

Resetting Normal: Defining the New Era of Work



Adecco



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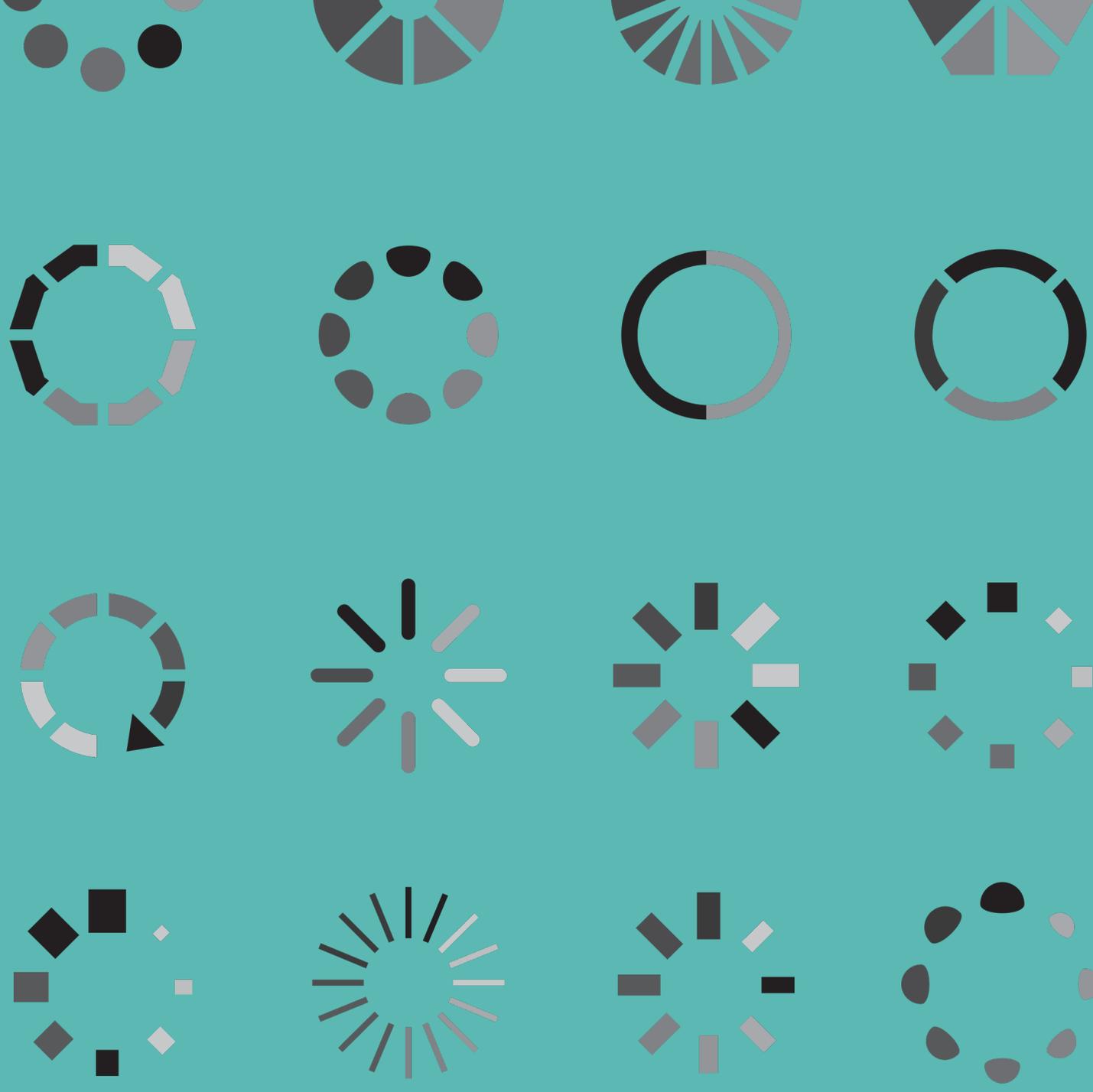
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Study Background and Objectives

In May 2020 with the onset of the global pandemic beginning to accelerate shifts in working practice, the Adecco Group launched an eight-market study to provide insights on the attitudes, behaviors and outlook of knowledge workers on the future of work.

As working practice and attitudes towards work continue to evolve, it is increasingly important for people and businesses to understand and adapt to the needs and priorities of the working world for the future, ultimately to 'Reset Normal' and create a future of work that works for everyone.

The second edition of 'Resetting Normal: Defining the New Era of Work' builds on the original research focusing on the outlook for 2021 and beyond and expanding to cover 25 countries across the globe to understand:

- How attitudes have changed and the implications for companies to successfully adapt in this period of transition, a year after the pandemic changed the way we work forever.
- Uncover new perspectives and insight on what the future world of work can and should look like



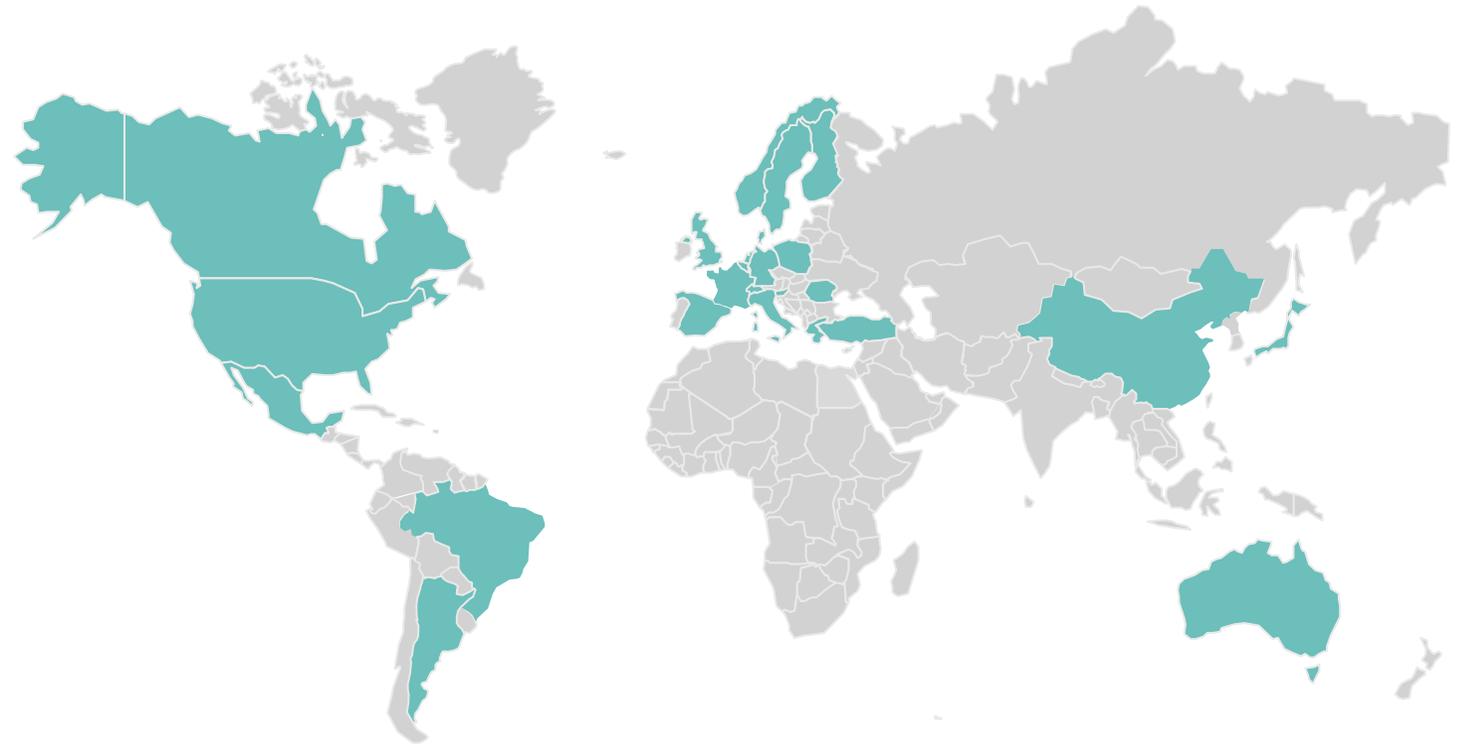
Methodology Overview

Office-Based Workers (Aged 18-60)

Respondents must have desk-based jobs, with contracts of at least 20 hours. In addition, they must have had to alter the way they work during the pandemic, predominantly working remotely.

Fieldwork was conducted between 13th May & 4th June 2021 in local languages.

14,800 respondents across 25 countries answered a 15-minute online survey.



2020 Original 8 markets (8,000)		Bel / Ned (1,000)	LatAm (1,000)	Nordics (1,000)	EMEENA (1,000)	Other
Australia (1,000)	Japan (1,000)	Belgium (404)	Argentina (117)	Denmark (196)	Greece (60)	Canada (1,000)
France (1,000)	Spain (1,000)	Netherlands (596)	Brazil (333)	Finland (237)	Poland (269)	China (1,000)
Germany (1,000)	UK (1,000)		Mexico (550)	Norway (141)	Romania (125)	Switzerland (800)
Italy (1,000)	USA (1,000)			Sweden (426)	Slovenia (14)	
					Turkey (552)	

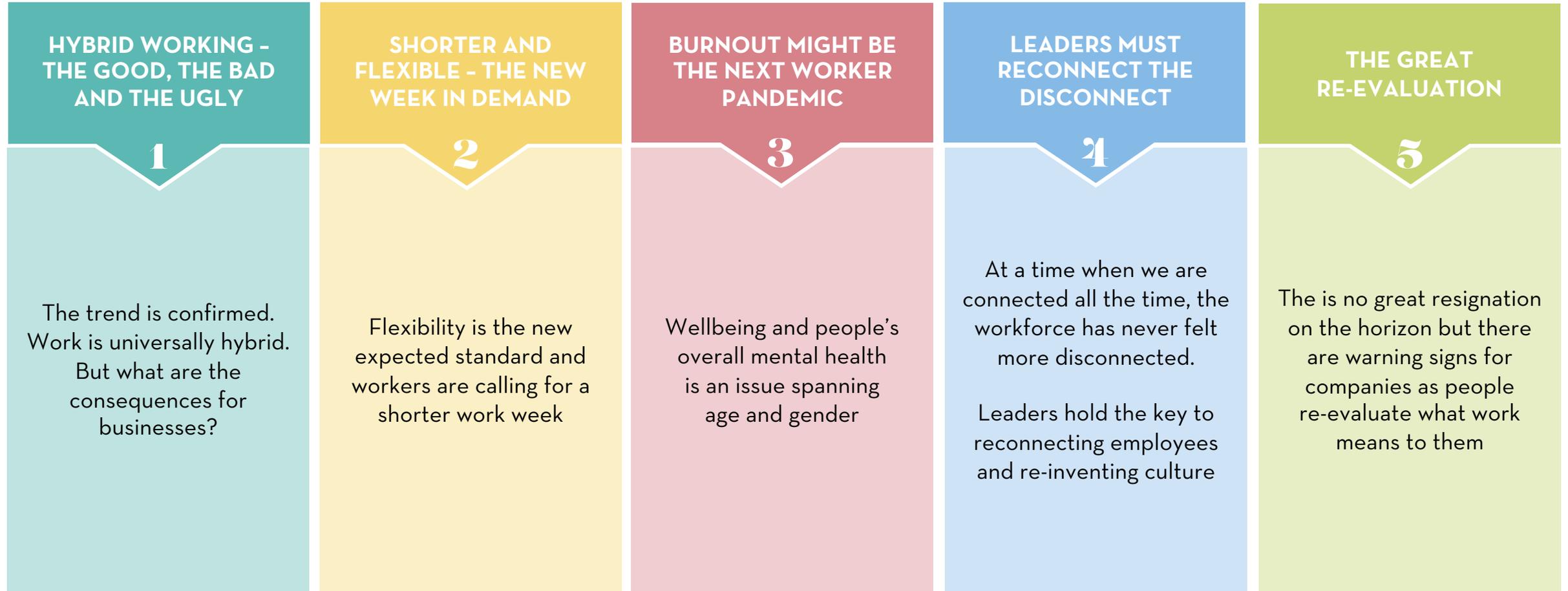


THE ADECCO GROUP

A hiker in a white and red jacket stands on a rocky outcrop, looking out over a vast mountain landscape. The foreground is a green meadow with scattered rocks. In the background, there are large, rugged mountains with patches of snow and a clear blue sky with some clouds.

Key Insights

From the research, five key themes have emerged, as the most relevant for organisations to consider in the next normal



Executive Summary:

1

HYBRID WORKING - THE GOOD, THE BAD AND THE UGLY

- Globally, **workers want a hybrid working model where more than half of their time is spent working is remote** (53%). Parents and younger generations want more office time
- **Hybrid has boosted equal opportunities:** With remote work believed to help parents, people with disabilities and people from diverse backgrounds access opportunities and maintain work.
- **People want to go back to the office on their own terms:** workers want a place for connection and escape, but half of them are anxious about returning.
- **But there are polarised experiences for workers and some areas have got worse.** Companies must focus on wellbeing, reconnecting leaders and workers, and embrace the “One size will not fit all” when addressing employee needs

2

SHORTER AND FLEXIBLE - THE NEW WEEK IN DEMAND

- **Productivity has passed the test** and many things have improved for workers since last year, particularly their digital skills, their ability to care for others and their work/life balance. They are better time managers and feel more trust to get the job done.
- **Flexibility is the new standard.** Workers don't want to give up the flexibility gained. More than three quarters want to retain flexibility over their own schedule.
- **Workers are calling for a shorter work week:** with hours increasing 14% in the last year, more than half of workers state they would be able to do the same work in less than 40 hours.
- **More workers want to shift from hours to an outcome-based culture** but companies and leaders struggle with performance management based on results. **Only 36% of non-managers feel their managers are assessing their performance based on results.**

Executive Summary:

3

BURNOUT MIGHT BE THE NEXT WORKER PANDEMIC

- **Wellbeing and people's mental health is an issue spanning age and gender** and burnout is a key concern, but half of leaders struggle to see the signs. 67% of non-managers say leaders don't meet their expectations for checking on their mental wellbeing
- **Burnout has been a significant cause for concern across the workforce, for almost 4 in 10 workers. More than half of young leaders are suffering from burnout**, the same group who shoulder significant responsibility for future progress.
- **Companies are expected to share the responsibility of supporting wellbeing** - Workers want companies and leaders to increase their focus on supporting their wellbeing

1

LEADERS MUST RECONNECT THE DISCONNECT

- **At a time when we are connected all the time, the workforce has never felt more disconnected. Leaders hold the key to reconnecting employees and re-inventing culture**
- Satisfaction with leadership is low at a non-management level and worker's relationships, motivation and sense of team and company culture have deteriorated over the last year.
- **Managers are falling short when it comes to setting a good culture** and those in non management positions feel the impact
- **Leaders don't see the issue - there is a big disconnect** between management views of their own performance and the opinion of their employees
- **Coaching and leadership development is key for leaders.**

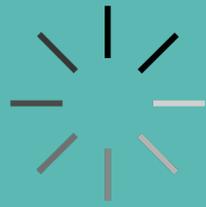
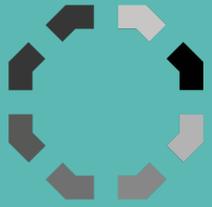
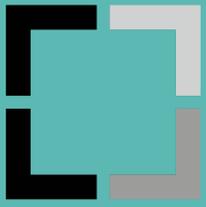
Executive Summary:

5

THE GREAT RE-EVALUATION

- **There is no ‘great resignation’ on the horizon but warning signs for companies are there as people re-evaluate what work means to them.** With motivation and engagement at a low, nearly 2 in 5 are considering moving to a job with more flexible options. A quarter of the workforce are considering moving to another country or region.
- Two-thirds of workers are confident that companies will start significant hiring again, and less than half are satisfied with career prospects at their company. Career reassessment looks set to converge with career opportunity.
- **Security, agency, culture, wellbeing and development are most important** to people going forward. Eight in ten workers want to be able to maintain a good work/life balance.
- **The next normal is EQUAL: Women and men are equally re-assessing their careers** and have similar priorities for their career going forward.





