



# Decoding Global Talent 2024 - Serbia results

## REPORT 2: Work Preferences in the Age of AI



JUNE 2024



# Introducing Decoding Global Talent 2024

> 150,000  
global  
workforce  
responses

> 185  
countries  
worldwide

## What this document covers



### Demographics of respondents

# of participants, gender, age, education and industry background distribution for country's respondents



### Global survey results

Impact of GenAI on the workforce and shifts in work preferences



### Shifting work preferences

Evolving priorities with strong appetite for reskilling



### Gen AI impact on workers

Adoption, use-cases, and perceived impact of AI

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The objective of the country kits is to complement the findings of the global reports with specific information about your market.

To ensure consistency of data, please follow a few rules when adjusting anything on the following slides.

## What can you adjust?



- ✓ Translate text to local language
- ✓ Add comments with your own interpretation of the results
- ✓ Change slide title to represent key message
- ✓ Change visuals to match your branding

## What should you not adjust?

- ✗ Data itself/any numbers

## How can you use the finished product?

- ✓ Include the data in your press release/media kit for additional information
- ✓ In presentations for clients/media
- ✓ As input for writing articles locally conducting future research
- ✗ Please do not formally publish these actual slides (e.g. on your website) - these have not been edited for publication



If you'd like to create a local specific publication, please ask the global team for approval.

If you need more detailed data cuts, please contact the global team.

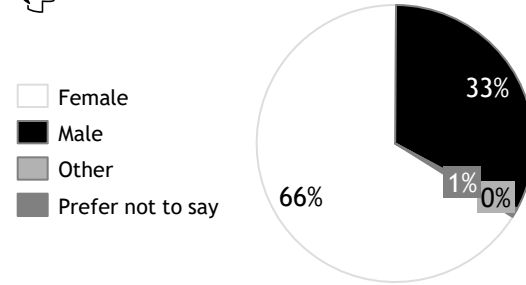


# Demographics of 2024 survey respondents in Serbia

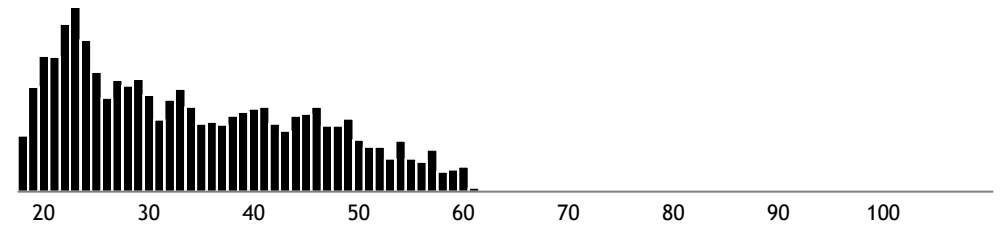
Workforce participants in Serbia

3,439

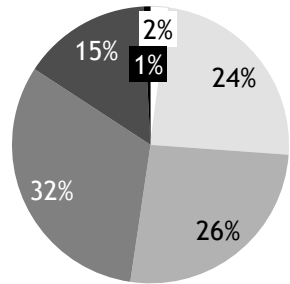
Gender



Age distribution

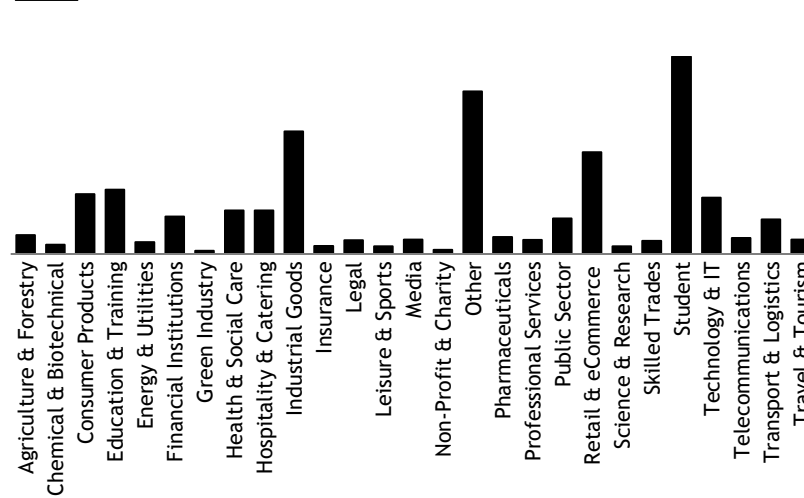


Education

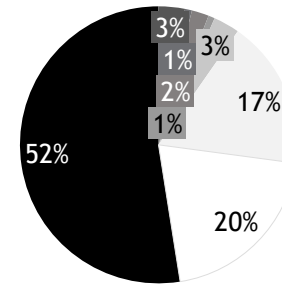


No formal education  
 High school  
 Secondary qualification  
 Bachelor  
 Master/Diploma  
 Doctorate/PhD/MD

Industry background

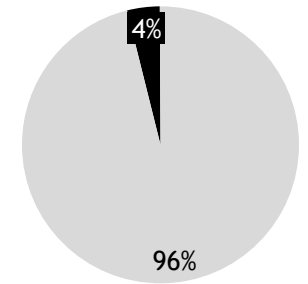


Employment status



Full-time  
 Part-time  
 Internship  
 Not working (other)  
 Retired  
 Self-employed  
 Student  
 Unemployed

Living Status



Not living in country of origin  
 Living in country of origin

Note: Percentages may not total 100% due to rounding. Responses to questions: “What is your gender?”, “What is your year of birth?”, “What is the highest level of education you have completed?”, “What is/was your employer’s/company’s main activity/services you offer?”, “Do you currently live in your country of origin?”

