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The ifo Human Resources Survey

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The ifo Human Resources Survey

Abstract

This paper documents the methodology, content, and evolution of the ifo Human Resources (HR) Survey, a quarterly survey conducted by the ifo Institute since 2008 that targets human resource managers in German firms. While the ifo Institute's traditional business surveys capture general management perspectives, the ifo HR Survey fills a crucial gap by focusing on personnel management strategies, recruitment practices, and workforce development. The survey consists of regular questions about personnel flexibilization instruments, on the company, or about further training measures complemented by special modules addressing current policy issues and labor market challenges. The paper describes the survey's panel composition with currently about 900 companies across manufacturing, trade, and the service sector, and explains the weighting procedures used to ensure representativeness of the German economy. Additionally, it catalogs the extensive set of standard and special questions fielded since 2008 covering aspects like the COVID-19 pandemic, demographic changes, and technological transformation. The micro data is available through the LMU-ifo Economics & Business Data Center.

JEL-Codes: C830, J200, M120, M500.

Keywords: human resources survey, personnel management, labor market, firm behavior.

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1 Introduction

The ifo Institute has been at the forefront of economic surveying since 1949, when it launched its first business survey to address the significant gaps in official post-war statistics in Germany. What began as a pragmatic solution to data scarcity has evolved into one of the most comprehensive and respected survey programs in economic research. The ifo Business Survey, particularly its Business Climate Index, has become an indispensable tool for analyzing and forecasting German economic developments.¹

While these business surveys offer crucial insights into general economic trends and business performance, they primarily reflect the perspective of general management. Recognizing that labor markets have become increasingly complex and human capital has emerged as a critical factor in firm competitiveness, the ifo Institute established the Human Resources (HR) Survey in 2008. This survey specifically targets HR officers rather than general managers and is conducted in collaboration with personnel service provider Randstad, who supports both financially and through expertise in questionnaire development. The survey operates quarterly, with waves in January/February, May/June, July/August, and October/November, each spanning a four-week period.

The HR survey addresses crucial areas often overlooked in standard economic surveys: personnel management strategies, recruitment practices, training methods, and employee well-being. This specialized focus has proved particularly valuable as firms navigate evolving workforce challenges, from demographic changes and skill shortages to technological transformation and new working arrangements. By targeting HR officers directly, the survey provides unique insights into how firms adapt their HR strategies to changing labor market conditions.

This paper provides comprehensive documentation of the ifo HR Survey, serving as a detailed reference guide to its methodology, content, and applications.² We document the survey’s development since 2008, including its evolving questionnaire design, panel composi-

¹Sauer et al. (2023) provides extensive background and information on the traditional ifo surveys. Lehmann (2023) surveys the forecasting power of ifo indices.

²To gain further insight into HR issues, we would like to point out that the German Economic Institute is also conducting a personnel survey. More information can be found here: <https://www.iwkoeln.de/themen/iw-panels/iw-personalpanel.html>

tion, and response patterns. Special attention is paid to the survey’s representativeness across different sectors and firm sizes, along with the weighting procedures that ensure results reflect the structure of the German economy.

The paper is structured as follows: Section 2 details the panel composition and survey methodology, including sampling framework and representativeness measures. Section 3 documents both regular questions forming the survey’s backbone and special questions addressing current policy issues, including the questionnaire’s evolution since 2008. Section 4 demonstrates the survey’s presence in research, while Section 5 provides information on data access.

2 Information on the panel

The following subsections examine key aspects of the survey panel. We first detail panel composition and evaluate its representativeness across different sectors and firm sizes, then trace the development of participant numbers since the survey’s inception, and finally provide insights into the size and structure of HR departments among participating firms.

2.1 Panel composition and representativeness of the survey

The panel of the ifo HR Survey contains currently (January 2025) around 900 companies. The participants can participate online or via standard mail, with the latter still making up about 10% of the panel. The survey covers manufacturing, trade and services. In detail, the sectors covered are classified according to the ‘Klassifikation der Wirtschaftszweige, Ausgabe 2008’ as follows: Manufacturing (C); trade, maintenance and repair of motor vehicles (G); transportation and storage (H); hotels and restaurants (I); information and communication (J); real estate, professional scientific and technical services (L,M); other business services (N).

For each firm we cover the following characteristics: sector in which the company is operating, status as a family business, size by employees, breakdown of employees into full-

time, part-time, temporary, trainees, marginally employed, and yearly turnover.

We report the actual distribution of firms and the corresponding covered employees in the first half of Table 1 as averages for the year 2023. In the second half we show the corresponding figures from the population of the German economy. The number of firms and employees, defined as employees subject to social security contributions, of the population are taken from the Federal Employment Agency and the value-added from the Federal Statistical Office for the year 2022. The actual number of employees covered by the survey is relatively low compared to the total number of employees in the German economy. This is not surprising given the number of participants.³

In terms of the distribution of employees, the survey results show notable deviations from the overall economy. In the survey the manufacturing sector covers 56.6% of all employees, which is significantly higher than the sector’s actual share of 32.7% in the economy. Conversely, the trade sector shows a survey representation of 12.8% of employees compared to the actual 22.2%, indicating an under-representation. The services sector, with a survey share of 30.6% of employees, falls short of its 45.1% share in the total economy, highlighting another case of under-representation.

When comparing the number of firms (‘Count’), the distribution in the survey also differs from the overall economy. The manufacturing sector accounts for 38.3% of the firms in the survey but only 12.8% in the total distribution, showing an over-representation. The trade sector comprises 21.7% of firms in the survey versus 31.1% in the total economy, reflecting a relatively balanced representation. The services sector, which constitutes 40.1% of the survey, is underrepresented when compared to its 56.1% share in the actual number of firms in the economy.

A comparison of value added reveals further insights when juxtaposed with the survey’s employee and firm distribution. The manufacturing sector shows a value added of 38.1%, which aligns closely with the share of firm count of 38.3% in the survey. In the trade sector, the value added share is 22.0%, comparable to its 12.8% share of employees and 21.7% firm count, suggesting a balanced representation in terms of economic contribution. For the

³The coverage in the larger monthly ifo business survey is reported in Hiersemenzel et al. (2022).

services sector, the value added of 39.9% is quite close to share 40.1% of firms in the survey.