1

HYBRID WORKING – THE GOOD, THE BAD AND THE UGLY

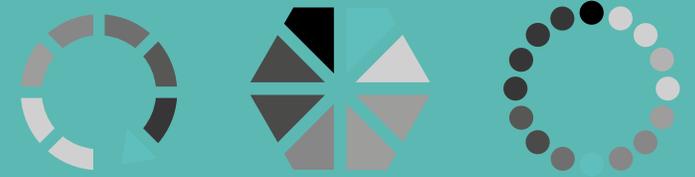
The trend is confirmed. But what are the consequences for businesses?



Hybrid Working: The Good, The Bad and The Ugly: Summary

- Globally, **workers want a hybrid working model where more than half of their time spent working is remote** (53%). Parents and younger generations want more office time
- 8 in 10 believe that increased flexibility around hybrid working will benefit both employers and employees. This belief is shared among leaders
- Majority believe hybrid working models will boost equal opportunities: with remote work creating more opportunities for parents, people with disabilities and people from diverse backgrounds.
- Workers want the complementary benefits of work/life balance and focus provided by remote alongside the office as a nice environment to collaborate and connect
- **Emotions of excitement** to reconnect with colleagues in the office **coexist with anxiety** about the return for some
- Workers want to go back to the office but on their own terms. 7 in 10 say working remotely more than before will be important to them, however **tension exists between the 'ideal' hybrid that people want vs. what they expect companies will impose**
- **Agency and adaptation:** workers have adapted, obstacles of trust and practicality are being overcome, and 7 in 10 (71%) now have a setup at home that allows effective remote work



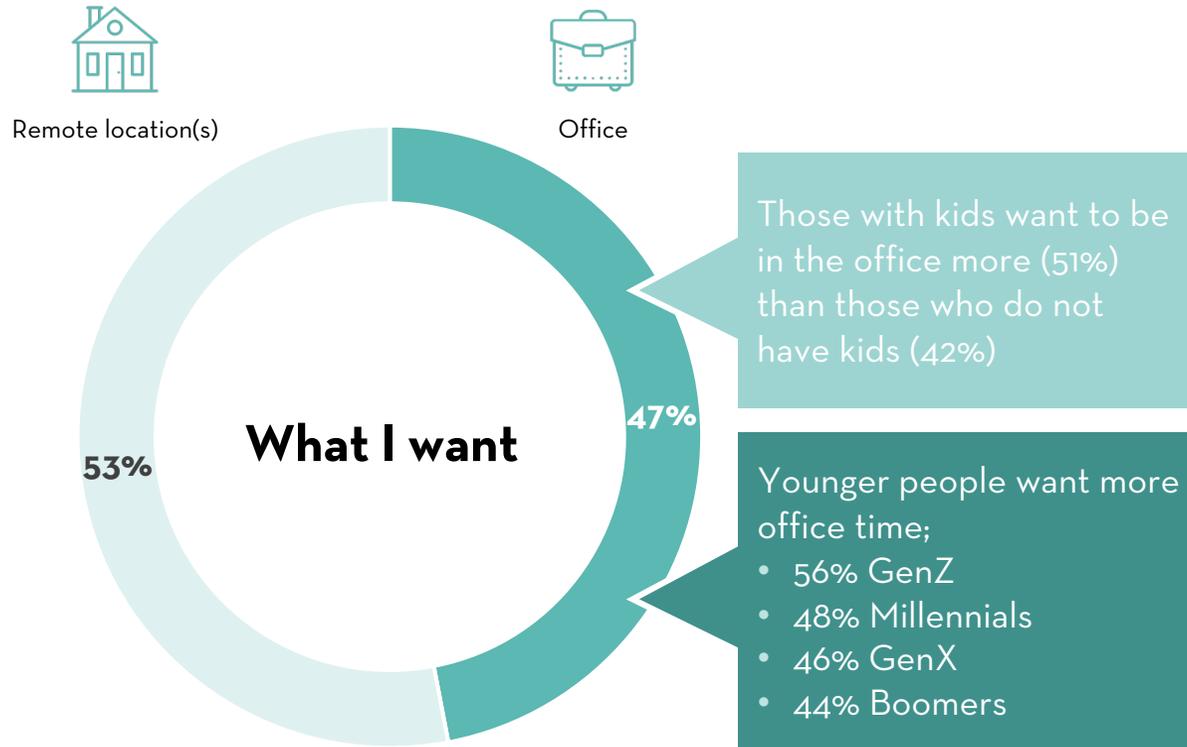


**Workers want to spend at least 53%
of their work time remotely**



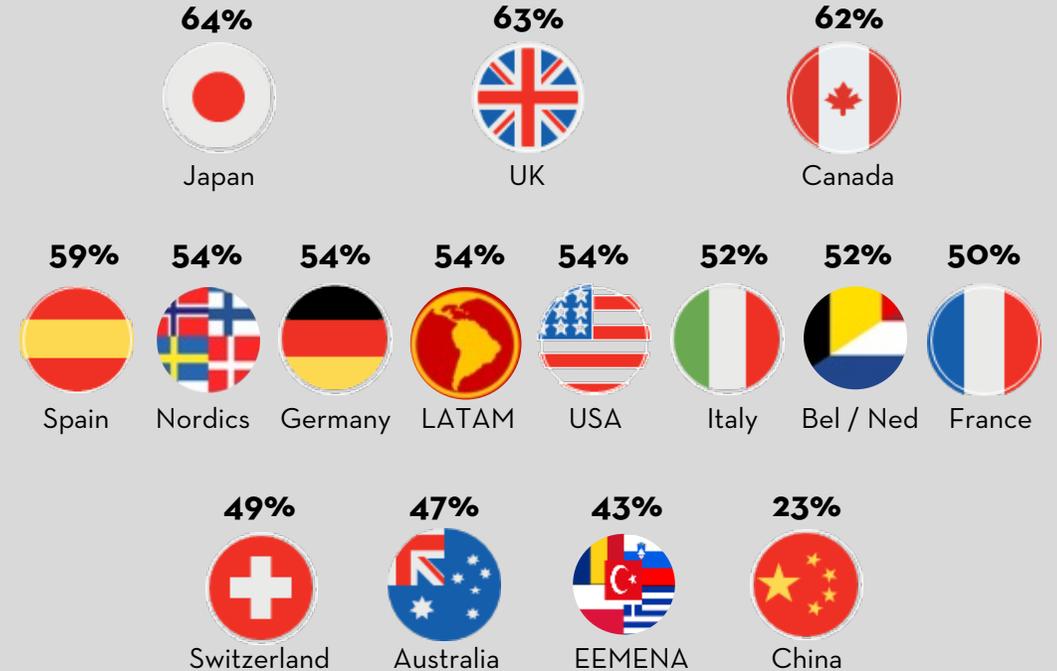
The next normal continues to be universally hybrid: over half of workers want to work remotely 50% of their time

% Who want to spend their working week in the following locations **after** the pandemic



% Wanting to work remotely **after** the pandemic

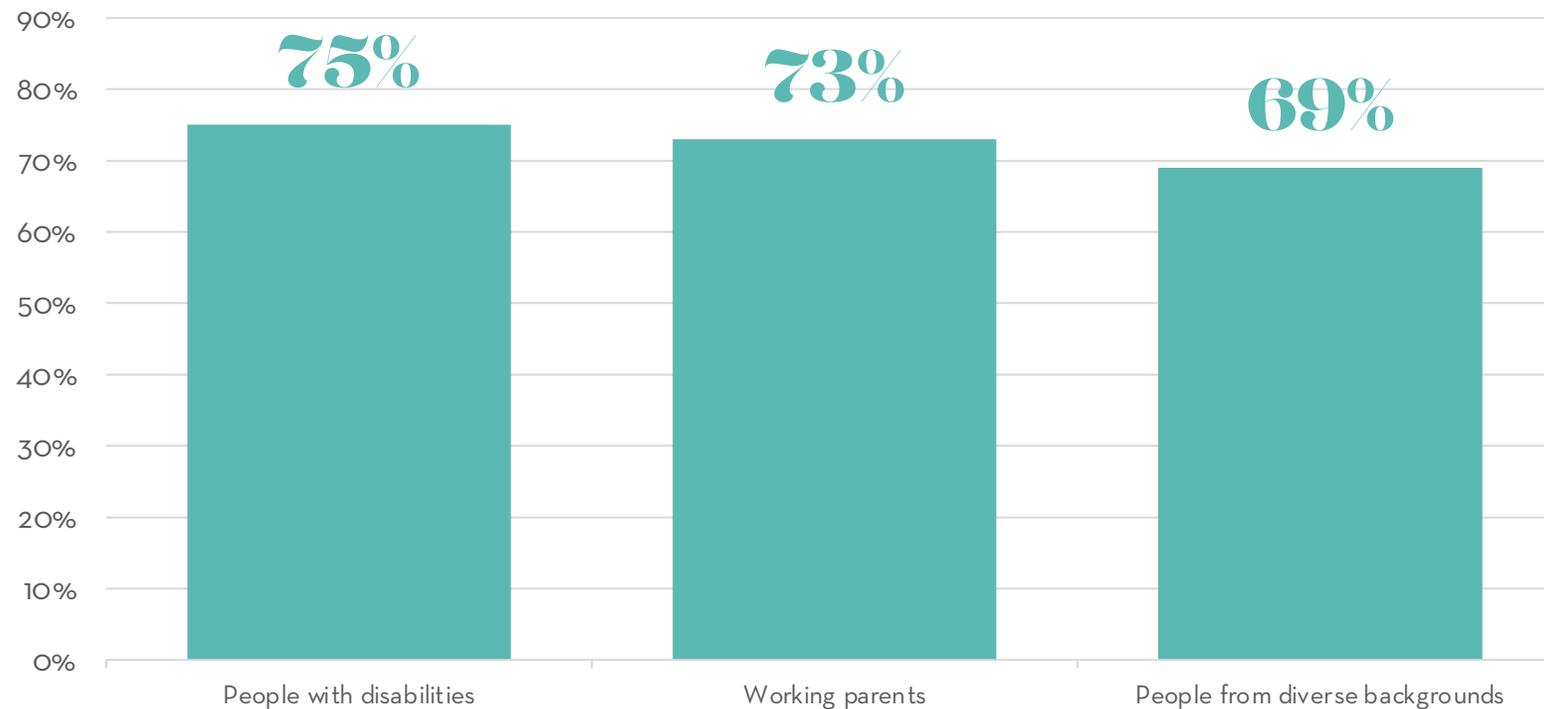
All want to spend at least 40% of their work time remotely (except in China)



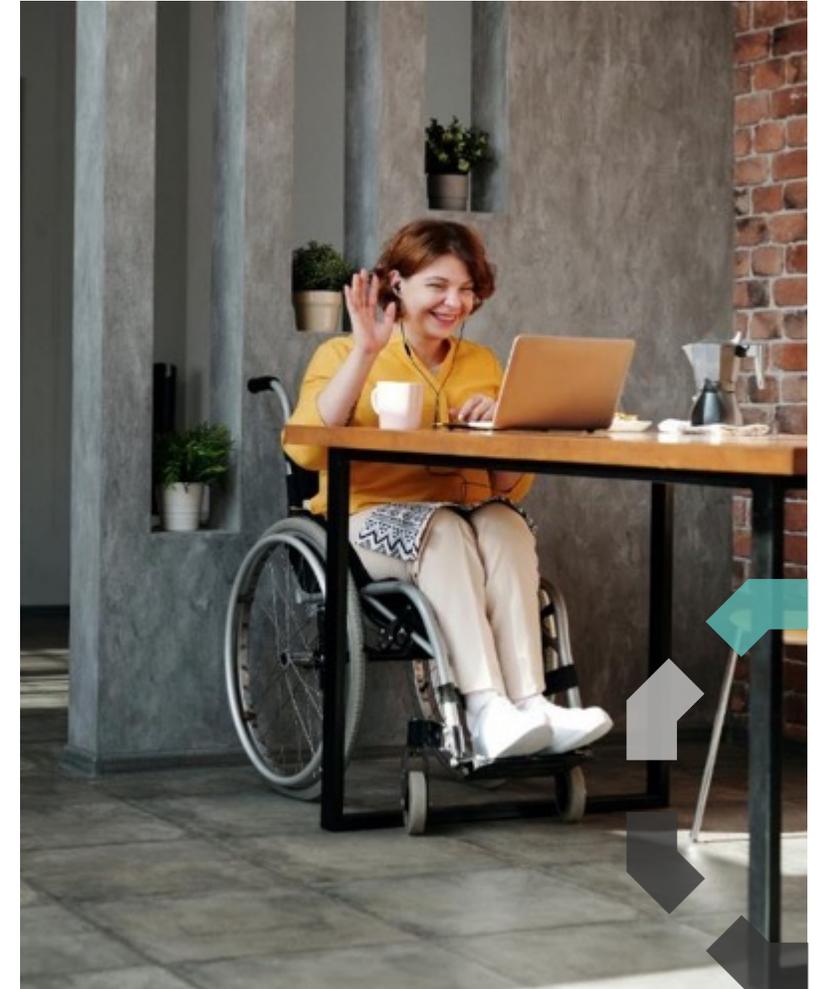
Q17. If you could choose for yourself, what proportion of your time would you want to spend working in the following locations in an average week after the pandemic? (NET From the office, NET Remotely) Base: All respondents (14,800), Have children at home (8,148), Do not have children (5,595), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353)

Most believe that the hybrid future offers opportunities for creating a more diverse and inclusive workforce

% Who believe the changes to working life caused by the pandemic will create more opportunities for the following (NET Agree)



Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic?
(NET Agree) Base: All respondents (14,800)



Workers remain enthusiastic about people-focused office environments, conducive to work, leisure and collaboration

Selected Verbatim Comments - 'Try to imagine what your ideal future working environment would be like and tell us about it'

"I'd like a **comfortable office environment** where I can work with my colleagues. **Loneliness** in our homes has caused our **collaborating skills** to decline. The presence of **co-working spaces** increases both the **quality of the work** and **the tenacity of the staff.**"

Manager, Hospitality



"**Comfortable working atmosphere**, including office **decoration, furnishings** etc. Good **interpersonal atmosphere. Leisure and entertainment** areas, to alleviate the fatigue and stress of long hours."