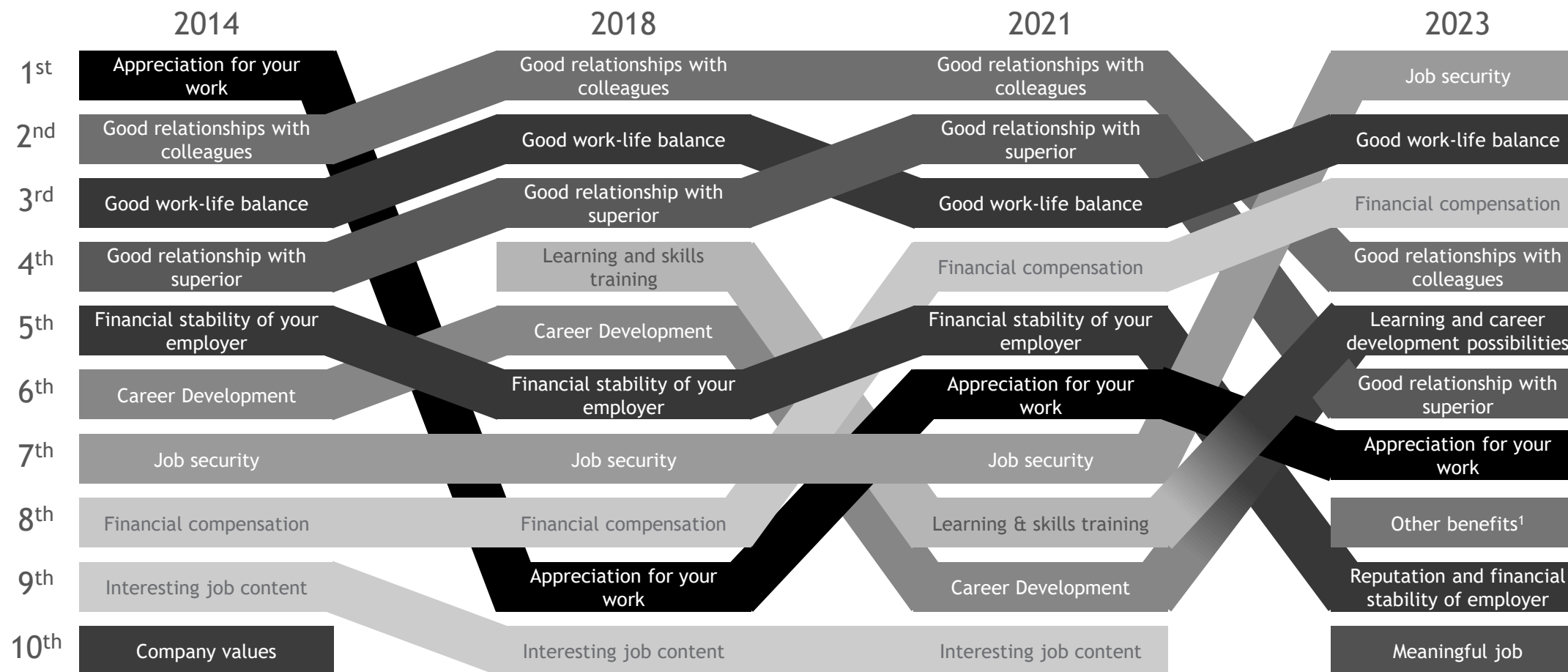


# Global survey results



# Top job elements for the Global workforce

Job security has surged in importance along with learning and career development



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



# Top job elements across the key Regions

Differences across the regions in the Top 10 factors that matter at work

	Sub-Saharan Africa	Latin America and the Caribbean	East Asia and Pacific	Middle East and North Africa	South Asia	North America	Europe and Central Asia
1 <sup>st</sup>	Learning and career development possibility	Learning and career development possibility	Job Security	Learning and career development possibility	Job Security	Financial Compensation	Good work life balance
2 <sup>nd</sup>	Job Security	Job Security	Financial Compensation	Job Security	Learning and career development possibility	Job Security	Good relationship with colleagues
3 <sup>rd</sup>	Opportunities to lead & take responsibility	Good relationship with superiors	Good work life balance	Appreciation for your work	Opportunities to lead & take responsibility	Good work life balance	Financial Compensation
4 <sup>th</sup>	Reputation & financial stability of employer	Appreciation for your work	Other Benefits <sup>1</sup>	Reputation & financial stability of employer	Good work life balance	Other Benefits <sup>1</sup>	Good relationship with superiors
5 <sup>th</sup>	Creative Environment	Financial Compensation	Learning and career development possibility	Opportunities to lead & take responsibility	Good relationship with colleagues	Appreciation for your work	Appreciation for your work
6 <sup>th</sup>	Good relationship with colleagues	Good relationship with colleagues	Reputation & financial stability of employer	Good relationship with colleagues	Financial Compensation	Reputation & financial stability of employer	Interesting Content
7 <sup>th</sup>	Meaningfulness of job	Other Benefits <sup>1</sup>	Good relationship with colleagues	Good work life balance	Reputation & financial stability of employer	Meaningfulness of job	Job Security
8 <sup>th</sup>	Appreciation for your work	Reputation & financial stability of employer	Good relationship with superiors	Creative Environment	Creative Environment	Amount of paid time off/Holiday	Amount of paid time off/Holiday
9 <sup>th</sup>	Good relationship with superiors	Opportunities to lead & take responsibility	Amount of paid time off/Holiday	Interesting Content	Good relationship with superiors	Values	Learning and career development possibility
10 <sup>th</sup>	Financial Compensation	Good work life balance	Appreciation for your work	Meaningfulness of job	Meaningfulness of job	Good relationship with superiors	Meaningfulness of job

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



# Top job elements across different Age Groups

Differences across the various age categories in the Top 10 factors that matter at work

	Younger than or equal to 20	21-30	31-40	41-50	51-60	Older than 60
1 <sup>st</sup>	Job Security	Job Security	Job Security	Good work life balance	Good relationship with colleagues	Good relationship with colleagues
2 <sup>nd</sup>	Learning and career development possibilities	Learning and career development possibilities	Good work life balance	Financial Compensation	Good relationship with superiors	Appreciation for your work
3 <sup>rd</sup>	Good work life balance	Good work life balance	Financial Compensation	Job Security	Appreciation for your work	Good relationship with superiors
4 <sup>th</sup>	Good relationship with colleagues	Financial Compensation	Learning and career development possibilities	Good relationship with superiors	Good work life balance	Interesting Content
5 <sup>th</sup>	Appreciation for your work	Other Benefits <sup>1</sup>	Other Benefits <sup>1</sup>	Good relationship with colleagues	Interesting Content	Meaningfulness of job
6 <sup>th</sup>	Financial Compensation	Good relationship with colleagues	Good relationship with colleagues	Appreciation for your work	Financial Compensation	Financial Compensation
7 <sup>th</sup>	Creative Environment	Appreciation for your work	Good relationship with superiors	Learning and career development possibilities	Job Security	Good work life balance
8 <sup>th</sup>	Good relationship with superiors	Reputation & financial stability of you employer	Appreciation for your work	Other Benefits <sup>1</sup>	Meaningfulness of job	Values
9 <sup>th</sup>	Meaningfulness of job	Good relationship with superiors	Reputation & financial stability of you employer	Reputation & financial stability of you employer	Reputation & financial stability of you employer	Reputation & financial stability of you employer
10 <sup>th</sup>	Reputation & financial stability of you employer	Creative Environment	Amount of paid time off/Holiday	Interesting Content	Values	Job Security

