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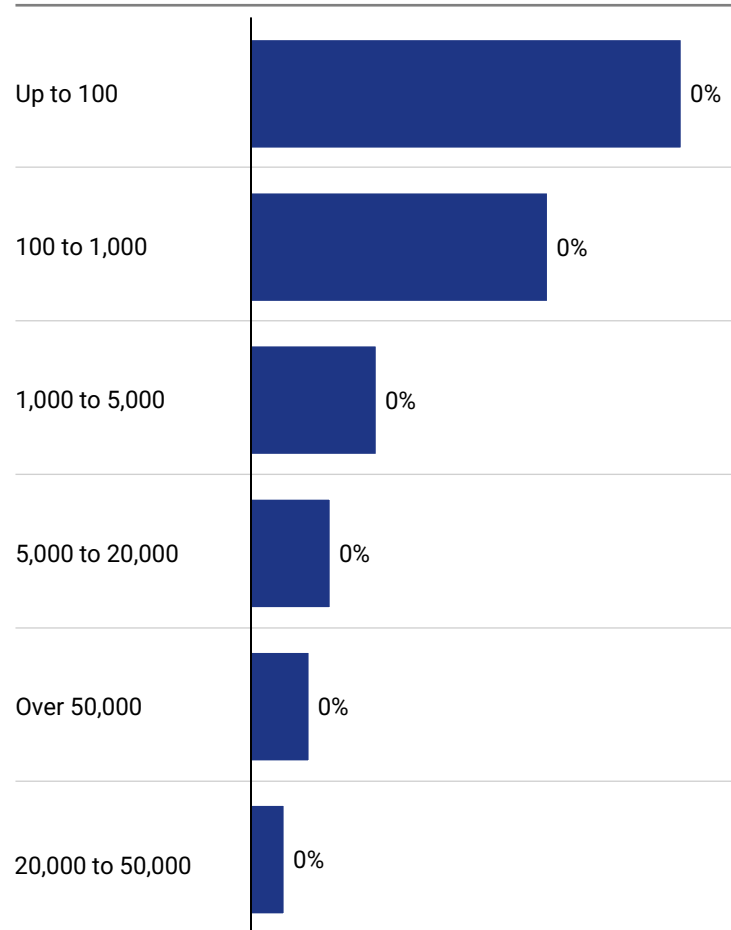
# The Impact of Social Trends on the Labor Market

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# A total of 1,500 job seekers from companies across different industries and sizes completed the survey

FTE in respondents' companies<sup>1</sup>,  
% of respondents



1. Companies where the surveyed job seekers previously worked or are employed right now.

The survey was conducted by Yakov & Partners and hh.ru

## Respondents from various sectors took part in the survey

- Information technology, system integration, Internet
- Construction, real estate, operation, project design
- State-owned organizations
- Healthcare, pharmaceuticals, pharmacies
- Academic institutions
- Retail
- Finance
- Food
- Transportation, logistics, warehouses, foreign economic activity
- Hotels, restaurants, food and catering services
- Industrial equipment, devices, machinery, and related components
- Mass media, marketing, advertising, BTL, PR, design, media production
- Business services
- Public services
- Art and culture
- Automotive industry
- Consumer goods (non-food)
- Utilities
- Energy
- Oil and gas
- Metals and metalworking
- Telecommunications and communications
- Other

The survey was conducted among **job seekers** who have an **account on hh.ru**

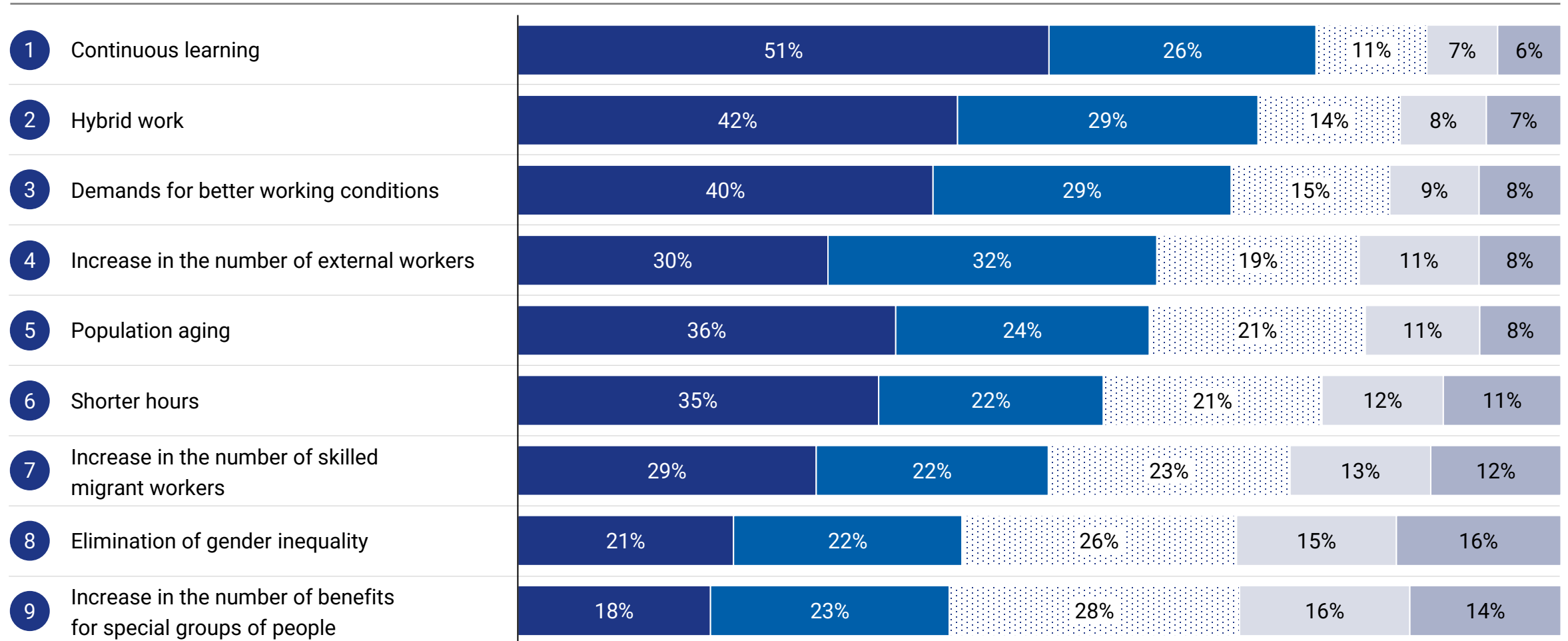
1,500 job seekers took part in the survey



# Continuous learning, hybrid work format, and increasing demands for better working conditions will drive the future of the labor market

Will definitely affect the labor market
  Is likely to affect the labor market
  Not sure / I haven't heard about this trend
  Won't affect the labor market
  Isn't likely to affect the labor market