Manager, Tech / Telecoms



"An office environment where you are mentally prepared through **yoga** or **breathing techniques**. I would like to see a more familiar **togetherness** and **ergonomic tables** and **chairs**, so that you can work standing if you choose. There should be a **nice canteen**, which also gives a **homely design, flowers** and **pleasant lighting.**"

Non-manager, Financial



"The ideal working environment is where I feel at **ease and there's no worry** about anything. I can **arrange my work schedule myself**, I have **good contact** with my supervisor and in general there is a nice atmosphere between all the employees."

Non-manager, Construction

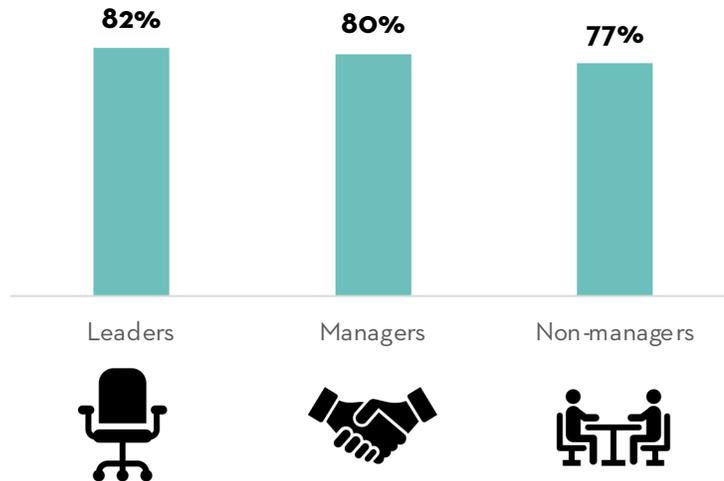


Q34. Try to imagine what your ideal future working environment would be like and tell us about it in the box below

Workers and leaders believe hybrid and flexible working benefits both them and the companies they work for

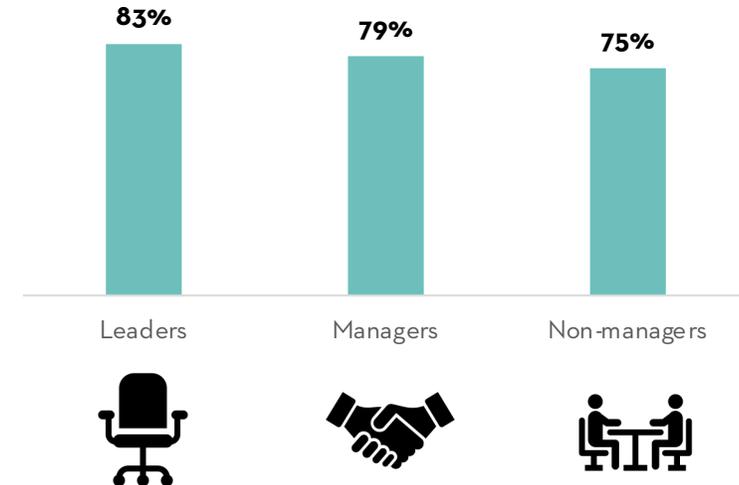
8 in 10

(79%) Believe **employees** will benefit from having increased flexibility around being in the office and remote working



8 in 10

(78%) Believe **business** will generally benefit from allowing increased flexibility around being in the office and remote working



Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)

Workers want to be back in the office on their own terms, enjoying the freedom of flexible work

Selected Verbatim Comments - 'Try to imagine what your ideal future working environment would be like and tell us about it'

"**Freedom to choose** my place of work, between office or home **according to my personal needs**, I'd also like to choose my schedule, be able to sleep a little more, start my workday earlier if I want to finish earlier."

Manager, Engineering



"Ideal would be **three days in the office** and **two from home**. This gives the **social interaction** I need plus the **break from traveling** to and from work and ability to **get things done** that need more **focus**."

Non-manager, Tech / Telecoms



"**Mix** of home and office with **flexible hours** so you can **choose to do something different** during the day and **catch up** in the evening or weekend."

Non-manager, Government



"If it's **technically possible** to work from home, then it should be a **RIGHT** as an employee. Think of what it could save in time, pollution, **road accidents** and **wear and tear on our infrastructure**, not to mention avoiding stress from transport."

Non-manager, Engineering



"I'd love to continue working remotely and have **one or two days** a week at the company to use the best tools at the forefront of technology and make my work easier and more productive."

Manager, Energy



"I want to return to the office at least **3 days a week** for focus on **collaborative tasks**, and then other days can work from home for **self-reliance** tasks."

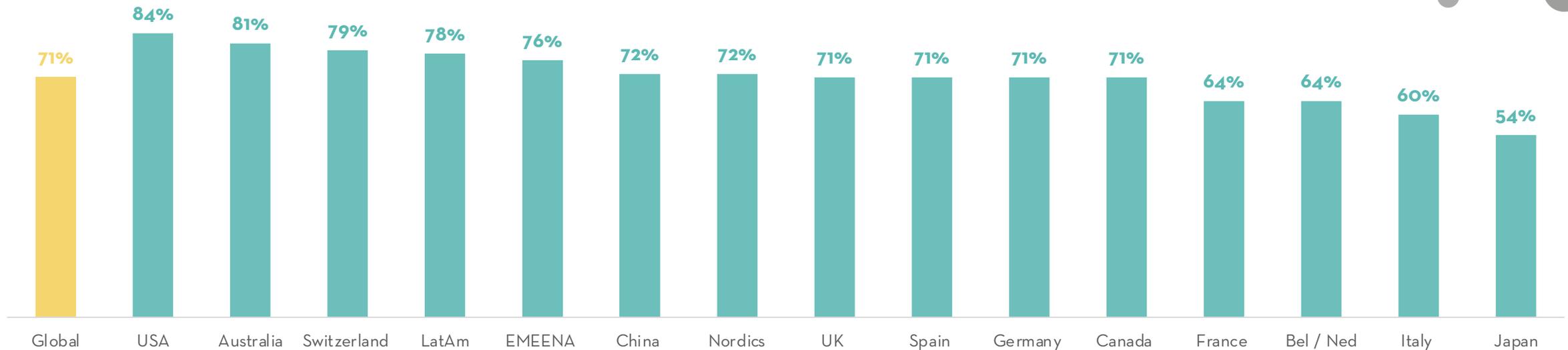
Manager, Financial services



Q34. Try to imagine what your ideal future working environment would be like and tell us about it in the box below

Workers have been successful in creating their own set up for effective remote work

% Who have a set-up at home that allows them to work well remotely (NET Agree)



Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800), Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)



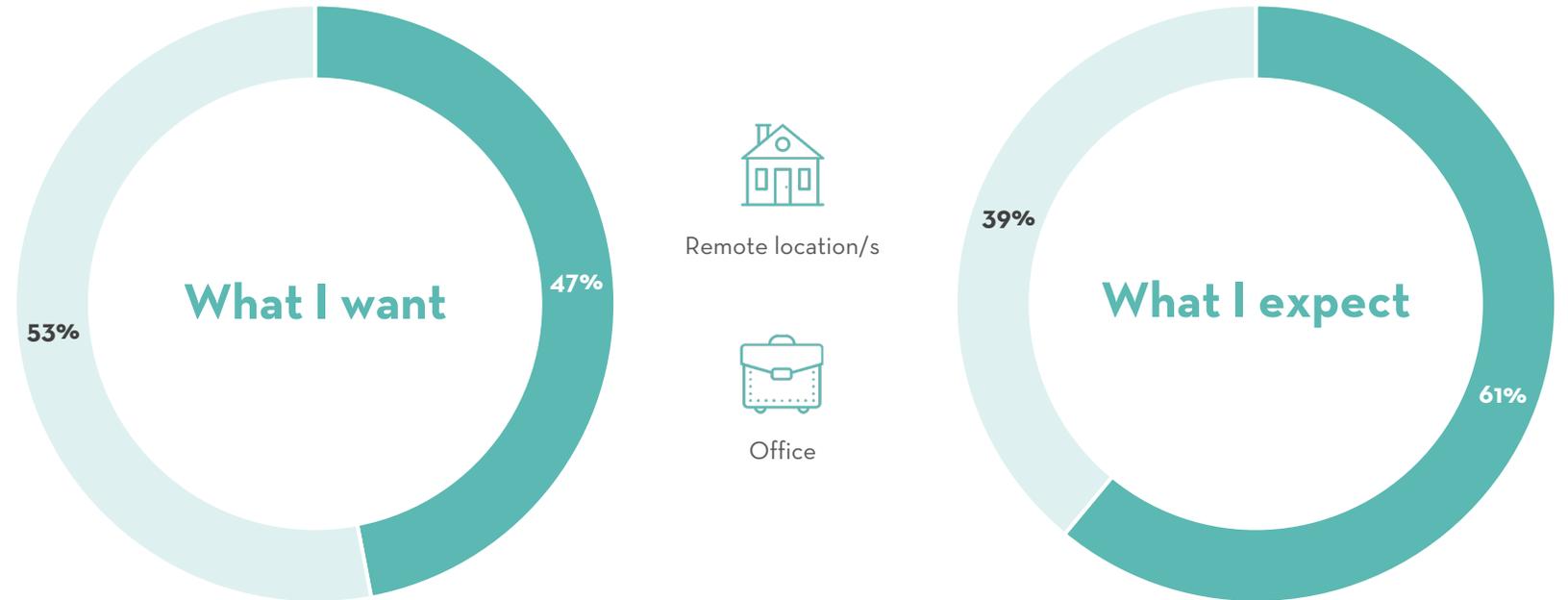
7 in 10 (71%) say working remotely more than they did before the pandemic will be important to them in future



Tension exists between the 'ideal' hybrid model that people want versus what they expect



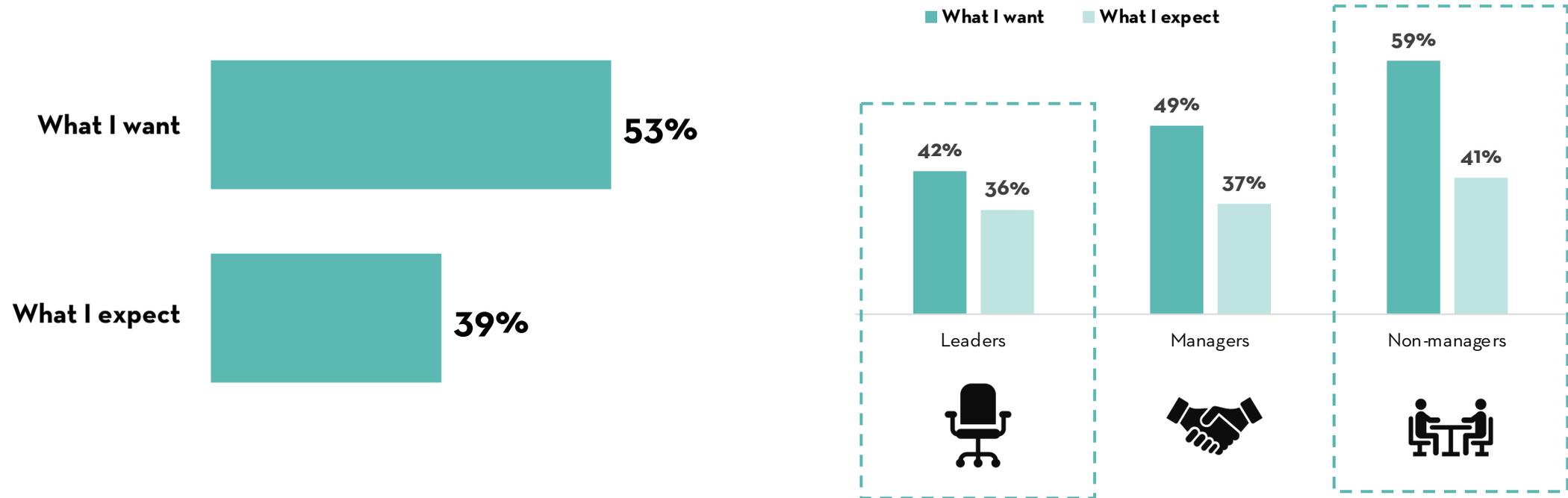
% Who want to spend vs. expect to spend their working week in the following locations after the pandemic



Q16. After the pandemic, what proportion of your time do you expect to spend working in the following locations? Q17. If you could choose for yourself, what proportion of your time would you want to spend working in the following locations in an average week after the pandemic? (NET From the office, NET Remotely) Base: All respondents (14,800)

Non-management have a greater desire for remote work than leaders and managers

% Of time people want to spend vs. expect to spend working remotely after the pandemic (NET Remotely)



Q16. After the pandemic, what proportion of your time do you expect to spend working in the following locations? (NET Remotely) Q17. If you could choose for yourself, what proportion of your time would you want to spend working in the following locations in an average week after the pandemic? (NET Remotely) Base: All respondents (14,800) Leaders (1,427), Managers (6,978), Non-managers (6,171)

Although the majority look forward to seeing colleagues, there is significant anxiety about returning to the office

57%

Say they can't wait to start seeing more of my colleagues in person again

42%

Say they feel / have felt a lot of anxiety about returning to the office

These feelings can co-exist and younger generations feel them more strongly

63%

Generation Z

46%

60%

Millennials

45%

55%

Generation X

40%

56%

Baby boomers

35%

Women tend to feel anxiety about returning more than men



46%



38%

Potentially linked to slightly more common issues with mental and physical wellbeing;

Mental wellbeing has worsened

34%

29%

Physical wellbeing has worsened

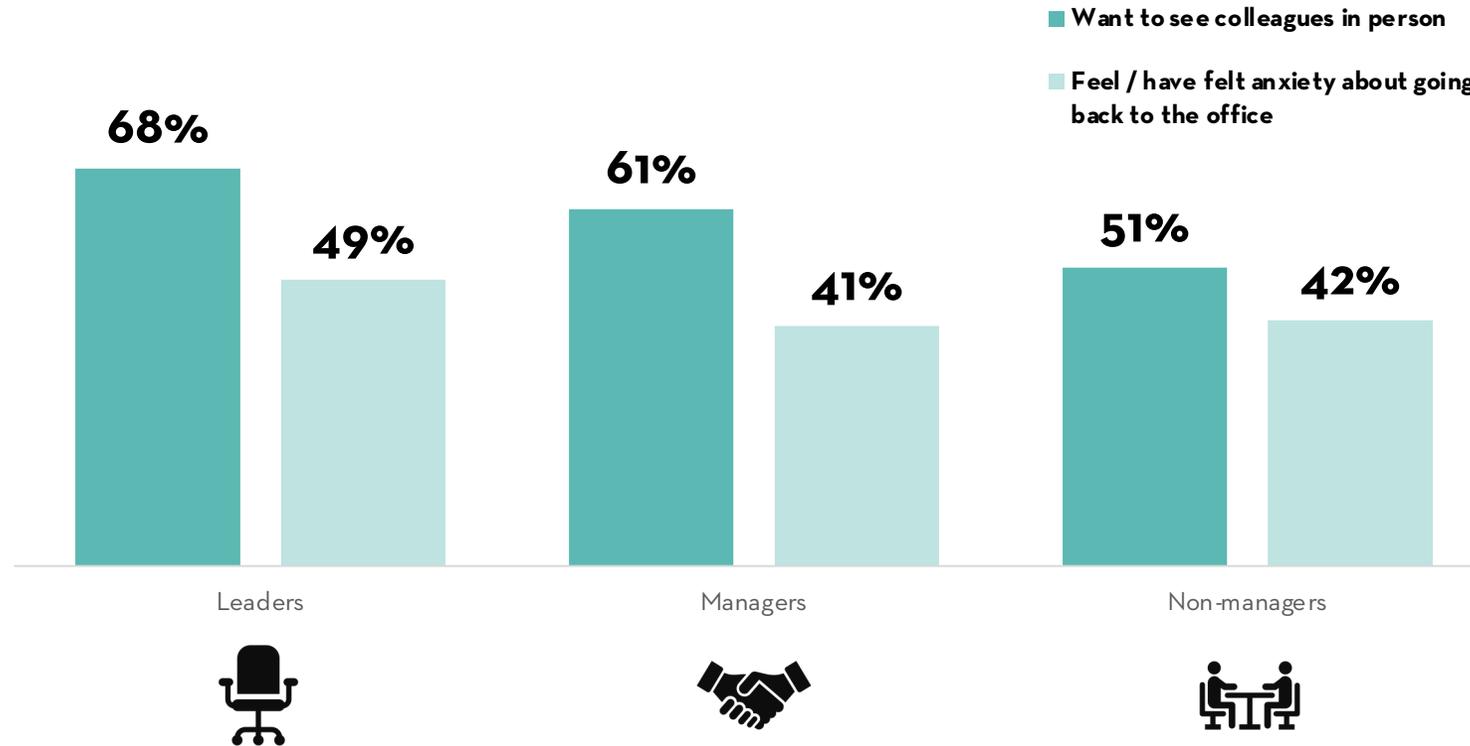
30%

26%

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following?
(NET Agree) Base: All respondents (14,800), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353), Women (7,324), Men (7,442)