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

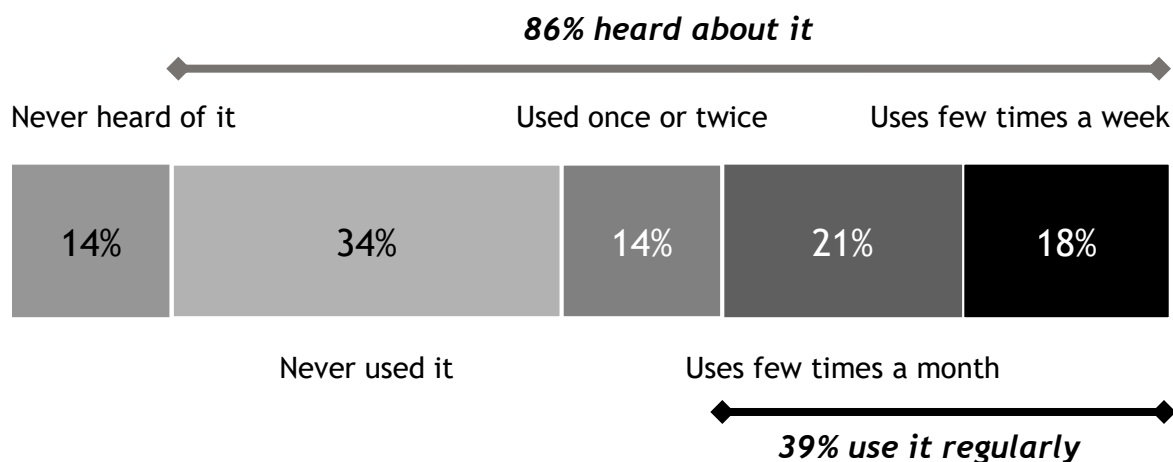




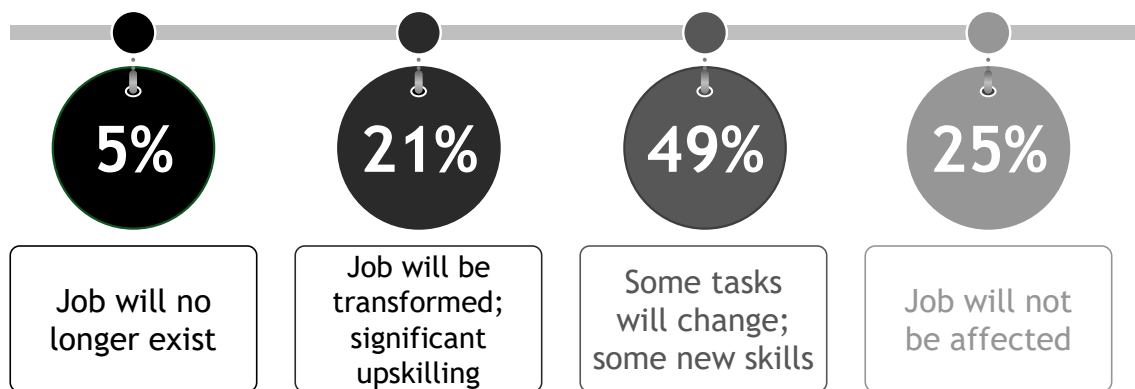
# Respondents in the age of Gen AI

Most workers have heard of Gen AI, 39% use it regularly

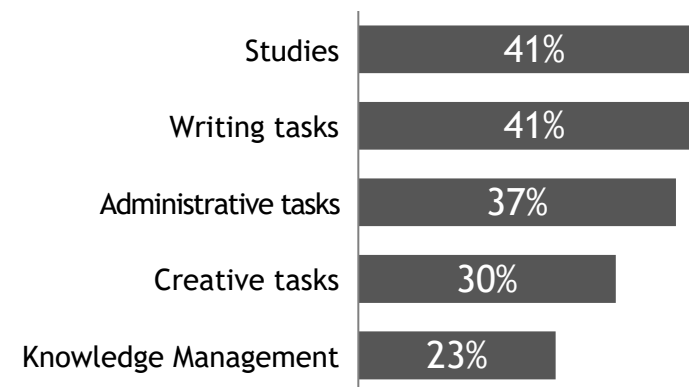
## Gen AI adoption



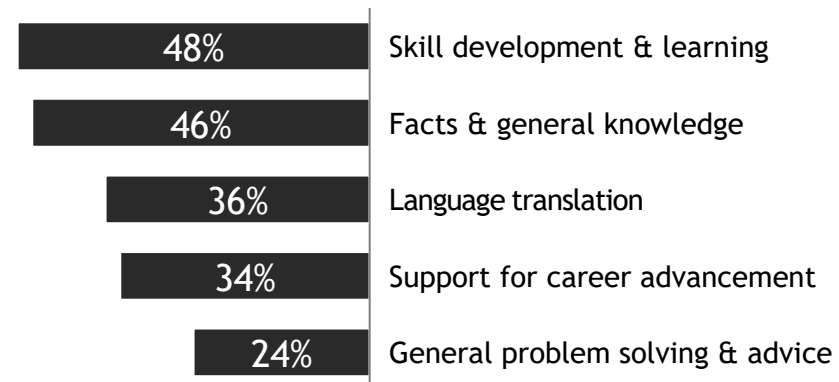
## Impact of Gen AI



## Top work use-cases of Gen AI



## Top personal use-cases of Gen AI





# Changing work preferences



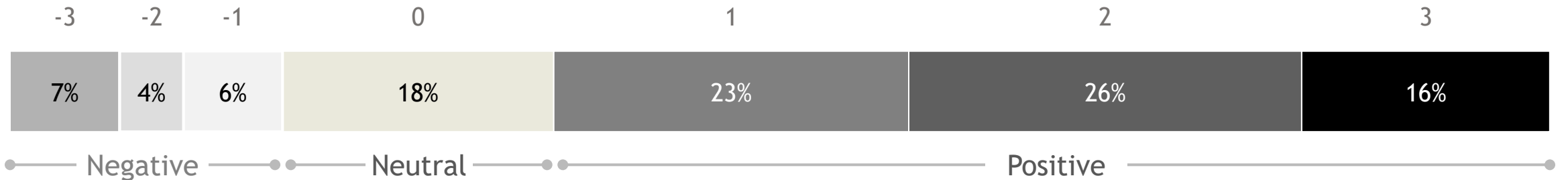
# Confidence within the Serbian Workforce

A good percentage of respondents claim getting approached a few times a year or more frequently, which translates into a similar percentage having multiple offers to negotiate

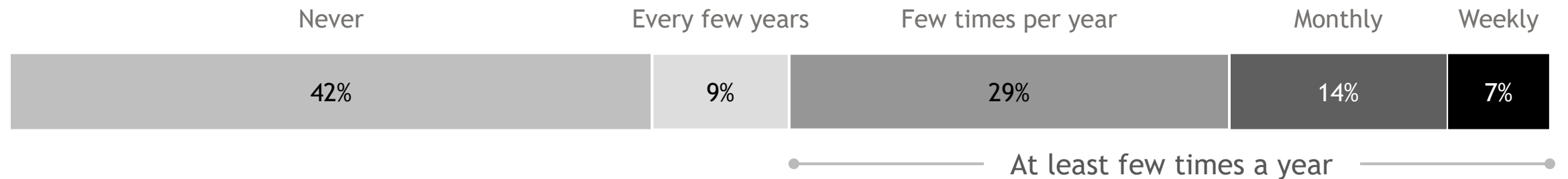
## How do you perceive your negotiation position?

“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?





# Top job elements for the Serbian Workforce

What the Serbia workforce values, as World gives more importance to Job Security and Good Work Life Balance

	Serbia 2018	Serbia 2020	Serbia 2023	Global 2023
1 <sup>st</sup>	Good relationship with colleagues	Good relationship with colleagues	Good work-life balance	Job Security
2 <sup>nd</sup>	Career development possibilities	Good work-life balance	Job security	Good work-life balance
3 <sup>rd</sup>	Good work-life balance	Appreciation for work	Financial compensation	Financial Compensation
4 <sup>th</sup>	Learning & skills training	Good relationship with superior	Learning and career development	Good relationship with colleagues
5 <sup>th</sup>	Job security	Career development possibilities	Other benefits	Learning & Career development possibilities
6 <sup>th</sup>	Good relationship with superior	Financial compensation	Good relationships with colleagues	Good relationship with superior
7 <sup>th</sup>	Appreciation for work	Job security	Amount of paid-off / holiday	Appreciation for your work
8 <sup>th</sup>	Financial stability of employer	Learning & skills training	Good relationship with superior	Other benefits <sup>1</sup>
9 <sup>th</sup>	Financial compensation	Financial stability of employer	Appreciation for your work	Reputation & financial stability of your employer
10 <sup>th</sup>	Interesting job content	Interesting job content	Reputation and financial stability of employer	Meaningful job

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



# Top job elements by age groups for the Serbian Workforce

How important are the following elements to the respondents as they mature

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



# Key dealbreakers for Serbian jobseekers

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



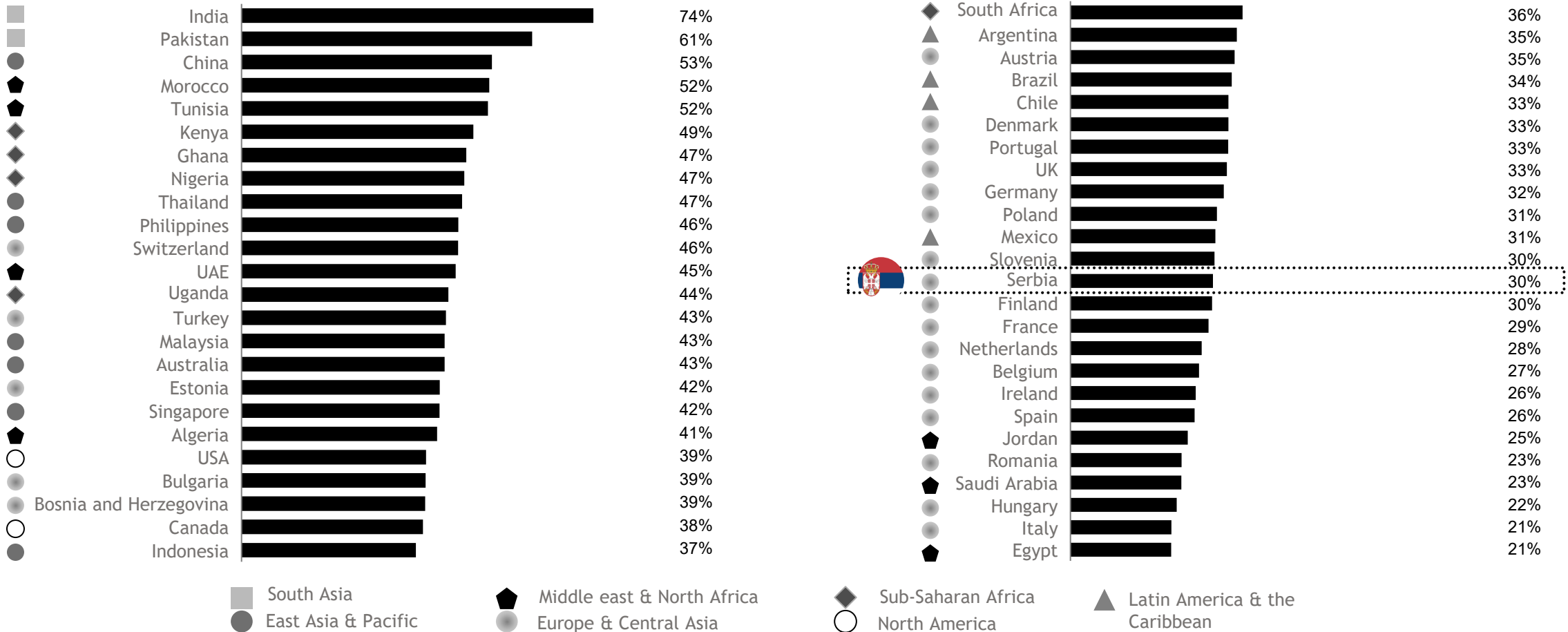


# Percieved impact of GenAI on the workforce in Serbia



# AI Adoption across countries

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



Note: Data for countries with at least 250 respondents. Ranking is similar when controlled for young respondents, those in digital and IT professions, or those who use GenAI for work. Countries are ranked basis *regular usage of Gen AI only (using few times a week / month)*. | Adoption %es on this page might differ from the *regular use %es* shown on next slide as respondents who regularly use GenAI but do not know what they use it for have been excluded  
 Source: 2024 BCG/The Network/Stepstone proprietary web survey and analysis.





