



FORRESTER®

Mind the Gaps: Developing Data Skills And Culture – Spotlight On EMEA

EMEA Results From The March 2022 Thought
Leadership Paper, “Building Data Literacy”

Executive Summary

Data is the language of modern business success, and organizations need more people who are fluent. Across the globe, more enterprises understand the everyday value of a workforce that is empowered by improved data skills and literacy. Even with limited training initiatives, many organizations have seen benefits with better and faster decision-making, productivity, and employee satisfaction and retention.

Tableau commissioned Forrester Consulting to explore the state of enterprise data literacy and culture and the organizational issues, challenges, and benefits that come with it. In October 2021, Forrester conducted two online surveys of 308 department decision-makers and 311 employees to evaluate organizational culture around data literacy. Both groups of respondents spanned multiple industries and company sizes and were based in EMEA.

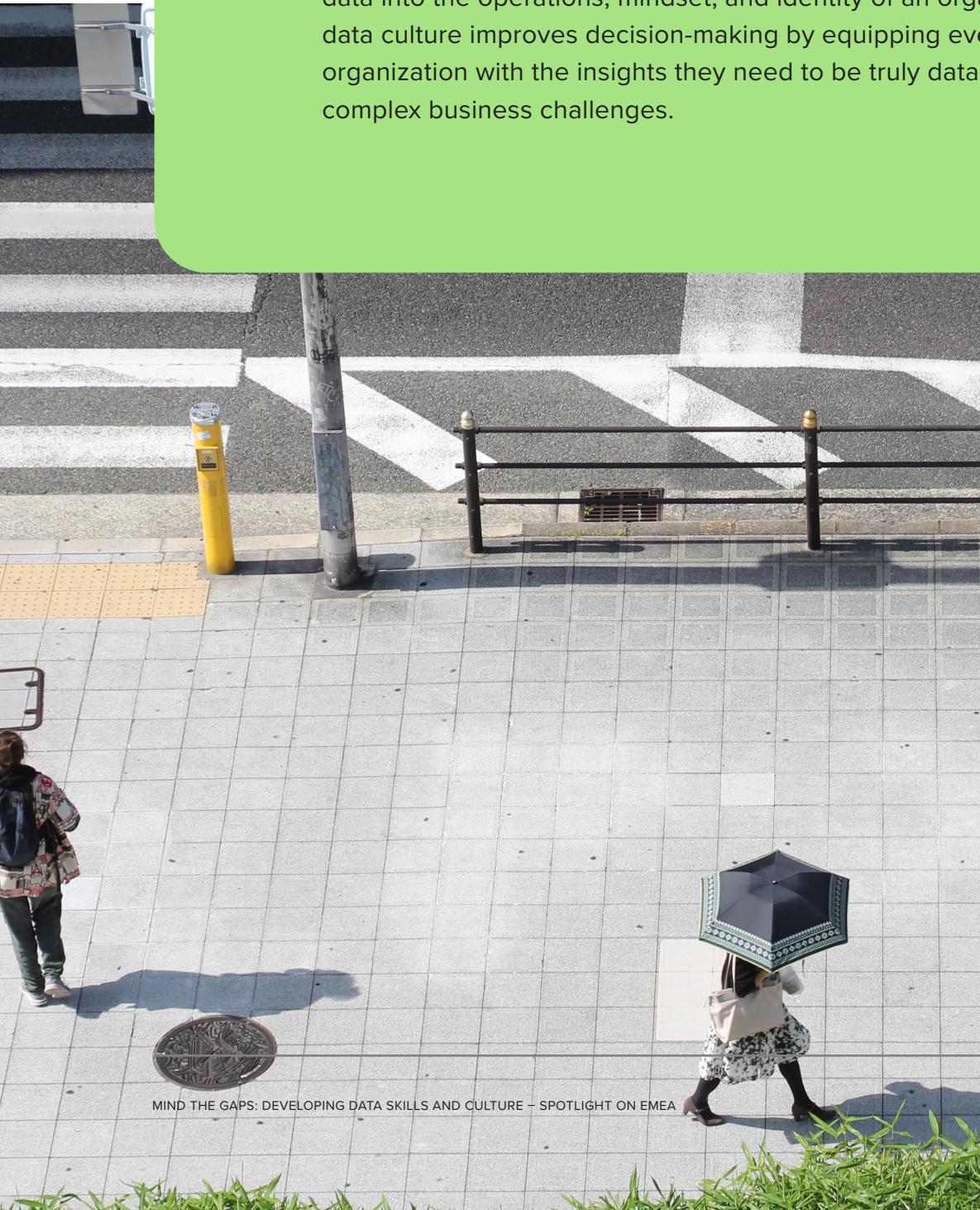
We found that like others worldwide, decision-makers for organizations in EMEA recognize the do-or-die imperative of creating a data-based organization. Encouragingly, most surveyed respondents report significant benefits from current data upskilling initiatives. However, we also identified several gaps that threaten the maturation of data fluency and cultures. Chief among these are: 1) the gap between the need for universally basic and advanced data training, which is clearly recognized by employees and decision-makers and 2) the ability of enterprises to deliver effective and scalable programs. These issues need to be properly addressed if organizations want to enjoy maximum advantage and create a data foundation for improved competitiveness and digital transformation.