Both excitement about seeing colleagues and anxiety about returning to the office are emotions that are strongest among leaders

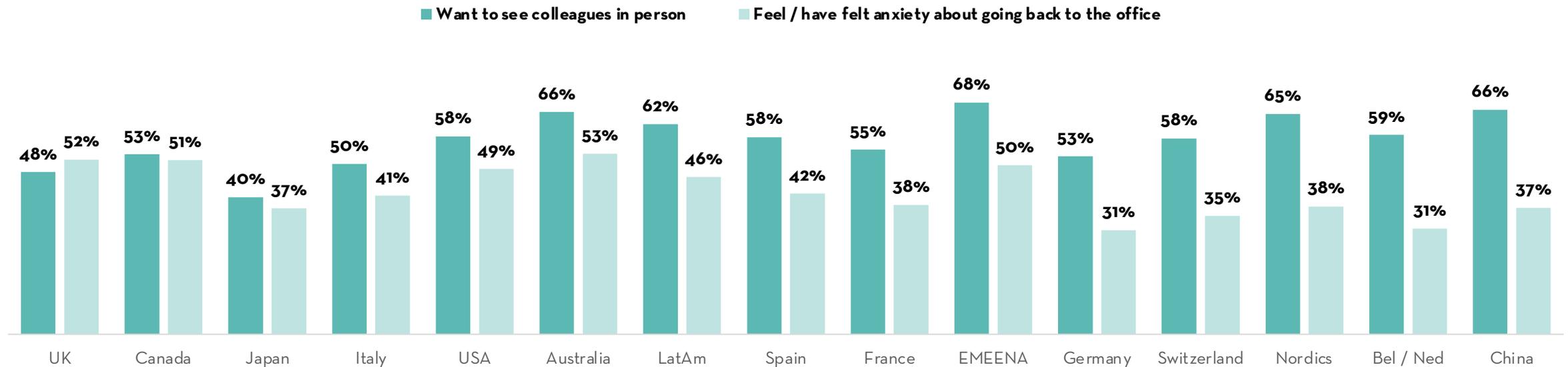
% Who say they cannot wait to start seeing colleagues in person again vs. feel / have felt a lot of anxiety about returning to the office (NET Agree)



Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: Leaders (1,427), Managers (6,978), Non-managers (6,171)

Anxiety about returning to the office is highest in Australia while people in the EEMENA region are most excited to see colleagues again

% Who say they cannot wait to start seeing colleagues in person again vs. feel / have felt a lot of anxiety about returning to the office (NET Agree)
[Ranked by difference between wanting to see colleagues and feeling anxiety]



Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Those who are anxious about a return to the office are more likely to have social, wellbeing and practical related concerns and priorities

Among those who are **anxious** about returning to the office:



(33%) say their mental wellbeing got worse during the last 12 months



say their physical wellbeing got worse



(25%) say their relationships with colleagues got worse



(77%) rate a redesigned office for people to work safely and effectively as important



rate ability to manage caring for others around work as important



(69%) want to work remotely more than they did before the pandemic

Q6. Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Worse); Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important); Q20: How important will the following be to your working life after the pandemic? Base: Who feel / have felt a lot of anxiety about returning to the office (6,234)

Those who are anxious about a return to the office also seem to be more concerned about losing benefits from remote work

Those who are anxious about a return to the office	Those who are anxious	Not anxious
More likely to say working remotely more than they did before the pandemic is important;		
Working remotely more than I did before the pandemic is important	78%	68%
Ability to manage caring for others / pets around work is important	74%	66%
More likely to feel their productivity improved (and so may be concerned about reduced productivity when they return);		
Productivity levels got better in last 12 months	49%	36%
Most likely related to these themes is a desire to spend less time working in the office		
Proportion of time they want to spend working in the office	41%	54%

Q3. Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Agree); Q14. Thinking about what you expect from your company after the pandemic, how important will the following be?; Q20: How important will the following be to your working life after the pandemic? (NET Important) Base: Who feel / have felt a lot of anxiety about returning to the office (6,234), Who do not feel anxious about returning to the office (5,115)

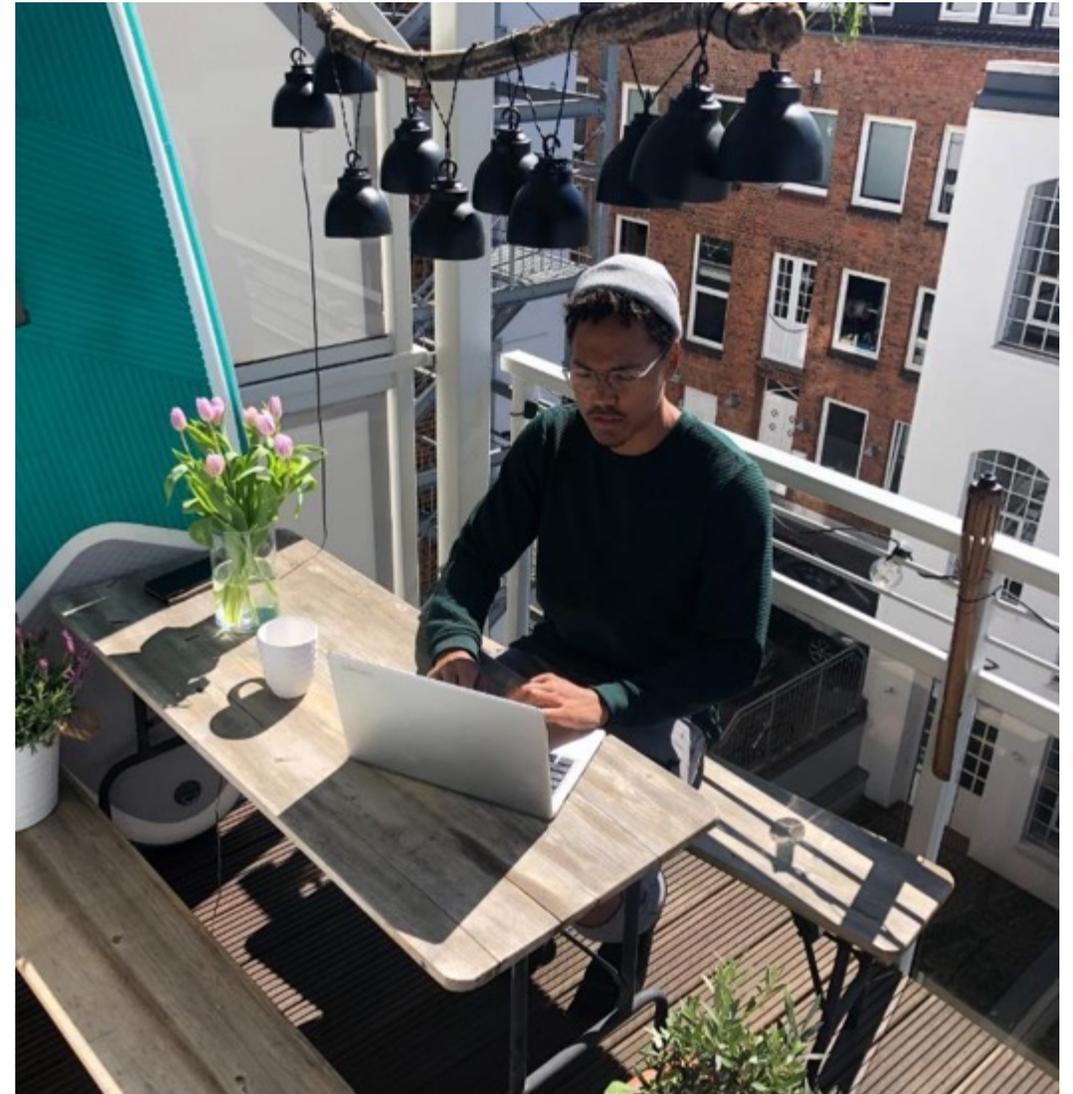
Those who are anxious about a return to the office are more likely to have social, wellbeing and practical related concerns

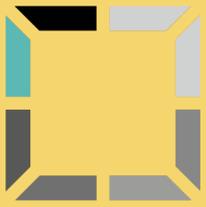
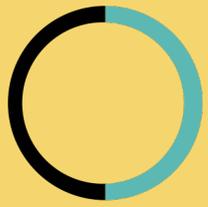
Those who are anxious about a return to the office	Those who are anxious	Not anxious
Feel less able to manage their wellbeing than those who are not anxious;		
I am able to manage my physical wellbeing	67%	73%
I am able to manage my mental wellbeing	66%	72%
Less likely to have good relationships at work;		
I have a strong relationship with my colleagues	65%	73%
More likely to rate a redesigned office for people to work safely and effectively as important		
Redesigned office for people to work safely and effectively is important	77%	71%

Q3. Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Agree); Q14. Thinking about what you expect from your company after the pandemic, how important will the following be?; Q20: How important will the following be to your working life after the pandemic? (NET Important) Base: Who feel / have felt a lot of anxiety about returning to the office (6,234), Who do not feel anxious about returning to the office (5,115)

Hybrid Working: The Good, The Bad and The Ugly: Key Takeaways

- **The last 18 months have proved that remote work doesn't come with a loss of productivity, and that a more inclusive and flexible way of working is possible.** Workers want to maintain flexibility over when and where they work.
- **The challenge for leaders is to capitalise on this and build the right structures, technology and resources to ensure this new way of working is future-proof, looking beyond the location of their employees.**
- It's Important for companies to consider **a hybrid working model that strikes the right balance between office and remote for all of their employees** and consider that "one size will not fit all" when addressing employee needs.
- **Flexible and remote working options are not a nice-to-have, but an expectation of workers,** as part of company packages in order to attract and retain top talent.
- **However, the physical office will still play an important role in the next normal.** Companies must consider how they can provide a safe, comfortable and enjoyable office environment to boost communication, colleague relationships and a sense of team culture and morale, in particular for those who are anxious to return to the office.
- **Technology is a key enabler to make hybrid work:** Cloud infrastructures, cybersecurity, and digital transformation are key foundations for a successful next normal.
- Shifting to a **hybrid working model is expected to create more opportunities for people with disabilities, working parents, and those from diverse backgrounds.** Companies should use the momentum to boost their diversity, equality and inclusion to encourage and support these groups. Making technology and digital skills accessible to all can create unlimited pools of talent, with no geographical limitations.





2

SHORTER AND FLEXIBLE – THE NEW WEEK IN DEMAND

Workers maintained the flexibility gained during 2020, but they want more. Questions over the length of the working week must be addressed as the future stays flexible



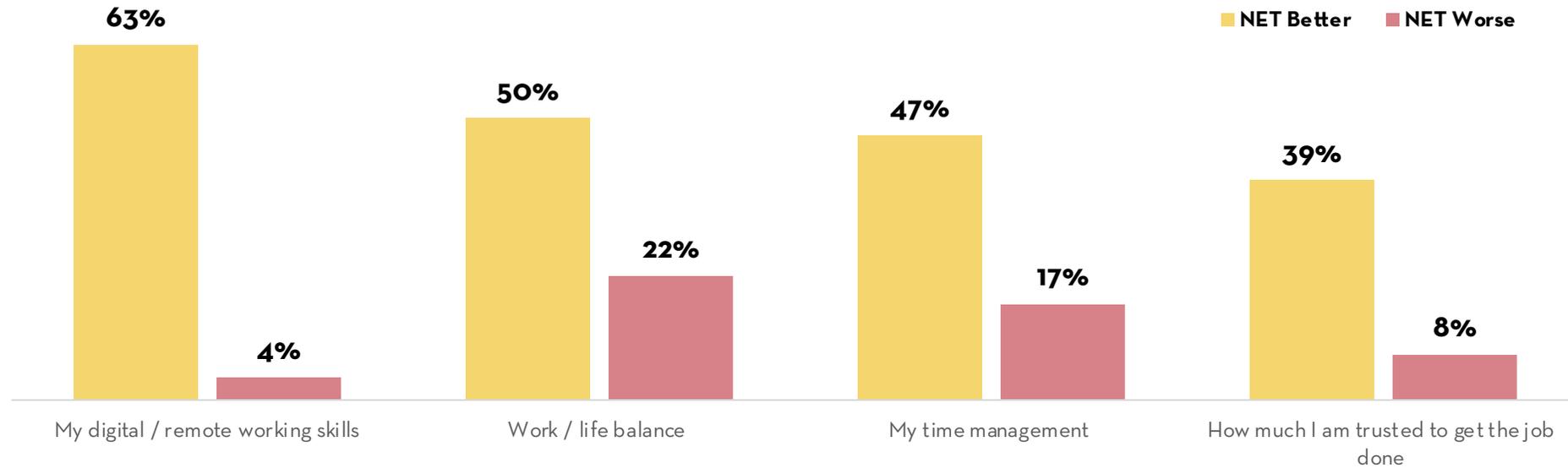
Shorter and Flexible – the New Week in Demand: Summary

- **Flexibility key for the next normal;** over two-thirds of workers have maintained flexibility and control over their working schedule and (75%) think it's important to retain flexibility going forward
- **Productivity has survived the shift to hybrid as people become better time managers and work/life balancers.** 82% say productivity has stayed the same or improved during the last 12 months.
- **7 in 10 (72%) call for employers to revisit the length of the working week and hours people are expected to work** with over half (57%) believing the job can be done in under 40 hours
- With flexible working becoming the norm, the 9 to 5 hour-based contract is outdated. **More workers and leaders call to be measured by outcomes and results rather than hours spent working,** a trend that was already strong in 2020
- **Companies and leaders are yet to adapt to the demand for outcome instead of hours-based approaches.** Only 36% of non-managers feel their managers are assessing their performance based on results instead of hours worked



People have become more trusted to do their job and able to balance work and personal life, scores are marginally higher than 2020 results