The estimated impact of social trends up until 2030, % of respondents

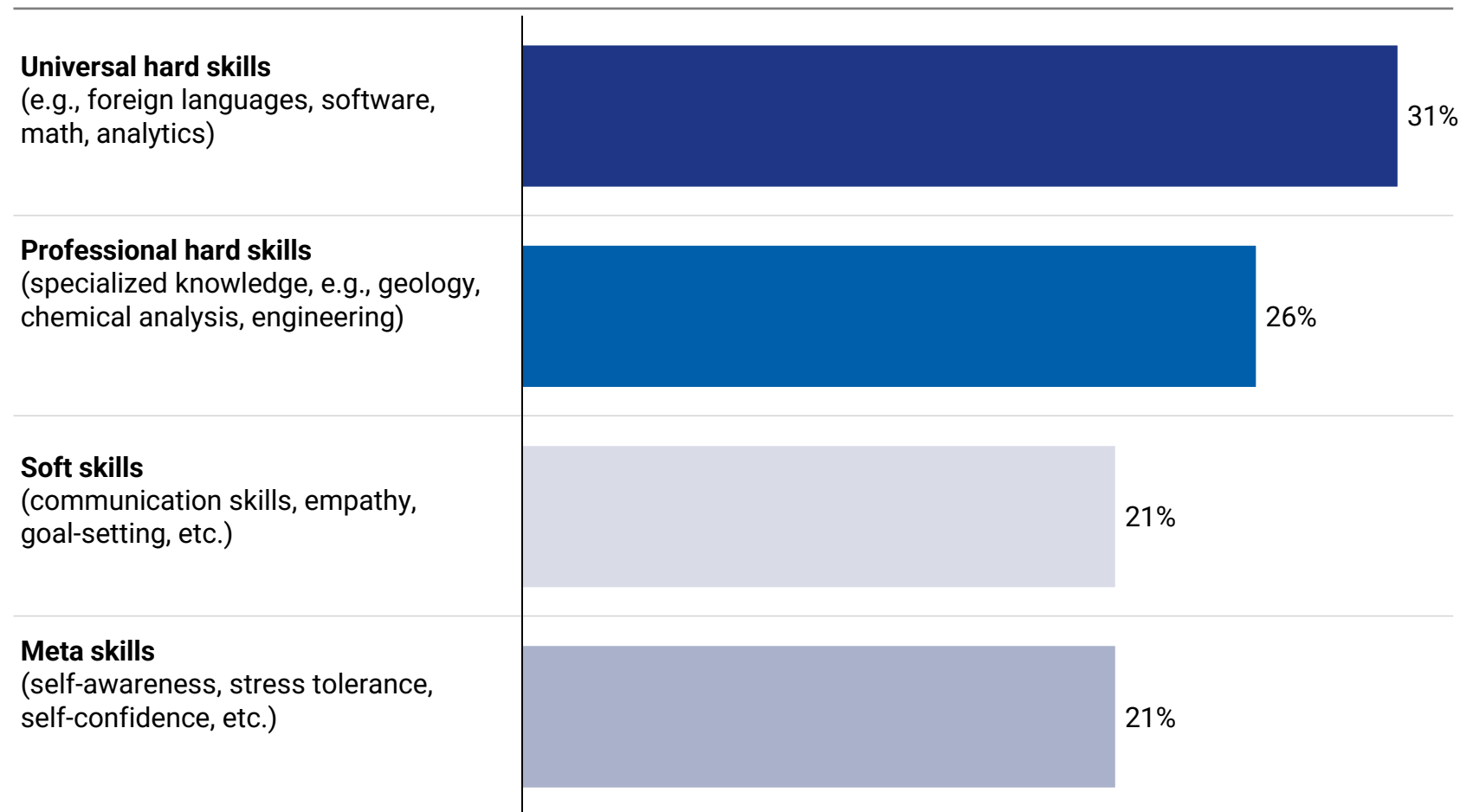


Question: "How would you assess the impact of these social trends up until 2030?"

The survey was conducted by Yakov & Partners and hh.ru

# Job seekers consider upgrading hard skills to be a top priority until 2030

## Skill sets that need to be upgraded by 2030, % of responses



15% of surveyed job seekers are ready to reskill independently

64% of respondents are only willing to reskill with the employer's support (financial support, study leave, etc.)

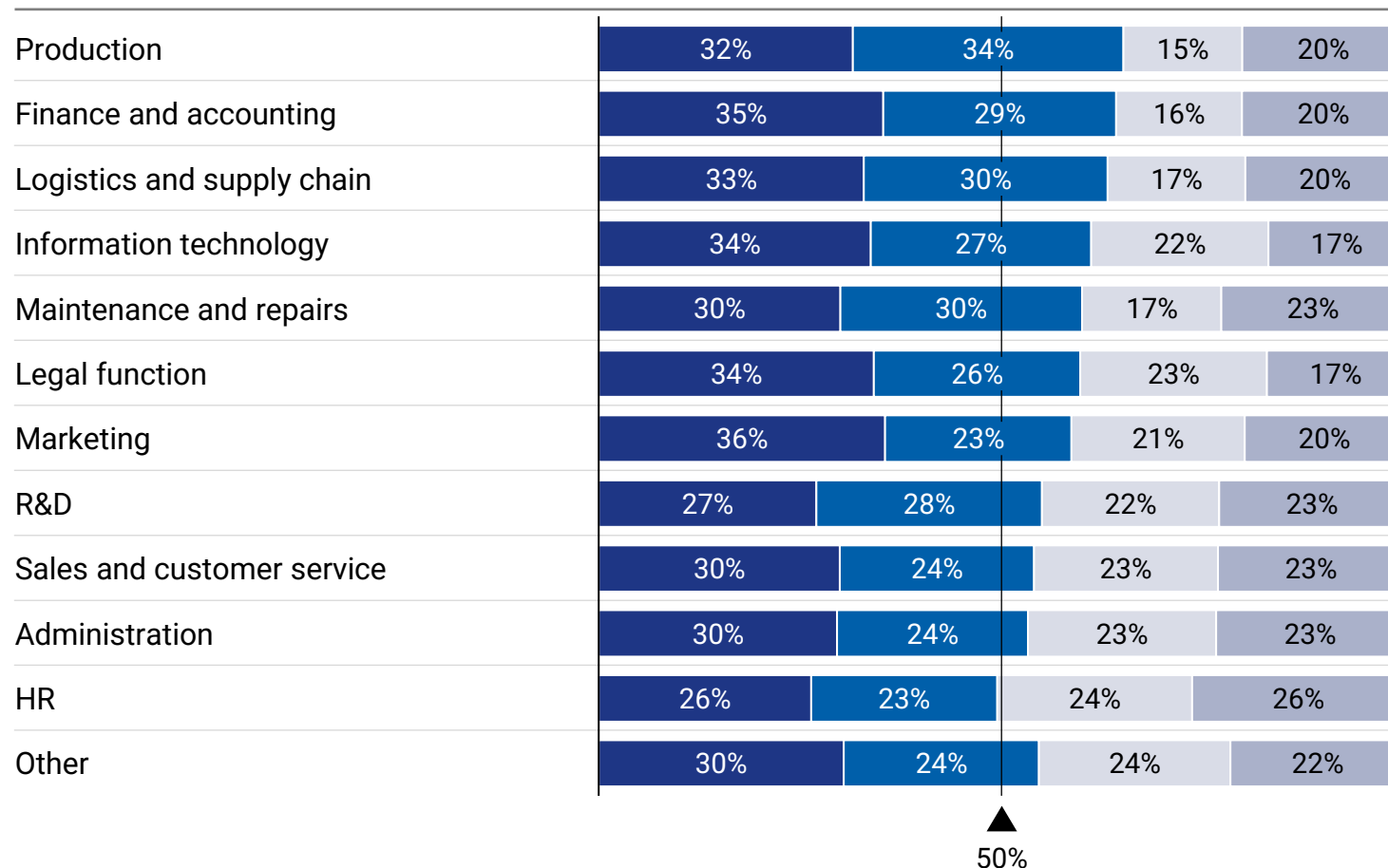
Question: "Select the skill sets that employees will need to upgrade by 2030 following the introduction of new technologies"  
Question: "Assess your employees' readiness to learn new skills to align with the technology advancements"  
The survey was conducted by Yakov & Partners and hh.ru



# Employees who traditionally rely on soft skills and meta skills prioritize them for upgrading

■ Universal hard skills
 ■ Professional hard skills
 ■ Soft skills
 ■ Meta skills

## Skill sets that need to be upgraded by 2030, % of respondents



**Universal hard skills** rank first by the aggregate percentage of responses: 31% of total responses, with marketing (36%) and finance (35%) professionals prioritizing them the most

**Professional hard skills** make up 26% of total responses, ranking first among employees from production departments (34%) and highly valued by technical and logistics staff (30% in each category)

Among the respondents, 21% expressed their **desire to upgrade their soft skills**, with HR employees (24%) often selecting this answer