Definitions

Data literacy: Possessing the skills necessary to understand, explore, use, make decisions with, and communicate using data.

Data skills: The techniques used to extrapolate meaning from data and communicate discoveries with data. Basic data skills include data literacy and basic data analysis. Advanced skills include data science, AI, machine learning, and advanced analysis techniques.

Data culture: The collective behaviors and beliefs of people that weave data into the operations, mindset, and identity of an organization. A data culture improves decision-making by equipping everyone in the organization with the insights they need to be truly data-driven and tackle complex business challenges.



Key Findings

EMEA lags the world in training for basic data skills. There's good and bad news here. More EMEA-based decision-makers say that basic data skills have increased in importance over the last three years, as compared to their peers worldwide (54% vs 49%). These respondents report lower rates of basic data skills training than the rest of the world (UK at 39%, France at 48%, and Germany at 58% vs 61% worldwide). EMEA firms are also much less likely to offer data training to all workers, as opposed to just those in traditional data roles.

Leaders and employees differ on the effectiveness of data upskilling efforts. Nearly 80% of EMEA-based decision-makers say their department successfully equips workers with the necessary data skills; this confidence rating was slightly higher in the UK and lower in Germany. However, fewer than half of EMEA-based employees agree. While that's 12 percentage points better than the global average, the results highlight a concerning gap. Overestimating the efficacy of current training efforts could create longer-term problems by inhibiting organizational appetite, funding, and support needed to mature vital data upskilling, literacy, and culture initiatives.



Low “data satisfaction” bodes ill for employee retention.

EMEA employees express the least satisfaction of any region with their organization’s data culture, training, and utilization. Satisfaction is lowest in the UK and highest in Germany, although levels are close across EMEA. Poor results in these key metrics should be a red flag for EMEA-based organizations: Forrester found that employees who are highly satisfied with their company’s data programs are 10 times more likely to be highly satisfied with their organization overall. Additionally, they are nearly twice as likely to stay for two to five years. EMEA leaders should worry that the opposite is true.

Top challenges include lack of budget and on-staff training expertise.

EMEA decision-makers ranked the absence of organizational support and resistance from employees as being their biggest obstacles to improving basic and advanced data skills. Decision-makers from German organizations reported having the most severe problems of those surveyed in all but one category.

Data literacy programs yield substantial benefits. EMEA respondents reported their data upskilling initiatives led to notable improvements in innovation, customer experience, and the speed and quality of decision-making. Globally, Forrester found that high-maturity data upskilling programs produce 10% to 50% higher benefits than less-evolved efforts (see Appendix C for more details on maturity). However, the maturity of data initiatives (based on the number of skills, availability, and types of training such as in-person, online, informal) is overall slightly lower in EMEA than in the rest of the world.