Table 2 shows the shares of respondents in the panel of the ifo HR Survey by firm size compared to the population. The proportion of small companies corresponds almost exactly to the proportion in Germany when looking at the number of employees. While in the German economy the share is 38.8%, in the panel the share of small companies is 37.7%. For mid-sized companies, the number of employees is slightly overrepresented in the panel (41.3% in the panel, 28.6% in the German economy) and for large companies slightly underrepresented (21.0% in the panel, 33.8% in the German economy). When comparing the shares by count and value added, differences are greater.

Overall, the distribution of firms by size in the ifo HR Survey shows a generally balanced representation when compared to the total population. While there are some deviations, particularly with medium-sized and large firms, the application of appropriate weighting methods ensures that the survey results reflect the structure of the German economy.

The weighting is applied in each survey wave for the aggregation of the results. For this purpose, the accounts of the Federal Employment Agency is used, which records the distribution of employees subject to social security contributions in the various economic sectors and company size classes. The distribution of employees subject to social security contributions, including the size and economic sectors of the companies, is compared with the distribution in the panel and the responses of companies in underrepresented sectors and size classes are weighted up, while those in overrepresented sectors and size classes are weighted down.

Table 1: Distribution of the survey participants compared to the population in Germany

	ifo HR Survey				Distribution of German firms by					
	Count		Employees		Count		Employees		Value Added	
	N	%	N	%	N	%	N	%	N	%
Manufacturing	235	38.3	117,730	56.6	165,404	12.8	6,796,053	32.7	773,337	38.1
Trade	133	21.7	26,643	12.8	400,798	31.1	4,602,884	22.2	445,431	22.0
Services	246	40.1	63,662	30.6	723,541	56.1	9,375,174	45.1	810,445	39.9
Total	614	100	208,035	100	1,289,743	100	20,774,111	100	2,029,213	100

Source: ifo HR Survey, Federal Statistical Office, Federal Employment Agency

Table 2: Distribution of Firms, Employees, and Value Added by Firm Size

in %	Small	Medium	Large
Manufacturing	11	16.4	10.8
Trade	7.2	9.9	4.5
Services	19.5	15	5.7
Total	37.7	41.3	21
Distribution of German firms by			
Count	94.6	4.6	0.8
Employees	38.8	28.6	33.8
Value Added	25.1	13.7	61.2

Notes: Definition of size classes: small = 1 – 49 employees, medium = 50 – 249 employees, large ≥ 250 employees, shares in %. Quarterly averages for the years 2023 (ifo HR Survey) and 2022 (Federal Statistical Office).

Source: ifo HR Survey, Federal Statistical Office, Federal Employment Agency

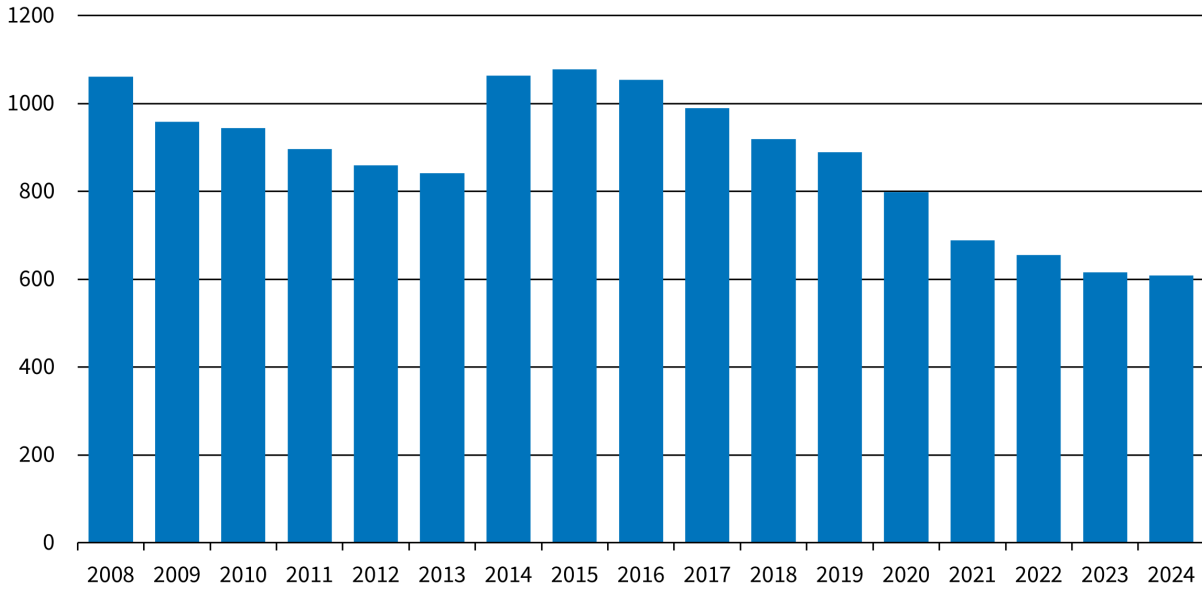
2.2 Development of number of participants

Figure 1 shows the development of participant numbers since 2008. Starting with around 1,000 participants in 2008, the panel maintained relatively stable participation between 800 and 1,000 companies until 2014. After a peak of about 1,100 participants in 2015, numbers gradually declined to around 600 in recent years. On average, the response rate in 2023 and 2024 was 53%, with 612 online respondents and 86 paper participants. Companies participated on average for 4 years between 2008 and 2021. The panel is purged annually, removing companies that have not participated for at least one year to maintain data quality.

To ensure that the panel remains representative, there is an ongoing recruitment of new members, specifically targeting HR managers with departmental responsibilities. Recruitment occurs through multiple channels: cooperations with HR professional associations, academic networks, participation in relevant events, and direct company outreach via letters using information from data providers. Additional recruitment takes place through business social media networks and other digital channels. The growing usage of our HR data underscores the importance of maintaining a sufficient panel.⁴

⁴Interested companies can join via <https://www.ifo.de/hr-befragung-registrierung>

Figure 1: Number of participants



Notes: Averages per year. *Source:* ifo HR Survey

2.3 Size of HR departments

To understand the organizational structure of HR functions across different company sizes, we asked our respondents in Q4 2024 about the size of their HR department:

How many employees work in your HR department (head count)?

We put this in relation to the size of the company in heads and thus create a ratio. This makes it possible to compare the results between companies of different sizes. However, measurement of HR department size presents some challenges. It is not always easy to clearly define the members of the HR department, especially in smaller companies. Some employees may perform HR-related tasks alongside other duties without being formally part of the HR department. This measurement issue is likely more pronounced in smaller companies that might lack a formal HR department but have several employees handling HR functions on a part-time basis.