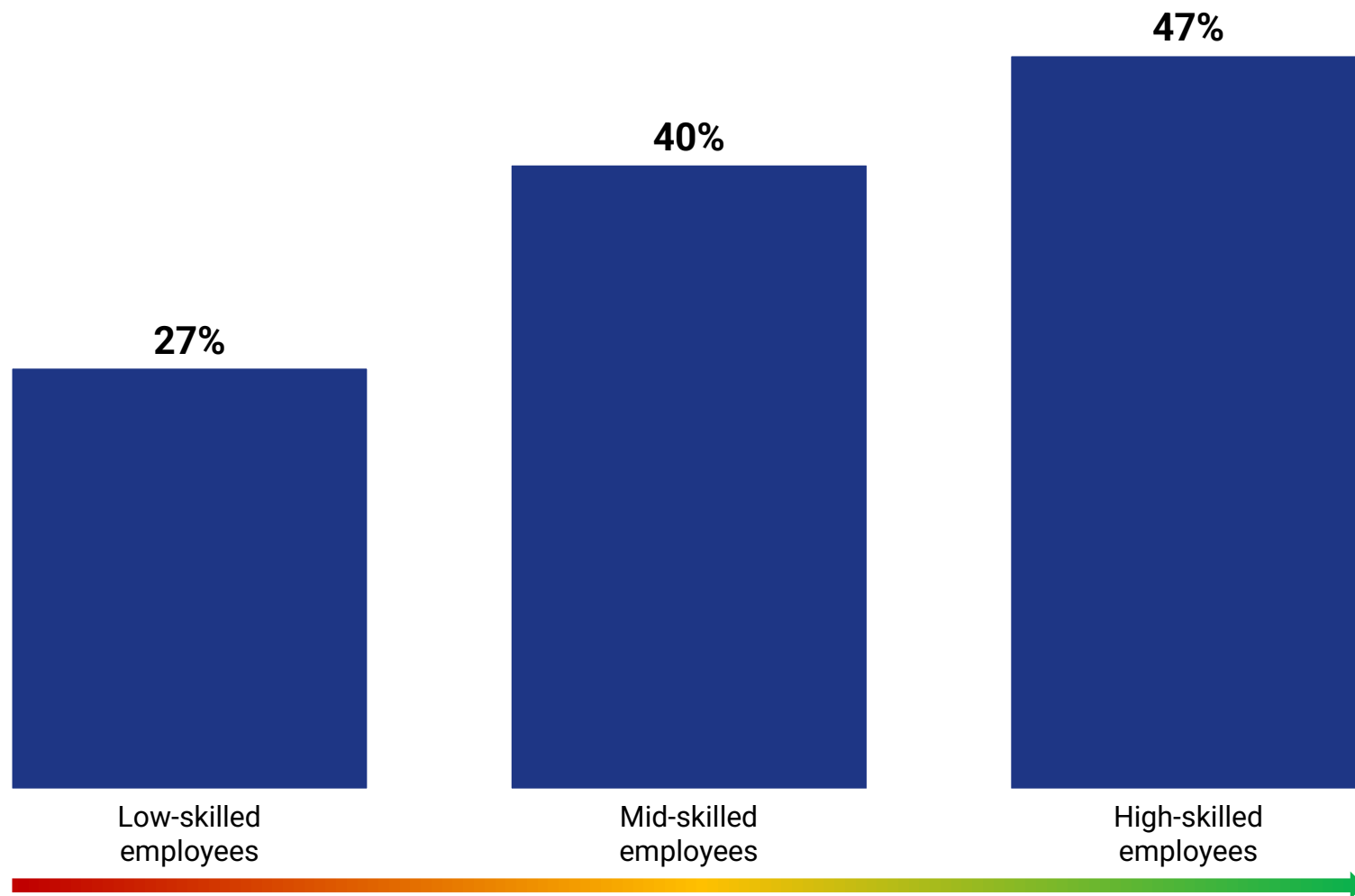
Only 21% of respondents prioritized **meta skills**, and only HR departments placed it at the top of the list (26%)

Question: "Select the skill sets that employees will need to upgrade by 2030 following the introduction of new technologies"

The survey was conducted by Yakov & Partners and hh.ru

# A large share of job seekers recognize the need to reskill following the adoption of new technologies

Percentage of employees who will require reskilling in order to adapt to new technologies, %



Question: "What percentage of employees will need to reskill by 2030 following the adoption of new technologies (robotization, generative AI, etc.)?"

The survey was conducted by Yakov & Partners and hh.ru

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It is true that high-skilled employees tend to be more engaged in continuous learning. However, it is generally the mid-skilled workers who require the most reskilling, as they are in high demand in today's reality.

“

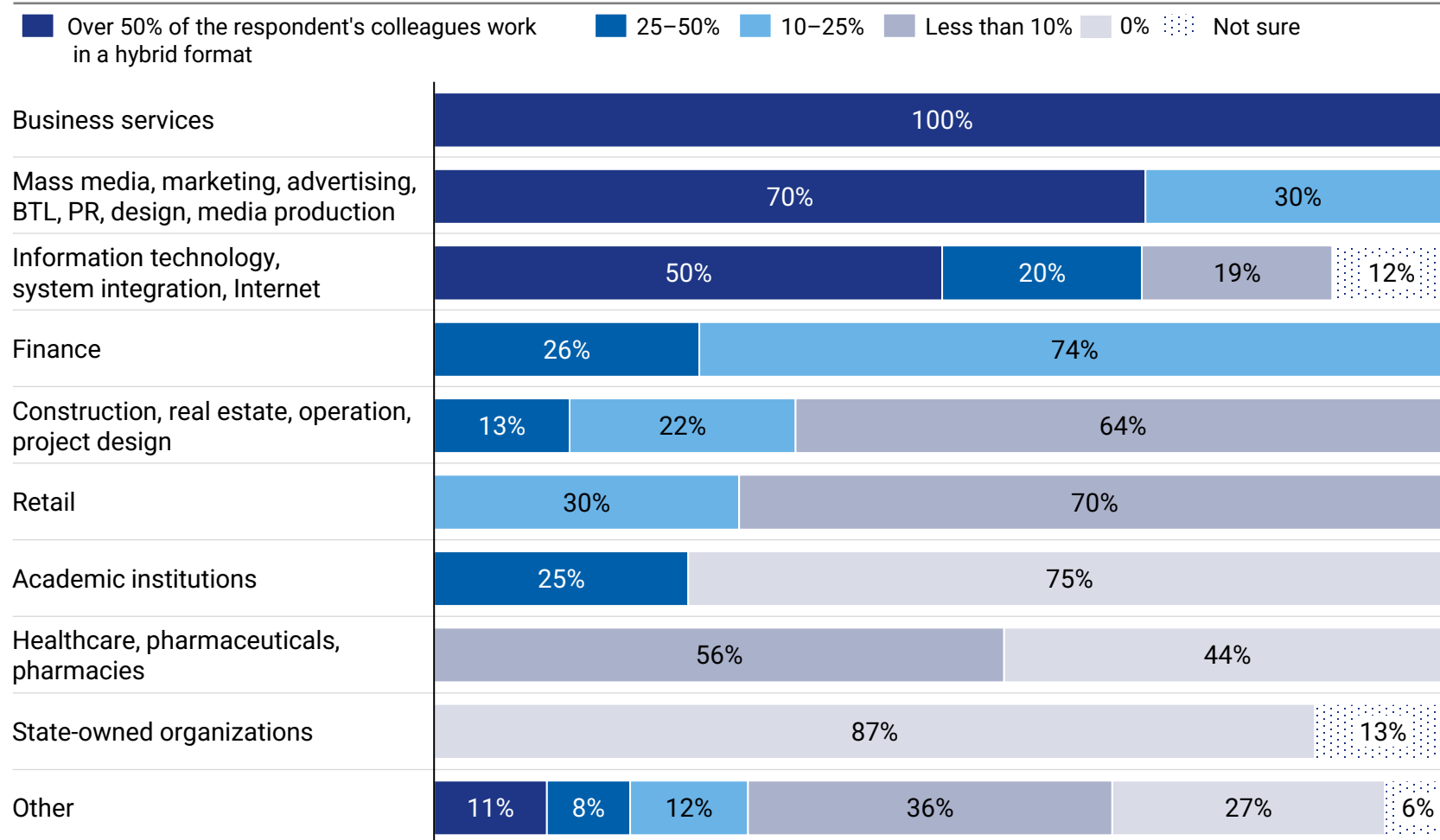
**Vladimir Juma**

Director of the Center for Digital Transformation and Data Analysis at the All-Russian Research Institute of Labor



