture is more important than strategy or operating model |

| 52% | … either agree or strongly agree that culture is an important topic on the agenda of their company's senior leadership |

| 53% | … either agree or strongly agree that culture is a strong reason people join their organization |

| 41% | … either agree or strongly agree that culture is a strong reason people leave their organization |

| 49% | … either agree or strongly agree that the way people act every day in their organization is consistent with what they like to say about their culture |

| 67% | … either agree or strongly agree that they feel proud to be part of their organization |

| 47% | … either agree or strongly agree that way things get done in their organization, the real chain of command, is consistent with what's on the formal organization chart |

Difference of >10% from global response rate

Europe is less aware of the importance of culture vs. global

	Global 🌍	Europe	N.A.	Japan	China	Australia
… either agree or strongly agree that culture is more important than strategy or operating model	65%	57%	65%	76%	60%	67%
… either agree or strongly agree that culture is an important topic on the agenda of their company's senior leadership	61%	52%	61%	87%	60%	73%
… either agree or strongly agree that culture is a strong reason people join their organization	60%	53%	65%	80%	60%	69%
… either agree or strongly agree that the way things get done, is consistent with what's on the organization chart	52%	47%	48%	65%	60%	49%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

Eastern/Southern EU countries are more skeptical about culture

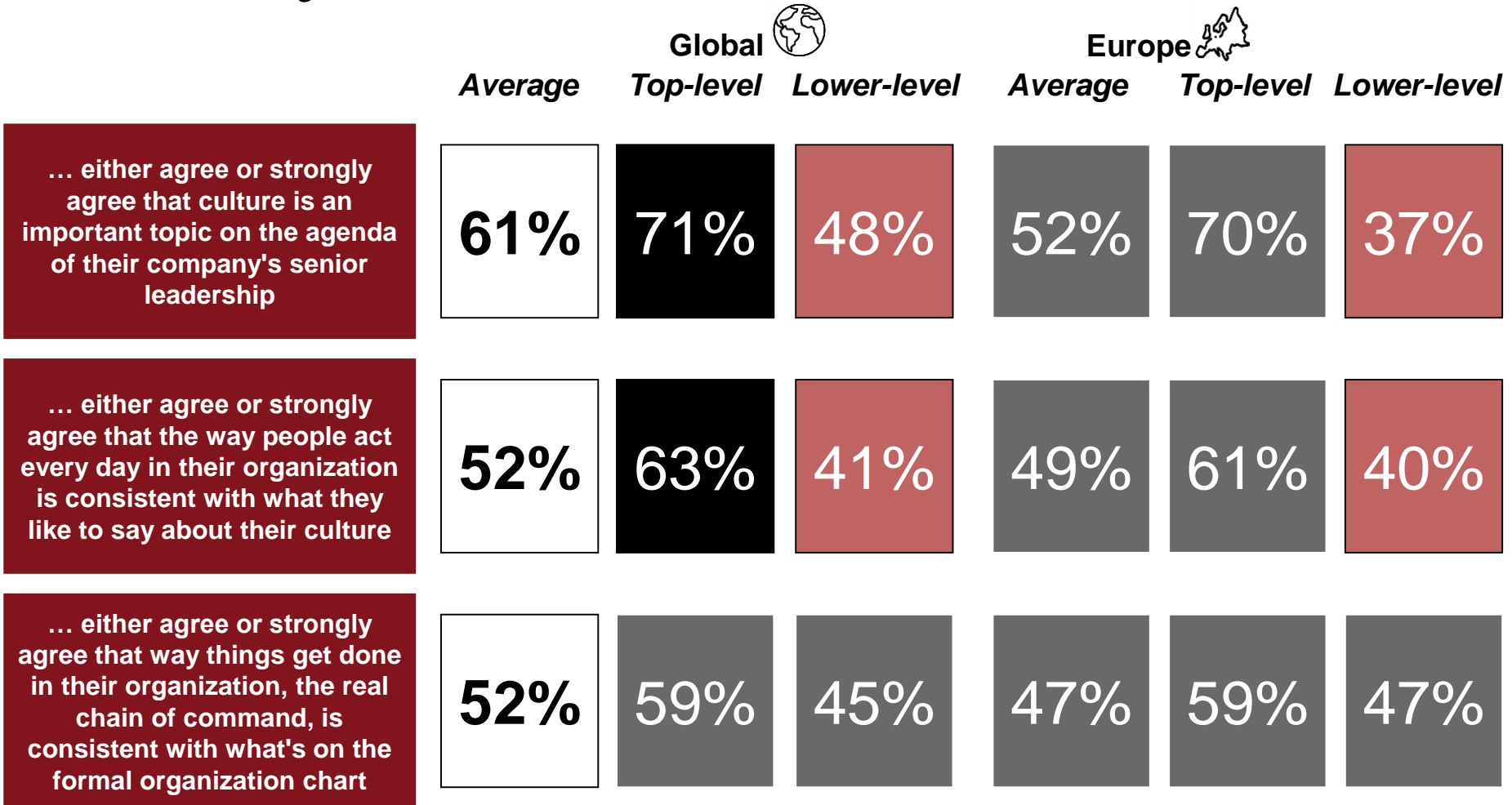|	Global	Europe	Germany & Swiss	UK	Spain & Italy	Poland & Czech	France & Netherlands
… either agree or strongly agree that culture is more important than strategy or operating model	**65%**	57%	63%	55%	65%	50%	41%
… either agree or strongly agree that culture is an important topic on the agenda of their company's senior leadership	**61%**	52%	51%	61%	46%	62%	50%
… either agree or strongly agree that culture is a strong reason people join their organization	**60%**	53%	60%	56%	42%	38%	73%
… either agree or strongly agree that the way things get done, is consistent with what's on the organization chart	**52%**	47%	49%	58%	46%	23%	55%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

Overall, top-level employees belief in culture impact is higher than that of lower-level

	Global 🌐			**Europe**		
	Average	*Top-level*	*Lower-level*	*Average*	*Top-level*	*Lower-level*
… either agree or strongly agree that culture is an important topic on the agenda of their company's senior leadership	**61%**	71%	48%	52%	70%	37%
… either agree or strongly agree that the way people act every day in their organization is consistent with what they like to say about their culture	**52%**	63%	41%	49%	61%	40%
… either agree or strongly agree that way things get done in their organization, the real chain of command, is consistent with what's on the formal organization chart	**52%**	59%	45%	47%	59%	47%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

Transportation industry respondents give strong role to culture

...

	Global	FS & Banks	Sw & Service Tech & Hw	Education	Transportation & Components
… either agree or strongly agree that culture is more important than strategy or operating model	**65%**	66%	59%	71%	75%
… either agree or strongly agree that culture is an important topic on the agenda of their company's senior leadership	**61%**	64%	67%	46%	59%
… either agree or strongly agree that culture is a strong reason people join their organization	**60%**	59%	58%	62%	71%
… either agree or strongly agree that the way things get done, is consistent with what's on the organization chart	**47%**	54%	57%	46%	52%

Difference of >10% (Negative) from global response rate

Difference of >10% (Positive) from global response rate

... confirmed at European level, compared to FS & Tech

	Global	Europe	FS & Banks	Sw & Service Tech & Hw	Education	Transportation & Components
... either agree or strongly agree that culture is more important than strategy or operating model	**65%**	57%	53%	52%	61%	78%
... either agree or strongly agree that culture is an important topic on the agenda of their company's senior leadership	**61%**	52%	62%	70%	22%	50%
... either agree or strongly agree that culture is a strong reason people join their organization	**60%**	53%	50%	61%	61%	67%
... either agree or strongly agree that the way things get done, is consistent with what's on the organization chart	**47%**	52%	52%	59%	39%	50%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

C-suite and Board members show higher belief in culture

	Global	Europe	C-Suite	Board Members	Managers	Non Managers
… either agree or strongly agree that culture is more important than strategy or operating model	**65%**	57%	59%	59%	56%	58%
… either agree or strongly agree that culture is an important topic on the agenda of their company's senior leadership	**61%**	52%	70%	69%	51%	37%
… either agree or strongly agree that culture is a strong reason people join their organization	**60%**	53%	81%	69%	46%	44%
… either agree or strongly agree that the way things get done, is consistent with what's on the organization chart	**47%**	52%	56%	66%	46%	40%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

The most common global response to "Describe your organization's culture in one word" was "collaborative"

Word Cloud for "Describe Your Organization's Culture in One Word" – Global

However, European responses differ in being perceived more conservative/bureaucratic yet inclusive and open

Word Cloud for "Describe Your Organization's Culture in One Word" – Europe

European organizations perceived more conservative and bureaucratic yet more of a "family", open and inclusive

There was a generally diverse array of global responses to the question asking participants to evaluate org. strengths

My organization is particularly strong in… (Select up to three) – Global
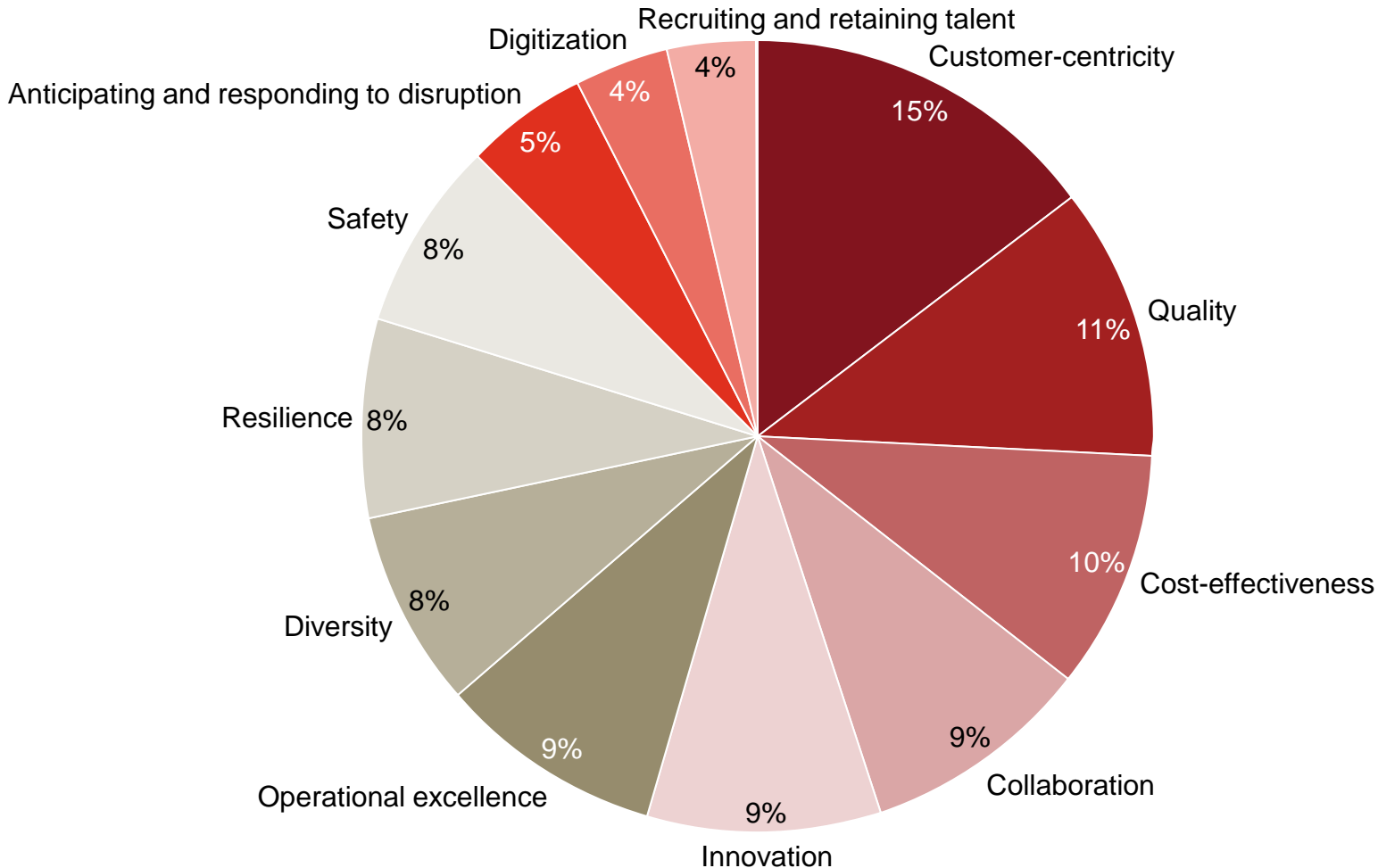
Among European respondents, there was a slightly greater emphasis on customer-centricity, quality, and innovation