To address these measurement challenges and provide meaningful comparisons, we present

results both for the full sample and separately for firms with more than 50 employees. To remove unrealistic outliers, we exclude all observations with an HR-to-employee ratio greater than 0.2. This adjustment reduces the number of responses from 439 to 372. The results can be found in Table 3.

The data shows that the average HR department in our sample has 5.3 employees (with a standard deviation of 19.9). When looking specifically at larger firms with more than 50 employees, the average HR department size increases to 7.6 staff members, though this represents a smaller percentage of total workforce at 1.8% compared to 3.4% for the full sample. This pattern reflects the aforementioned different organizational approaches to HR management: while larger companies typically maintain dedicated HR departments with full-time HR professionals, smaller companies often distribute HR responsibilities across employees who also handle other functions.

Table 3: Summary Statistics for the size of the HR department

Sample	N	Mean	SD	Min	Max
Full sample: Head count	372	5.3	19.9	0.5	267
Full sample Ratio in %	372	3.4	3.3	0.3	20
Number of employees >50: Head count	230	7.6	25.1	0.5	267
Number of employees >50 Ratio in %	230	1.8	1.6	0.3	19.2

Source: ifo HR Survey

3 Contents of the survey

The survey consists of two parts. The first part comprises regular questions that change quarterly and are repeated annually. Covered topics are personnel flexibilization instruments and their significance, central information about the firm (employees, turnover, etc.), further training, and, at the end of the year, an outlook for the upcoming year, which includes the number of employees and salary structure.

The second part of the survey consists of alternating special questions. These either ask about current topics and thus provide information on the attitudes and reactions of companies

to current events and political decisions or give the opportunity to examine a topic in more detail.

3.1 Regular questions

The survey has evolved substantially since its inception in 2008, with regular questions that are asked either quarterly or annually. These questions form the core of the survey and can be divided into three main categories: flexibilization instruments in HR management, outlook questions for the coming year, and general firm statistics. From 2025, there will also be questions about the shortage of (skilled) labor and further training opportunities in companies.

3.1.1 The evolution until 2024

The first set of regular questions, introduced in the second quarter of 2008, focused on flexibilization instruments in human resource management. Firms were asked quarterly to assess the importance and usage of nine distinct flexibility measures. The original question was:

What importance do you attribute to the following flexibilization instruments in your establishment?

(The information refers only to your establishment(s) in Germany)

There was a selection of nine instruments:

1. Overtime work
2. Additional / replacement staff on fixed-term contracts
3. Additional / replacement staff on mini-job/midi-job basis
4. Use of temporary agency workers
5. Use of independent contractors / freelancers
6. Outsourcing
7. Internal staff transfers / reassignments
8. Working time accounts

9. Flexibility measures in human resources in general

Initially, the assessment was carried out over three time horizons:

- The current importance in the company is ...
- Compared to the previous quarter, the importance is ...
- In the next quarter, the importance will be ...

With corresponding response categories:

- High / Medium / Low
- Higher / Same / Lower
- Increase / Remain the same / Decrease

This initial structure has undergone several important modifications over time. In the second quarter of 2010, the assessment of the previous quarter's development was eliminated to streamline the questionnaire. A significant methodological enhancement occurred in Q1 2013 with the addition of the 'Not applicable / Not used / Not implemented' option, which improved the precision of responses by distinguishing between low importance and non-implementation of specific instruments. Further streamlining occurred in Q1 2015 when the outlook for the next quarter was discontinued. Since 2020, the assessment of flexibilization instruments has been permanently conducted semi-annually rather than quarterly, occurring in the first and third quarters. In the second quarter the questions on flexibilization instruments were replaced by a standard set of statistical questions about firm characteristics:

1. In which sector do you classify your company (if you know the WZ-2008 number, please specify)?
2. Would you classify your company as a family business?
Yes / No
3. How many people are employed in your company (head count)? _____
Of which...
Full-time _____
Part-time _____
Marginal Employment _____
Temporary agency workers _____
Apprentices _____

4. What was your company's revenue in 2019?

< 1 million €

1 million – < 5 million €

5 million – < 25 million €

25 million – < 100 million €

> 100 million €

In the fourth quarter,⁵ the survey was expanded to include a comprehensive set of outlook questions for the following year, focusing on staffing levels, skill requirements, and training needs:

1. How do you expect your staffing levels to develop in the coming six months?

Increase significantly / Increase somewhat / Remain the same / Decrease slightly / Decrease significantly

2. What type of skilled workers do you expect to be seeking in 2020?

_____ / None

3. Do you expect problems finding suitable skilled workers?

Very major / Major / Moderate / Minor / None

4. How will the demand for temporary agency work develop in your company in the coming six months?

Increase significantly / Increase somewhat / Remain the same / Decrease slightly / Decrease significantly

5. How do you assess the importance of external partners for qualification and further training in the next six months?

Increase / Remain the same / Decrease / Unable to assess the development

6. In your opinion, how important will employee qualification and further training be for the future success of your company?

Become more important / Remain the same / Decrease in importance / Unable to assess the development

7. In your opinion, how important will the following further training and qualification offerings be for the future success of your company?

- Open training and further education programs
- Company-specific training and further education programs
- Certifications
- On-the-job qualification (vocational qualification)
- E-learning offerings

⁵The adjustment came into effect in Q4 2019.

Will become significantly less important / Will become somewhat less important / Will remain the same / Will become somewhat more important / Will become significantly more important

A major revision of the fourth quarter survey took place in 2023, when the outlook questions were restructured to focus more on immediate labor market challenges, in particular wage developments and recruitment:

1. How do you expect your staffing levels to develop in the coming six months?
Increase significantly / Increase somewhat / Remain the same / Decrease slightly / Decrease significantly
2. Are you currently experiencing a shortage of applicants?
Yes / Partially / No / Not seeking personnel
3. If yes or partially, in which occupational fields is this particularly strong:

4. How do you expect wages to develop on average in your establishment in 2025?
Increase by approximately _____% / Remain the same / Decrease by approximately _____%
5. What is the wage flexibility margin for newly hired employees compared to the salary of existing employees (on average) in the coming year?
No flexibility / Flexibility margin: _____% / No new hires planned
6. How do you see your company's temporary staffing needs evolving over the next six months?
Increase significantly / Increase somewhat / Remain the same / Decrease slightly / Decrease significantly
7. How do you assess the importance of external partners for qualification and further training in the next six months? Increase / Remain the same / Decrease / Unable to assess the development
8. In your opinion, how important will employee qualification and further training be for the future success of your company?