## Hybrid work is a popular arrangement in IT, mass media, marketing, advertising, and PR but is most rarely found in state-owned organizations

Percentage of employees currently working in a hybrid format, % of respondents



46% of the participants believe that hybrid work positively affects **staff efficiency**

- Among different departments, marketing (66%) and sales and service employees (65%) share the highest belief in efficiency gains

21% of respondents believe that the hybrid format is **negatively affecting staff efficiency**

- Respondents from forestry (75%) and mining (55%) report most concerns about efficiency reductions

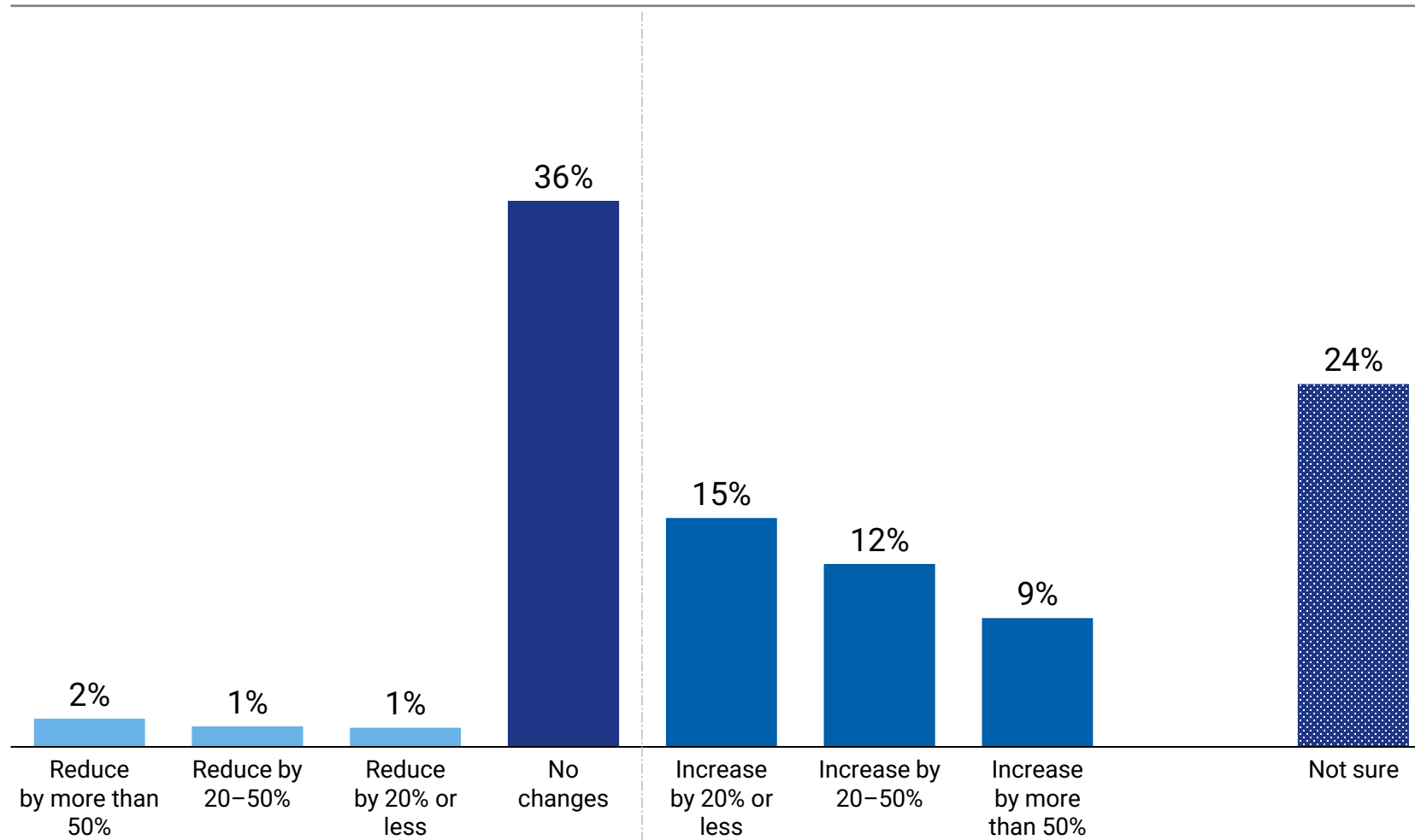
Question: "Indicate what percentage of employees in your company is currently working in a hybrid format (flexible format that includes remote work)?"

Question: "In your opinion, how does hybrid work (flexible format that includes remote work) affect staff efficiency?"

The survey was conducted by Yakov & Partners and hh.ru

## One out of three respondents believes that the percentage of employees working in a hybrid format will increase by 2030

Changes in the percentage of employees working in a hybrid format by 2030, % of responses



Question: "How will the percentage of staff working in a hybrid format in your company change by 2030?"

The survey was conducted by Yakov & Partners and hh.ru

Among the respondents, 36% believe that the percentage of staff working in a hybrid format will increase by 2030

Some of the groups that share a stronger belief in the rise of hybrid format are

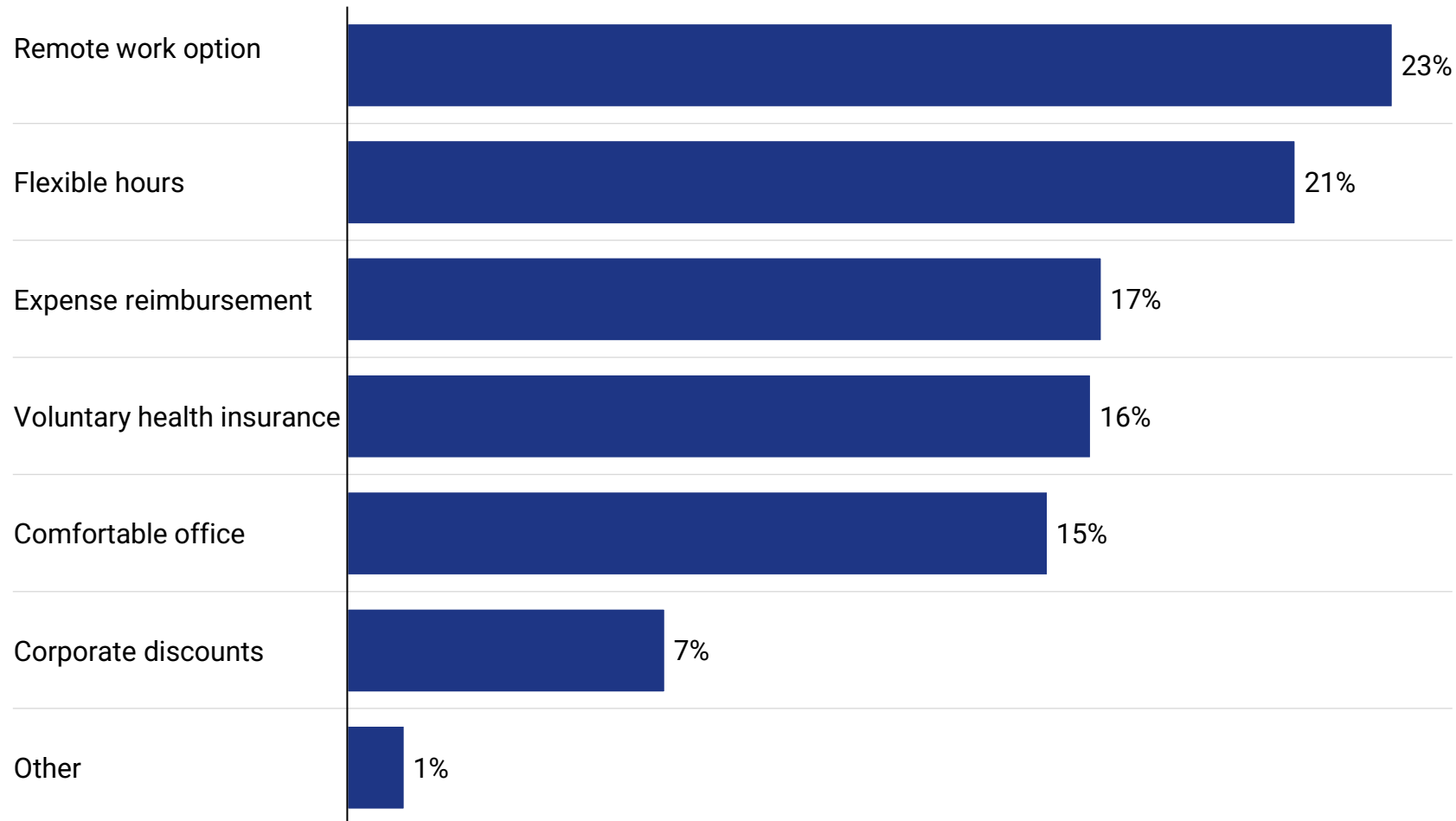
- Marketing (49% of respondents), HR (43%), and IT (42%) employees
- Respondents working in the chemical industry (60% in this sector) and finance (56%)