Data Upskilling Lags Growing Importance And Need

Like their peers globally, EMEA decision-makers and employees see a crucial gap between the vast amount of data harvested by their organizations and their ability to understand and use it to advance key goals. Leading enterprises go a step further by recognizing the importance of data fluency for both data specialists and the wide variety of rank-and-file jobs across the entire organization, i.e., for human resources, product, IT, and operations teams. As we will discuss in-depth later in this paper, organizations who prepare their employees with the requisite data literacy skills see substantial benefits in employee retention, innovation, decision-making, and more.

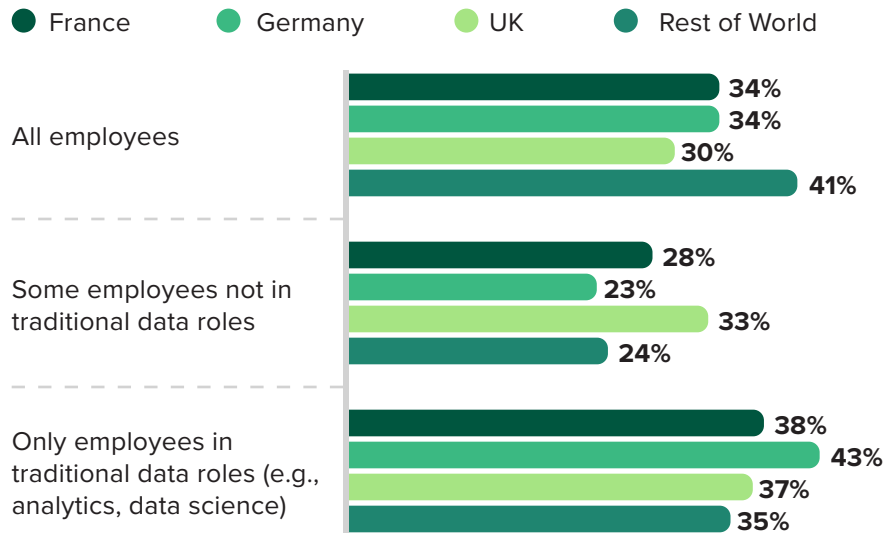
Despite the clear need and value, Forrester's research uncovered several concerning issues that EMEA organizations must address to prosper in the increasingly data-driven world:

- **Existing training lacks reach and depth.** The region's upskilling issues go beyond the lack of basic training noted above. Just 33% of EMEA decision-makers note that their organizations make data training available to all employees, compared to 41% worldwide. A slightly larger percentage (39%) offer training only to employees in traditional data roles (see Figure 1). Most current efforts are team or departmental. Data training initiatives in France (38%) are 2.5 times more likely than the UK (15%) to be organizationwide — this is followed closely by Germany (31%). To remain globally competitive, EMEA organizations should reconsider the belief, which is strongest in the UK, that employees should arrive at their jobs already equipped with the skills needed to succeed.
- **In the UK, high hopes meet a disappointing reality.** UK decision-makers say in an ideal world that nearly 85% of employees would be using data on a regular basis — this is a higher percentage than their peers in Germany and France. According to these respondents, workers in UK organizations are more likely to arrive at their job with the basic data skills they need. Polled UK executives were also most likely to say that many employees lacked the data skills needed for crucial tasks such as decision-making. This group was also most likely to report hearing employee complaints that data literacy expectations are too

high. That’s hardly a surprise, given that UK respondents offered the least basic data training of those surveyed. While the survey found UK organizations led the world in training for advanced data skills, expanding and democratizing basic data training is a must to maintain regional and global competitiveness.

Figure 1

“Which employees are offered data training?”



DECISION-MAKERS

Base: 1,032 director+ data program decision-makers at global companies with 500+ employees
 Source: A commissioned study conducted by Forrester Consulting on behalf of Tableau, a Salesforce company, November 2021