% Who say that aspects of their working life has got better vs. got worse **during** the last 12 months (NET Better vs. NET Worse)



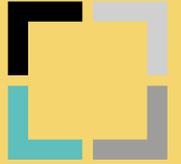
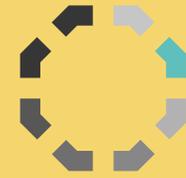
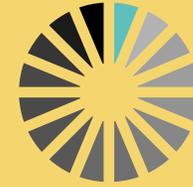
Top scoring country / region (NET Better)



Bottom scoring country / region (NET Better)



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better, NET Worse) Base: All respondents (14,800), Australia (1,000), Canada (1,000), France (1,000), Japan (1,000)



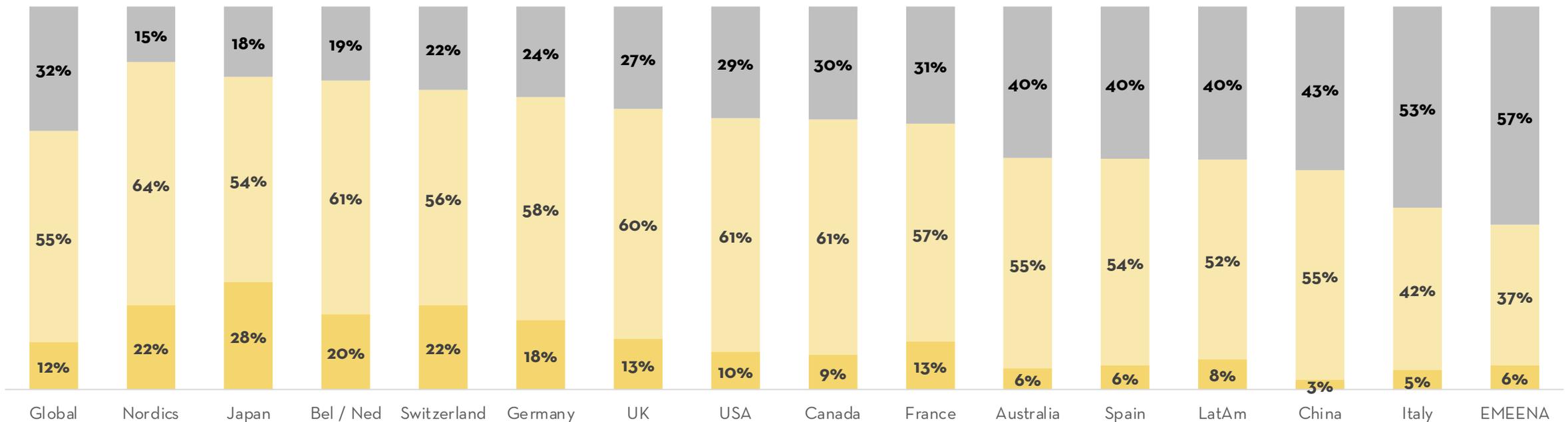
Workers don't want to lose autonomy. 3 in 4 (75%) think it's important to retain flexibility over their own schedule in the next normal



Two thirds of workers have maintained some flexibility and control over their working schedule

% Who say their working schedule was set by themselves vs. by their company [Ranked by NET Have flexibility]

■ Working schedule was completely set by me ■ Some flexibility to adjust my own working schedule ■ Set by the company

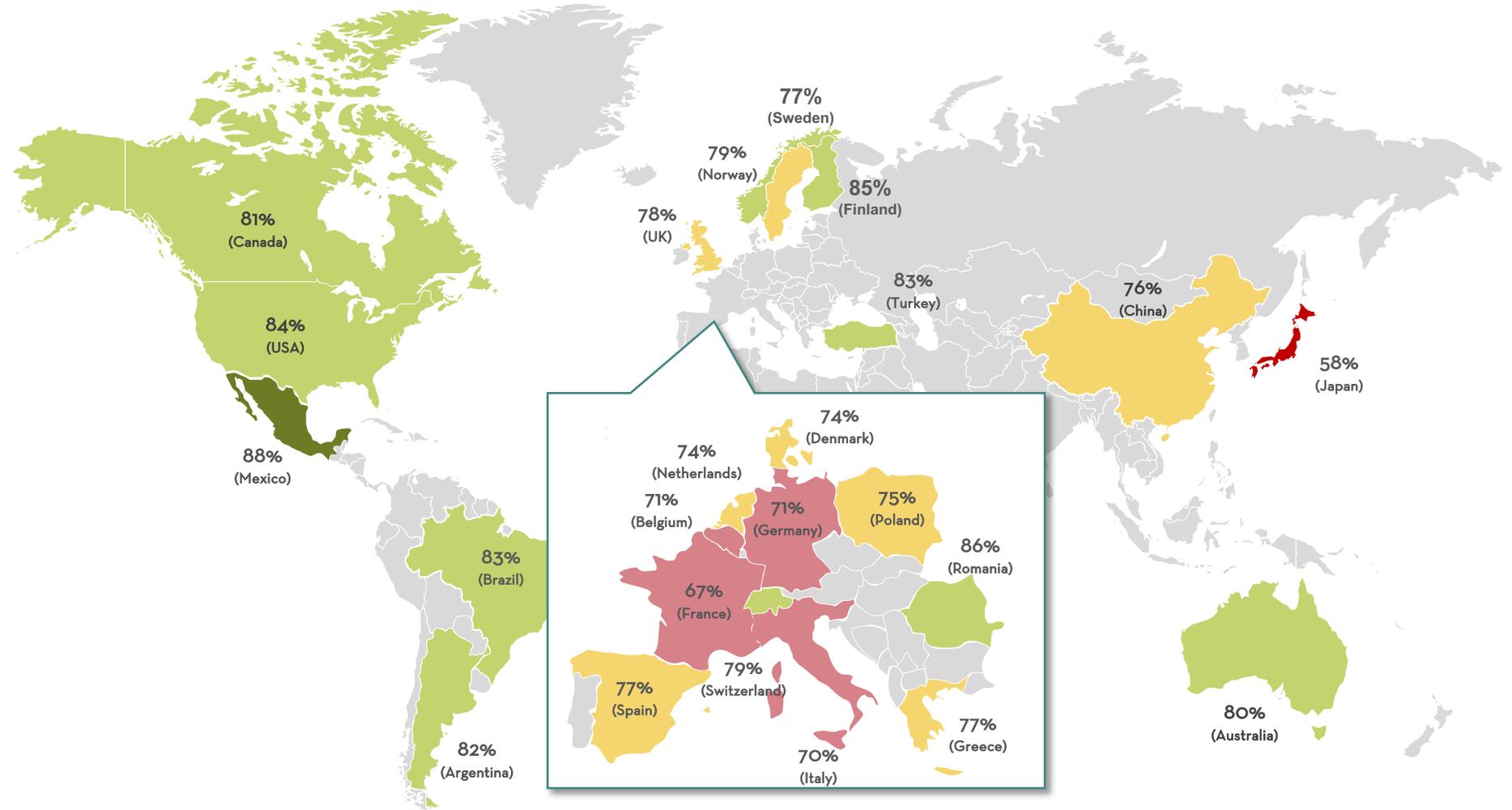
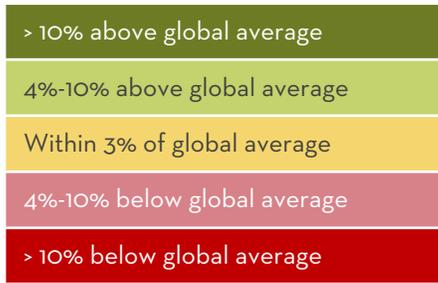


Q11. During the last 12 months, which of the following statements best describes your weekly working time and schedule? Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Across geographies, retaining the benefits of flexibility at work is highly sought after

76%

Say support for flexible working needs will be important after the pandemic



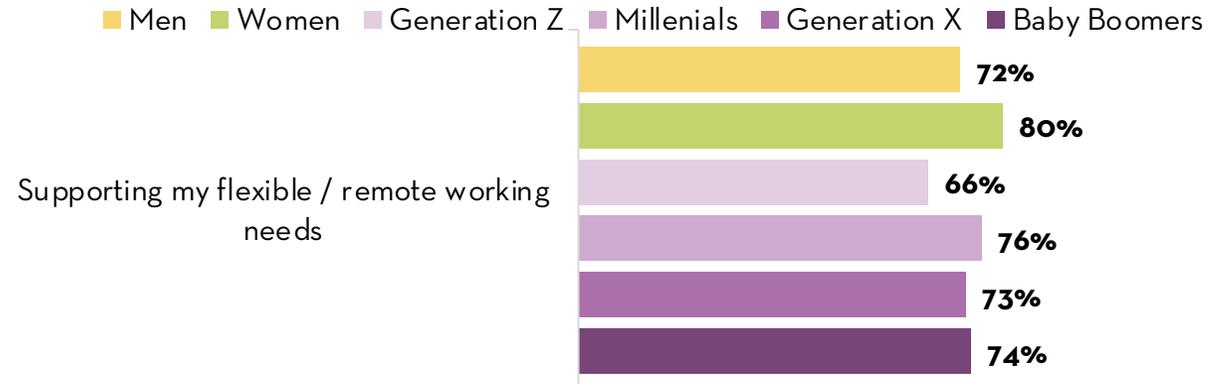
Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: All respondents (14,800) [Detailed country bases in appendix]

Flexibility is highly valued across gender, age and life-stage, especially for those with children and caring responsibilities

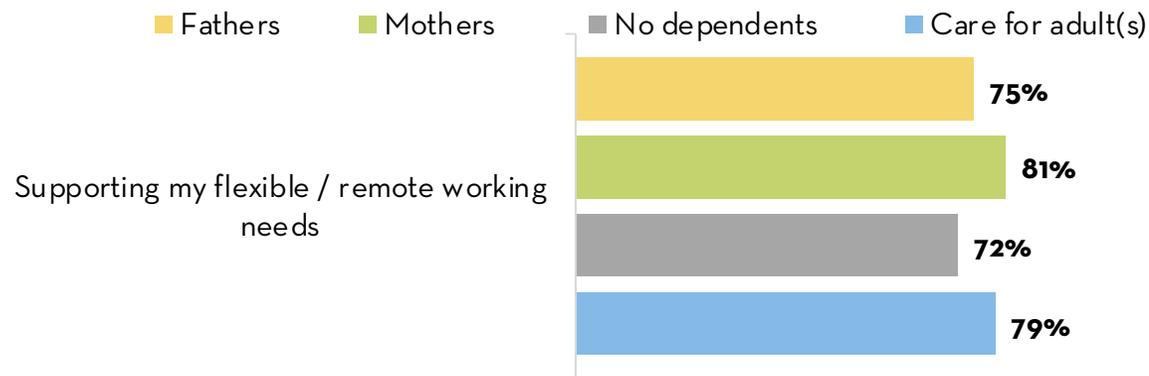
76%

Say support for flexible working needs will be important **after** the pandemic

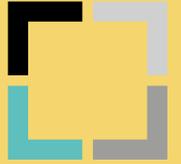
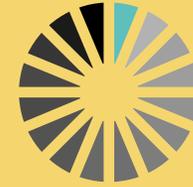
% Say support for flexible working needs will be important **after** the pandemic (NET Important)



% Say support for flexible working needs will be important **after** the pandemic (NET Important)



Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353). Mothers with children at home (3,829), Fathers with children at home (4,299), Have an adult reliant on care (159), No dependents (3,434).



82% of workers say their productivity has stayed the same or improved in the last 12 months



Productivity has survived the shift to hybrid work with 82% feeling as productive or more than before

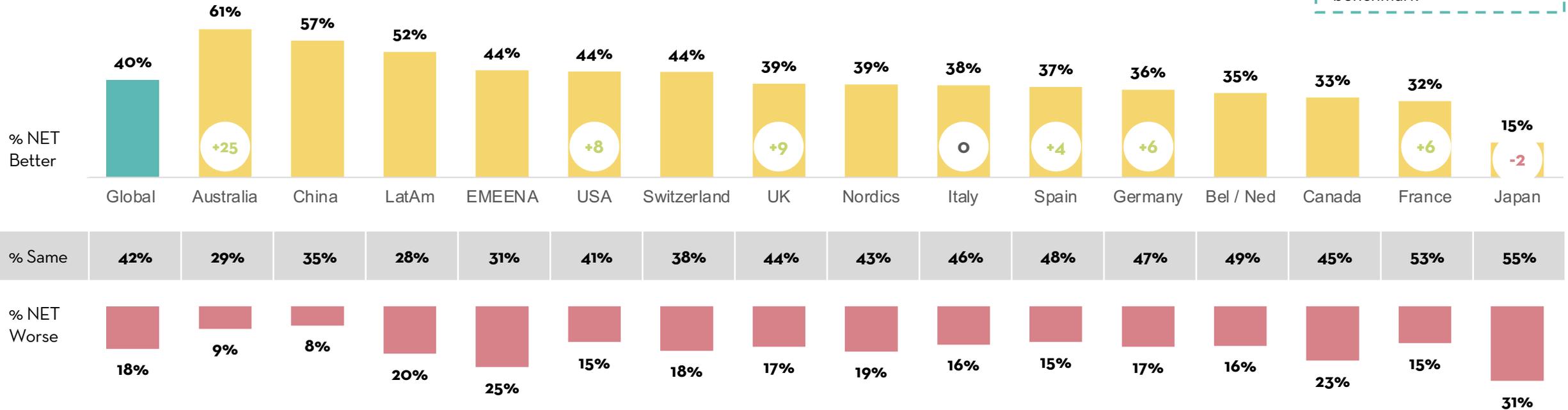
% Who say their productivity has got worse / stayed the same / got better **during** the last 12 months



8-market benchmark

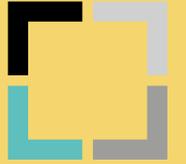
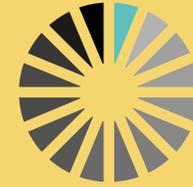


+7
vs. 2020



* Caution: Figures may not add to 100% due to rounding

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better, NET Worse) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