My organization is particularly strong in… (Select up to three) – Europe
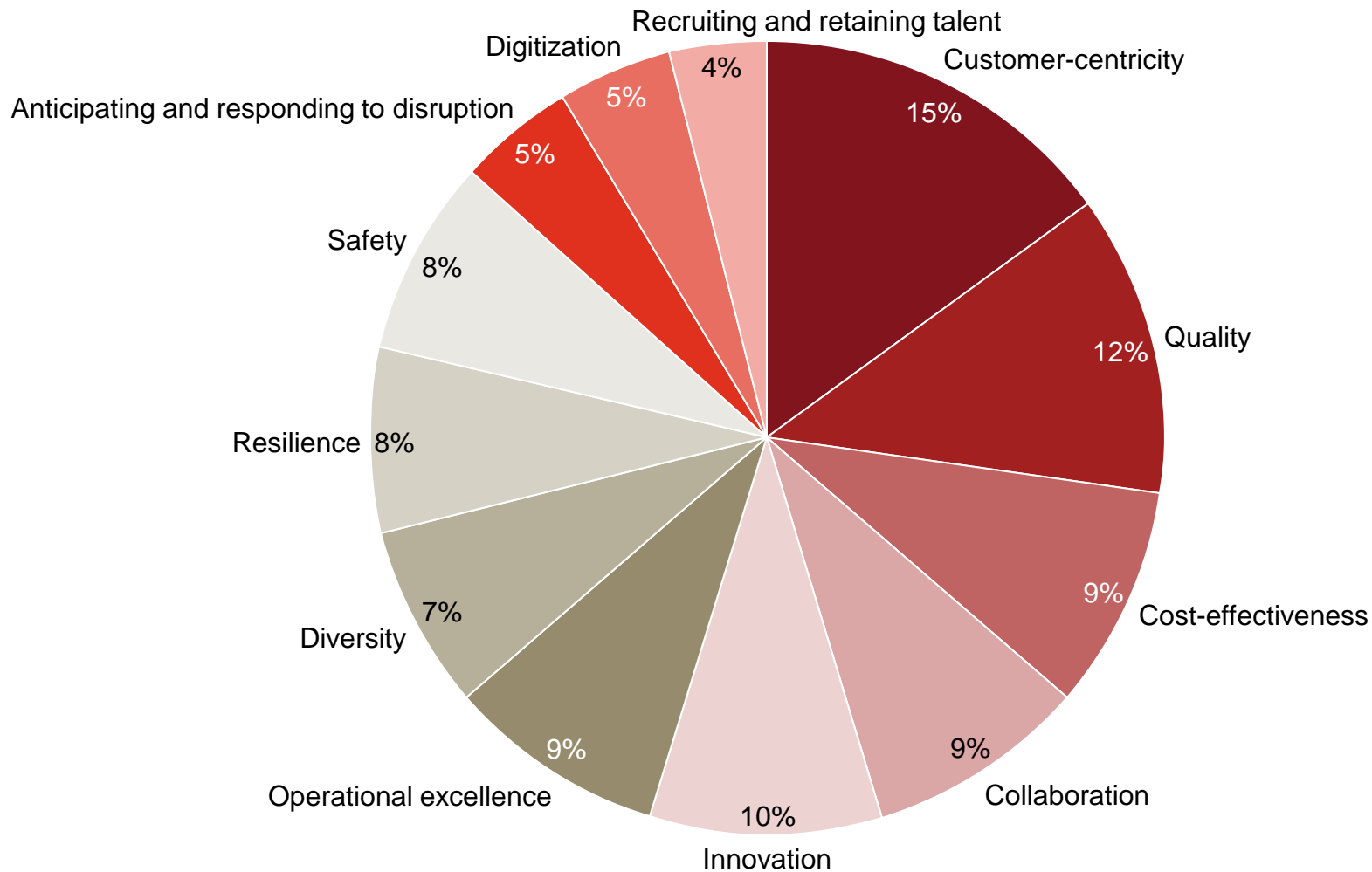
Breakdown of global responses to Cultural Thumbprint questions

57% …make decisions via consensus (versus having single points of accountability)	**59%** …value levels and titles (versus being flat and non-hierarchical)	**68%** …fix problems as they appear (versus preventing problems before they arise)
60% …focus on external customers (versus focusing on internal operations)	**62%** …are risk-averse (versus being comfortable with risk)	**54%** …focus mostly on financial metrics (versus broader performance measures)
55% …stress team performance (versus stressing individual performance)	**61%** …follow set processes (versus encouraging improvisation)	**62%** …have a lean mentality (versus having an abundance mentality)
57% …value depth of knowledge (versus valuing breadth of knowledge)	**71%** …pursue small, incremental improvements (versus pursuing large, revolutionary change)	**66%** …are polite and cordial in their interactions (versus accepting conflict in their interactions)

Breakdown of European responses to Cultural Thumbprint questions

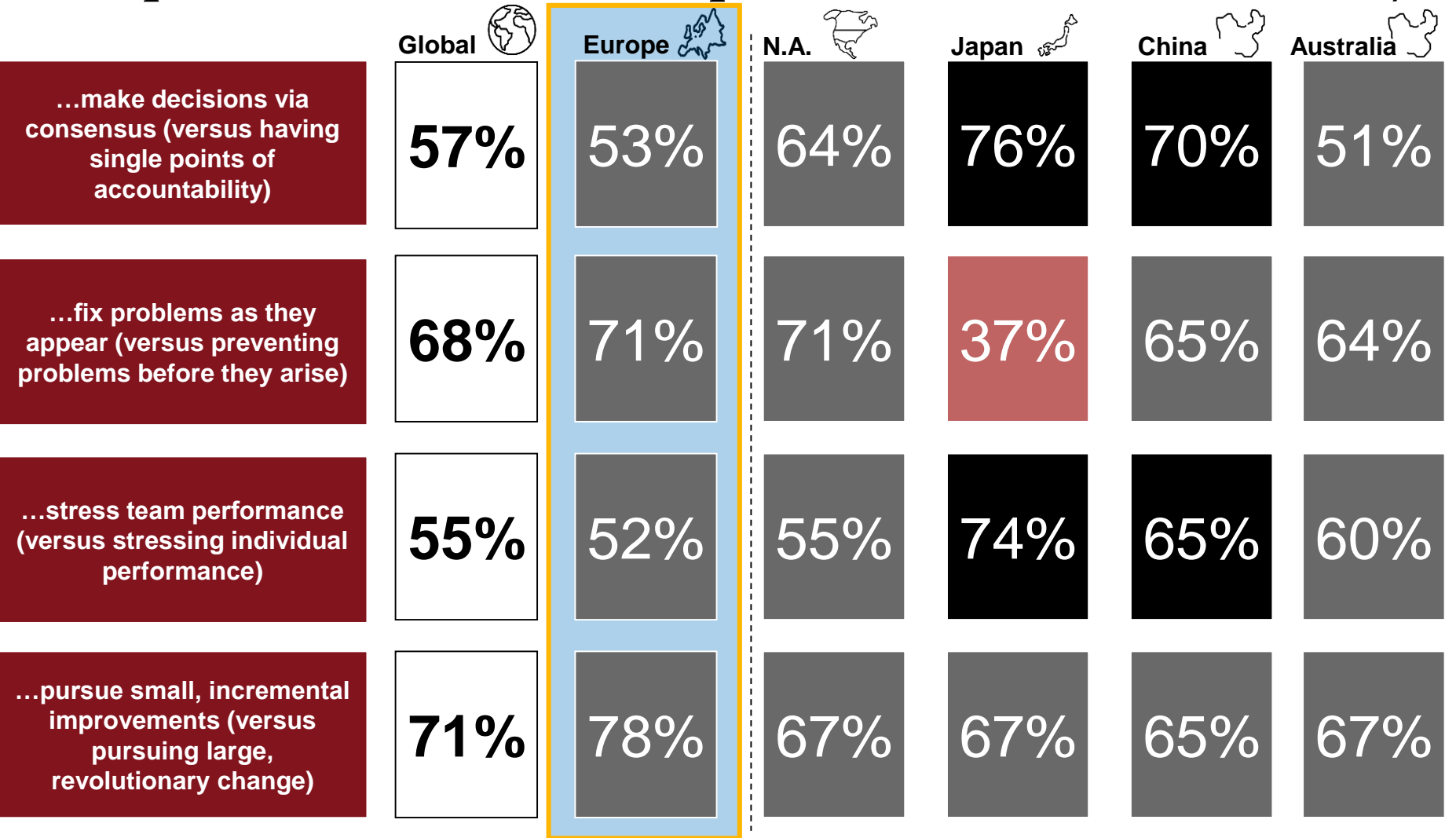|	
53%	...make decisions via consensus (versus having single points of accountability)
63%	...value levels and titles (versus being flat and non-hierarchical)
71%	...fix problems as they appear (versus preventing problems before they arise)
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52%	...stress team performance (versus stressing individual performance)
62%	...follow set processes (versus encouraging improvisation)
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57%	...value depth of knowledge (versus valuing breadth of knowledge)
78%	...pursue small, incremental improvements (versus pursuing large, revolutionary change)
65%	...are polite and cordial in their interactions (versus accepting conflict in their interactions)

All responses within 10% global response rate

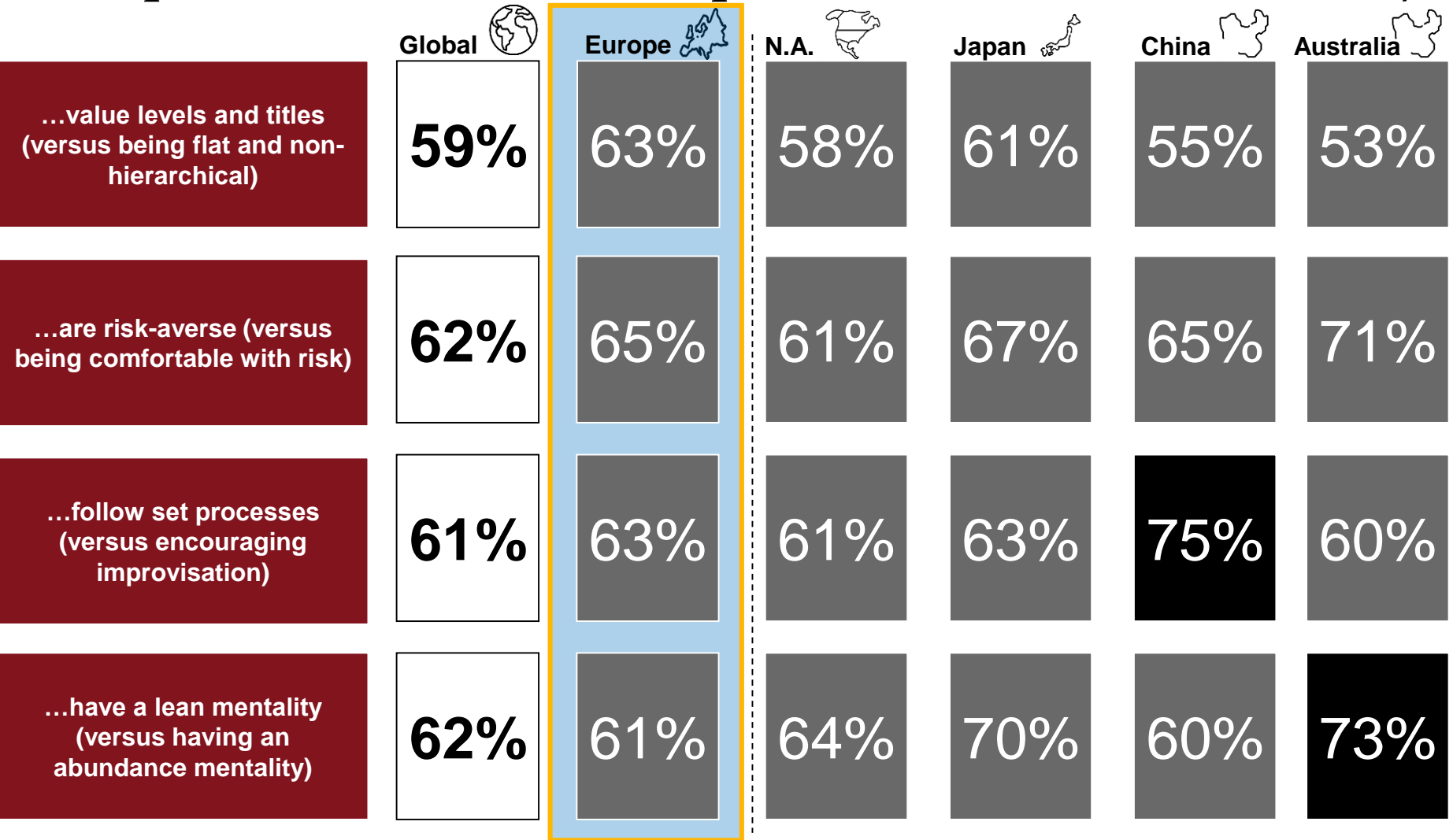Difference of >10% from global response rate

Responses to Cultural Thumbprint: international scenario (1/2)

	Global	Europe	N.A.	Japan	China	Australia
…make decisions via consensus (versus having single points of accountability)	57%	53%	64%	76%	70%	51%
…fix problems as they appear (versus preventing problems before they arise)	68%	71%	71%	37%	65%	64%
…stress team performance (versus stressing individual performance)	55%	52%	55%	74%	65%	60%
…pursue small, incremental improvements (versus pursuing large, revolutionary change)	71%	78%	67%	67%	65%	67%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

EDITED

Responses to Cultural Thumbprint: international scenario (2/2)

	Global	Europe	N.A.	Japan	China	Australia
…value levels and titles (versus being flat and non-hierarchical)	**59%**	63%	58%	61%	55%	53%
…are risk-averse (versus being comfortable with risk)	**62%**	65%	61%	67%	65%	71%
…follow set processes (versus encouraging improvisation)	**61%**	63%	61%	63%	75%	60%
…have a lean mentality (versus having an abundance mentality)	**62%**	61%	64%	70%	60%	73%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