# Experimentation with Gen AI | Overall adoption

More frequent use of Gen AI among younger and more highly educated respondents



## Serbia



## Global

Regular	Serbia	Global
Used few times a week in work/personal life	13%	18%
Used few times a month in work/personal life	18%	21%
Only once or twice	12%	14%
Heard of these technologies but never experimented with them	39%	34%
Not heard of these technologies	19%	14%

... and for talent segments\* in demand

Young



44%

Highly educated



36%

... and for talent segments\* in demand



Young

49%



Highly educated

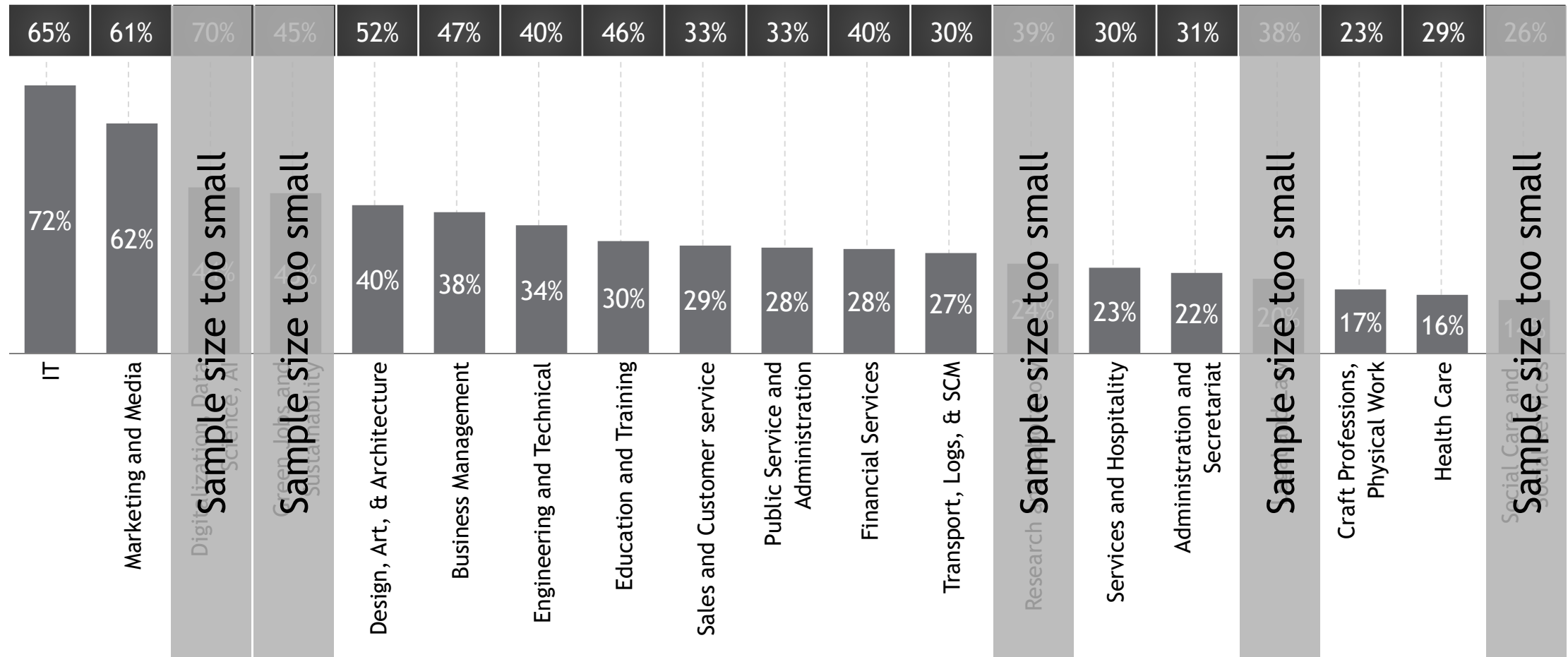
45%

\*Note: Split for young talent (<30 years) and highly educated (Masters/Diploma, Doctorate/PhD/MD) categories are amongst *regular users only (using few times a week / month)*  
 Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis



# Gen AI Adoption across various professions

Digital, Media, and IT professionals lead Gen AI adoptions across the world, as following are the adoption rates across different job roles in Serbia...



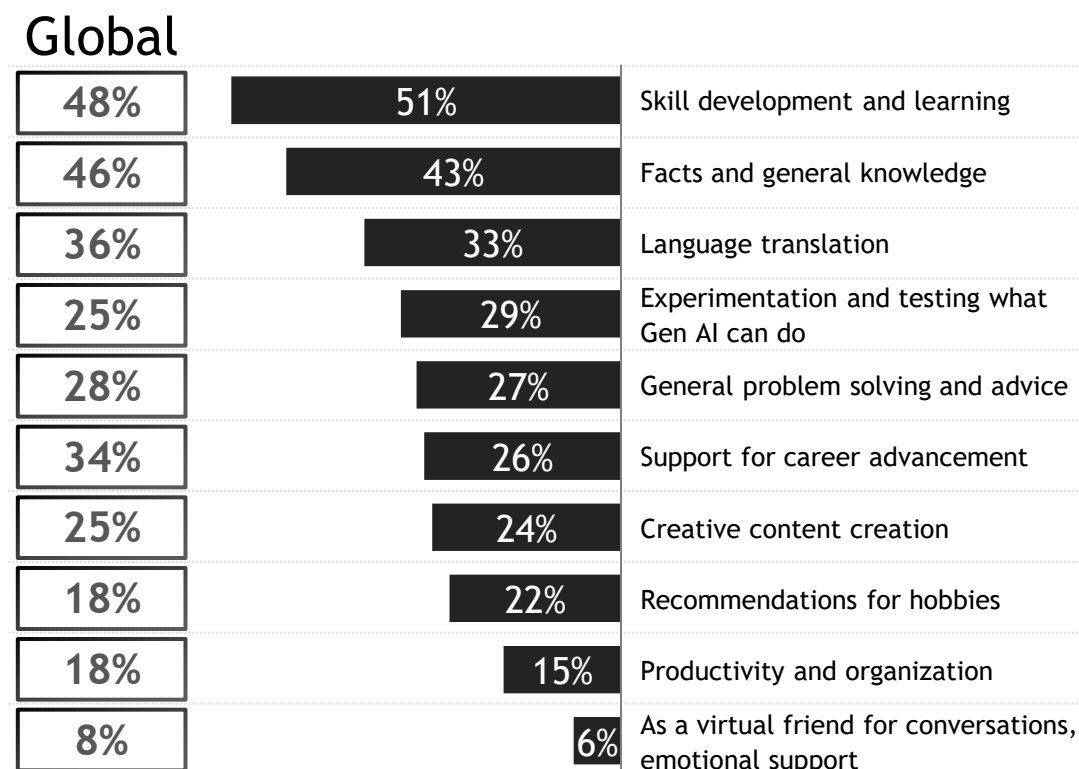
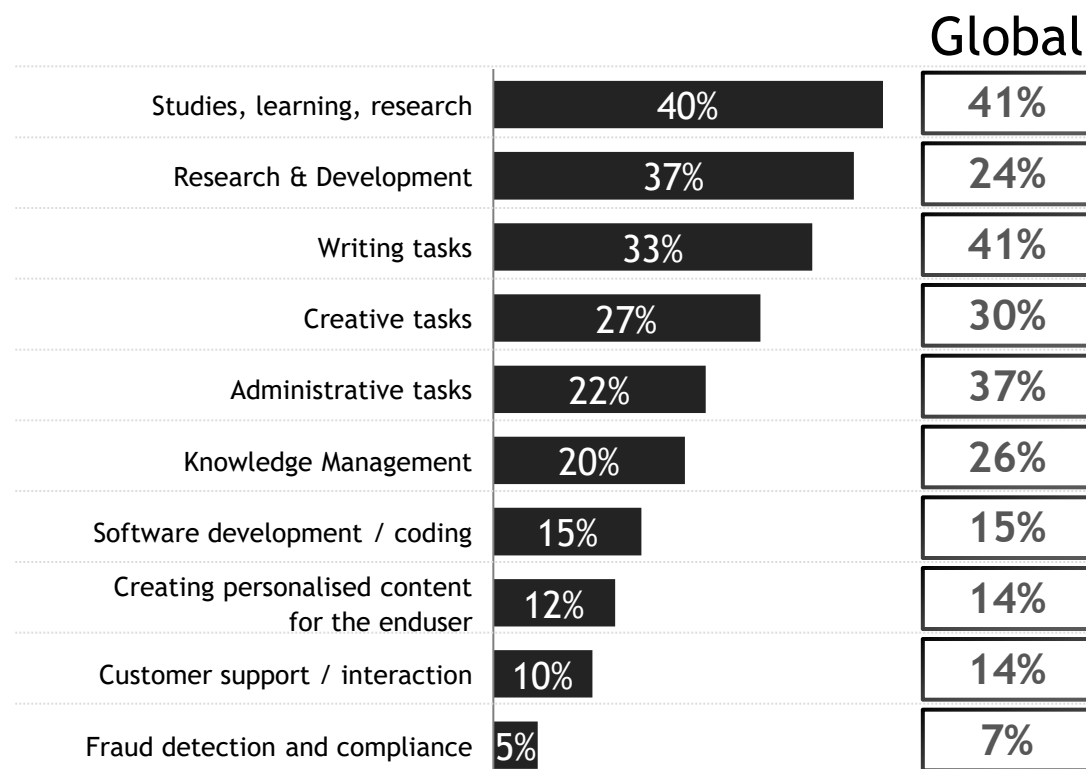
Note: Work/personal uses given only for those who do use Gen AI at work / in personal lives, respectively, amongst *regular users only (using few times a week / month)*  
 Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis