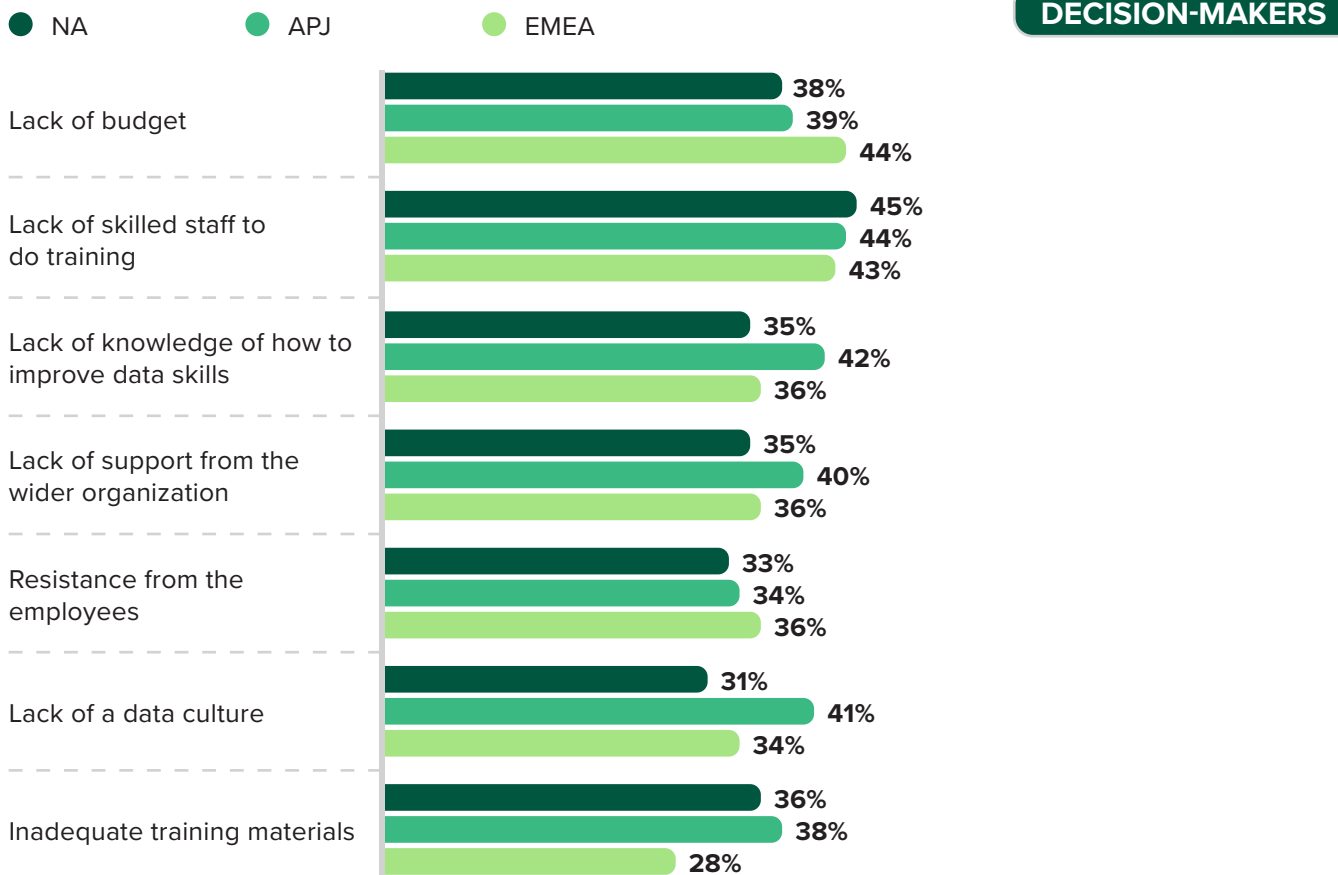
- **Despite current shortcomings, French employees see data literacy as increasingly important.** Basic data skills such as reading data outputs was ranked low by more than 80% of French employees. This group voiced the strongest belief in EMEA that data would become more important over the next three years. They were also most likely to say that expectations for using data in decision-making have increased over the past three years, so this belief is well placed.
- **Germany pushes ahead with upskilling.** German employees polled say they are much less likely than those in EMEA and the rest of the world to take a job that requires data skills. Even so, they’re still slightly less likely than France and the UK to resist data upskilling programs. That’s a plus, because 58% of German decision-makers say they have specific plans to improve basic data skills, compared to 48% in France and 38% in the UK.