EDITED

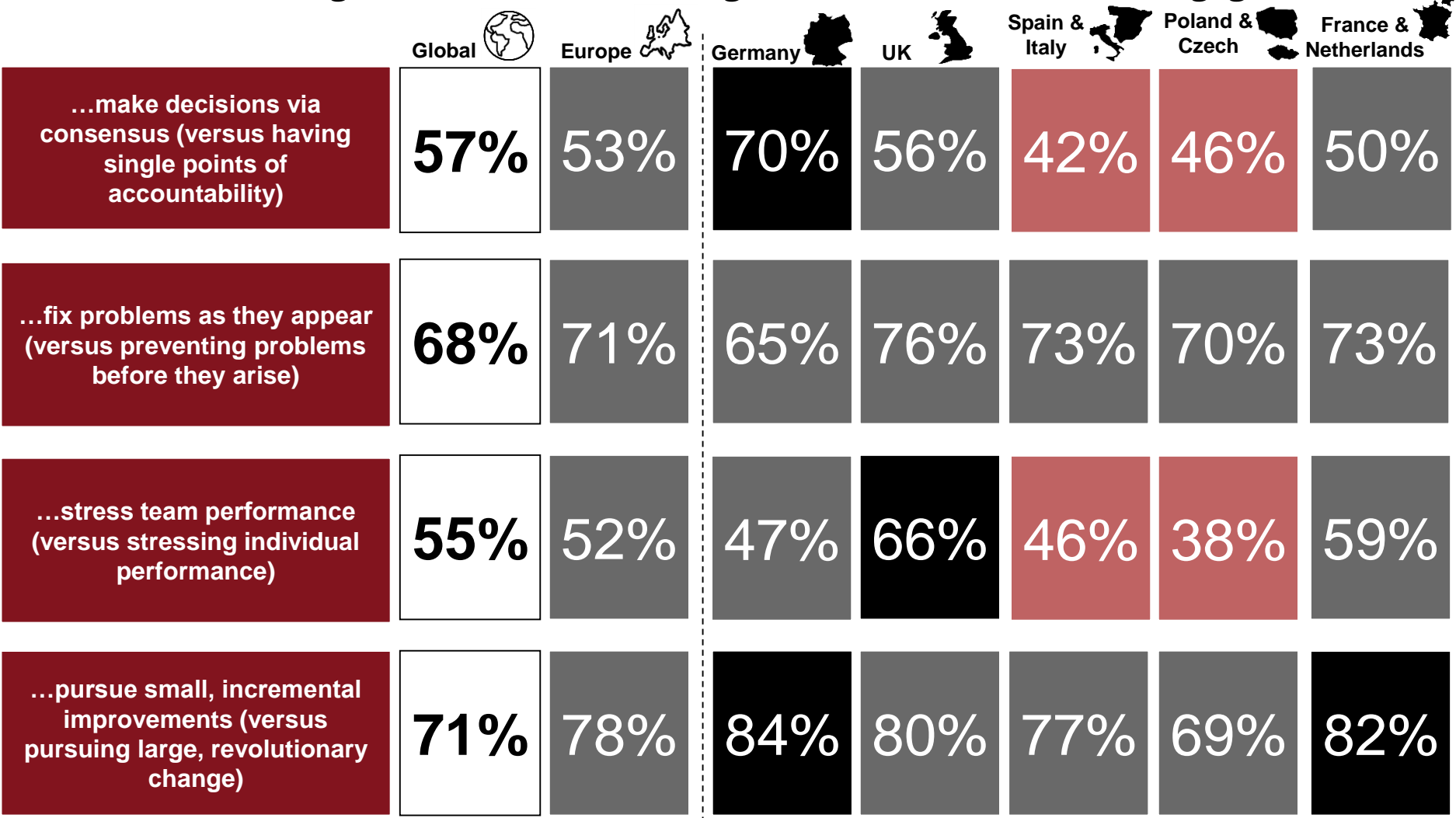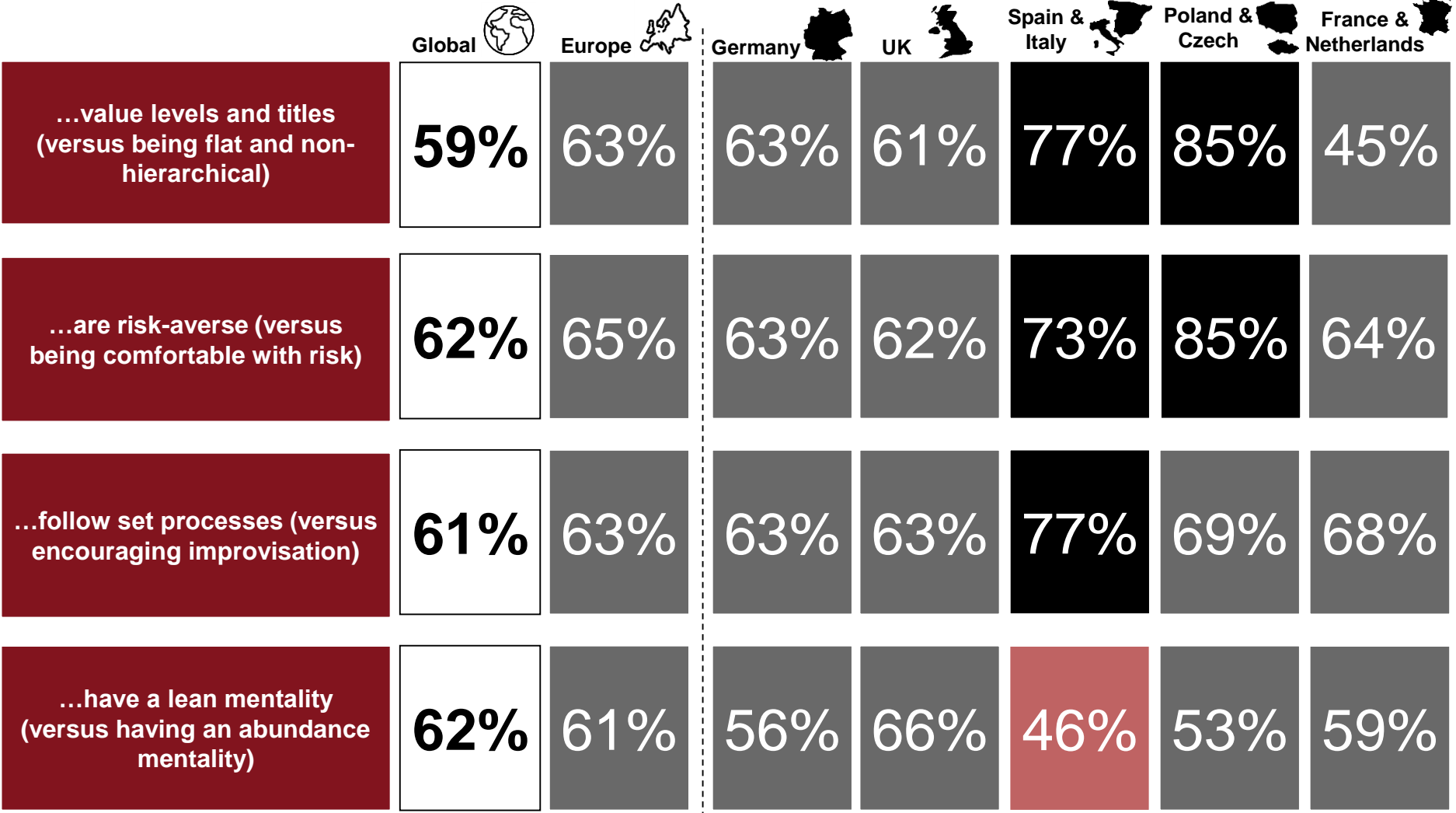# *Individuality is valued more by EU countries than by global*

	Global 🌍	Europe	Germany	UK	Spain & Italy	Poland & Czech	France & Netherlands
…make decisions via consensus (versus having single points of accountability)	57%	53%	70%	56%	42%	46%	50%
…fix problems as they appear (versus preventing problems before they arise)	68%	71%	65%	76%	73%	70%	73%
…stress team performance (versus stressing individual performance)	55%	52%	47%	66%	46%	38%	59%
…pursue small, incremental improvements (versus pursuing large, revolutionary change)	71%	78%	84%	80%	77%	69%	82%

Difference of >10% (Negative) from global response rate
Difference of >10% (Positive) from global response rate

Spain & Italy are more hierarchical and risk-averse than others

	Global	Europe	Germany	UK	Spain & Italy	Poland & Czech	France & Netherlands
…value levels and titles (versus being flat and non-hierarchical)	59%	63%	63%	61%	77%	85%	45%
…are risk-averse (versus being comfortable with risk)	62%	65%	63%	62%	73%	85%	64%
…follow set processes (versus encouraging improvisation)	61%	63%	63%	63%	77%	69%	68%
…have a lean mentality (versus having an abundance mentality)	62%	61%	56%	66%	46%	53%	59%

Difference of >10% (Negative) from global response rate

Difference of >10% (Positive) from global response rate

Education pursues decision by consensus & structured approach

	Global	FS & Banks	Sw & Service Tech & Hw	Education	Transportation & Components
…make decisions via consensus (versus having single points of accountability)	**57%**	61%	51%	62%	48%
…fix problems as they appear (versus preventing problems before they arise)	**68%**	66%	68%	74%	71%
…stress team performance (versus stressing individual performance)	**55%**	54%	60%	52%	51%
…pursue small, incremental improvements (versus pursuing large, revolutionary change)	**71%**	74%	70%	75%	71%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

Transportation instead is more hierarchical and risk-averse

	Global	FS & Banks	Sw & Service Tech & Hw	Education	Transportation & Components
…value levels and titles (versus being flat and non-hierarchical)	**59%**	58%	49%	57%	75%
…are risk-averse (versus being comfortable with risk)	**62%**	63%	50%	65%	76%
…follow set processes (versus encouraging improvisation)	**61%**	67%	49%	65%	72%
…have a lean mentality (versus having an abundance mentality)	**62%**	64%	64%	52%	72%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

European results confirm the trend of Education industry …

	Global	Europe	FS & Banks	Sw & Service Tech & Hw	Education	Transportation & Components
…make decisions via consensus (versus having single points of accountability)	57%	53%	52%	50%	72%	33%
…fix problems as they appear (versus preventing problems before they arise)	68%	71%	62%	70%	72%	83%
…stress team performance (versus stressing individual performance)	55%	52%	50%	59%	56%	39%
…pursue small, incremental improvements (versus pursuing large, revolutionary change)	71%	78%	78%	61%	94%	78%

Difference of >10% (Negative) from global response rate

Difference of >10% (Positive) from global response rate

NEW

... as much as transportation one

	Global	Europe	FS & Banks	Sw & Service Tech & Hw	Education	Transportation & Components
...value levels and titles (versus being flat and non-hierarchical)	59%	63%	62%	52%	50%	83%
...are risk-averse (versus being comfortable with risk)	62%	65%	64%	45%	72%	78%
...follow set processes (versus encouraging improvisation)	61%	63%	62%	50%	78%	72%
...have a lean mentality (versus having an abundance mentality)	62%	61%	62%	57%	56%	72%

Difference of >10% (Negative) from global response rate   Difference of >10% (Positive) from global response rate

Consensus and teaming are stronger at top of pyramid in Europe

	Global	Europe	C-Suite	Board Members	Managers	Non Managers
…make decisions via consensus (versus having single points of accountability)	57%	53%	59%	55%	50%	42%
…fix problems as they appear (versus preventing problems before they arise)	68%	71%	63%	45%	79%	71%
…stress team performance (versus stressing individual performance)	55%	52%	59%	55%	51%	56%
…pursue small, incremental improvements (versus pursuing large, revolutionary change)	71%	78%	89%	69%	79%	73%

Difference of >10% (Negative) from global response rate

Difference of >10% (Positive) from global response rate

# *... while hierarchy and risk-aversion at lower-end*

	Global	Europe	C-Suite	Board Members	Managers	Non Managers
...value levels and titles (versus being flat and non-hierarchical)	59%	63%	33%	24%	72%	73%
...are risk-averse (versus being comfortable with risk)	62%	65%	41%	31%	66%	79%
...follow set processes (versus encouraging improvisation)	61%	63%	37%	41%	66%	69%
...have a lean mentality (versus having an abundance mentality)	62%	61%	70%	59%	56%	63%

Difference of >10% (Negative) from global response rate Difference of >10% (Positive) from global response rate

The majority of global respondents found that their organization's culture changed over the past five years