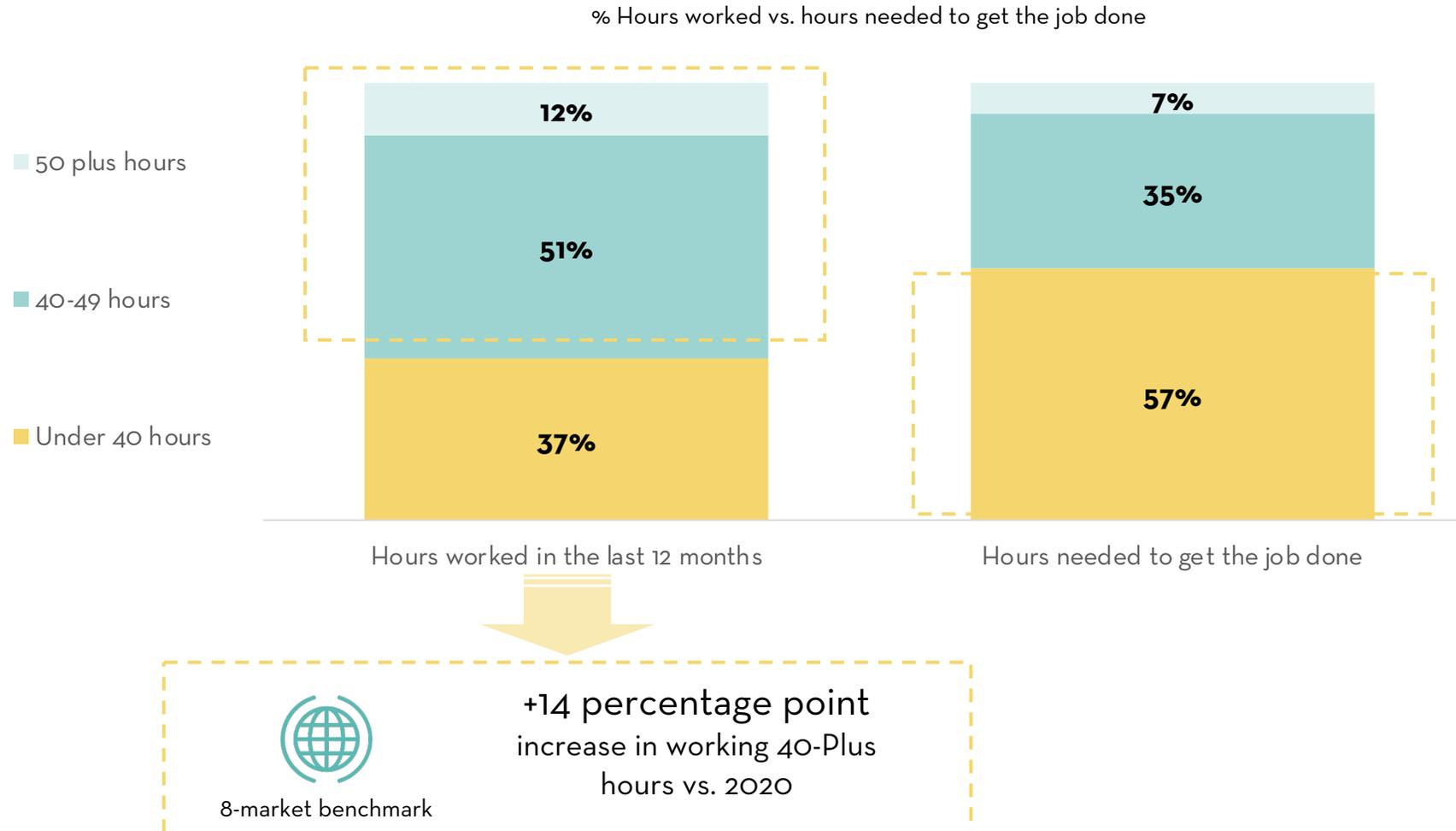


Hours worked have increased 14% since last year with 63% of workers working over 40 hours per week

But 6 out of 10 (57%) say they would be able to do their work in less than 40 hours



Workers perceive an opportunity to reverse a growing trend in long working hours, with 6 out of 10 able to do their work in less than 40 hours.

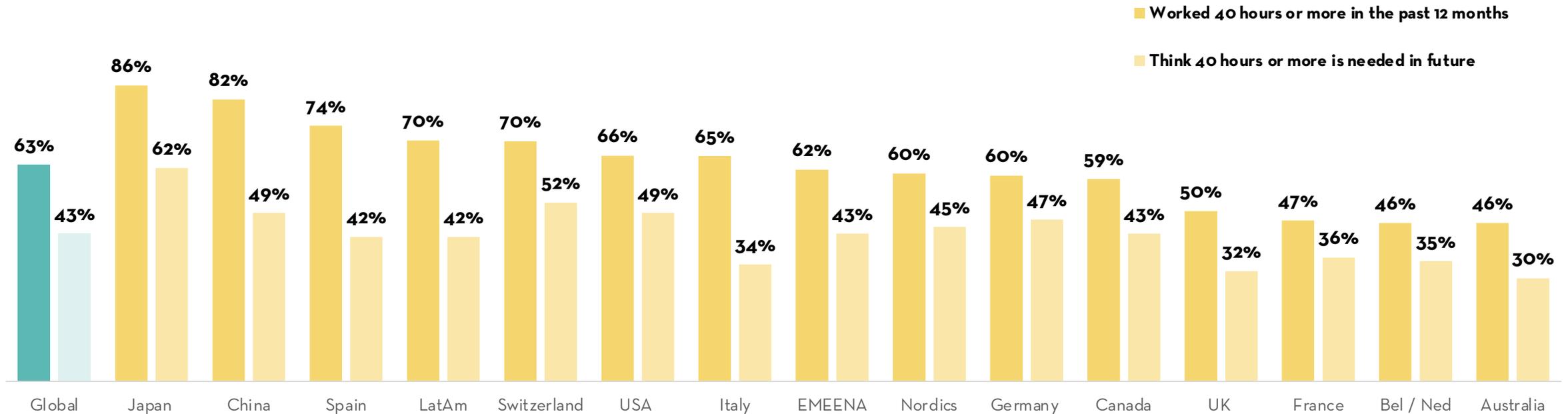


Q10. How many hours would you say you have been working during the last 12 months in an average week?

Q37. Now that new ways of working are becoming established, how many hours do you think you actually need to spend to get your job done on an average week? Base: All respondents (14,800)

Disconnect between hours worked vs. hours deemed necessary is clear across geographies

% Who worked 40 hours or more per week in the last 12 months vs. need to spend 40 hours or more to get the job done



Q10. How many hours would you say you have been working during the last 12 months in an average week?

Q37. Now that new ways of working are becoming established, how many hours do you think you actually need to spend to get your job done on an average week? Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Calls for a shift from hours-based to outcome-based working has strengthened

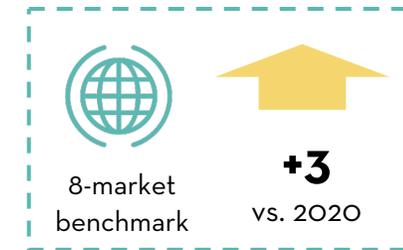


72%

Say employers should revisit the **length of the working week** and the hours that employees are expected to work

73%

Say employee contracts should focus more on **meeting the needs of the role** and less on number of hours worked

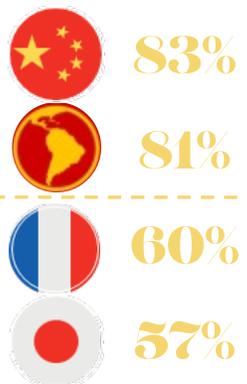


8 in 10
(79%) leaders agree



"A more **flexible working life**, with a **focus on the efficiency of tasks** and not so much on hours spent."

Manager, Engineering



Most likely to agree

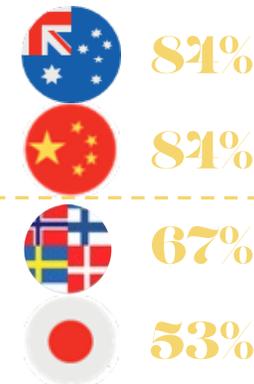
Least likely to agree

8 in 10
(81%) leaders agree



"I'd like my working hours to be based on **workload** rather than an **expectation** to be online for a certain number of hours each week."

Manager, Government



Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800), Australia (1,000), LatAm (1000), China (1,000), France (1,000), Japan (1,000), Nordics (1,000)

Only 36% of non-managers say leaders are assessing them on outputs & results

73%

Say employee contracts should focus more on **meeting the needs of the role** and less on number of hours worked

52%

Say their manager **did not** meet their expectations for assessing performance on outcomes / results instead of hours worked



Leaders

71%



Managers

53%



Non-managers

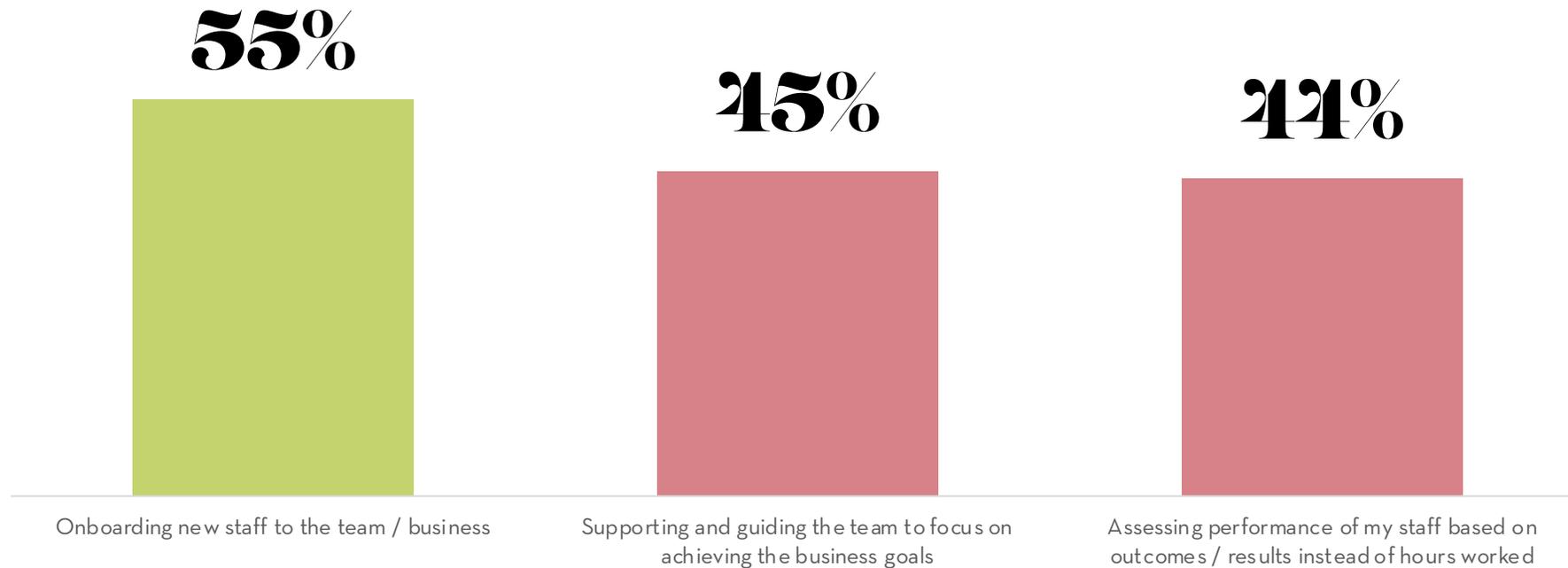
36%



Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800), Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)

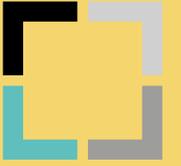
Almost half of leaders have not found it easy to support and guide the team to focus on achieving business goals, and assessing their performance based on outcomes

% Of managers who have **NOT** found the following easy over the past 12 months
[Top 8]



Q12. Thinking this time about how you have found the experience of managing other people during the last 12 months, how easy or difficult have you found the following? (NET Not Easy) Base: All managers (8,405)





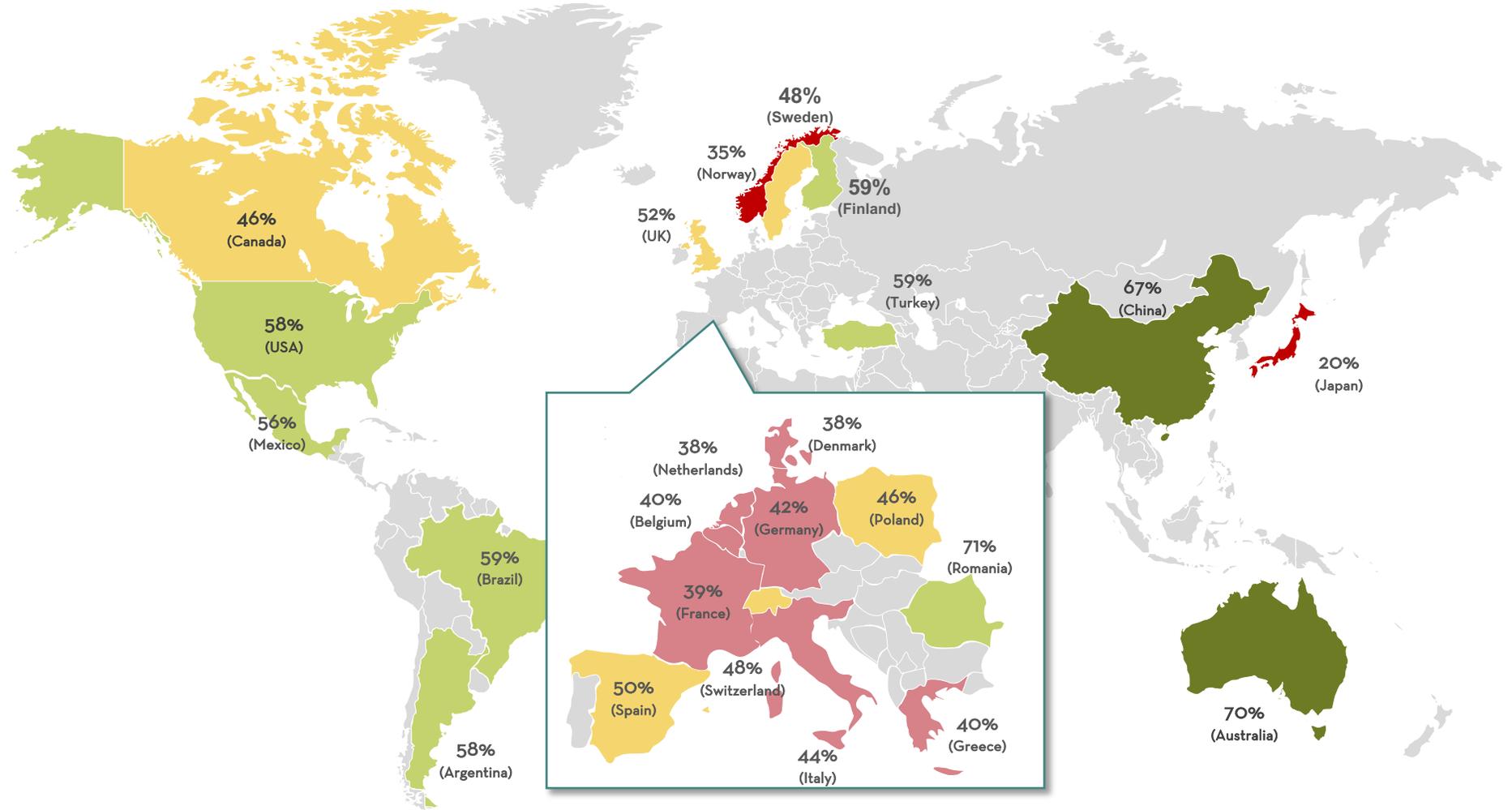
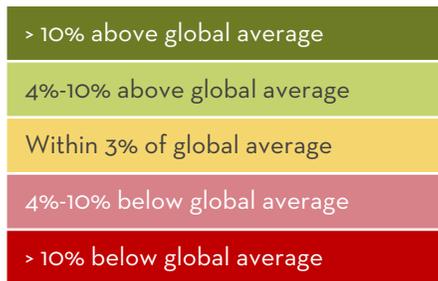
Workers have had polarised experiences over changes at work. Companies must embrace that “One size will not fit all” when addressing employee individual needs. Flexibility will be key



Views on the future of working life are split with just under half of workers happier following changes at work