- Advanced data topics lack the necessary budget and skilled staff.**

Similarly with the rest of the world, EMEA respondents struggle in varying degrees to find skilled internal resources who possess subject matter knowledge and know-how to design and deliver effective data courses, especially on advanced topics. While three-fourths of decision-makers outsource training, and training materials are easily obtainable, EMEA decision-makers report that getting funding for data training is harder here than in any region polled (see Figure 2). No surprise then that only about 40% of firms polled reimburse employees for taking data training classes, well below the 60% for the rest of the world. Informal and peer training is more popular in the region than elsewhere, likely due to budget constraints.

Figure 2

“Which of the following challenges has your department faced or currently faces in trying to improve its level of data skills (both basic and advanced)?”



Base: 825 director+ department decision-makers at companies with 500+ employees offering data training in NA, APJ, and EMEA
 Source: A commissioned study conducted by Forrester Consulting on behalf of Tableau, a Salesforce company, November 2021

Data Literacy And Culture Deliver Benefits For All

Despite a low percentage of employees getting formal data training, Forrester's research found that EMEA firms nonetheless report that their upskilling initiatives have produced clear, sometimes “transformative” benefits for employees, departments, enterprise, customers, and other stakeholders.

The greatest gains came from high-maturity programs that train for a wide range of skills, in multiple formats (classroom, online, informal, etc.), and for all employees, not just those in traditional data roles. In surveying 623 EMEA employees and decision-makers across departments, industries, and regions, we found that data literacy is a win-win for both workers and their organizations.

EMPLOYEES FEEL MORE VALUABLE AND LIKELIER TO STAY

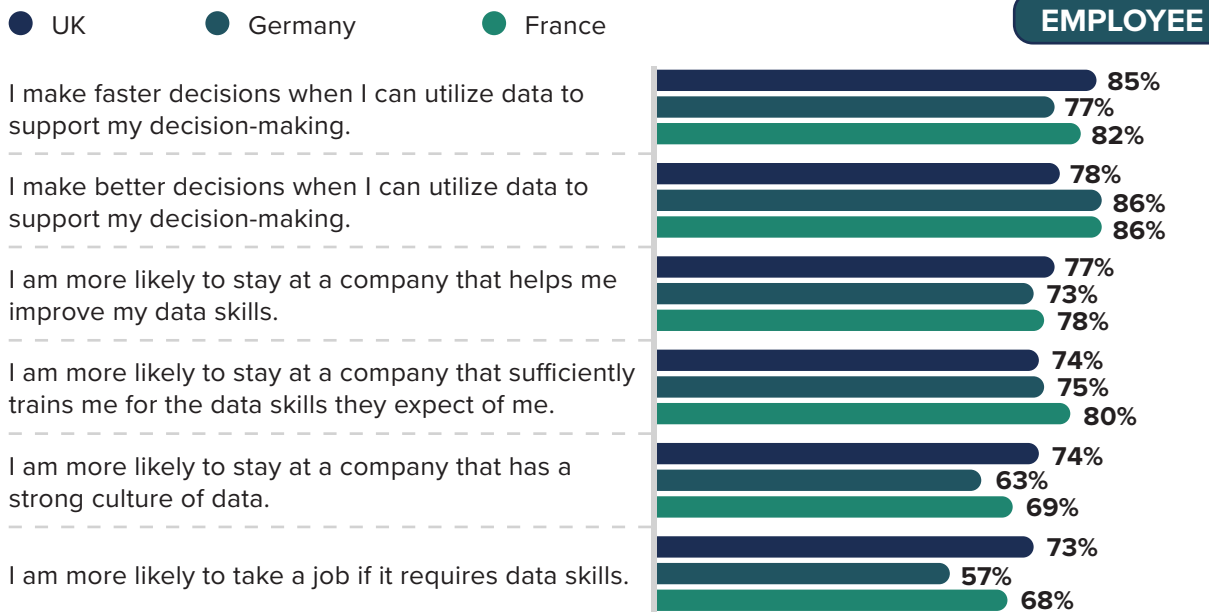
EMEA employees see many motivations and benefits of improved data literacy. These are topped by self-betterment (58%), increased employability (49%), and the desire to be seen as more competent (48%). Moreover, data-fluent employees say they make better and more innovative decisions, and they are likelier to stay at a company with a strong data culture, especially in the UK (see Figure 3).