Has your organization's culture changed over the past five years? – Global
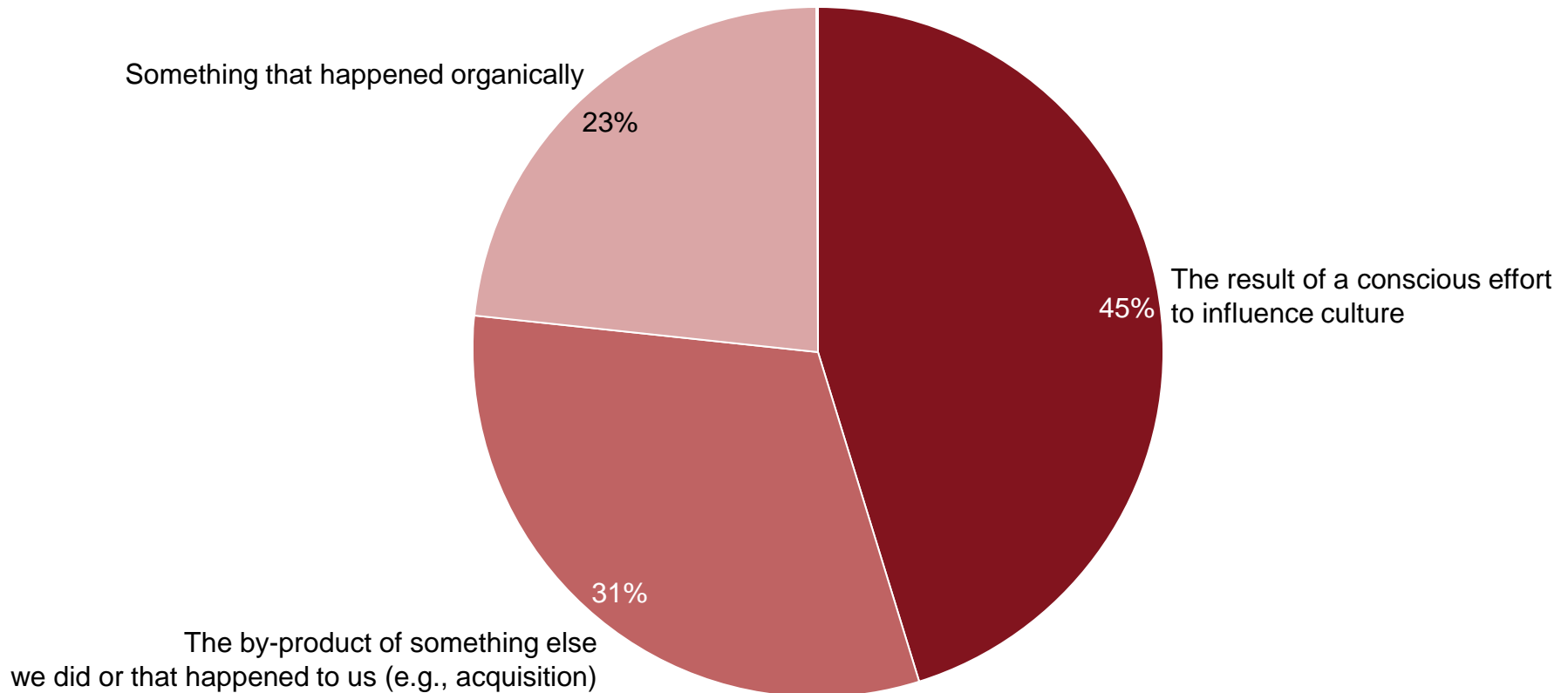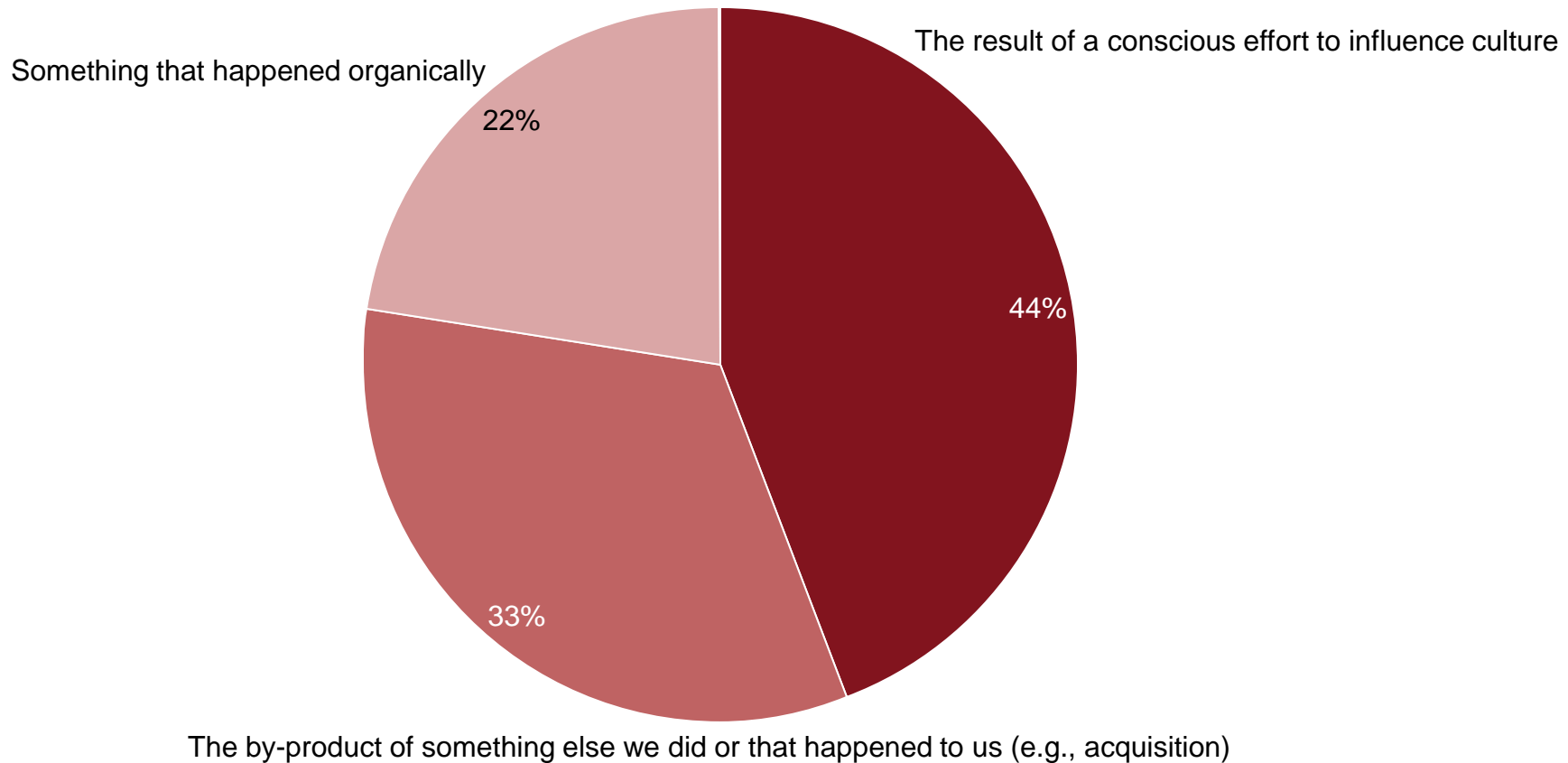

No 42%

58% Yes
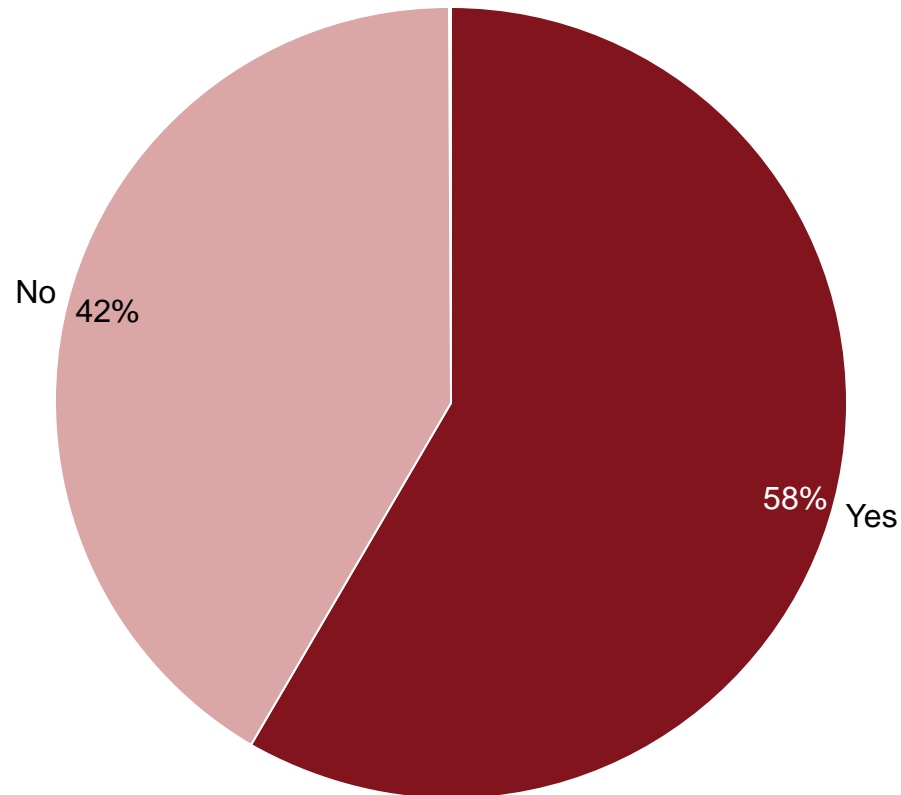
Similar majority of European respondents also found that their organization's culture changed over the past five years

Has your organization's culture changed over the past five years? – Europe

No 45%

55% Yes
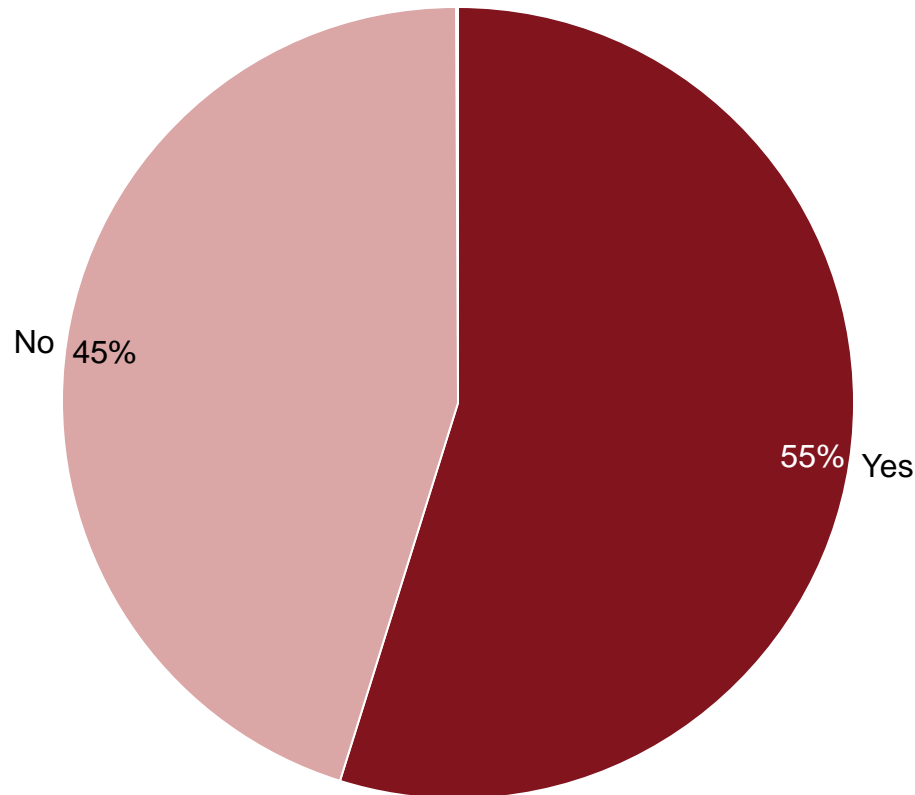
The plurality of global respondents who saw in change in culture reported that it was an intentional change

The change has been… – Global

Something that happened organically

23%

The result of a conscious effort
to influence culture

45%

31%

The by-product of something else
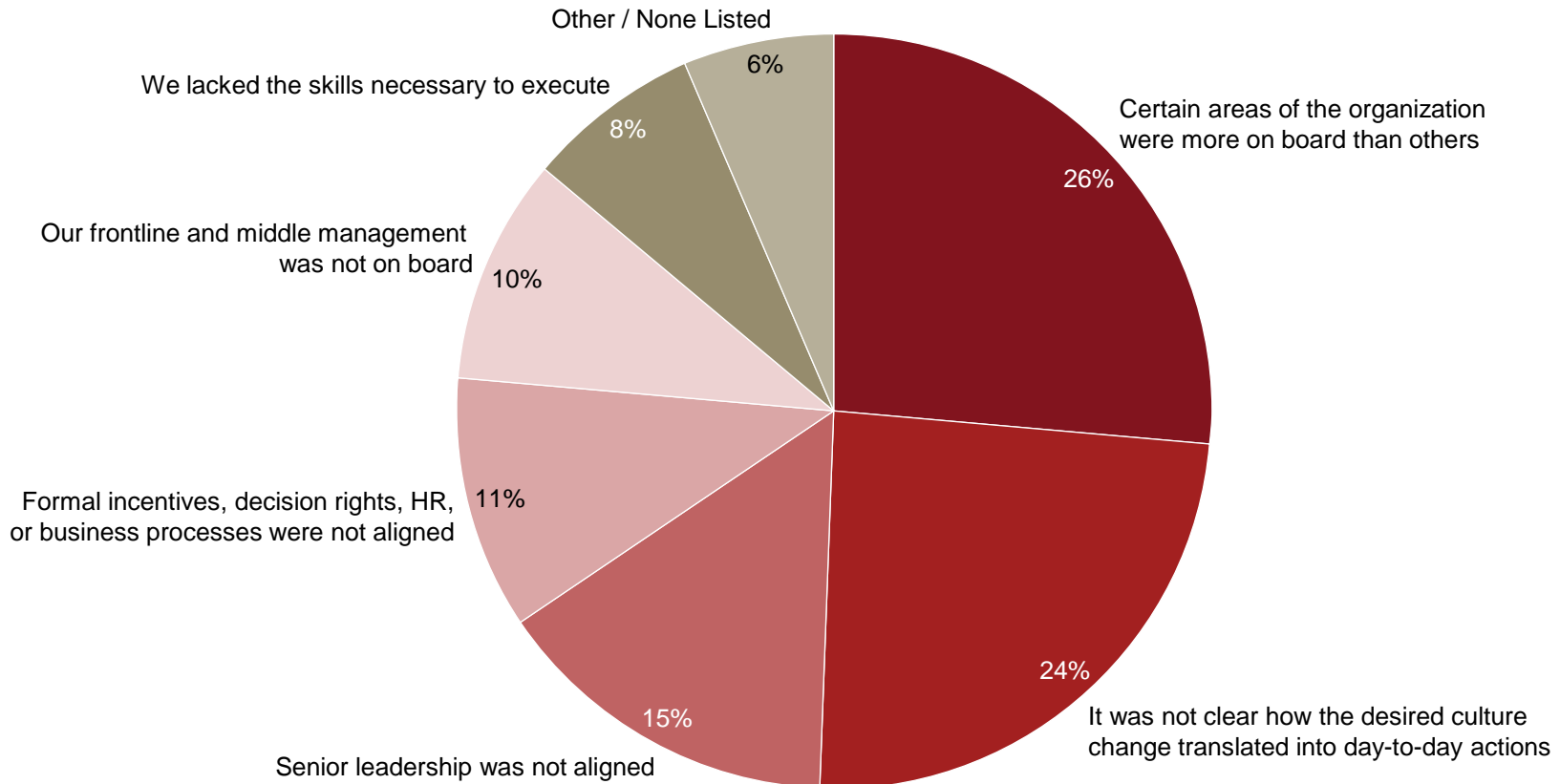we did or that happened to us (e.g., acquisition)