5% of respondents believe that the percentage of staff working in a hybrid format will reduce



## Job seekers have started paying more attention to employee benefits

New requirements to employers, % of respondents



Question: "Do job seekers have any new requirements to their employers (flexible hours, wages, voluntary health insurance, etc.)?"

The survey was conducted by Yakov & Partners and hh.ru

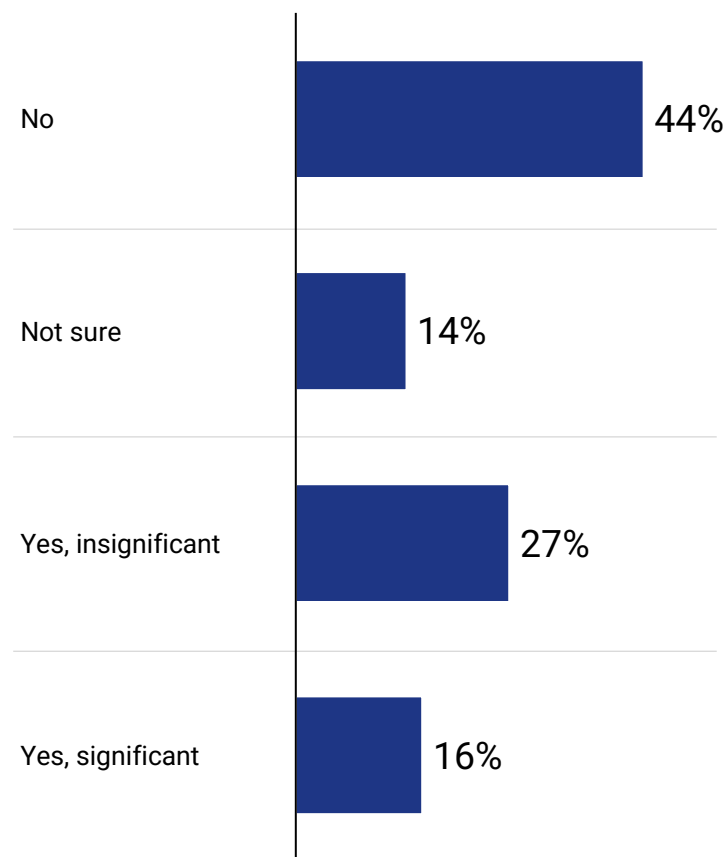
Around 80% of job seekers have noticed a rise in demands to employers among their current or former coworkers

The most popular benefits include options that allow for better time management, such as remote work and flexible hours. Respondents even prioritize them over expense reimbursement and voluntary health insurance

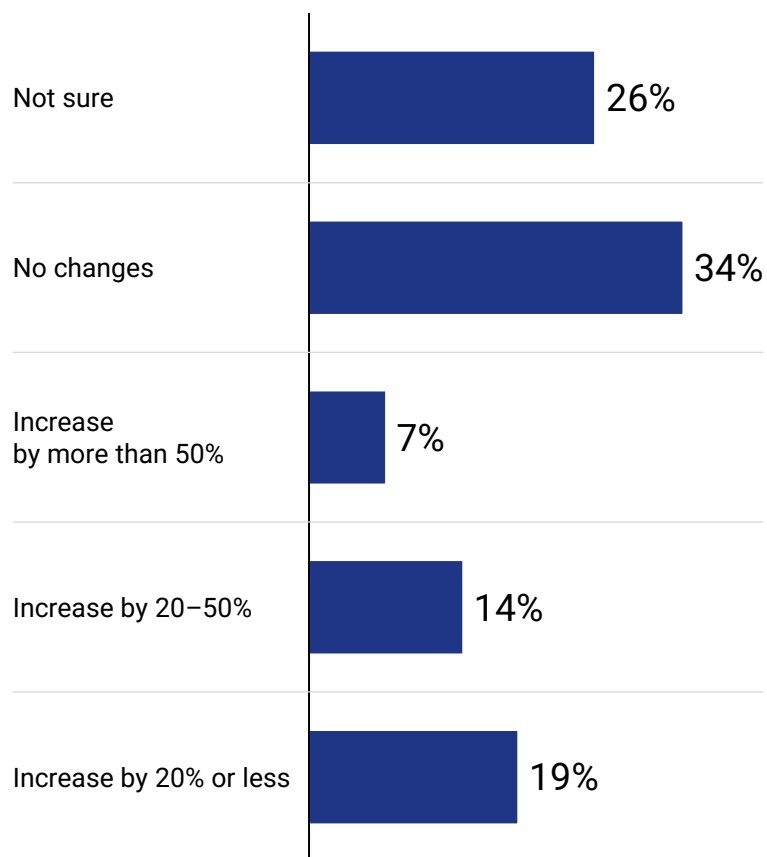


## Job seekers expect the number of external workers to grow by 2030

Estimated growth in the number of external personnel over the past 5 years, % of respondents



Changes in the number of external workers by 2030, % of respondents



Among all job seekers, 40% believe that the number of external workers will increase by 2030

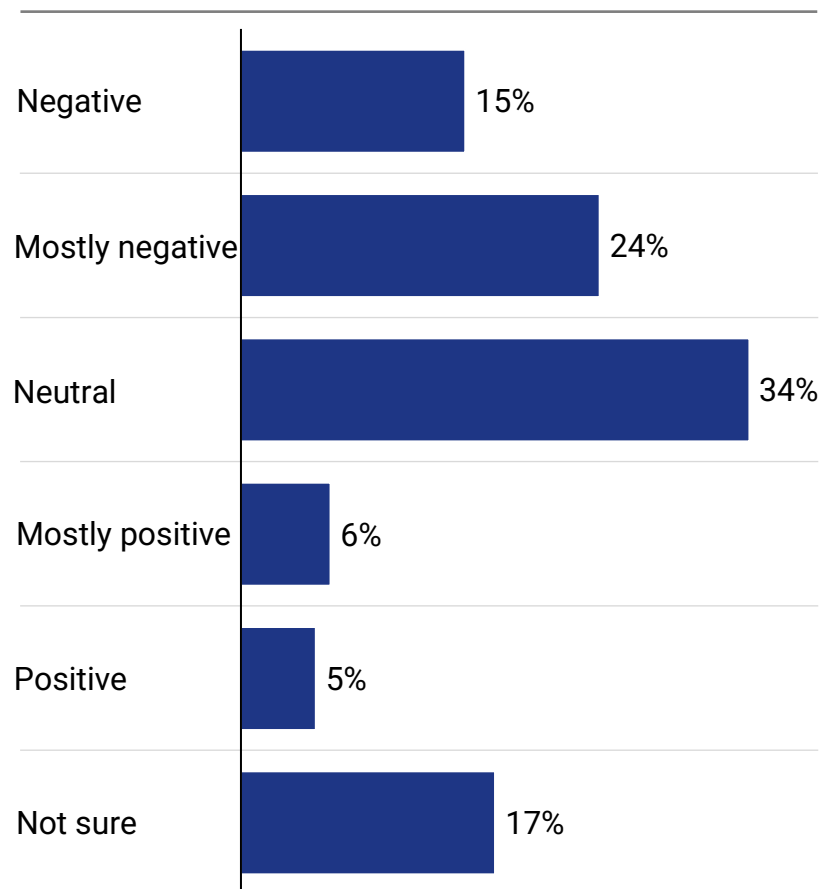
34% of respondents believe that the number of external workers will not change by 2030