49%

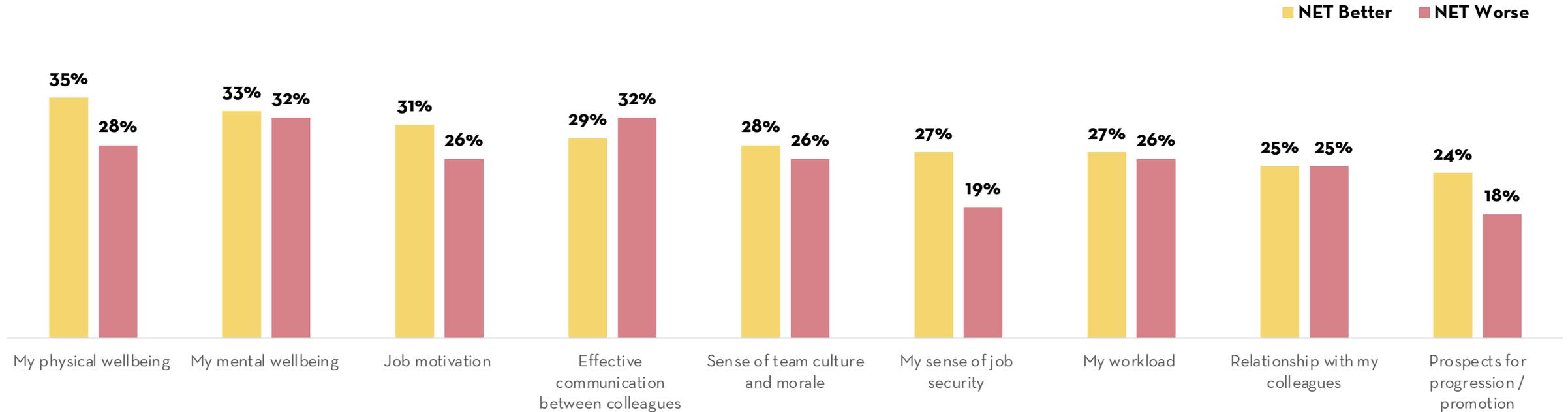
Say they are happier following the changes to working life in the last 12 months



Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800) [Detailed country bases in appendix]

Polarised experience is evident across aspects of work spanning wellbeing, career, relationships and company engagement

% Who said that the following aspects of their working life has got better/ got worse **during** the last 12 months (NET Better / NET Worse)

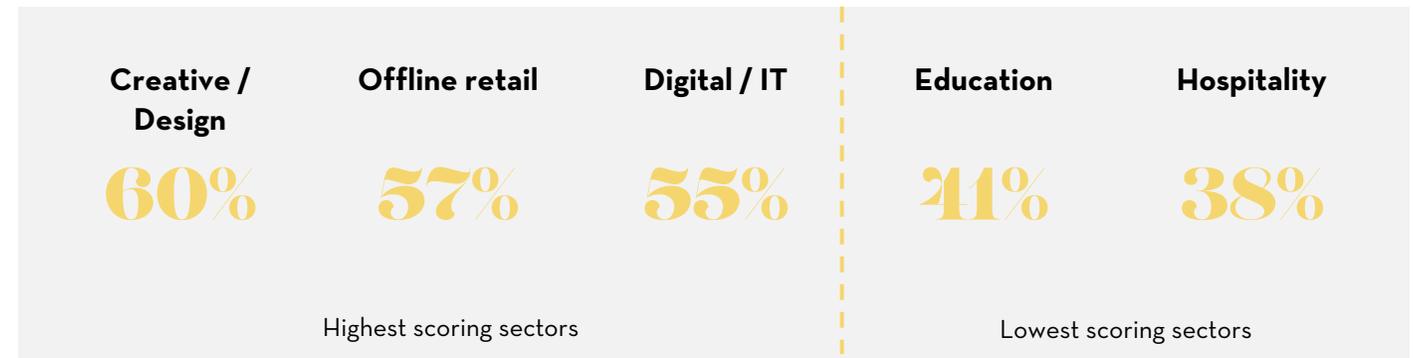


Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better, NET Worse) Base: All respondents (14,800)

Just under half of workers are happy with the new working normal



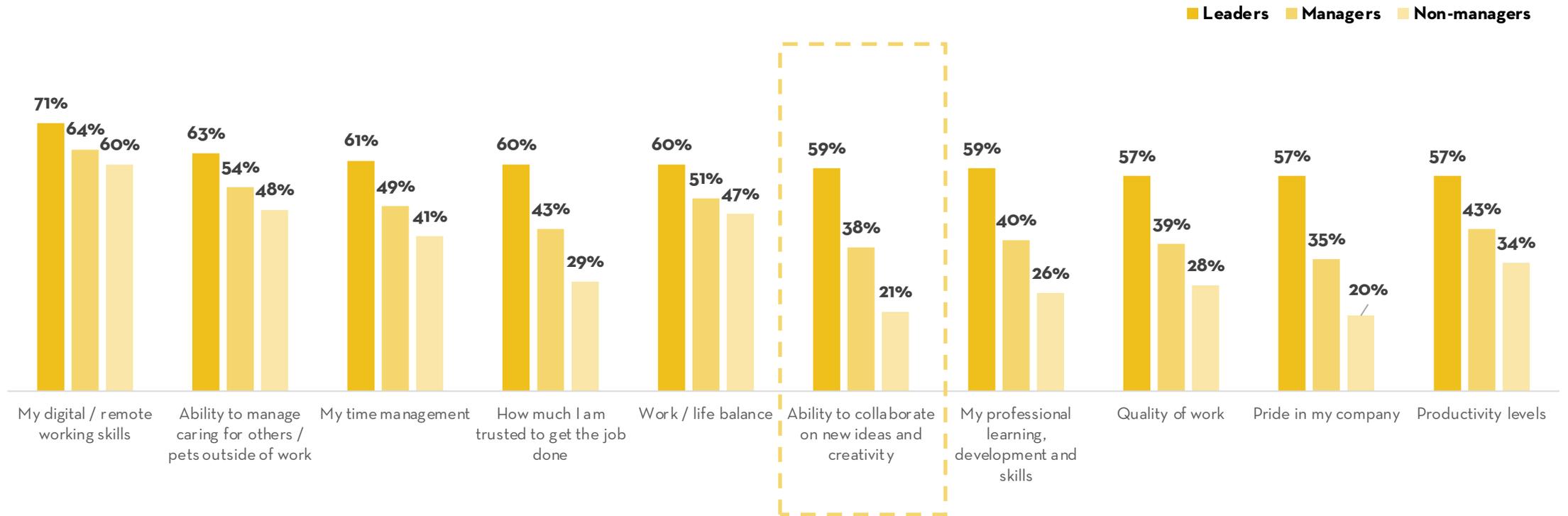
Say they **are happier** following the changes to working life in the last 12 months



Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171), Creative / Design (235), Digital / IT workers (7,440), Offline retail (2,075), Education (1,236), Hospitality (165)

Much has got better for leaders compared to non-managers, especially the ability to collaborate with their colleagues

% Who say that aspects of their working life has got better **during** the last 12 months (NET Better)
 [Ranked on Top 10 aspects that got better for Leaders]

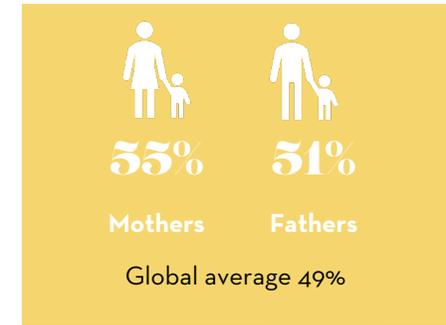


Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better) Base: Leaders (1,427), Managers (6,978), Non-managers (6,171)

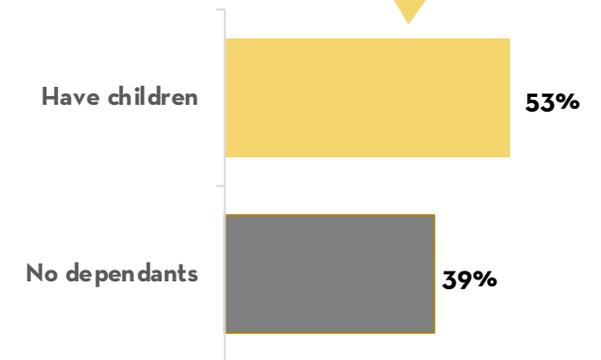
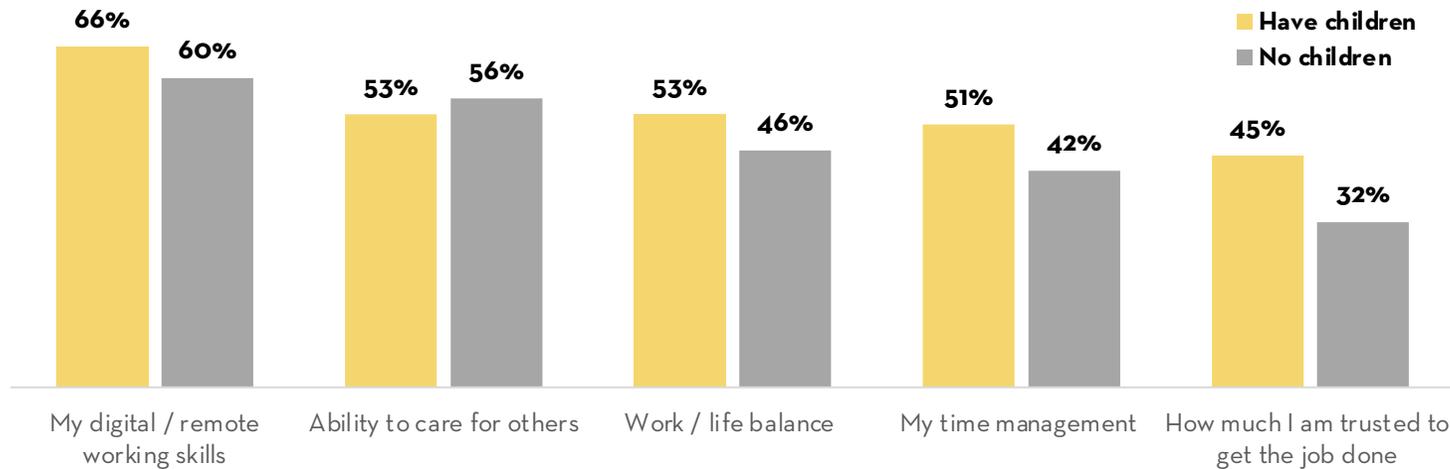
Parents, on the other hand, feel more trusted to do their job and able to manage their time, and they are noticeably happier with the changes than those with no dependants

Mothers and fathers are happier with changes at work than those with no dependants

% Who agree that they are happier in their jobs following the changes to work in the last 12 months (NET Agree)



% Who say that aspects of their working life has got better during the last 12 months (NET Better) [Top 5 aspects]



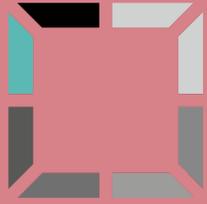
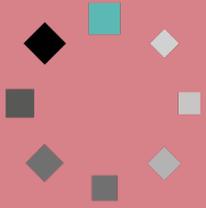
Q30: Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800), Fathers with children at home (4,299), Mothers with children at home (3,829), Have children at home (8,148), Have an adult reliant on care (159), No dependants (3,434)

Q6: Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better, NET Worse) Base: All respondents (14,800)

Shorter and Flexible – The New Week in Demand: Key Takeaways:

- **People want to work smarter, not longer.** Maintaining flexibility and autonomy over their own schedules is key for workers going forward. Companies must build a culture of trust and re-invent planning and collaboration for a new era of flexible work.
- Measuring employee performance based on their activity and time spent online is outdated and inadequate in the next normal. Companies need to provide **support and guidance on how managers can assess performance on outcomes and results** instead of hours worked.
- With only 36% of non-managers being measured based on their results, performance management appear as a clear opportunity for improvement for leaders and companies. Using technology and creating resources such as clear and personalised score cards, ongoing analysis, feedback processes, and collaborative and adapted actions will be key to link the success of teams and individuals to the company success.
- Therefore, calls for companies to **revisit hour-based contracts and to focus instead on outcomes and results** continue to be strong and leaders share the vision. Automation of repetitive tasks via technologies such as AI and machine learning will play an important role in this shift.
- It will also be important for companies to create a **hybrid model that encourages and fosters a better normal for all individuals, acknowledging that “one size does not fit all”**. **Listening to employee feedback and striking** the right balance will be key to successful hybrid working.

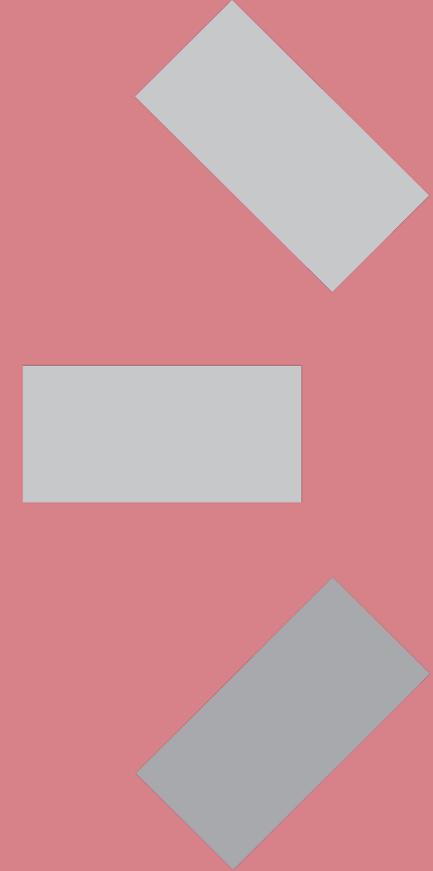




3

BURNOUT MIGHT BE THE NEXT WORKER PANDEMIC

Wellbeing is an issue spanning age and gender.
And half of leaders struggle to see the signs