Europeans similarly to global average identify change as the result of a conscious effort to influence culture

The change has been… – Europe

Something that happened organically

The result of a conscious effort to influence culture

22%

44%

33%

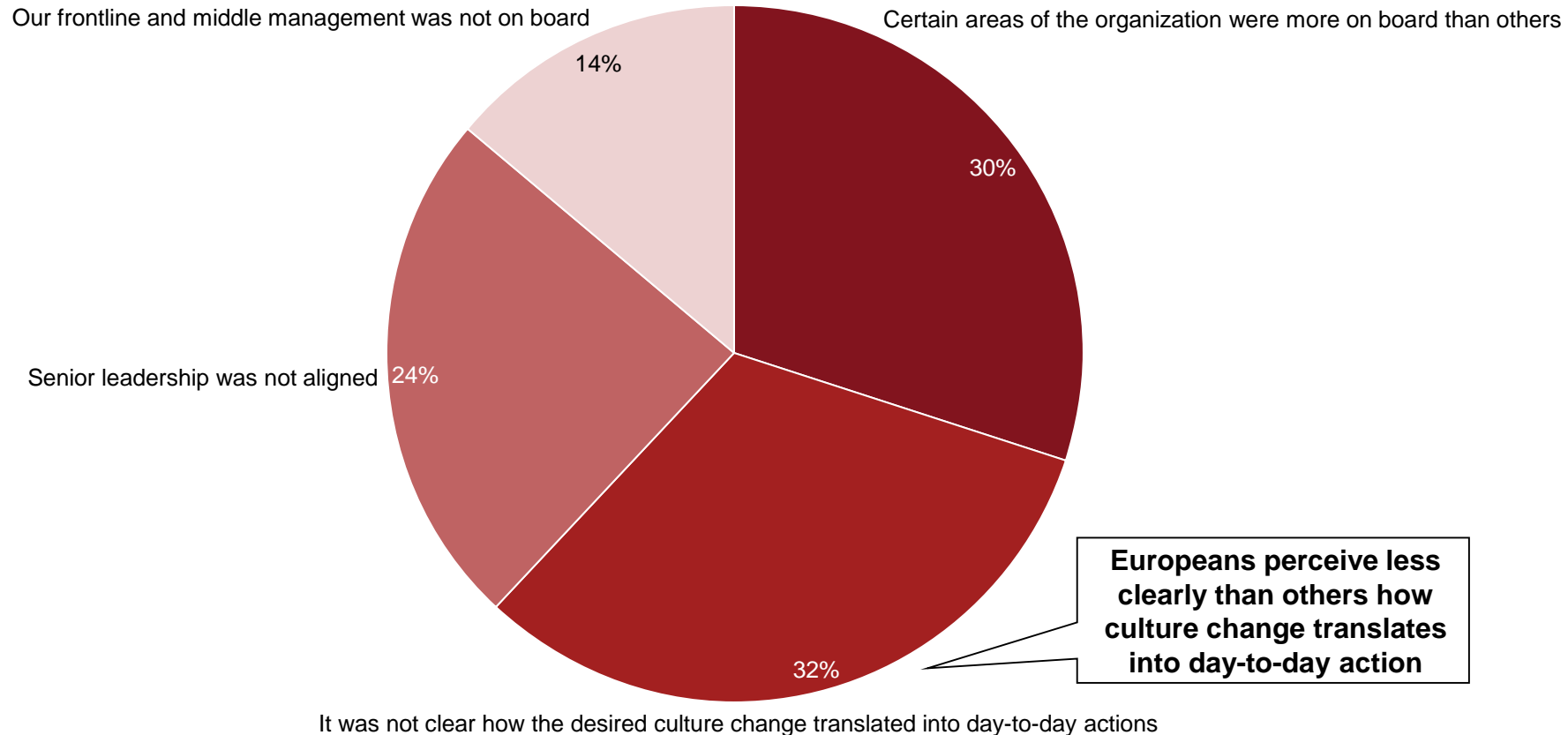The by-product of something else we did or that happened to us (e.g., acquisition)

Globally, a key roadblock of intentional culture change was how well this cultural change was communicated, gaining buy-in across the enterprise

What challenges has your organization experienced in undertaking the culture work? – Global
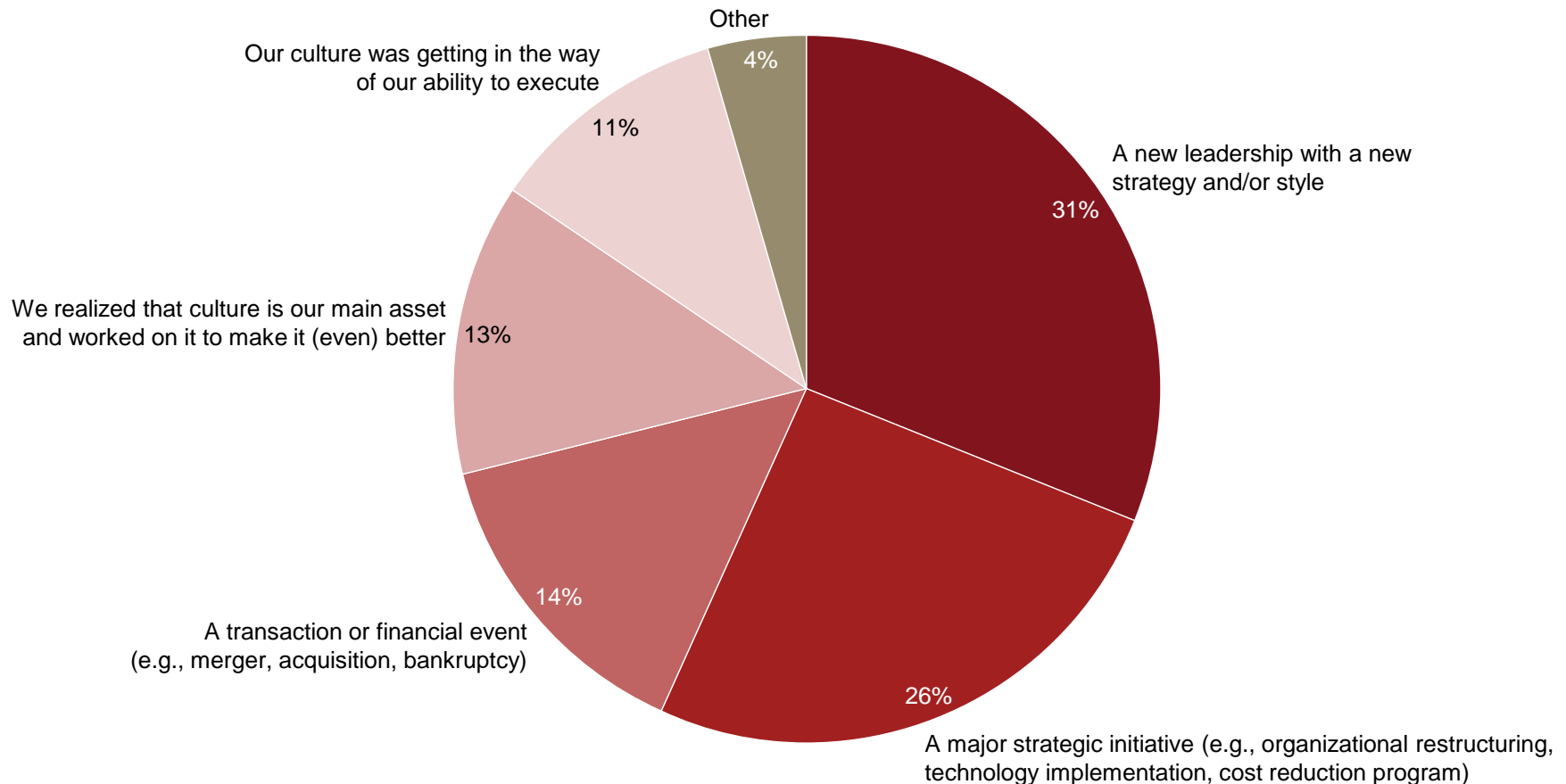

Other / None Listed
6%

We lacked the skills necessary to execute
8%

Certain areas of the organization were more on board than others
26%

Our frontline and middle management was not on board
10%

Formal incentives, decision rights, HR, or business processes were not aligned
11%

It was not clear how the desired culture change translated into day-to-day actions
24%

Senior leadership was not aligned
15%

Senior alignment bigger issue in Europe vs. global with not clarity on tangibility of change effort

What challenges has your organization experienced in undertaking the culture work?
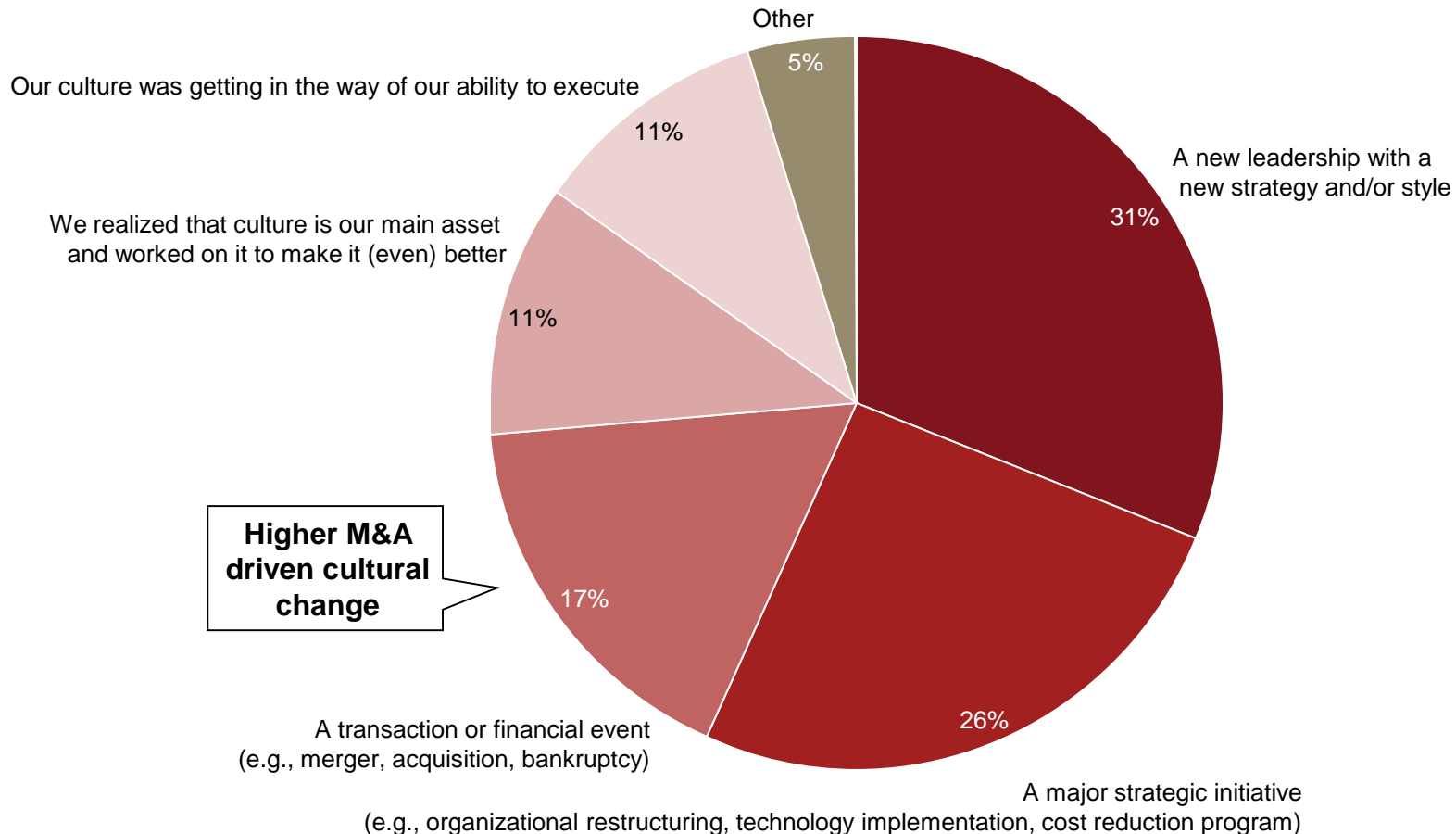**Top 4 choices - Europe**

Our frontline and middle management was not on board — 14%

Certain areas of the organization were more on board than others — 30%

Senior leadership was not aligned — 24%

It was not clear how the desired culture change translated into day-to-day actions — 32%

Europeans perceive less clearly than others how culture change translates into day-to-day action

Globally, the majority of these cultural changes are coming from top-down and / or strategic initiatives