Question: "Have you noticed an increase in the number of external employees in your company over the past 5 years?"  
 Question: "Do you think the number of external employees in your company will increase by 2030?"  
 The survey was conducted by Yakov & Partners and hh.ru

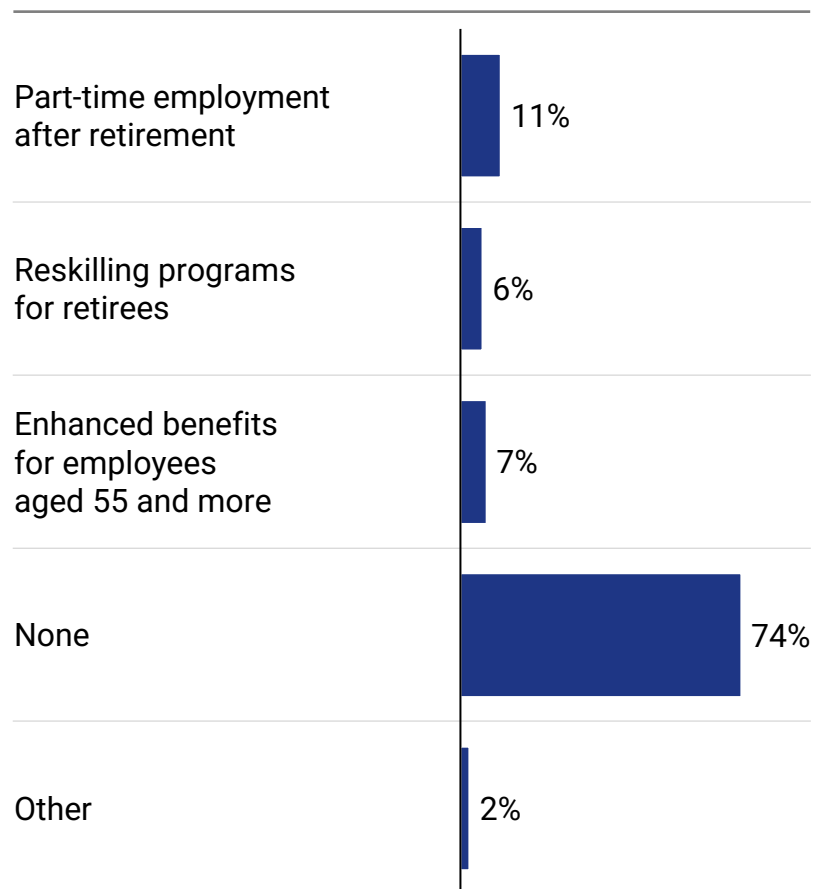


## Three-quarters of respondents believe that their companies are not taking any action to address the aging population trend

### Attitude to hiring senior employees in the respondents' companies, % of respondents



### Initiatives to retain and recruit senior employees, % of respondents



Question: "How does your company feel about hiring individuals near or after retirement age?"  
 Question: "What initiatives to address the aging population trend are planned / being implemented in your company?"  
 The survey was conducted by Yakov & Partners and hh.ru

In light of the global aging population and the shortage of skilled professionals, companies worldwide have become more open to actively engaging and retaining older employees

75% of respondents reported that their companies do not implement any initiatives in this area

“ In Russia, a significant share of employees do not wish to continue working after reaching retirement age.

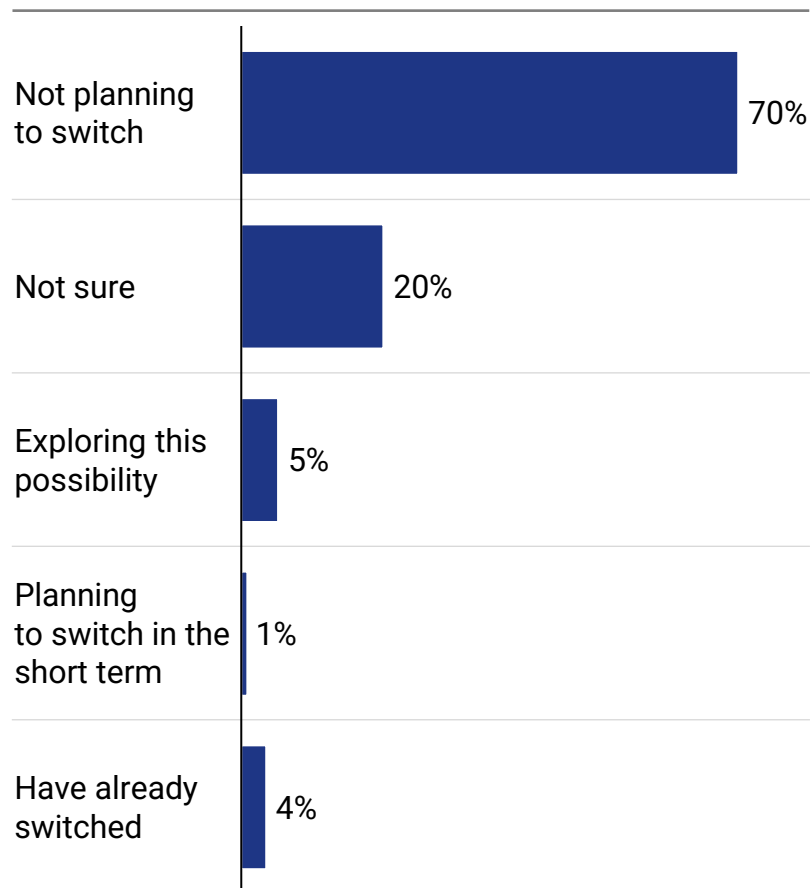
“ Many people who continue to work after retirement show lower productivity, making companies less willing to hire them.

**Vladimir Juma**

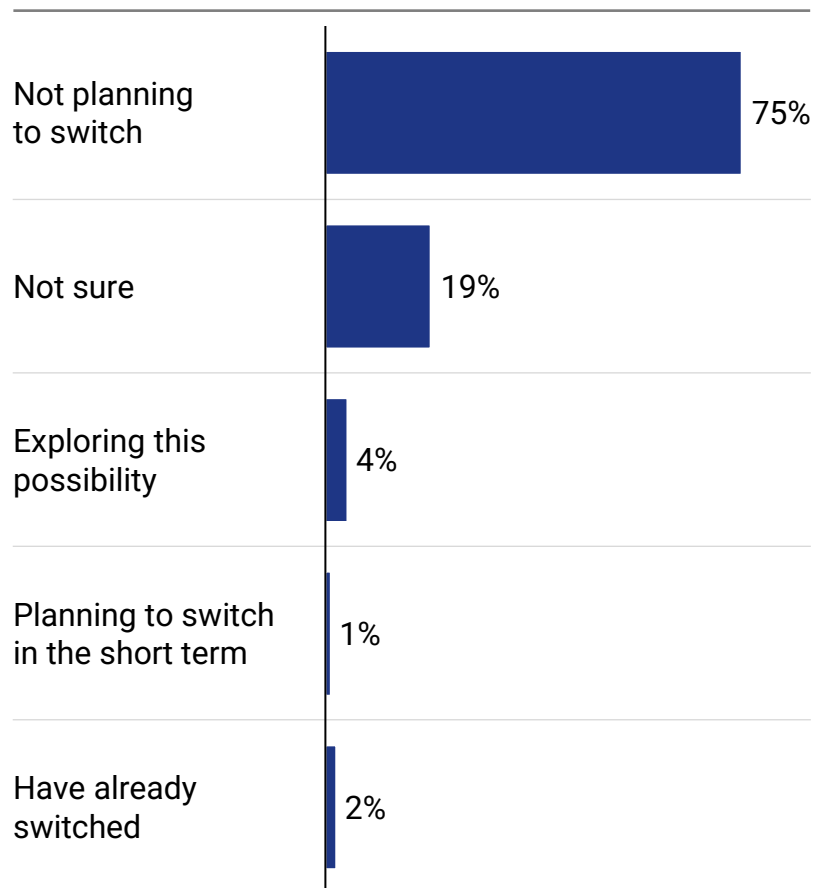
Director of the Center for Digital Transformation and Data Analysis at the All-Russian Research Institute of Labor