To further streamline the questionnaire and because the topic of further training will be asked in the first quarter in the future, we removed questions 7 and 8 in 2024.

This evolution of the regular questions reflects the survey's adaptation to changing labor market conditions and HR priorities, while maintaining consistency in core areas of inquiry. The modifications have generally aimed at improving response quality and focusing on the most relevant aspects of HR management.

3.1.2 Regular questions from 2025 onward

Starting in 2025, the regular questions have been streamlined and reorganized to better reflect current labor market challenges. Building on the experiences from previous years, some adjustments have been made to improve the survey’s effectiveness. Most notably, the assessment of flexibilization instruments has been limited to the third quarter, while new questions about skills shortages and training have been introduced in the first quarter. The quarterly structure is as follows:⁶

Quarter 1

1. Which incentives does your company offer to attract employees and skilled workers (multiple answers)?
 - 4-day week
 - Flexible working hours
 - Flexible work location
 - Above-average pay
 - Sabbatical
 - Workation
 - Further training measures
 - Additional benefits (health prevention, sport, etc.)
 - Non-monetary incentives (job ticket, canteen)
2. What is the primary motivation behind your company’s further training program? Please check a maximum of 3 answers
 - Consolidation of existing skills
 - Learning new skills
 - Increasing productivity
 - Increasing competitiveness
 - Promoting internal mobility
 - Increasing attractiveness as an employer
 - Employee motivation and retention
3. What proportion of your company’s employees participated in training in 2025?
_____ %

⁶The original German wording of all questions can be found in the Appendix.

4. What is the average length of a training program in your company? (e.g. 35 hours)
_____hours
5. When do your employees most often attend training?
 - during regular working hours
 - after / before regular working hours
 - at weekends

Quarter 2

1. Would you classify your company as a family business?
Yes / No
2. How many people are employed in your company (head count)? _____
Of which...
Full-time _____
Part-time _____
Temporary agency workers _____
Apprentices _____
Marginally employed (up to 450€ / up to 520€) _____
3. What was your company's revenue in 2021?
< 1 million €
1 million – < 5 million €
5 million – < 25 million €
25 million – < 100 million €
> 100 million €
4. Does your company offer remote work/home office for office work or comparable activities?
No / Yes, on average _____ days per month / Not applicable
5. How many employees work in your HR department (head count) _____

Quarter 3

How do you estimate the expected use of the following flexibilization instruments
in your company?

(The information refers only to your establishment(s) in Germany)

1. Overtime work
2. Additional/replacement staff on fixed-term contracts
3. Use of temporary agency workers

4. Use of independent contractors / freelancers
5. Outsourcing
6. Internal staff transfers/reassignments
7. Working time accounts
8. Flexibility measures in human resources in general

We ask first about the 'Current Use' of the instrument and then about the expected use with 'Utilization is expected to be' where the options are Increase / Remain the same / Decrease.

Quarter 4

1. How do you expect your staffing levels to develop in the coming six months?
Increase significantly / Increase somewhat / Remain the same / Decrease slightly / Decrease significantly
2. Are you currently experiencing a shortage of applicants?
Yes / Partially / No / Not seeking personnel
3. If yes or partially, in which occupational fields is this particularly strong:

4. How do you expect wages to develop on average in your establishment in 2025?
Increase by approximately _____% / Remain the same / Decrease by approximately _____%
5. What is the wage flexibility margin for newly hired employees compared to the salary of existing employees (on average) in the coming year?
No flexibility / Flexibility margin: _____% / No new hires planned
6. How do you see your company's temporary staffing needs evolving over the next six months?
Increase significantly / Increase somewhat / Remain the same / Decrease slightly / Decrease significantly

3.1.3 Results for the flexibilization instruments

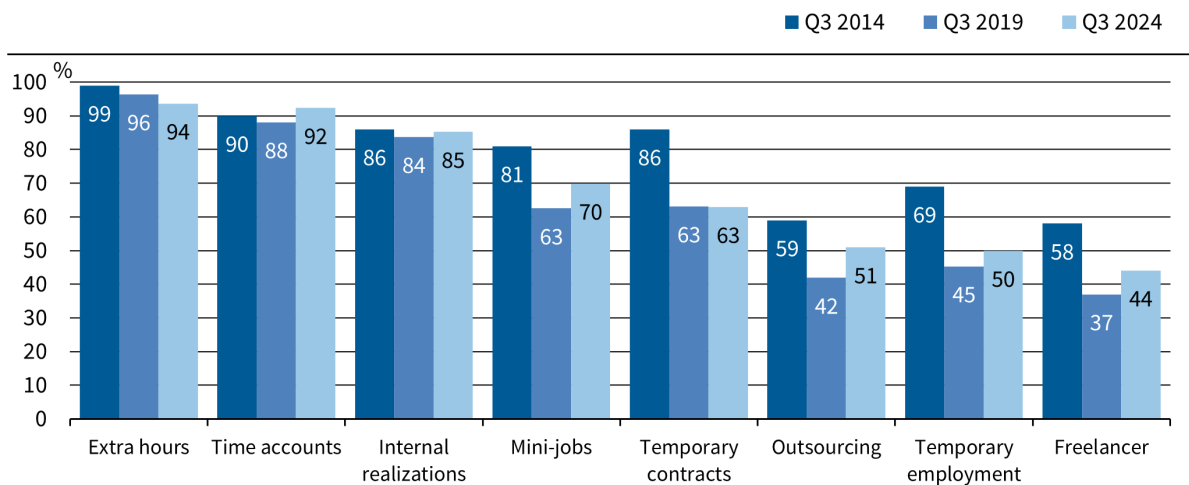
Figures 2 and 3 illustrate the evolution of flexibilization instruments between Q3 2014 and Q3 2024, examining both their usage rates and relative importance. Extra hours consistently show the highest adoption rate, used by 99% of companies in Q3 2014 and maintaining high levels at 94% in Q3 2024. Time accounts and internal realizations follow as the next most widely used instruments, with adoption rates above 80% throughout the period.