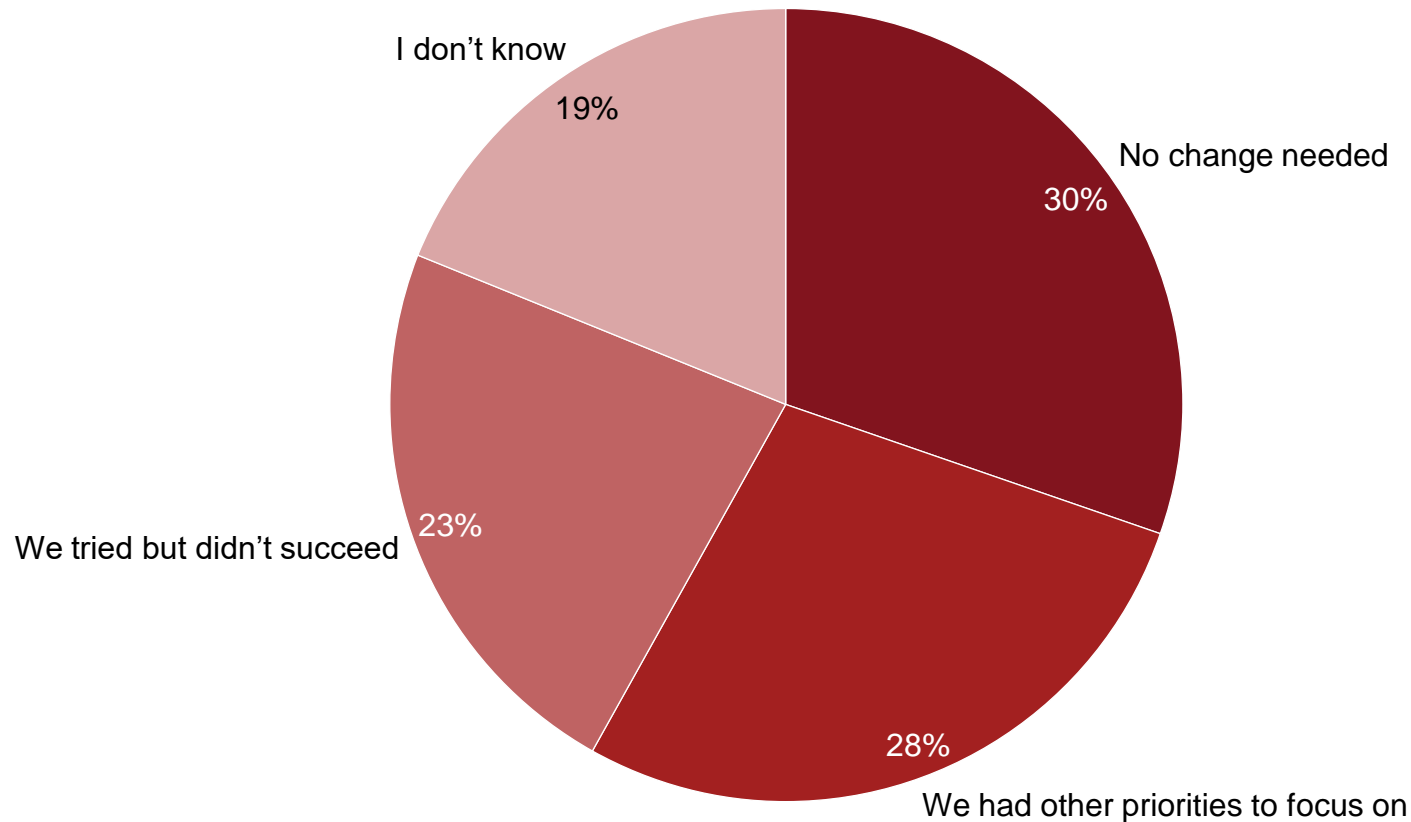**What triggered the culture change? – Global**

Other
4%

Our culture was getting in the way
of our ability to execute
11%

A new leadership with a new
strategy and/or style
31%

We realized that culture is our main asset
and worked on it to make it (even) better
13%

A transaction or financial event
(e.g., merger, acquisition, bankruptcy)
14%

A major strategic initiative (e.g., organizational restructuring,
technology implementation, cost reduction program)
26%

For Europe as well, the majority of these cultural changes are coming from a new leadership and / or strategic initiatives

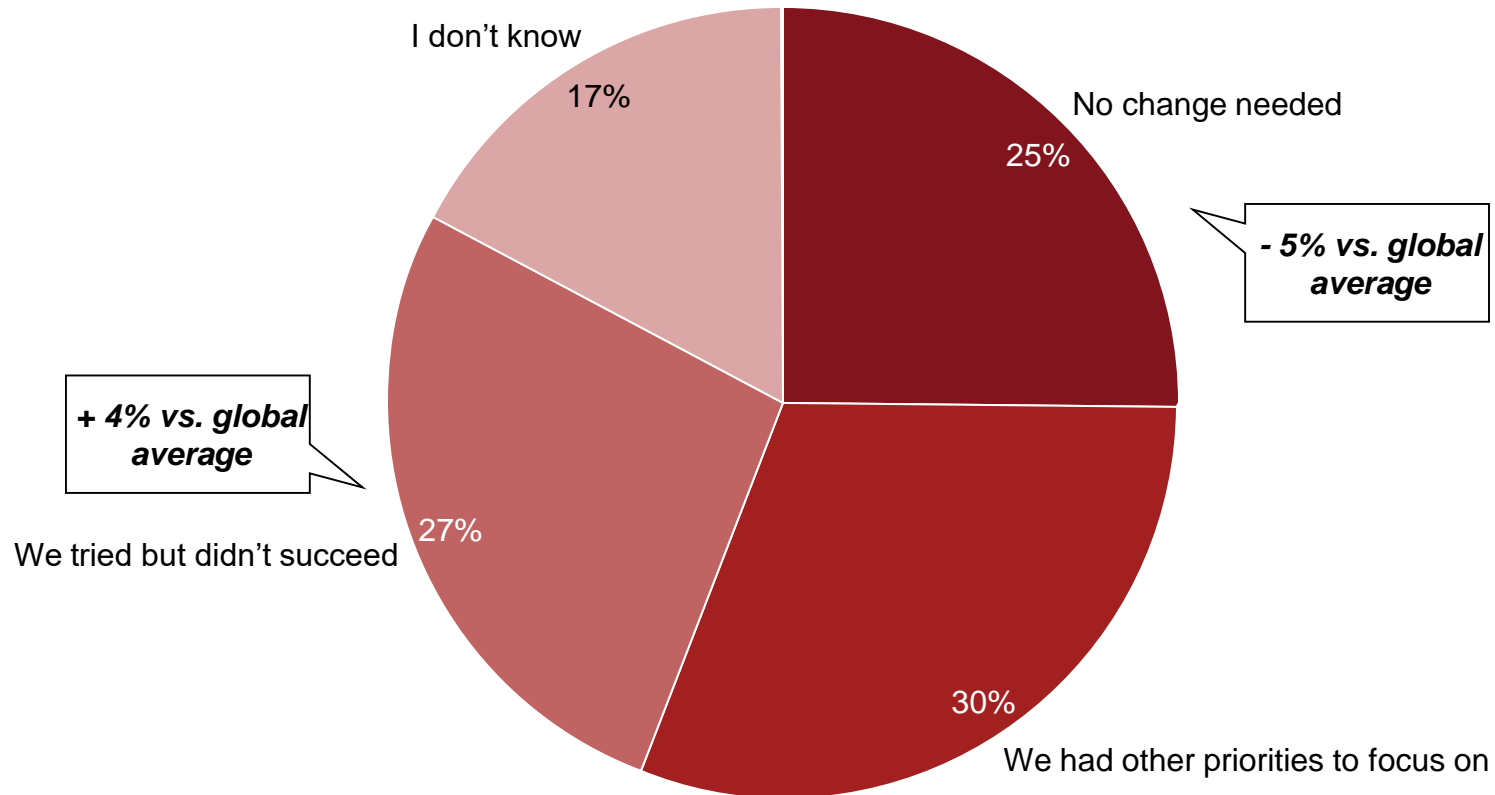**What triggered the culture change? – Europe**

Other
5%

Our culture was getting in the way of our ability to execute
11%

A new leadership with a new strategy and/or style
31%

We realized that culture is our main asset and worked on it to make it (even) better
11%

Higher M&A driven cultural change
17%

26%

A transaction or financial event
(e.g., merger, acquisition, bankruptcy)

A major strategic initiative
(e.g., organizational restructuring, technology implementation, cost reduction program)

Among global respondents who did not see a cultural shift, the plurality said no cultural change was needed

Why has your organization's culture not changed? – Global

I don't know

19%

No change needed

30%

We tried but didn't succeed

23%

28%

We had other priorities to focus on

On the contrary, Europeans are more vocal for the need for change – and blame failure when change is not effective

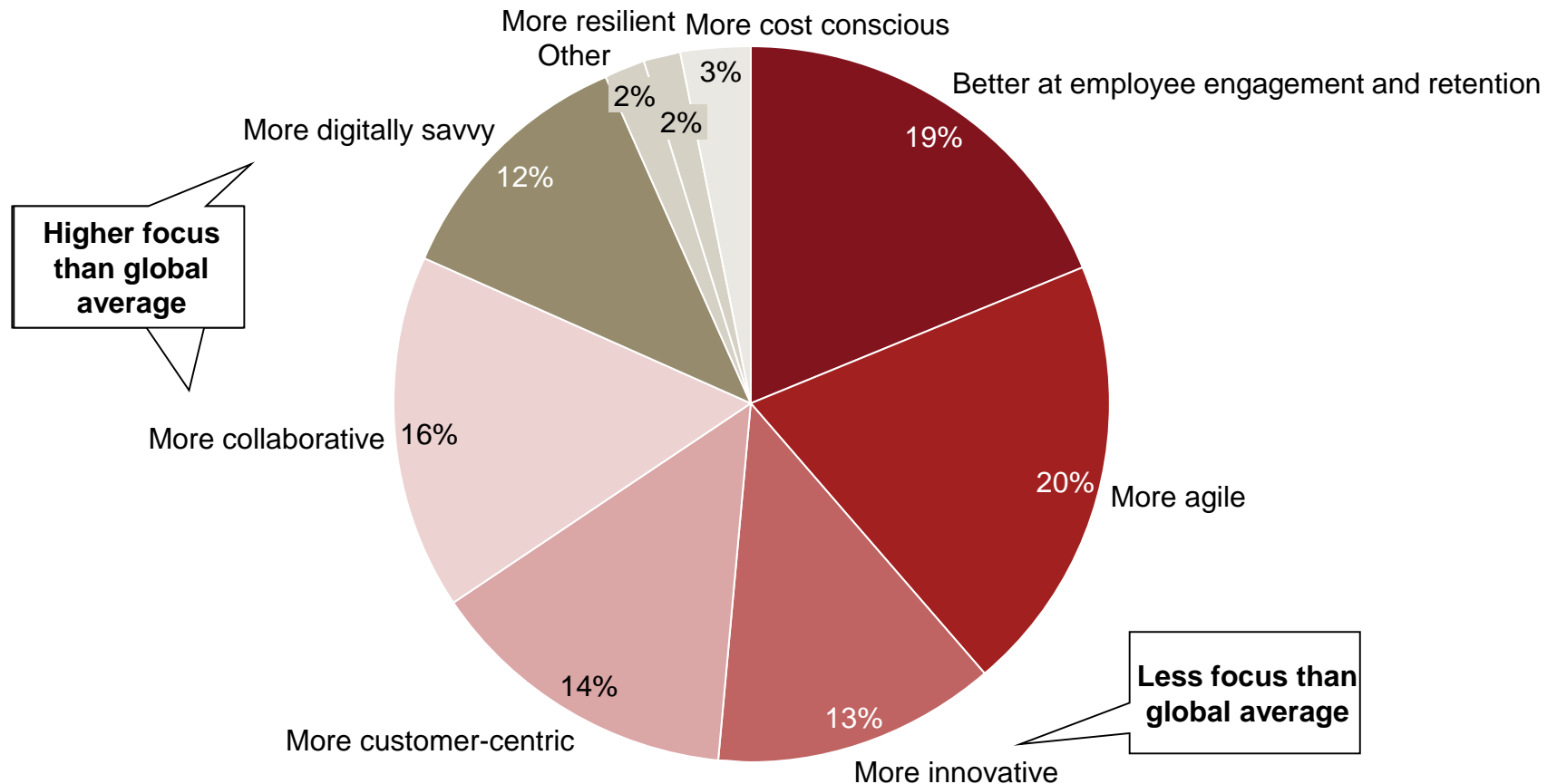

Why has your organization's culture not changed? – Europe

I don't know — 17%

No change needed — 25%

- 5% vs. global average

+ 4% vs. global average

We tried but didn't succeed — 27%

We had other priorities to focus on — 30%

Globally, top cultural aspirations include improved employee engagement / retention, agility, and innovation