DIVERSE ORGANIZATIONAL BENEFITS REPORTED

EMEA decision-makers say they highly value the improved performance of individual data-literate employees. These improvements, they note, combine to bring a wide variety of meaningful gains to their departments, notably improved decision-making and innovation, better customer experience, and reduced costs; these improvements are similar to those reported by other regions (see Figure 4).

Figure 3

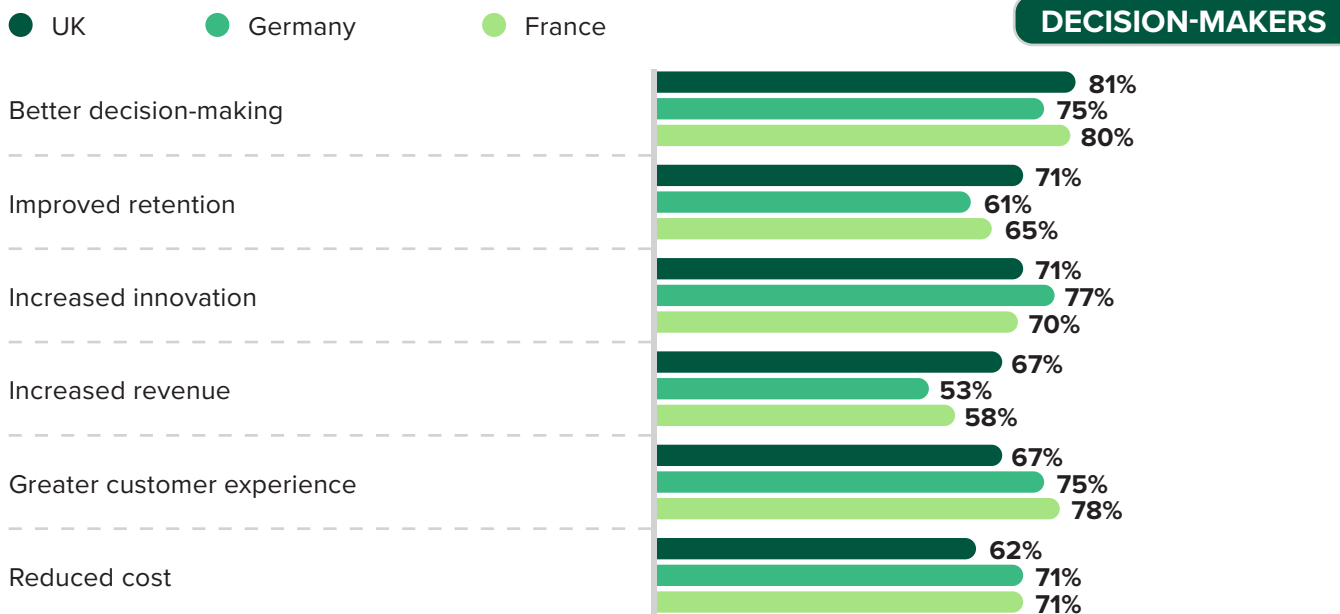
“Please indicate to what extent you agree with each of the following statements regarding benefits of data use.” (showing % Agree/Completely agree)



Base: 311 employees in all roles with three-plus years of experience at global companies with 500+ employees in France, Germany, and the UK
 Source: A commissioned study conducted by Forrester Consulting on behalf of Tableau, a Salesforce company, November 2021

Figure 4

“To what extent has your department received the following benefits from its specific data skills initiatives?” (showing % Significant/Transformational benefit)



Base: 308 director+ department decision-makers at companies with 500+ employees offering data training in France, Germany, and the UK
 Source: A commissioned study conducted by Forrester Consulting on behalf of Tableau, a Salesforce company, November 2021

Key Recommendations

To truly leverage data for better results, EMEA organizations need to move beyond the recognition that data literacy is imperative and continue to invest in operationalizing upskilling efforts. The next step is committing to the strategic scaling of efficient and effective initiatives that create a solid foundation for a robust data culture. Committed organizations can expect big benefits in innovation, decision-making, and employee satisfaction and retention.