Most flexibilization instruments show a declining trend in both usage and importance over the decade. The most dramatic decrease is observed in temporary contracts, where usage dropped significantly from 86% in Q3 2014 to 63% in Q3 2024. This decline is mirrored in their importance rating, falling from 2.0 to 1.0. Similar substantial decreases in importance are seen for mini-jobs (from 2.1 to 1.1) and freelancers (from 1.6 to 0.6).

However, two instruments buck this downward trend: time accounts and extra hours. Time accounts show both increased usage (from 90% to 92%) and notably higher importance ratings (from 1.5 to 2.2). Extra hours maintain their paramount position with a slight increase in importance from 1.9 to 2.0, despite a minor decline in usage from 99% to 94%.

This suggests a shift in corporate flexibility strategies, with companies increasingly favoring internal time management tools over external employment arrangements.

Figure 2: Application of flexibilization instruments

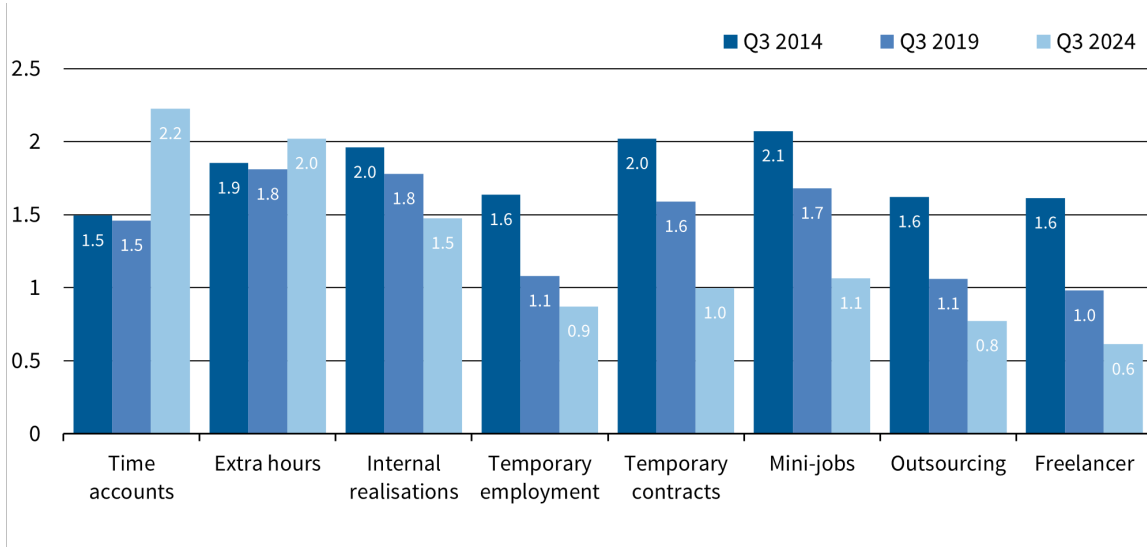


Notes: Frequency of the flexibilization instrument in percent. *Source:* ifo HR Survey

3.2 Special questions

While regular questions provide consistent tracking of key metrics, special questions allow for exploration of emerging topics and specific challenges. These special questions have addressed a variety of topics that span both recurring themes and timely issues, offering

Figure 3: Importance of flexibilization instruments



Notes: Mean values from no application (= 0) to high (= 3). *Source:* ifo HR Survey

valuable insights into HR-specific challenges and strategies.

3.2.1 Historical overview

Table 4 provides an overview of all topics covered by the alternating special questions and their corresponding publications (if available).

Certain topics, such as vocational training and responses to economic and policy shifts, appear multiple times throughout the survey's history, underscoring their continued relevance to HR officers. In contrast, topics such as working hours or specific economic policies may appear only once or sporadically, reflecting a more targeted focus when relevant conditions arise. This demonstrates that while the survey revisits key HR themes, it is also flexible in responding to unique, time-sensitive issues.

The survey has reacted to major developments and changes in legal requirements over the years. For example, the introduction of the nationwide minimum wage in Germany in 2015 was a significant policy change that influenced HR practices. The survey captured firms' responses to this development, providing insight into how HR strategies adapted to new wage floors and their implications for employment structures.

Similarly, the migrant crisis of 2015, which brought a substantial number of refugees into Germany, was addressed in the survey to understand how firms managed the integration of refugees into the workforce. This topic was essential for examining how HR departments adapted recruitment and training to support this influx and contribute to social and economic integration.

The COVID-19 pandemic also featured prominently as a topic, reflecting its unprecedented impact on the global economy and workforce management. The survey documented how HR policies evolved to respond to challenges such as remote work, health and safety regulations, and flexible working arrangements during the pandemic. This timely focus highlighted the adaptability and resilience of HR strategies under extraordinary conditions.

The inclusion of questions related to economic policy impacts, such as minimum wage regulations and short-time work ("Kurzarbeit"), highlights the survey's role in exploring how HR strategies adapt to legislative and economic shifts.

Table 4: Historical overview of covered topics in the HR survey

Quarter	Topic	Publication
2007 / Q3	Importance of the flexible personnel management instruments	
2007 / Q4	Older employees	
2008 / Q1	Effects of the minimum wage	
2008 / Q2	Effects of the financial crisis on the workforce	
2008 / Q3	Academics from EU countries	
2008 / Q4	Education and training expenses	
2009 / Q1	Extension of short-time allowance	
2009 / Q2	Change in social security contributions and stimulus package II	
2009 / Q3	Economic stabilization and impact on head count	
2009 / Q4	Effects of the economic policy measures	
2010 / Q1	Plans for short-term work in 2010	Dorffmeister (2010a)
2010 / Q3	Shortage of skilled workers	Dorffmeister (2010b)
2011 / Q1	Extension of working life	
2011 / Q2	Recruitment channels	