Over the next three to five years, imagine that you could "embed" a new quality or trait into your organization's culture. What would you choose? What's the quality that would help your organization better achieve its goals? – Global
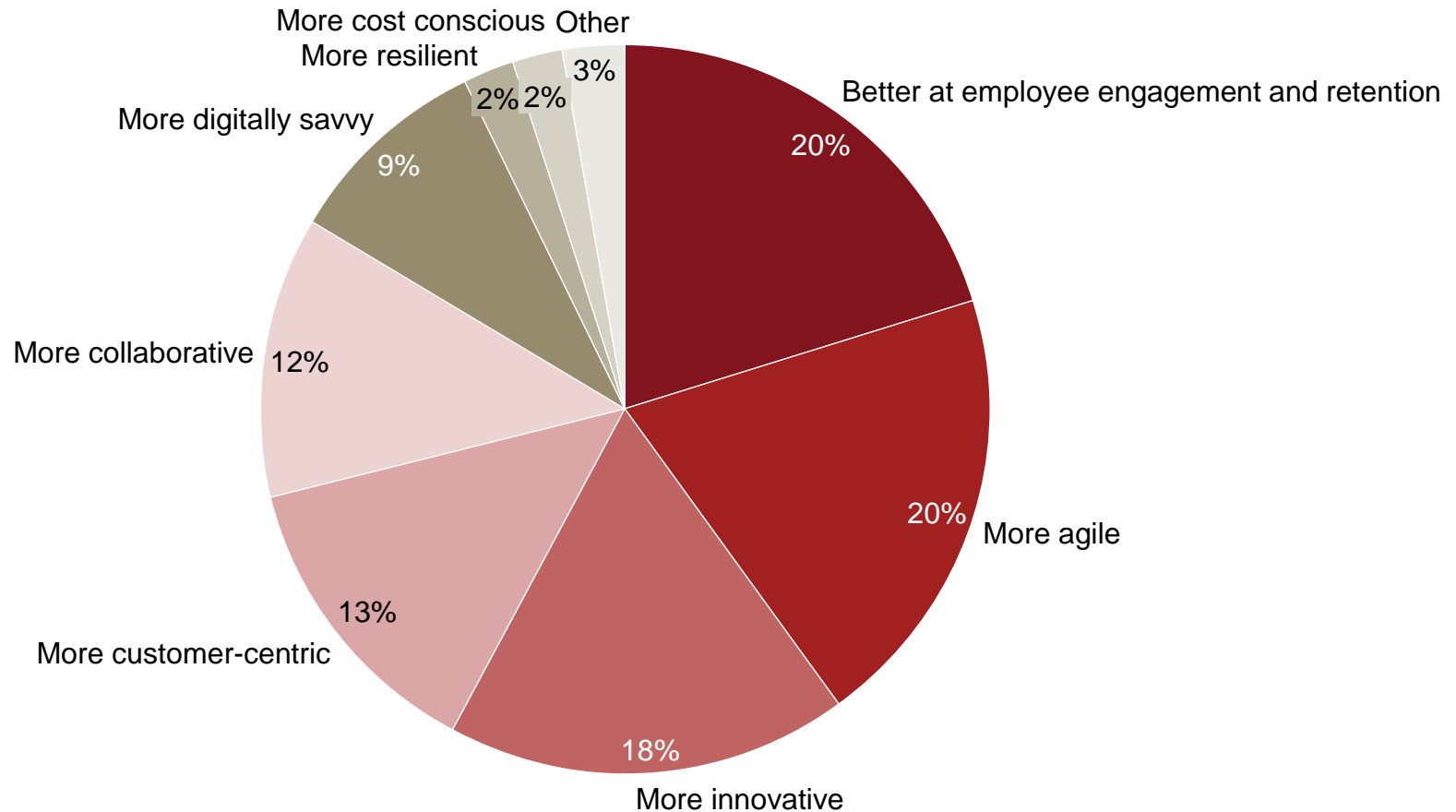
Collaboration and digital savviness seem to be higher priority vs. innovation

Over the next three to five years, imagine that you could "embed" a new quality or trait into your organization's culture. What would you choose? What's the quality that would help your organization better achieve its goals? – Europe

More resilient
More cost conscious
Other
More digitally savvy 12%
2%
2%
3%
Better at employee engagement and retention 19%

Higher focus than global average

More collaborative 16%

20% More agile

14%

13%

More customer-centric

More innovative

Less focus than global average

80% of global respondents found that their organization's culture must evolve significantly or a fair bit

In order to succeed, grow, and retain the best people, how much do you think your organization's culture will need to evolve in the next three to five years? – Global
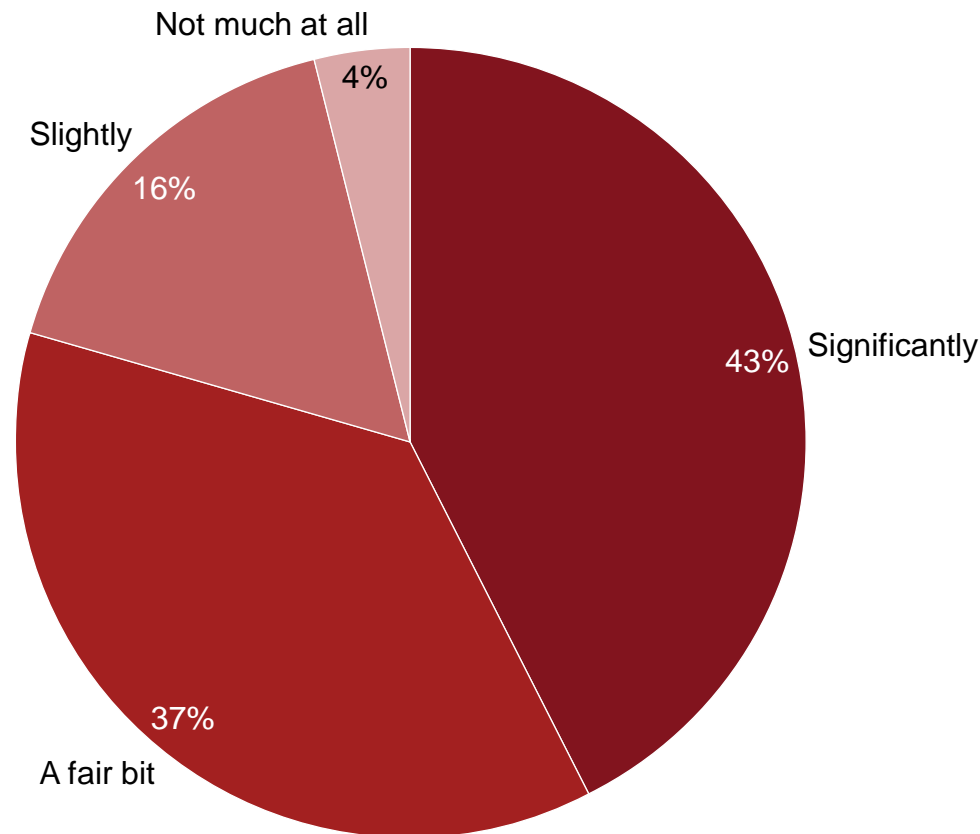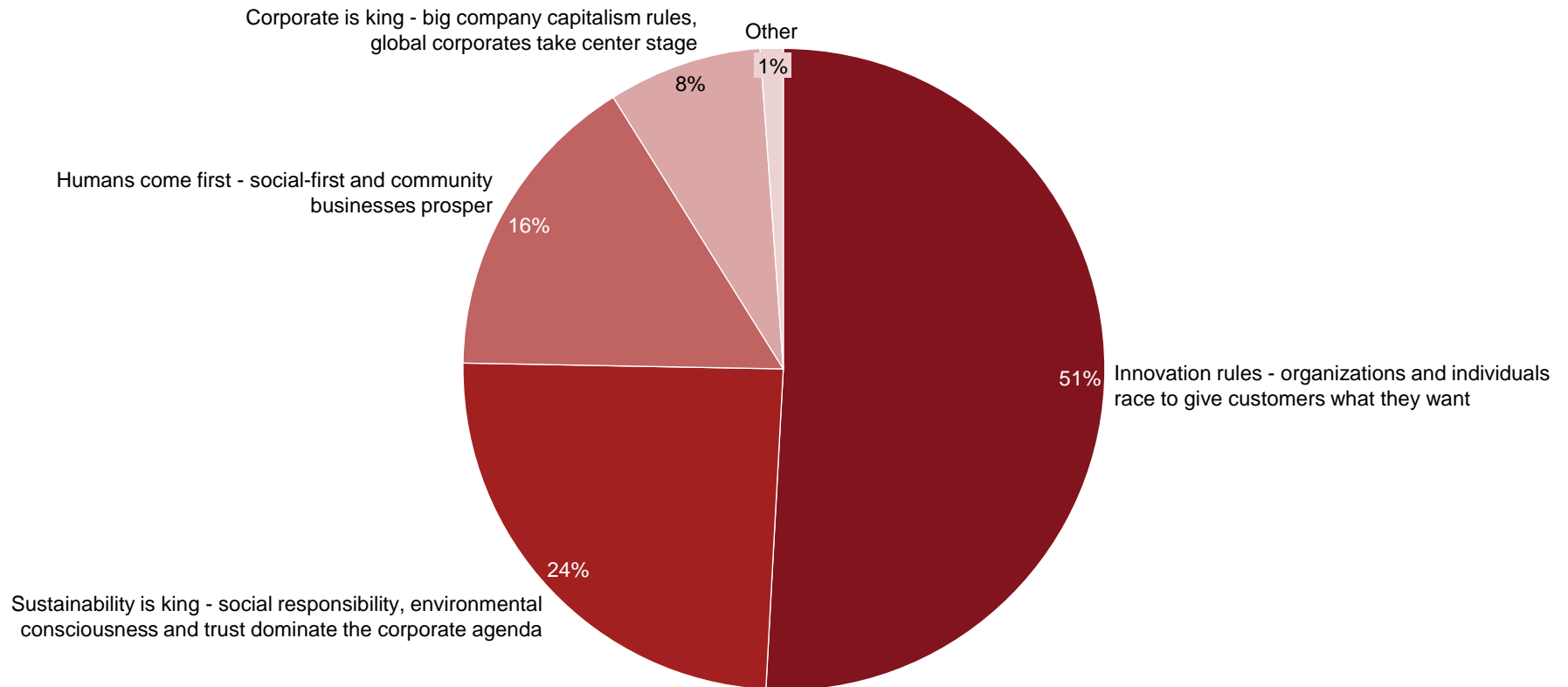
Europe acknowledges their organization culture needs to evolve significantly to succeed in the next 3-5 years

In order to succeed, grow, and retain the best people, how much do you think your organization's culture will need to evolve in the next three to five years? – Europe
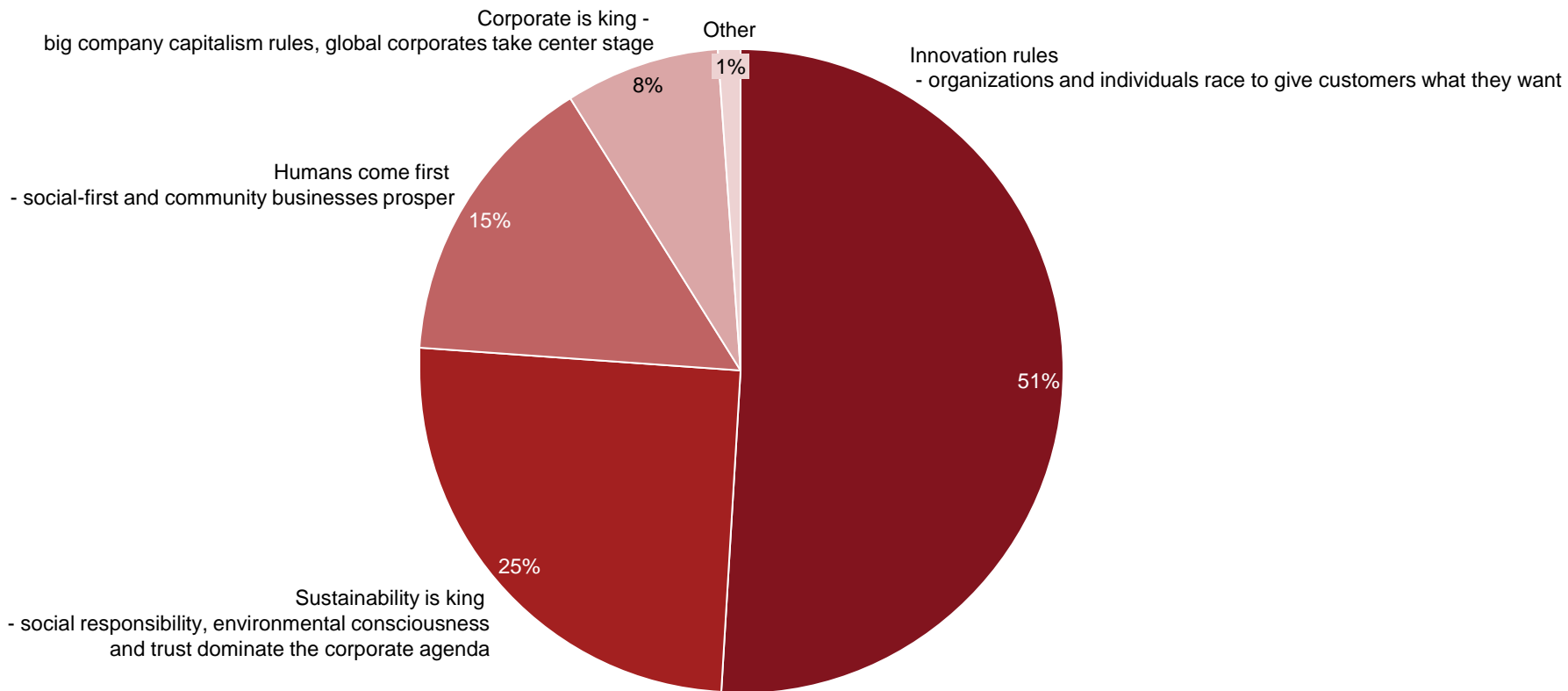
Not much at all