# Gen AI use cases for the Serbian Workforce

What do you use GenAI for at work?

What do you use GenAI for in your personal life?

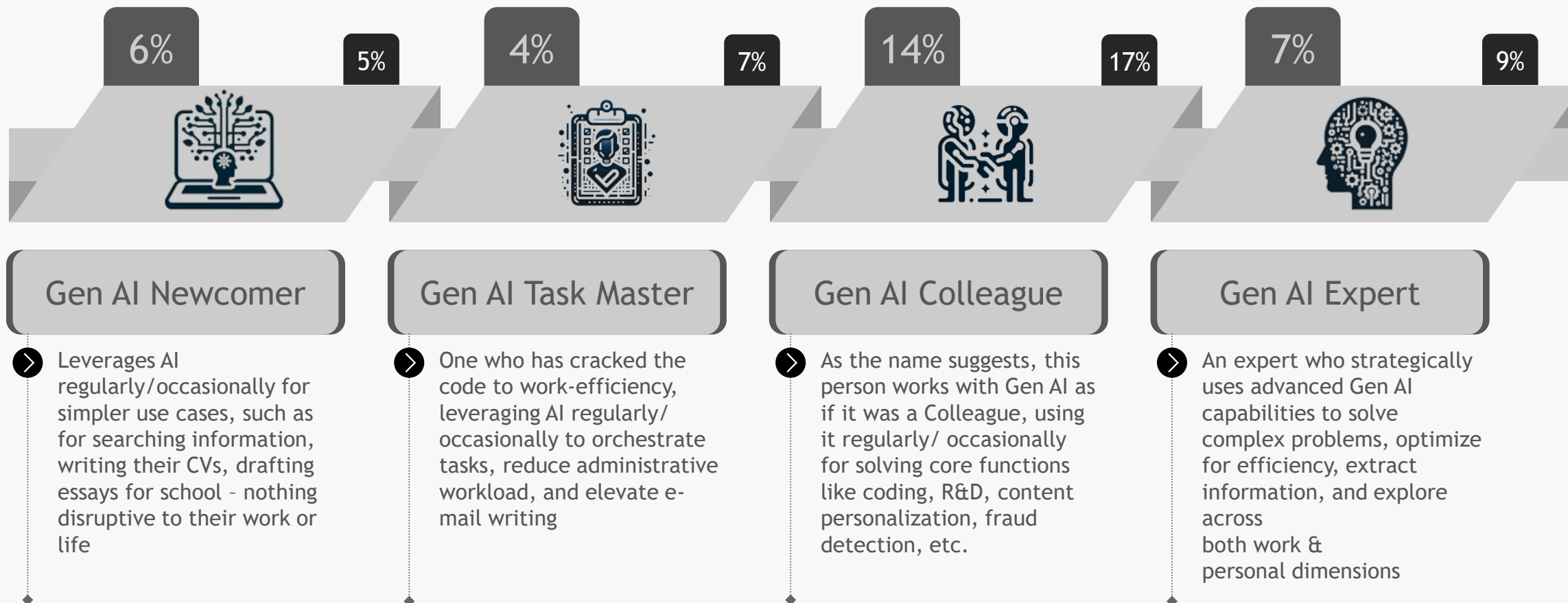


Note: Work/personal uses given only for those who do use Gen AI at work / in personal lives, respectively, amongst *regular users only (using few times a week / month)*  
 Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis



# User personas across Gen AI use-cases

Workers can be segmented into 4 personas based on their GenAI usage





**%** % of respondents who fall into the specific persona globally

~1% respondents (out of the ~39% regular users globally) don't know what they're using AI for  
 Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis



# Major difficulties while using AI

Unavailability of data or slow speed are major pain points for the Global workforce, as people in Serbia face difficulties with...

	 Serbia	 Global
Difficulty	% of all respondents	Global
Unavailability of data or Sources not credible	28%	32%
Slow speed or other Technical issues	22%	31%
Difficulties in writing prompts, lack of other skills	22%	30%
Output quality is not high enough	20%	20%
Biased output	5%	8%

## Serbia by key user personas

### Newcomer

- 27% Slow speed or other Technical issues
- 18% Unavailability of data or Sources not credible
- 16% Output quality is not high enough

### Colleague

- 27% Unavailability of data or Sources not credible
- 21% Output quality is not high enough
- 20% Difficulties in writing prompts, lack of other skills

### Task Master

- 28% Difficulties in writing prompts, lack of other skills
- 25% Slow speed or other Technical issues
- 23% Unavailability of data or Sources not credible