Continued on next page

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Quarter	Topic	Publication
2011 / Q3	Demand from jobseekers from the following EU countries: Greece, Ireland, Italy, Portugal, Spain	
2011 / Q4	Regulations on the recognition of foreign vocational training	
2012 / Q1	Change in the headcount of the company	
2012 / Q2	Options for flexible working	
2012 / Q3	Impact of euro crisis on personal planning	
2012 / Q4	Companies' response to weakening economy in 2013	Jacob-Puchalska (2013a)
2013 / Q1	Demand from jobseekers from the following EU countries: Greece, Ireland, Italy, Portugal, Spain	Jacob-Puchalska (2013a)
2013 / Q2	Offer of part-time positions in companies	Jacob-Puchalska (2013a)
2013 / Q3	Home office	Jacob-Puchalska (2013b)
2013 / Q4	Does the euro crisis influence personnel planning	Jacob-Puchalska (2014b)
2014 / Q1	Influence of nationwide minimum wage	Jacob-Puchalska (2014a)
2014 / Q2	Retirement at 63	Jacob-Puchalska (2014c)
2014 / Q3	Quota of women	
2014 / Q4	Search for apprentices	
2015 / Q1	Work contracts and education	
2015 / Q2	Aspects of personnel selection and online research on applicants	
2015 / Q3	Everyday working life and vocational training	
2015 / Q4	Asylum seekers	
2016 / Q1	Internship	Jacob-Puchalska (2016)
2016 / Q2	Home-office workplaces	
2016 / Q3	Bologna process	
2016 / Q4	Retirement from 63	Jacob-Puchalska (2017b)
2017 / Q1	Refugees	Jacob-Puchalska (2017a)
2017 / Q2	Digitalization	Heimisch et al. (2017)
2017 / Q3	Working hours	Schricker (2017)
2017 / Q4	Pay inequality and transparency in the Wage Structures Act	
2018 / Q1	General Data Protection Regulation	Schricker (2018)
2018 / Q2	In-company training	
2018 / Q3	Transparency in Wage Structures Act	
2018 / Q4	Vocational training	

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Quarter	Topic	Publication
2019 / Q1	Data-driven recruitment methods	
2019 / Q2	Working hours	
2019 / Q3	Bridge part-Time	
2019 / Q4	Nationwide minimum wage	
2020 / Q1	Sustainability	
2020 / Q2	COVID-19	
2020 / Q3	Training year 2020/21	Brandt (2020)
2020 / Q4	Outlook for 2021, short-term work and supporting families during COVID-19	Brandt (2021)
2021 / Q1	Changes in the head count (fixed-term contracts)	Freuding and Garnitz (2021b)
2021 / Q2	Diversity in the corporate culture	Freuding and Garnitz (2021c)
2021 / Q3	Vocational training during COVID-19	Freuding and Garnitz (2021a)
2021 / Q4	Outlook for 2022: wage development	Freuding and Garnitz (2022d)
2022 / Q1	Effects of Omicron on personal planning and recruitment channels	Freuding and Garnitz (2022b)
2022 / Q2	Effects of the current crisis on HR policy	Freuding and Garnitz (2022c)
2022 / Q3	Company and workforce in times of crisis	Freuding and Garnitz (2022a)
2022 / Q4	Feedback culture	Freuding and Garnitz (2023)
2023 / Q1	Company holidays	Freuding et al. (2023b)
2023 / Q2	Effects of demographic change on personnel policy	Freuding et al. (2023a)
2023 / Q3	Training year 2023/2024 and use of artificial intelligence in companies	Garnitz and Schaller (2023a)
2023 / Q4	Current economic challenges	Garnitz and Schaller (2023b)
2024 / Q1	Equal opportunities on the labor market	Schaller (2024)
2024 / Q1	Labor shortage and hybrid work	Garnitz et al. (2024)
2024 / Q2	4-day week and legal incentives to hire foreign skilled workers	Hennrich and Schaller (2024b)
2024 / Q3	Part-time work	Hennrich and Schaller (2024a)
2024 / Q4	Training year 2024/2025	

3.2.2 Selected results from special questions

We would like to illustrate two examples of special questions in more detail, starting with the 4-day-week as outlined in Hennrich and Schaller (2024b) from the survey in Q2 2024.

Reducing working hours to four days a week is becoming increasingly popular, driven by both employee and employer interests. Employees seek better work-life balance, greater

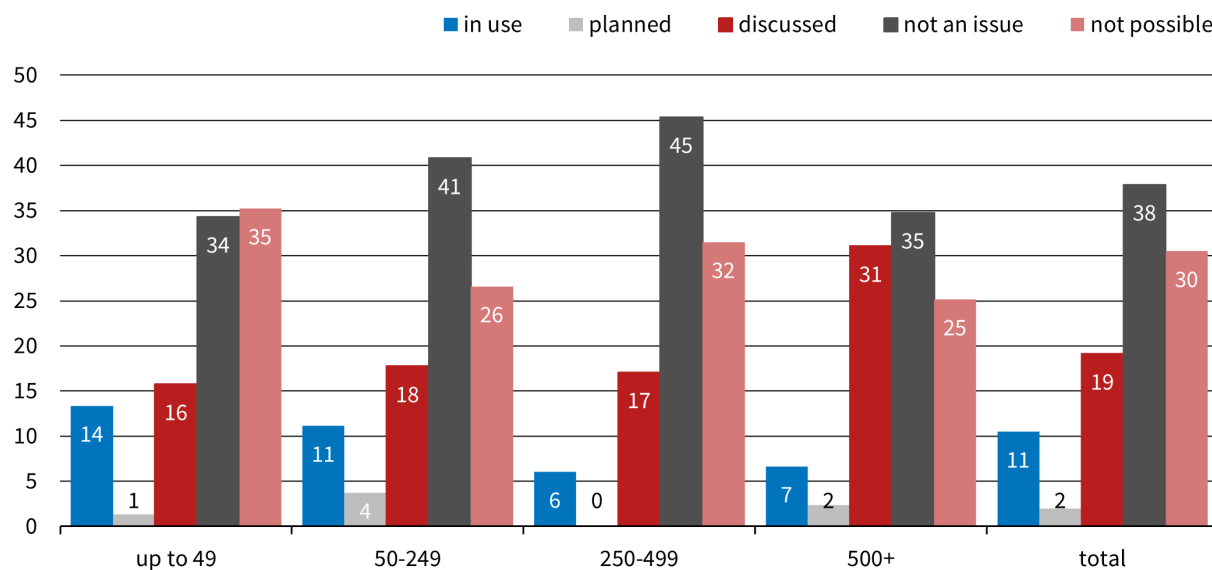
motivation, and reduced stress with associated health benefits. Employers anticipate increased attractiveness as a workplace, better employee retention, and potential energy cost savings from reduced facility usage. However, implementation requires careful consideration of organizational demands, staffing needs, and productivity requirements.