## Nearly half of employees who have switched to shorter hours see an increase in their work performance

Share of respondents planning to switch to shorter working hours,  
% of respondents



Share of respondents whose companies are planning to switch to a four-day workweek,  
% of respondents



Despite the recent popularity of this trend, only 4% of companies actually switched to shorter working hours and only 2% opted for a shorter workweek. Still, 5–6% of companies are looking into this or already have plans to switch

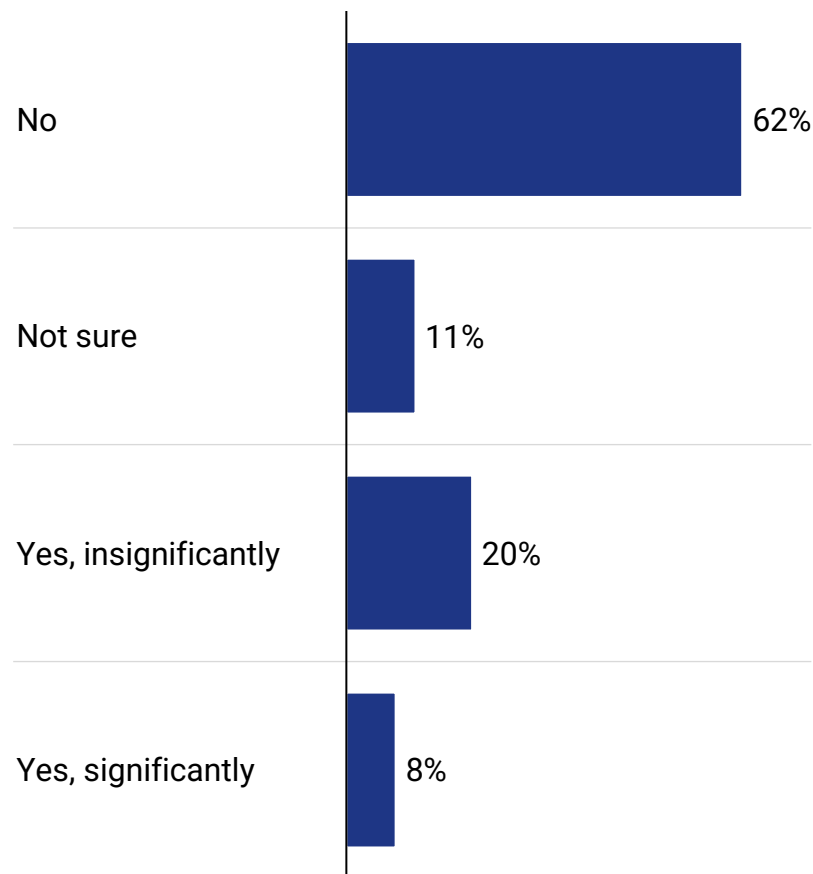
**46% of employees** who have switched to shorter hours see an increase in their work performance

Questions: "Is your company planning to switch to shorter hours?" / "Is your company planning to switch to a four-day workweek?"  
Question: "What changes in your employees' performance do you see after switching to shorter hours?"  
The survey was conducted by Yakov & Partners and hh.ru

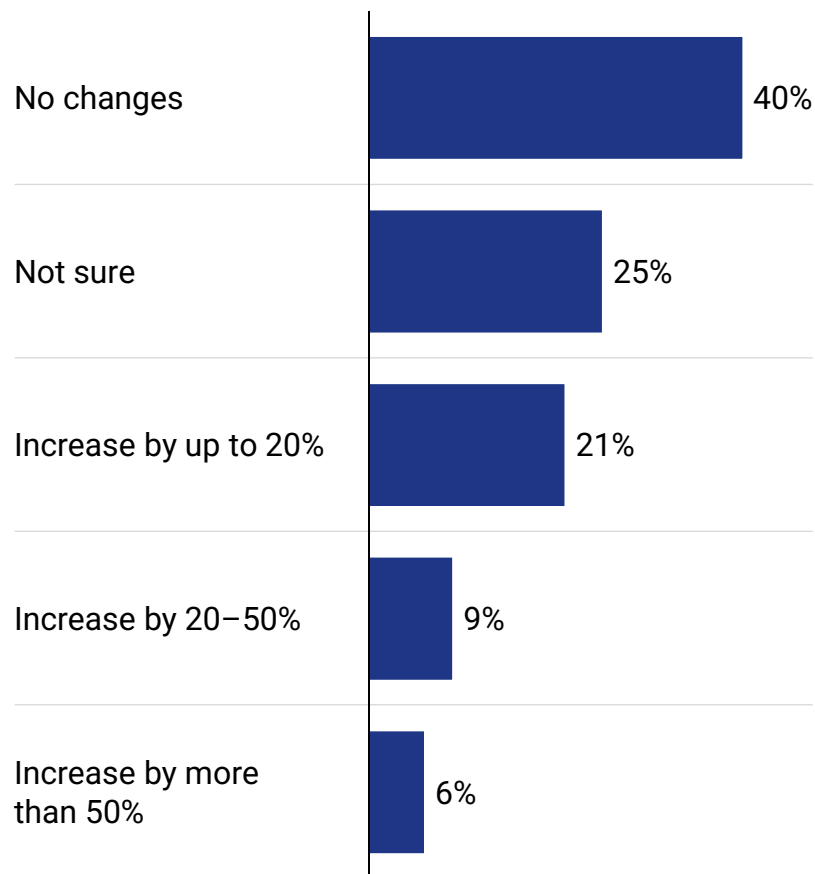


## Nearly 40% of respondents do not see a significant increase in the number of skilled migrant workers over the last 5 years and do not expect such an increase by 2030

Estimated increase in the number of skilled migrant workers over the last 5 years, % of respondents



Changes in the number of skilled migrant workers by 2030, % of respondents



36% of job seekers believe that the number of skilled migrant workers will increase by 2030, but only 15% think that it will increase significantly