Slightly

15%

3%

48% Significantly

34%

A fair bit
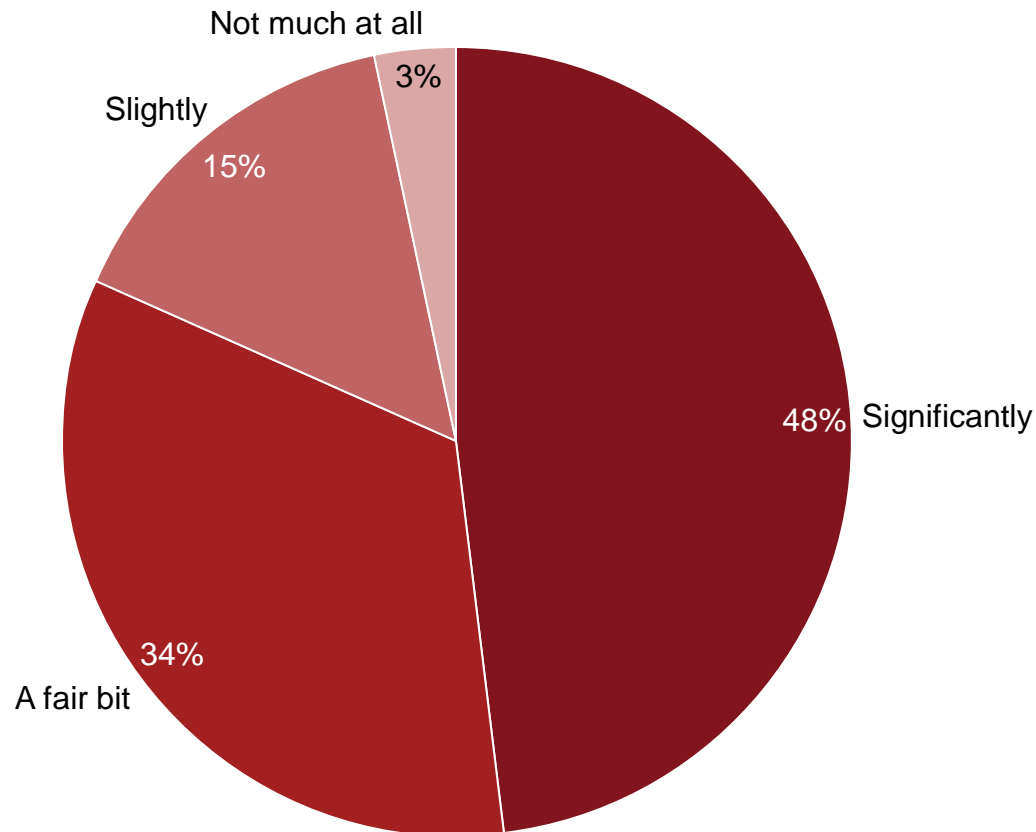
The majority of global respondents envision a future where "innovation rules"

Imagine your organization in the year 2030. What kind of "future scenario" do you see in the cards? What does the world in which you'll need to compete look like? – Global
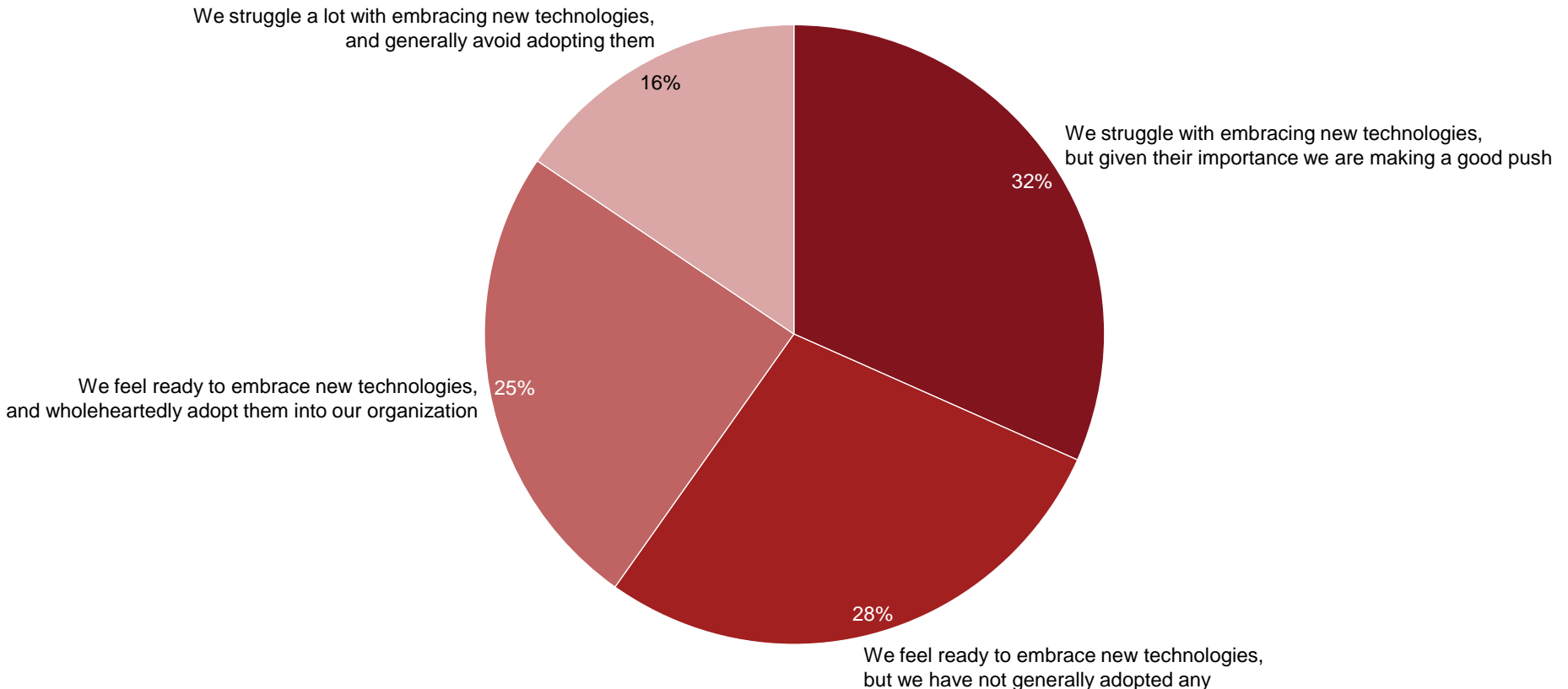

Corporate is king - big company capitalism rules, global corporates take center stage — 8%

Other — 1%

Humans come first - social-first and community businesses prosper — 16%

Innovation rules - organizations and individuals race to give customers what they want — 51%

Sustainability is king - social responsibility, environmental consciousness and trust dominate the corporate agenda — 24%

Europeans confirm the importance of innovation to better fulfill customers needs

Imagine your organization in the year 2030. What kind of "future scenario" do you see in the cards? What does the world in which you'll need to compete look like? – Europe
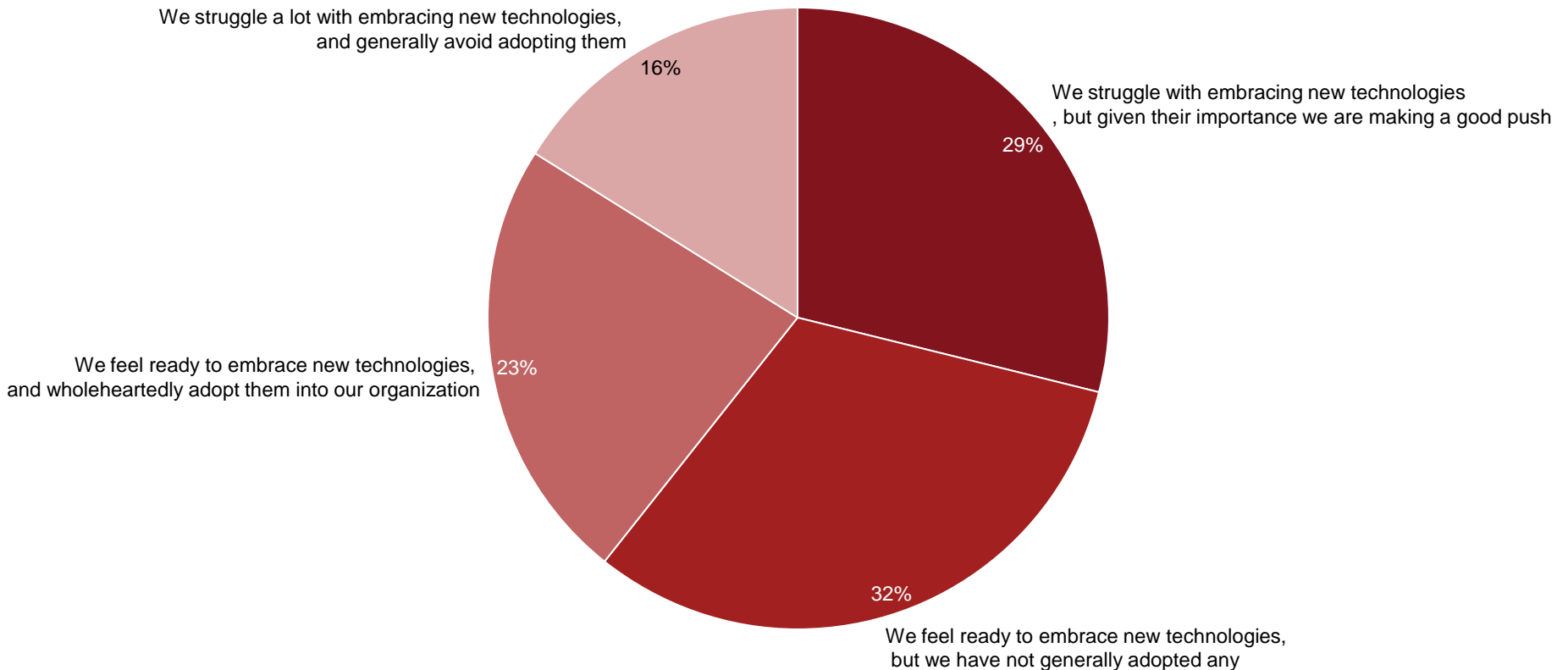
Corporate is king -
big company capitalism rules, global corporates take center stage

Other

Innovation rules
- organizations and individuals race to give customers what they want

8%

1%

51%

Humans come first
- social-first and community businesses prosper

15%

Sustainability is king
- social responsibility, environmental consciousness
and trust dominate the corporate agenda

25%

Global respondents seem to either struggle adopting new technologies or embracing them entirely ...

How ready do you think your organization is to embrace new technologies, such as robotics and artificial intelligence, that may change the way we work? – Global

We struggle a lot with embracing new technologies, and generally avoid adopting them

16%

We struggle with embracing new technologies, but given their importance we are making a good push

32%

We feel ready to embrace new technologies, and wholeheartedly adopt them into our organization

25%

28%

We feel ready to embrace new technologies, but we have not generally adopted any

... a concern that is shared among European counterparts

How ready do you think your organization is to embrace new technologies, such as robotics and artificial intelligence, that may change the way we work? – Europe

We struggle a lot with embracing new technologies, and generally avoid adopting them

16%

We struggle with embracing new technologies, but given their importance we are making a good push

29%

We feel ready to embrace new technologies, and wholeheartedly adopt them into our organization

23%

32%

We feel ready to embrace new technologies, but we have not generally adopted any

Appendix

As a refresher, this year's Global Culture Survey included five key categories – and these questions (1/3)

Category	Description
Demographics	• Please select the location you are based in: • Please select your organization's industry: • What size is your organization in terms of revenues? • Please tell us the age of your organization: • What function are you affiliated with in your organization? • What is your level within the organization? • Relative to your industry, is your organization's revenue growth:
Role of Culture	To what extent do you agree with the following statements? • In general, culture is more important to performance than an organization's strategy or operating model. • My organization's culture is an important topic on the agenda of my company's senior leadership. • Culture is a strong reason people join our organization. • Culture is a strong reason people leave our organization. • The way people act every day in our organization is consistent with what we like to say about our culture. • I feel proud to be part of my organization. • The way things get done in my organization, the real chain of command, is consistent with what's on the formal organization chart.

As a refresher, this year's Global Culture Survey included five key categories – and these questions (2/3)

Category	Description

Cultural Thumbprint	• Describe your organization's culture in one word or a single phrase:
	• My organization is particularly strong in… (Select up to three)
	• My organization is best characterized by… (Select the more accurate option of each pair)
	   – Having single points of accountability vs Making decisions via consensus
	   – Focusing on external customers vs Focusing on internal operations
	   – Stressing individual performance vs Stressing team performance
	   – Valuing depth of knowledge vs Valuing breadth of knowledge
	   – Valuing levels and titles vs Being flat and non-hierarchical
	   – Being comfortable with risk vs Being risk-averse
	   – Following set processes vs Encouraging improvisation
	   – Pursuing small, incremental improvements vs Pursuing large, revolutionary change
	   – Preventing problems before they arise vs Fixing problems as they appear
	   – Focusing mostly on financial metrics vs Focusing on broader performance measures
	   – Having a lean mentality vs Having an abundance mentality
	   – Being polite and cordial in our interactions vs Accepting conflict in our interactions

As a refresher, this year's Global Culture Survey included five key categories – and these questions (3/3)

Category	Description

Culture Evolution	• Has your organization's culture changed over the past five years?
	• If yes…
	  – The change has been (Select one) *[Options include result of a conscious effort to change culture, something that happened organically, the by-product of something else we did]*
	  – If conscious effort…
	    – What challenges has your organization experienced in undertaking the culture work? (Select one)
	  – What triggered the change in your organization's culture? (Select up to three)
	• If no…
	  – Why has your organization's culture not changed? (Select one)
	• Over the next three to five years, imagine that you could "embed" a new quality or trait into your organization's culture. What would you choose? What's the quality that would help your organization better achieve its goals?
	• In order to succeed, grow, and retain the best people, how much do you think your organization's culture will need to evolve in the next three to five years?

Future of Work and Culture	• Imagine your organization in the year 2030. What kind of "future scenario" do you see in the cards? What does the world in which you'll need to compete look like? (Select one) • How ready do you think your organization is to embrace new technologies, such as robotics and artificial intelligence, that may change the way we work? (Select one)

The model then processed these questions across the following sections

Section	Description
Dashboard	• Filters for all of the multiple-choice questions, including demographics • Tracker of key insights derived from reviewing the model
Response Breakdowns	• Summaries of responses for each question, including graphs
Response Correlations	• Correlations between survey responses to see certain trends across response types
Qualitative Analysis	• Word clouds for all free-text questions / options to indicate "other"
Data	• Survey data, including additional columns for survey analysis • GDP calculations to identify representations of various countries
Miscellaneous	• List for data validation • List of individuals signing up for S+B subscription

Model can be provided upon request