Our survey reveals that 11% of companies currently offer a 4-day week. Comparing the different size classes, the introduction of a 4-day week is most frequently discussed in large enterprises with 500 or more employees. On the other hand, small enterprises with less than 49 employees are most often not able to implement it (see Figure 4). There are three main models for the introduction of a 4-day-week: maintaining the same wage, reducing pay proportionally, or compressing full-time hours into four days. The majority of respondents said they (plan to) offer a 4-day week with reduced hours and lower pay, while only roughly one tenth of the companies implemented reduced hours without reducing pay. In the survey, companies had the opportunity to express both positive effects and concerns. Expected positive effects included increased employee loyalty and motivation. However, companies also expressed concerns about the need for increased personnel and organizational costs, among other things.

The usage of artificial intelligence (AI) in HR was addressed in Q3 2023 (Garnitz and Schaller, 2023a). In the ifo HR survey, 18% of the participants reported using AI in at least one business area, with a further 35% planning to do so (see Figure 5).⁷ Specifically in HR, only 5% of companies currently use AI, though 25% plan implementation. Companies see the greatest potential in automating personnel processes and recruitment. However, concerns persist: 62% worry about lack of expertise, and 48% anticipate legal issues. Additional concerns include trust deficits and high costs. Regarding staff development, most firms expect stable employment levels, with only 13% anticipating AI-related job losses in the next five years.

⁷Licht and Wohlrabe (2024) show the adoption rate among German firms for 2024.

Figure 4: Use of the 4-day-week



Notes: Weighted shares in percent, by company size (number of employees). *Source:* ifo HR Survey

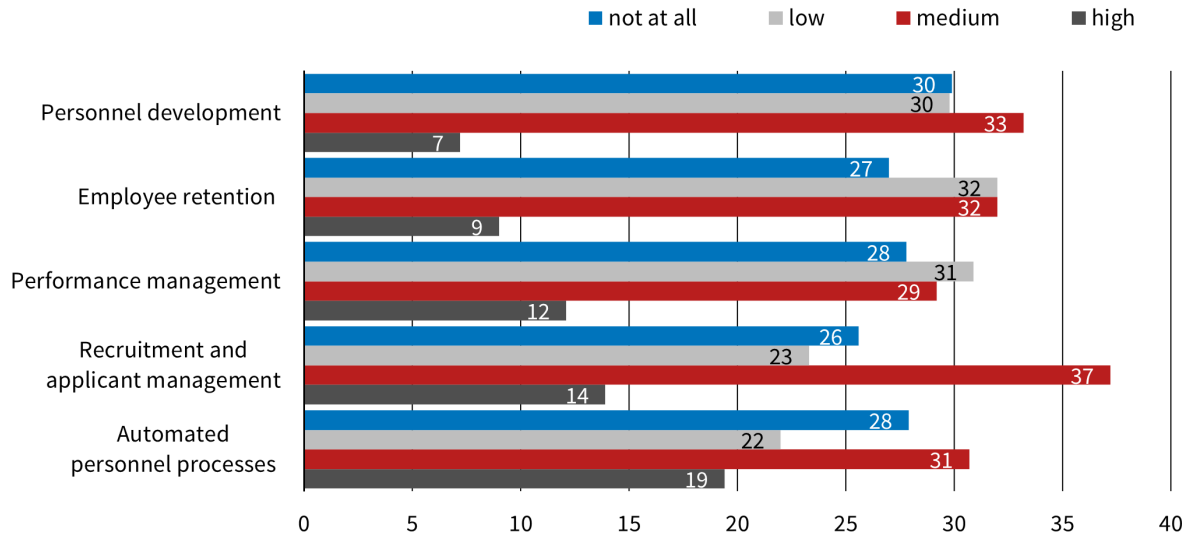
4 The HR survey in research

The HR survey is also open to special surveys outside the regular schedule for research. We now present three examples.

Piopiunik et al. (2020) examine which skill signals are valued by employers during hiring decisions. The study asked HR managers to choose between pairs of fictitious resumes where signals of cognitive skills, social skills, and maturity were independently randomized. This experimental design allowed the researchers to identify the independent effects of different skill signals that are typically highly correlated in real-world applications.

The results show that signals in all three domains significantly influence the likelihood of being invited for a job interview. However, the effectiveness of specific signals varied between applicants for apprenticeship positions and college graduates. While grade point averages and social skills proved important for both genders, there were notable gender differences: male applicants particularly benefited from signals of maturity, while female

Figure 5: Potential in the use of AI



Notes: Weighted shares in percent. *Source:* ifo HR Survey

applicants gained more from demonstrating IT and language skills. The study also found that older HR managers placed less emphasis on school grades and more weight on other signals, while HR managers in larger firms attributed greater importance to college grades.

Gödl and Gödl-Hanisch (2024) investigate wage-setting behavior using the ifo Institute's HR survey, which regularly surveys HR managers across German firms. Through supplementary questions added to the survey in Q4 2022, they compare wage-setting practices between periods of low inflation (2017-2019) and high inflation (2022-2024). The results reveal that during high inflation, firms adjust their wage-setting behavior significantly: the average duration between wage adjustments decreases, with many firms planning more frequent negotiations. Additionally, the size of wage adjustments increases substantially during the high inflation period. The authors show how the observed state dependence can be rationalized in menu cost and Calvo models of wage setting with heterogeneous firms.

Caldwell et al. (2024) leverage the ifo HR Survey to examine wage-setting strategies among German firms. The survey collected data from 772 firms and was linked to administrative social security records and a complementary worker survey encompassing approximately 10,000

participants. This dataset enabled an in-depth analysis of individual bargaining practices and their implications for wage dynamics and inequality within firms. The findings reveal that individual wage bargaining is prevalent, particularly for managers and employees in bottleneck positions. Firms often use salary expectations provided by workers to differentiate initial offers, even for workers with comparable qualifications. The study also documents significant heterogeneity in bargaining practices across employee groups and firms, with labor market factors, such as difficulties filling specific positions, being stronger predictors of bargaining strategies than firm-level characteristics like size or productivity. Additionally, firms engaging in individual bargaining exhibit greater within-firm wage inequality, including a higher gender wage gap compared to firms with uniform wage-setting policies.

5 Data access

The micro data collected from the HR Survey have been available since 2008 and are securely stored at the ifo Institute’s data center. The dataset includes repeated observations at the firm level, offering a panel structure that allows for the analysis of firm-specific developments over time. The panel dimension is particularly useful for studying changes in labor market dynamics and organizational practices.