### Expert

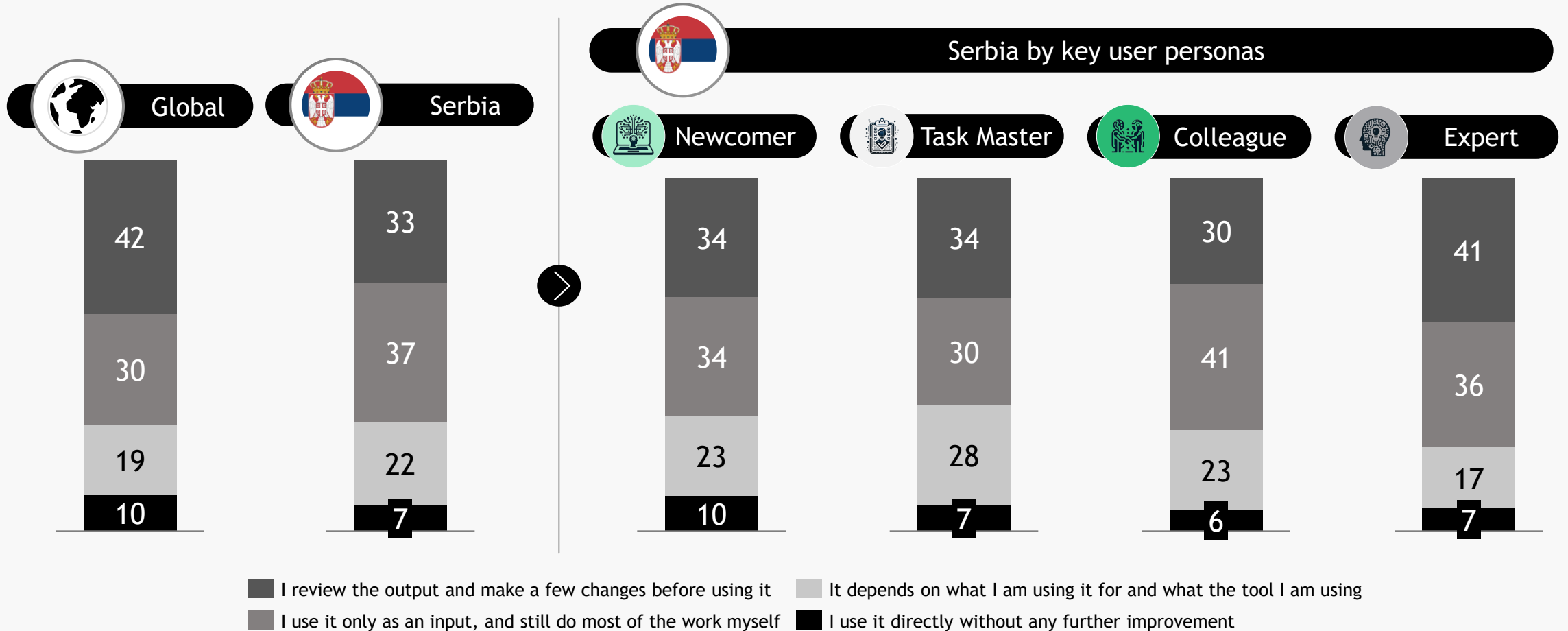
- 36% Unavailability of data or Sources not credible
- 29% Difficulties in writing prompts, lack of other skills
- 28% Slow speed or other Technical issues

Overall data for various difficulties amongst *regular users only (using few times a week / month)*  
 Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis



# Utilizing Gen AI's final output

Use of final output generated by Gen AI across different personas identified

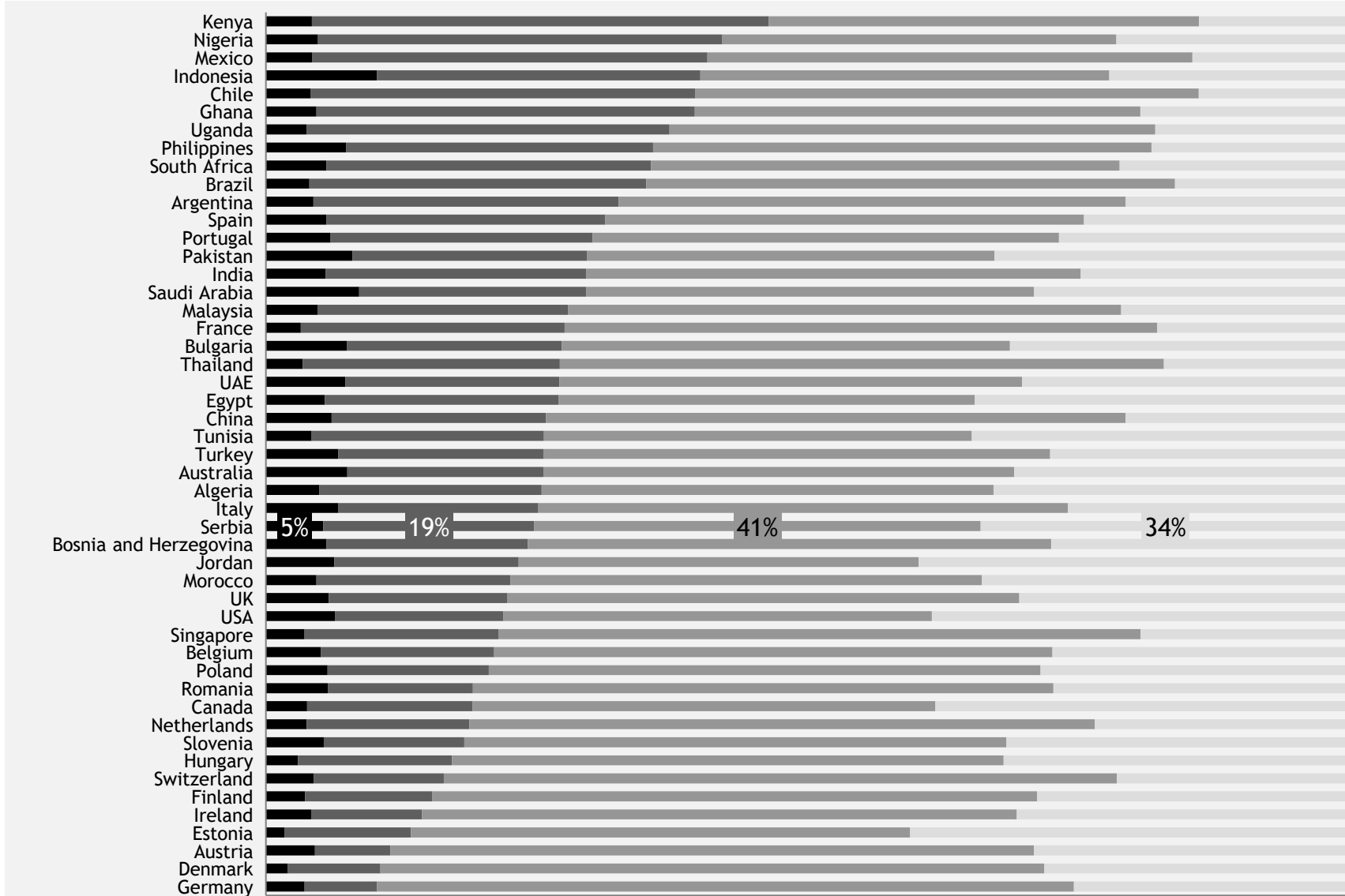


Overall data for utilizing output amongst *regular users only (using few times a week / month)*  
 Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis



# Re-skilling in Serbia

# Perceived impact of AI on jobs in the next 5 years



Serbia

Case in focus  
(see next slide for exact numbers)