Forrester's in-depth survey of decision-makers and employees yielded several important recommendations for EMEA organizations working to build data competencies and transformational, data-driven cultures:

Keep an open ear and mind.

If data literacy and upskilling programs are to evolve to meet growing needs, organizations must make an ongoing priority of hearing and analyzing employee feedback on strengths and weaknesses.

Think beyond training to build data skills and culture.

Training is a primary tool, but other interactive approaches also are critical. More than half of surveyed employees say they improved data skills through several types of knowledge sharing. Approaches can include conducting "office hours," i.e., data experts with good consulting and teaching skills setting time to help colleagues with questions and challenges. Communities of practice unite people with a common interest in specific data skills (analytics or visualization, for example) for regular interactions, shared activities, and learning from each other. Organizations that are committed to data should explore and pursue these powerful training complements. It's equally important that managers should lead by example and use data effectively to support their decisions, explaining why and how.

Seek strategic partners that are focused on relevant training.

Sidestep internal resource and skills constraints with consulting partners, technology vendors, data-literacy specialists, and others who can supply a wide variety of on-demand, in-person, and individual or group training for specific technologies and roles. Make sure training is relevant to an individual's job role and daily tasks.

Drive maximum value with company-sponsored programs.

Training instead of hiring for specific skillsets can greatly help alleviate talent pipeline issues. The accountability and coordination of departmental or companywide initiatives supported by top leadership is the surest way to maximize customer, business, and employee value from the smart use of data.

Appendix A: Methodology

In this study, Forrester conducted two online surveys to evaluate organizational culture around data literacy. One survey included 1,032 director+ department decision-makers at global companies with 500+ employees; 308 of whom were based in EMEA. The second survey featured 1,036 employees in all roles with three-plus years of experience at global companies with 500+ employees; 311 of whom were based in EMEA. Respondents were offered a small incentive as a thank you for the time spent on the survey. The study began in October 2021 and was completed in November 2021.

To read the full results of this study, please refer to the Thought Leadership Paper commissioned by Tableau, a Salesforce company titled, “Building Data Literacy.”

Project Director: Josh Blackborow,
Market Impact Consultant

Contributing Research: Forrester’s
technology executives and
business insights research groups

Appendix B: Demographics/Data

DECISION-MAKER SURVEY

GEOGRAPHY

France	33%
Germany	33%
UK	33%

EMPLOYEES

20,000 or more	12%
5,000 to 19,999	27%
1,000 to 4,999	38%
500 to 999	22%

ANNUAL REVENUE (USD)

>\$5 billion	7%
\$1 billion to \$5 billion	15%
\$500 million to \$999 million	21%
\$400 million to \$499 million	16%
\$300 million to \$399 million	10%
\$200 million to \$299 million	13%
\$100 million to \$199 million	8%
\$1 million to \$99 million	10%

POSITION

VP	32%
Director	68%

DEPARTMENT (TOP 7)

IT	13%
Marketing/advertising	13%
Operations	12%
Finance/accounting	10%
Analytics/business intelligence	9%
Human resources/training	9%
Customer experience	8%

INDUSTRIES (TOP 7)

Retail	9%
Technology and/or technology services	8%
Manufacturing and materials	8%
Transportation and logistics	8%
Business or professional services	6%
Financial services and/or insurance	6%
Telecommunications services	6%

EMPLOYEE SURVEY

GEOGRAPHY	
France	33%
Germany	33%
UK	33%

POSITION	
Manager	40%
Project manager	22%
Full-time practitioner	38%

EMPLOYEES	
20,000 or more	18%
5,000 to 19,999	22%
1,000 to 4,999	36%
500 to 999	25%

Appendix C: Maturity Definitions

DEFINING DATA INITIATIVE MATURITY

Data initiative maturity is based on: **=** Number of skills offered training for **+** Training availability **+** Types of data training initiatives



Source: A commissioned study conducted by Forrester Consulting on behalf of Tableau, a Salesforce company, November 2021

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

© Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on the best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. [E-52183]