The micro data can only be accessed on-site at the LMU-ifo Economics & Business Data Center (EBDC) in compliance with strict data protection regulations; data are not distributed externally. The EBDC provides a secure environment for researchers and offers detailed documentation to facilitate the use of the data. Previous works (Abberger et al. (2007), Becker and Wohlrabe (2008), Seiler (2012), Sauer et al. (2023)) describe the access procedures and infrastructure for working with the microdata at the ifo Institute.

In addition to the data, all past questionnaires are available upon request to support researchers in contextualizing their analyses. For further information or to request access, please visit <https://www.ifo.de/ebdc> or contact: pl-umfrage@ifo.de.

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Appendix: Regular questions from 2025 onward in German

Figure A1: 1st quarter regular questions

1. Quartal

A) Recruiting und Weiterbildung

1) Welche Anreize setzt Ihr Unternehmen, um Arbeits- und Fachkräfte anzuwerben (Mehrfachnennungen)?

<input type="checkbox"/> 4-Tage-Woche	<input type="checkbox"/> Flexible Arbeitszeiten
<input type="checkbox"/> Flexibler Arbeitsort	<input type="checkbox"/> Überdurchschnittliche Bezahlung
<input type="checkbox"/> Sabbatical	<input type="checkbox"/> Workation
<input type="checkbox"/> Weiterbildungsmaßnahmen	<input type="checkbox"/> Zusatzangebote (Sport, Jobticket, Kantine etc.)

2) Welche primäre Motivation liegt dem Weiterbildungsangebot in Ihrem Unternehmen zugrunde? Bitte maximal 3 Antworten ankreuzen

<input type="checkbox"/> Vertiefung bereits bekannter Fähigkeiten	<input type="checkbox"/> Erlernen neuer Fähigkeiten
<input type="checkbox"/> Steigerung der Produktivität	<input type="checkbox"/> Steigerung der Wettbewerbsfähigkeit
<input type="checkbox"/> Förderung von interner Mobilität	<input type="checkbox"/> Erhöhung der Attraktivität als Arbeitgeber
<input type="checkbox"/> Mitarbeitermotivation und -bindung	

3) Welcher Anteil an Mitarbeitenden Ihres Unternehmens hat im Jahr 2024 an einer Weiterbildung teilgenommen?
_____ %

4) Welchen Umfang hat eine durchschnittliche Weiterbildung in Ihrem Unternehmen? _____ Stunden pro Woche

5) Wann besuchen Ihre Mitarbeitenden am häufigsten Weiterbildungen?

<input type="checkbox"/> während der regulären Arbeitszeit	<input type="checkbox"/> nach / vor der regulären Arbeitszeit	<input type="checkbox"/> am Wochenende
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Figure A2: 2nd quarter regular questions

2. Quartal

A) Ihr Unternehmen (Die Angaben beziehen sich nur auf Ihre(n) Betrieb(e) in Deutschland)

1) Würden Sie Ihr Unternehmen als Familienunternehmen bezeichnen? ☐ Ja ☐ Nein

2) Wie viele Beschäftigte arbeiten in Ihrem Unternehmen (Köpfe)? _____

Davon...	Vollzeit _____	Teilzeit _____	
	Zeitarbeitnehmer _____	Auszubildende _____	Geringfügig Beschäftigte (bis 520€) _____

3) Wie viel Umsatz erwirtschaftete Ihr Unternehmen 2024?

<input type="checkbox"/> < 1 Mio €	<input type="checkbox"/> 1 Mio – < 5 Mio €	<input type="checkbox"/> 5 Mio – < 25 Mio €	<input type="checkbox"/> 25 Mio – < 100 Mio €	<input type="checkbox"/> ≥ 100 Mio €
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4) Bieten Sie in Ihrem Unternehmen bei Büroarbeiten oder vergleichbaren Tätigkeiten Remote Arbeit/Homeoffice an?

<input type="checkbox"/> Nein	<input type="checkbox"/> Ja, und zwar durchschnittlich _____ Tage pro Monat	<input type="checkbox"/> nicht relevant
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5) Wie viele Beschäftigte arbeiten in Ihrer HR-Abteilung (Köpfe)? _____

Figure A3: 3rd quarter regular questions

3. Quartal

A) Flexibilisierungsinstrumente

Wie schätzen Sie die voraussichtliche Nutzung folgender Flexibilisierungsinstrumente in Ihrem Unternehmen ein?

(Die Angaben beziehen sich nur auf Ihre(n) Betrieb(e) in Deutschland)

Instrumente	Gegenwärtige Anwendung	Die Nutzung wird voraussichtlich...		
		steigen	gleich bleiben	abnehmen
1) Überstunden	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2) Zusatz-/Ersatzpersonal auf Basis befristeter Verträge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3) Einsatz von Zeitarbeitnehmern (Leiharbeitnehmern)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4) Einsatz freier Mitarbeiter/Freelancer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5) Outsourcing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6) Innerbetriebliche Umsetzungen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7) Arbeitszeitkonten/Gleitzeitkonten	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8) Flexibilisierungsmaßnahmen im Personalbereich generell (einschließlich oben nicht genannter Maßnahmen)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure A4: 4th quarter regular questions

4. Quartal

A) Ausblick auf das Jahr 2026

1) Wie wird sich Ihr Personalbestand im kommenden halben Jahr voraussichtlich entwickeln?

☐ stark steigen ☐ etwas steigen ☐ gleich bleiben ☐ leicht sinken ☐ stark sinken

2) Verspüren Sie aktuell einen Bewerbermangel?

☐ ja ☐ teils/teils ☐ nein ☐ nicht auf Personalsuche

3) Falls ja bzw. teils/teils, in welchen Berufsfeldern ist dieser besonders stark: _____

4) Wie werden sich die Löhne 2026 in Ihrem Betrieb im Durchschnitt voraussichtlich entwickeln?

☐ steigen, um ca. _____% ☐ gleich bleiben ☐ sinken, um ca. _____%

5) Wie hoch ist der Lohngestaltungsspielraum im kommenden Jahr bei neu eingestellten Beschäftigten im Vergleich zum Gehalt von bestehenden Beschäftigten (durchschnittlich)?

☐ kein Spielraum ☐ Spielraum: _____% ☐ keine Neueinstellungen geplant

6) Wie wird sich der Bedarf nach Zeitarbeit in Ihrem Unternehmen im kommenden halben Jahr entwickeln?

☐ stark steigen ☐ etwas steigen ☐ gleich bleiben ☐ leicht sinken ☐ stark sinken