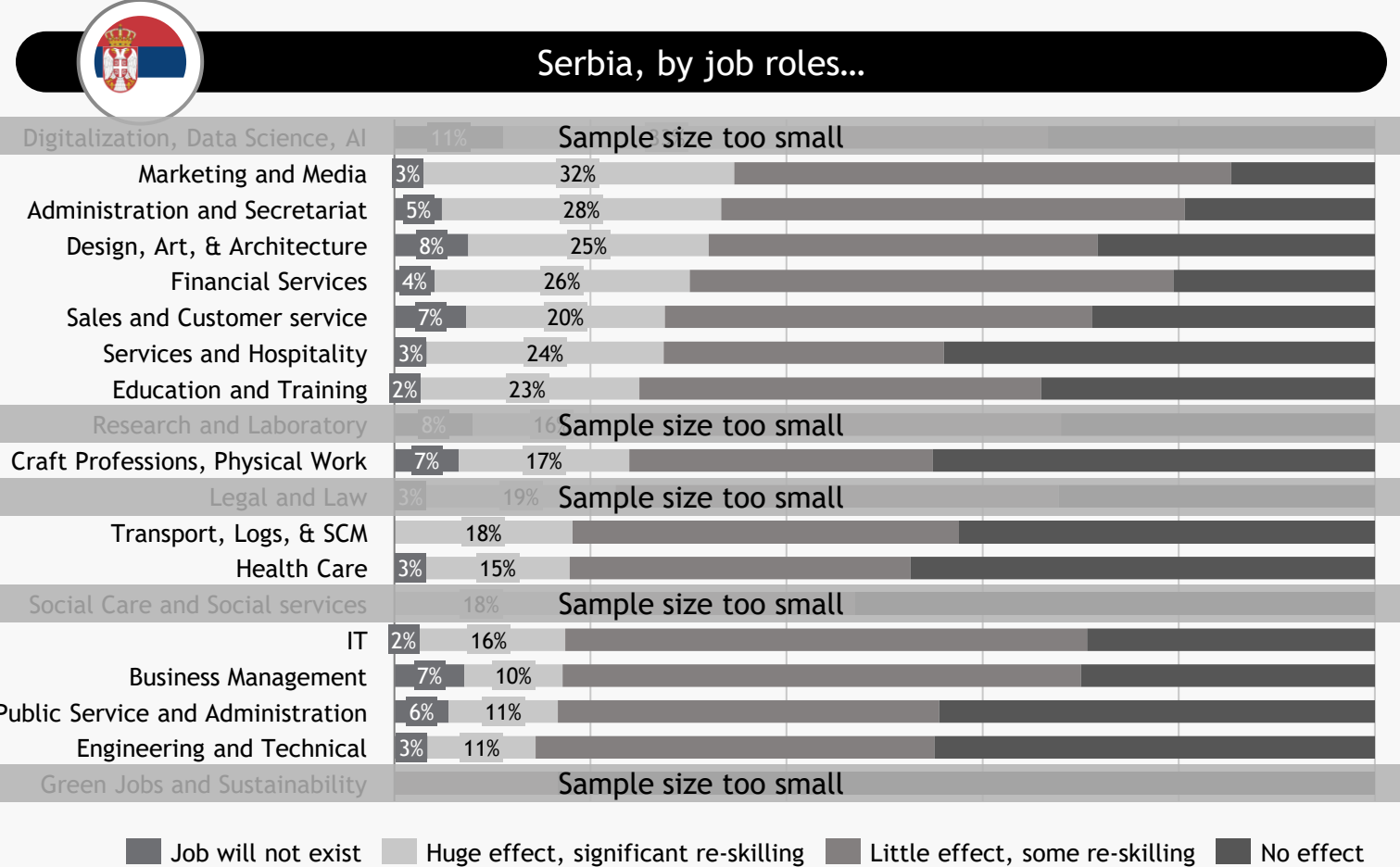
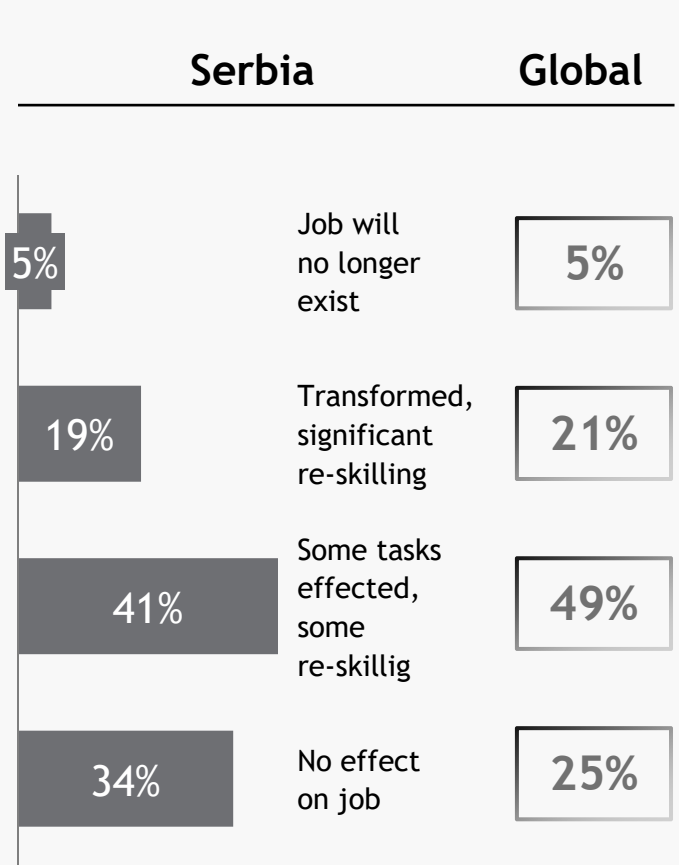
- Job will not exist
- Huge effect, significant re-skilling
- Some effect, some re-skilling
- No effect on job

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



# Perceived impact of Gen AI on various job roles across Serbia

A country-wise ranking by percentage of respondents feeling that their jobs will not exist or get significantly impacted in the next 5 years because of Gen AI

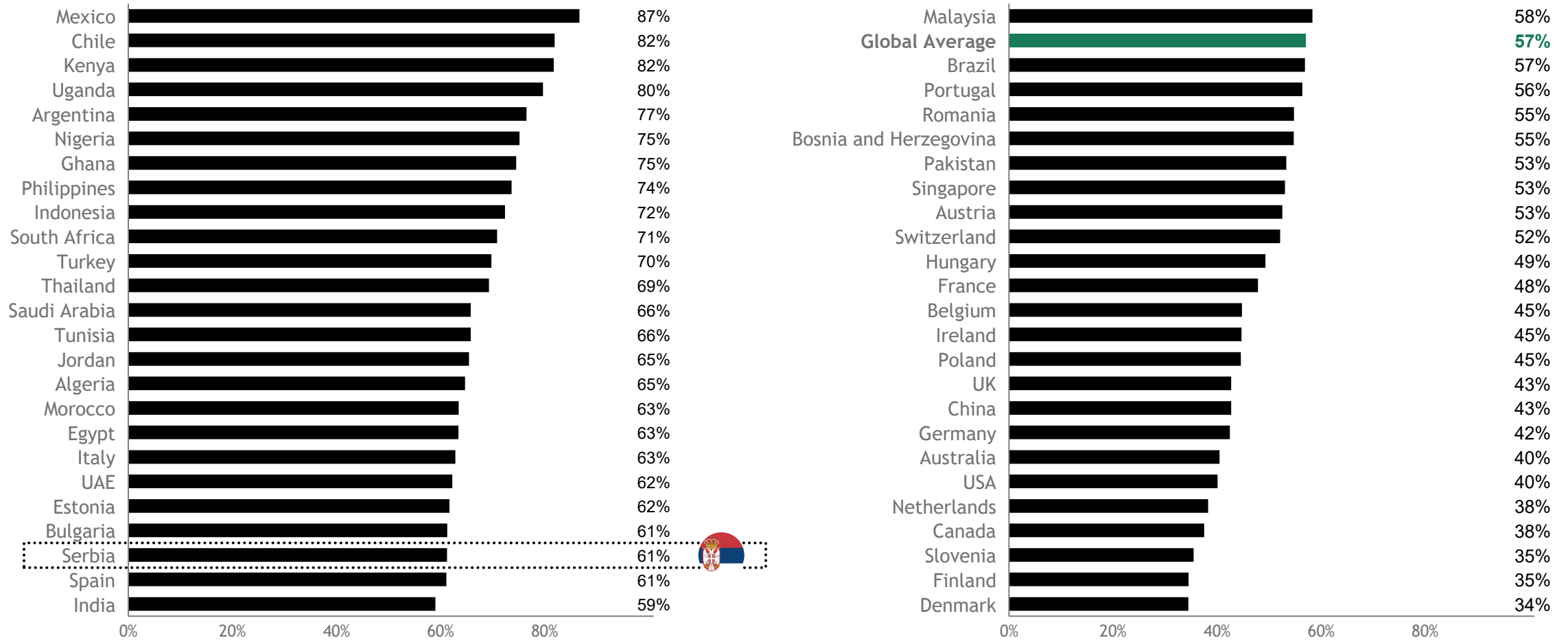


Source: 2023 BCG/The Network/The Stepstone Group proprietary web survey and analysis



# Willingness to Re-skill

A country-wise ranking based on percentage of respondents willing to reskill "in any case"