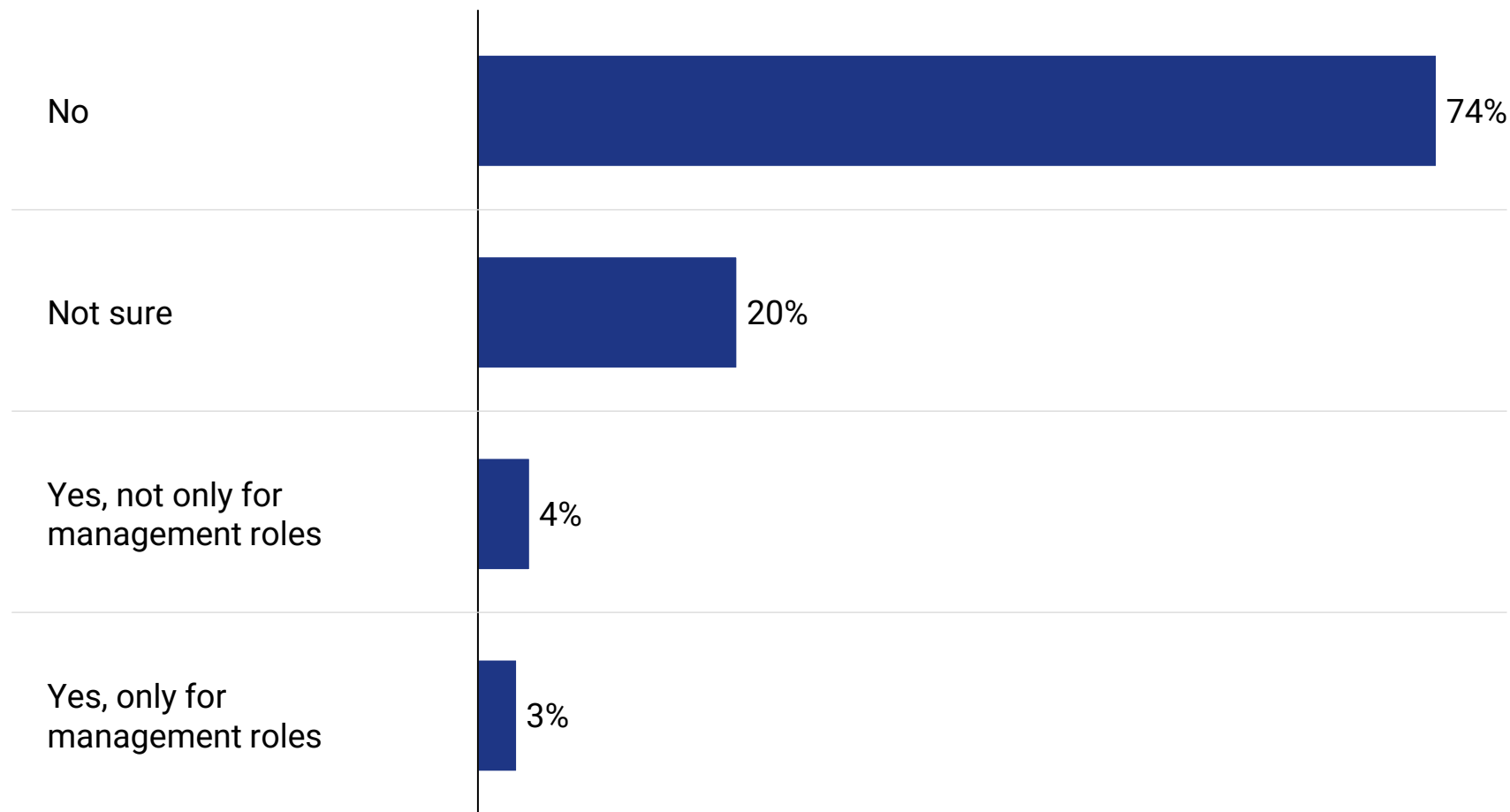
40% do not expect an inflow of skilled migrant workers to their companies by 2030

Question: "Have you witnessed an increase in the number of skilled migrant workers in your company over the past 5 years?"  
 Question: "How much do you think the number of skilled migrant workers in your company will increase by 2030?"  
 The survey was conducted by Yakov & Partners and hh.ru



## Around 7% of respondents said there were quotas for women

Quotas for women,  
% of responses



Question: "Does your company have quotas for a specific number of women employed?"

The survey was conducted by Yakov & Partners and hh.ru

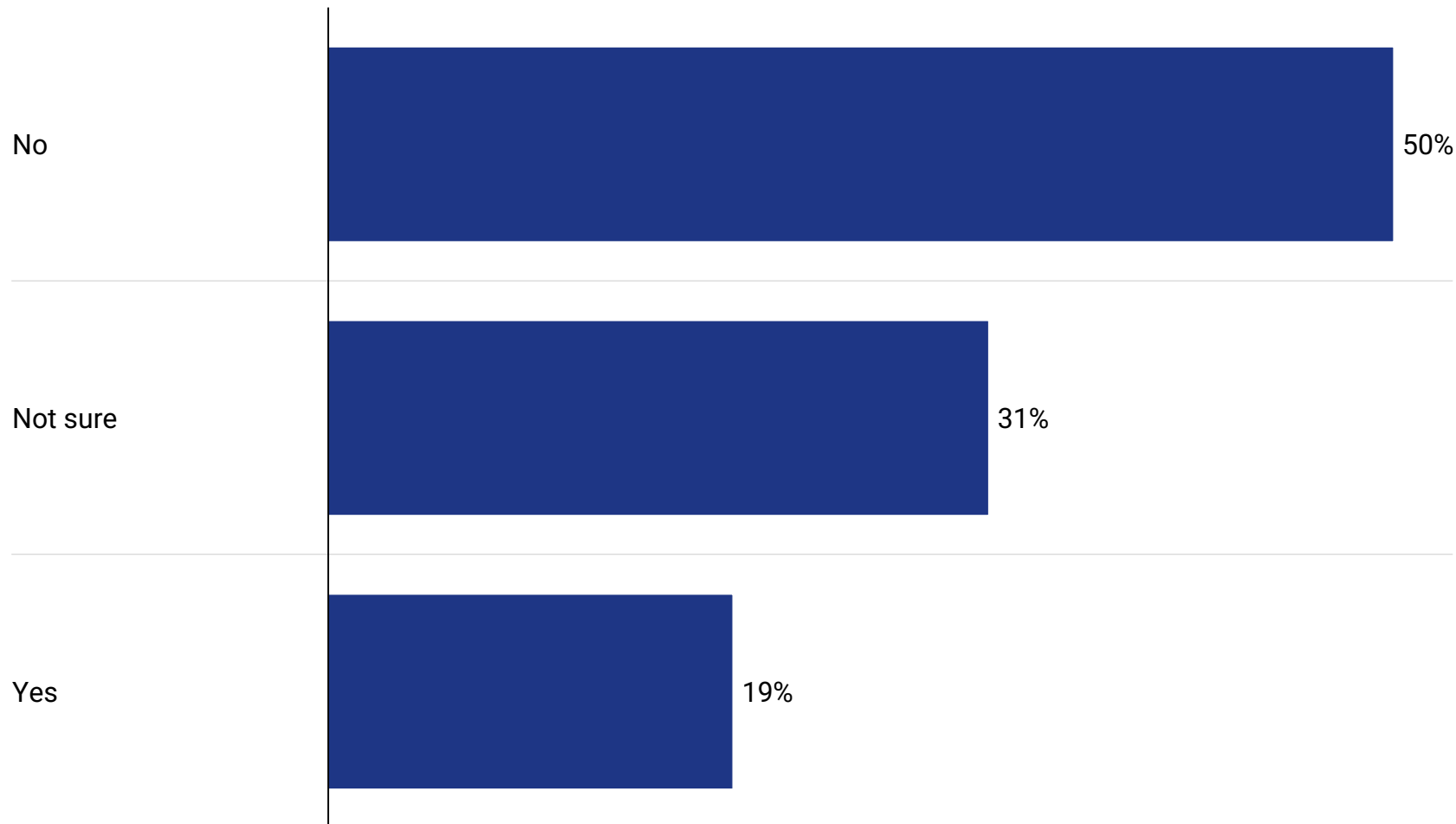
Russian law does not provide for any gender quotas. According to RBC, "the Ministry of Labor has plans to stimulate companies to advance corporate gender equality programs"

It is worth noting that 7% of respondents are already confident that their companies have such quotas. 33% of respondents who said that their companies have quotas for women managers work in HR



## Respondents are poorly informed about quotas for special groups of people in their companies

Quotas and benefits for special groups of people,  
% of respondents



Questions: "Does your company have quotas or benefits for special groups of people?"

The survey was conducted by Yakov & Partners and hh.ru

- According to Article 13.2 of the Russian law on employment of the population, employers that have more than 100 employees are required to introduce quotas for disabled people equal to 2–4% of the average headcount, while the quota for employers that have 35–100 employees may be up to 3%
- That provided, a large share of respondents are not aware of such quotas or benefits in their companies (for all respondents irrespective of the size of their company)



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### **Impact of Social Trends on the Labor Market in 2023**

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