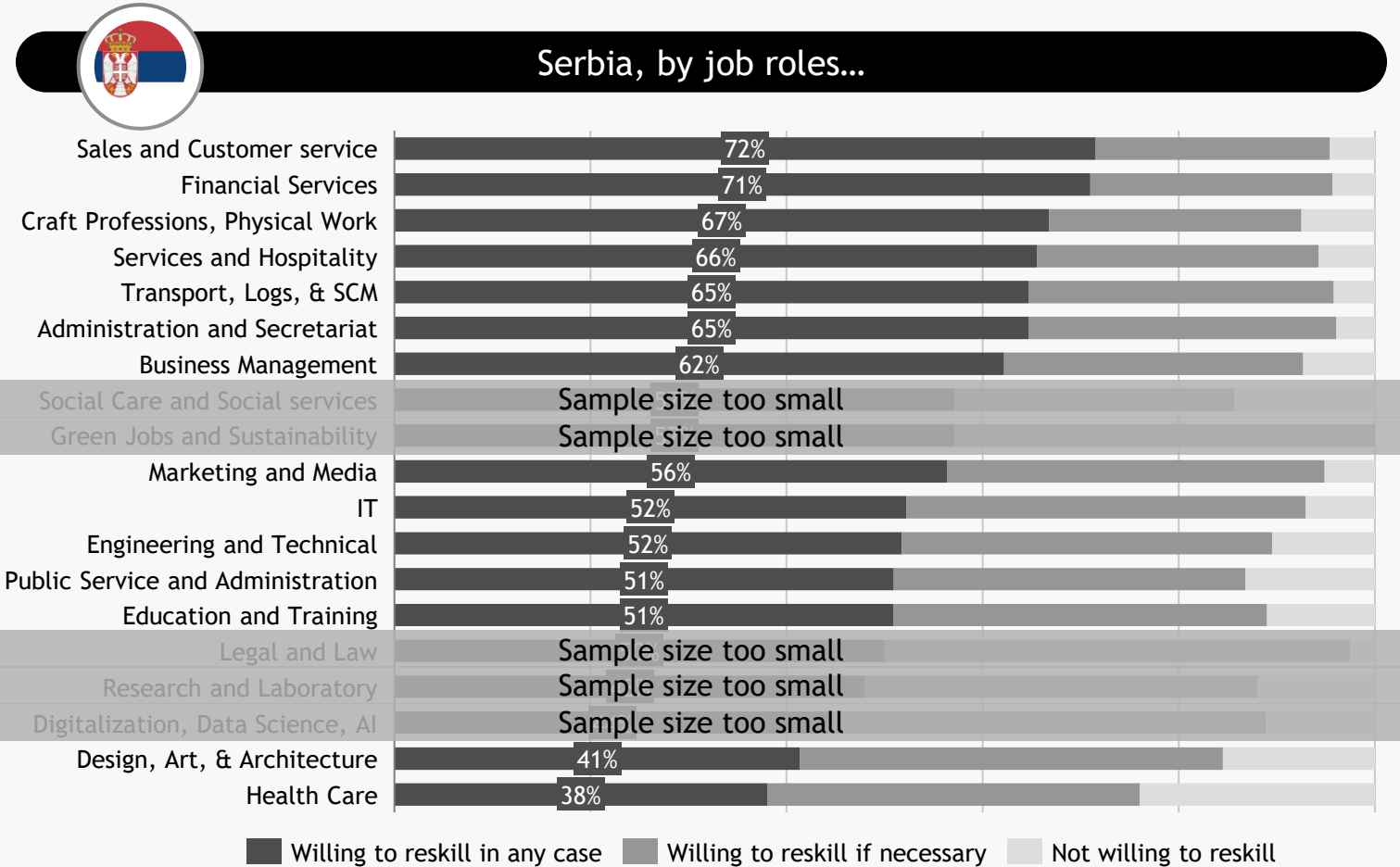
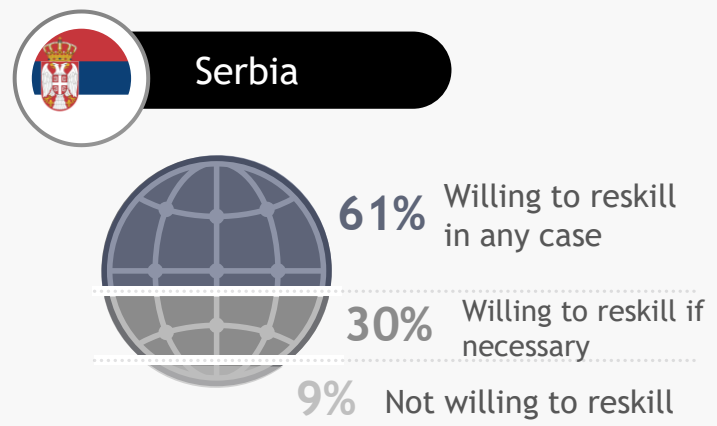


Note: Data for countries with at least 250 respondents.  
 Source: 2024 BCG/The Network/Stepstone proprietary web survey and analysis.



# Willingness to re-skill across job roles

Appetite for reskilling in Serbia, ordered by percentage of respondents willing to reskill "in any case" across job roles



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

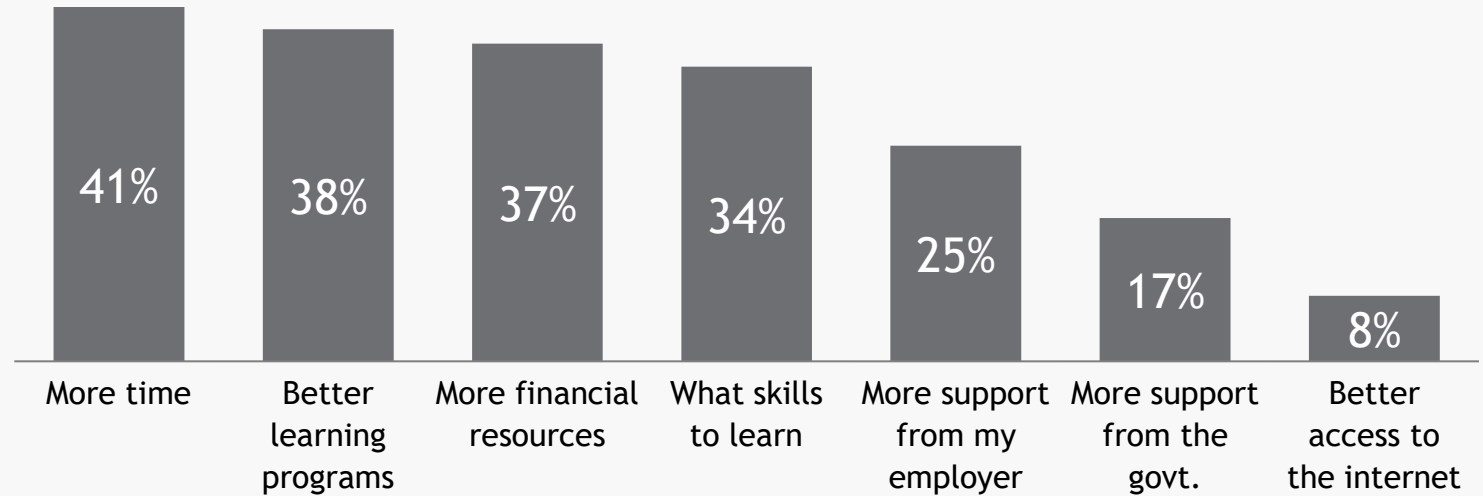


# The need for resources to upskill

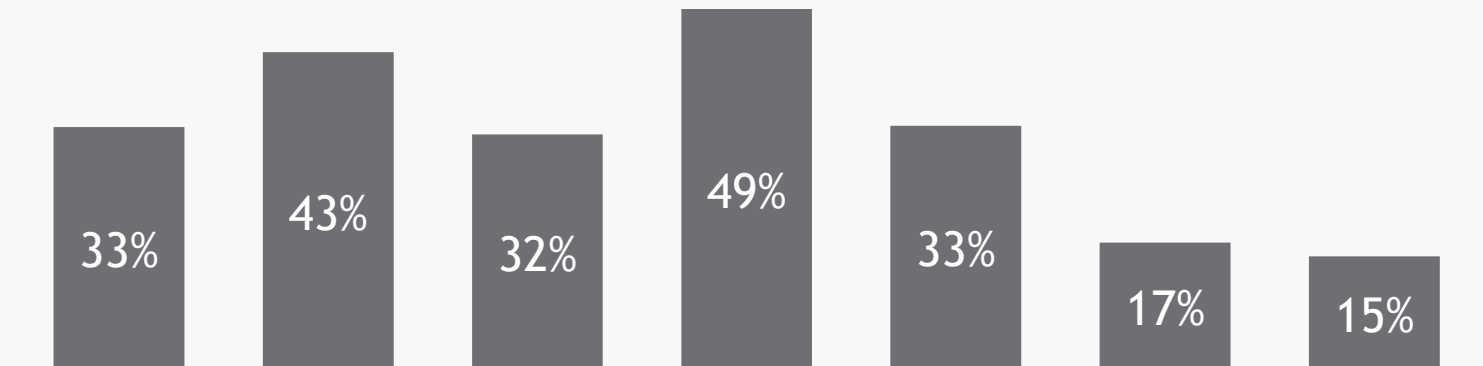
What would you need to keep up with new technologies?



Serbia



Global



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