Burnout Might Be the Next Worker Pandemic: Summary

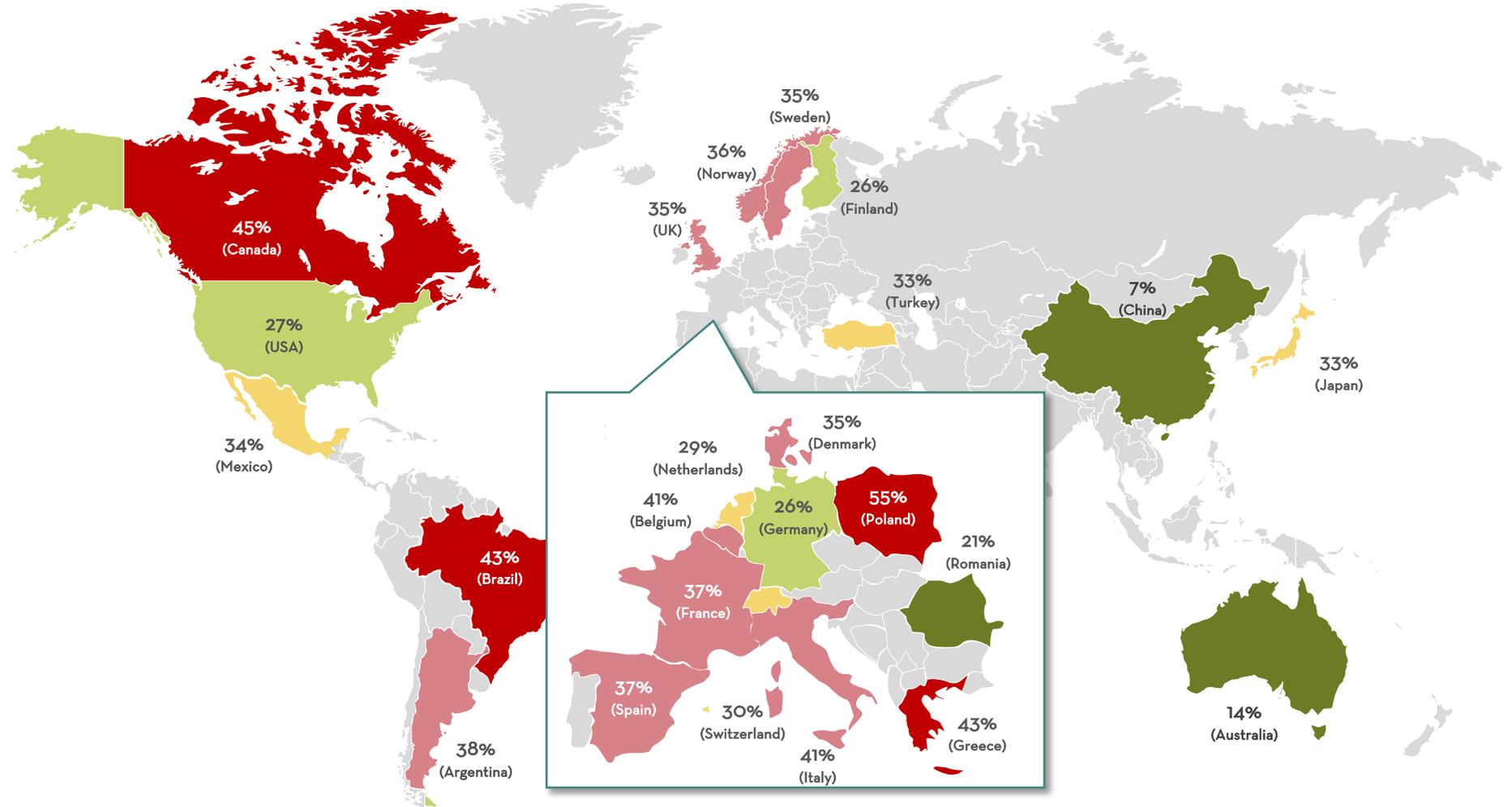
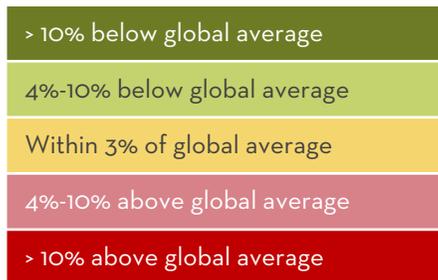
- **Wellbeing comes to the fore as a key challenge for companies and leaders going forward. It's an issue spanning geographies, age and gender**
- 63% of workers have worked more than 40 hours per week in the last 12 months. **With working hours increasing by 14% since 2020, 3 in 10 also say their mental and physical health has declined in the last 12 months**
- **Burnout has been a significant cause for concern across the workforce for almost 4 in 10 workers. And it's been felt most among younger generations. More than half of young leaders (54%) have suffered from burnout**, the same group who shoulder significant responsibility for future progress
- **Leaders are not equipped to support employees: More than half of all managers find it hard to identify when staff may be struggling** with mental wellbeing (53%) or overwork and burnout (51%) .
- **7 in 10 (71%) say having the right support for mental wellbeing at work will be important** to them in future and nearly three-quarters (74%) expect their company to **increase focus on wellbeing of staff**



A third say their mental health has got worse, rising to around half in Poland and Canada

32%

Say their mental wellbeing got worse in the last 12 months



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Worse) Base: All respondents (14,800) [Detailed country bases in appendix]

1 in 3 say their mental and physical health has declined



2021 25-market average

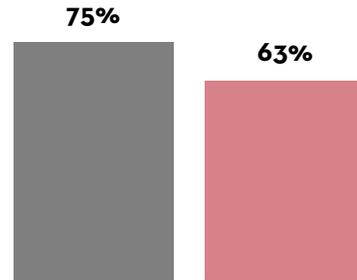
3 in 10

(32%) say their **mental health** has got worse in the last 12 months

3 in 10

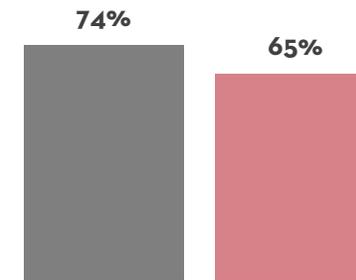
(28%) say their **physical health** has got worse in the last 12 months

■ 2020 ■ 2021



I am / was able to manage my mental wellbeing (NET Agree)

■ 2020 ■ 2021



I am / was able to manage my physical wellbeing (NET Agree)

-12
vs. 2020



8-market benchmark

-11
vs. 2020



Q3. Thinking about your working life as it is now [before the pandemic], how far would you agree or disagree with the following? (NET Agree)

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Worse) Base: All respondents (14,800), Core 8 2020 (8,000), Core 8 2021 (8,000)

Mental wellbeing is an issue spanning age and gender

32%

Say their mental wellbeing has worsened over the last 12 months

*“There should be money for the **wellbeing** and coaching of staff towards better mental and physical health.”*

Non-manager, Tech / Telecoms

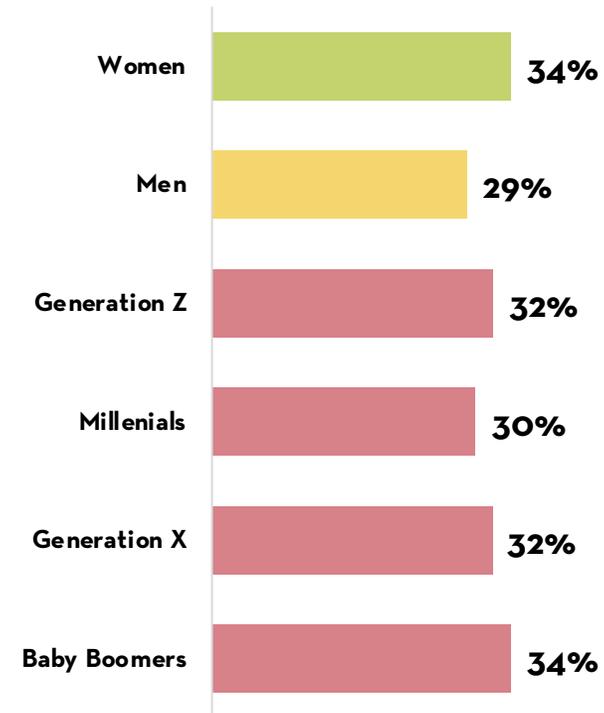


*“Taking care of your **employees' health** gives your company and yourself the **greatest protection.**”*

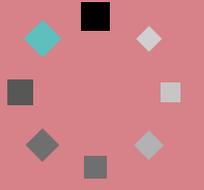
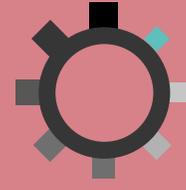
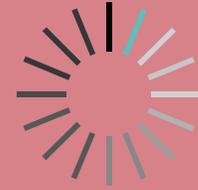
Non-manager, Tech / Telecoms



% Who say their mental wellbeing has worsened over the last 12 months (NET Worse)



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Worse) Base: All respondents (14,800), Women (7,324), Men (7,442), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353)



67% of non-managers say leaders don't meet their expectations for checking on their mental wellbeing

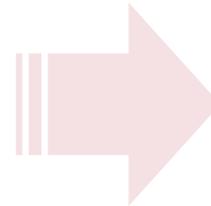


Better support for mental wellbeing is key and managers need guidance and support to deliver this

7 in 10 (71%) say having the right support for mental wellbeing at work will be important to them in future

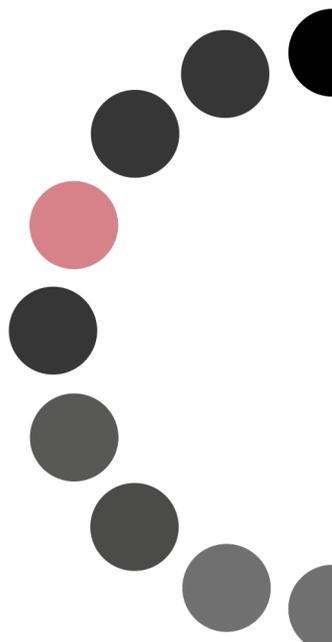
67%

of **non-managers** say leaders **don't meet** their expectations for checking on their **mental wellbeing**



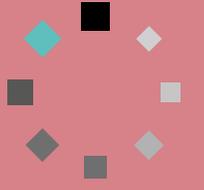
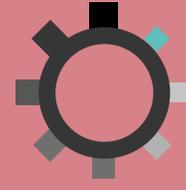
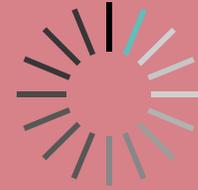
53%

Of **all managers** say they have not found it easy to identify when staff may be struggling with **mental wellbeing**



Q12. Thinking this time about how you have found the experience of managing other people during the last 12 months, how easy or difficult have you found the following? (NET Not Easy Base: All managers (8,475)

Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? (NET Haven't met expectations) Base: Non-managers (6,171)



**63% have worked more than 40
hours in the last 12 months
(14% more than in 2020)**

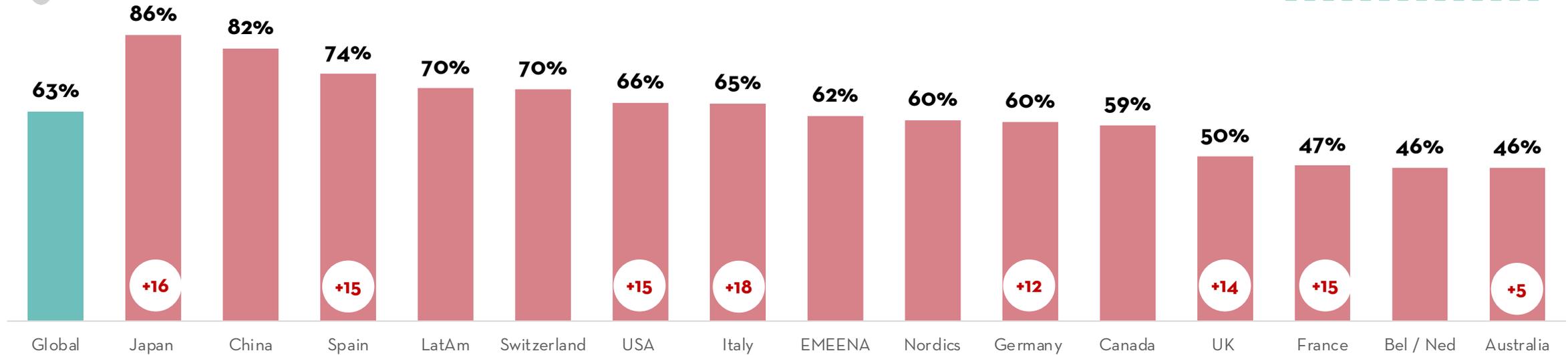


Working long hours is common, and on the increase

% Who worked 40 hours or more per week in the last 12 months

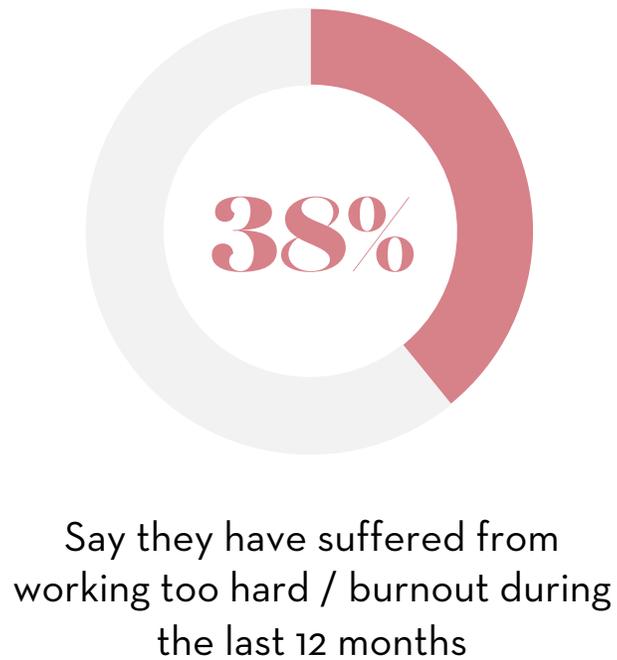



8-market benchmark **+14** vs. 2020

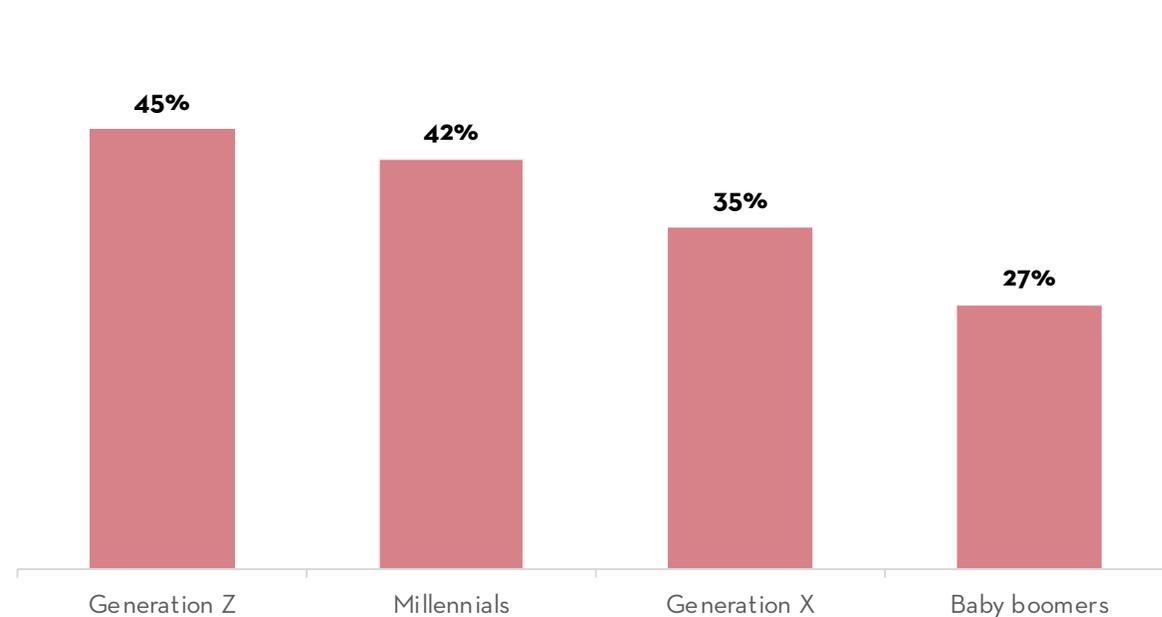


Q10. How many hours would you say you have been working during the last 12 months in an average week? Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Burnout has been a significant issue over the last year, felt most among younger generations. Managers need help in spotting the signs



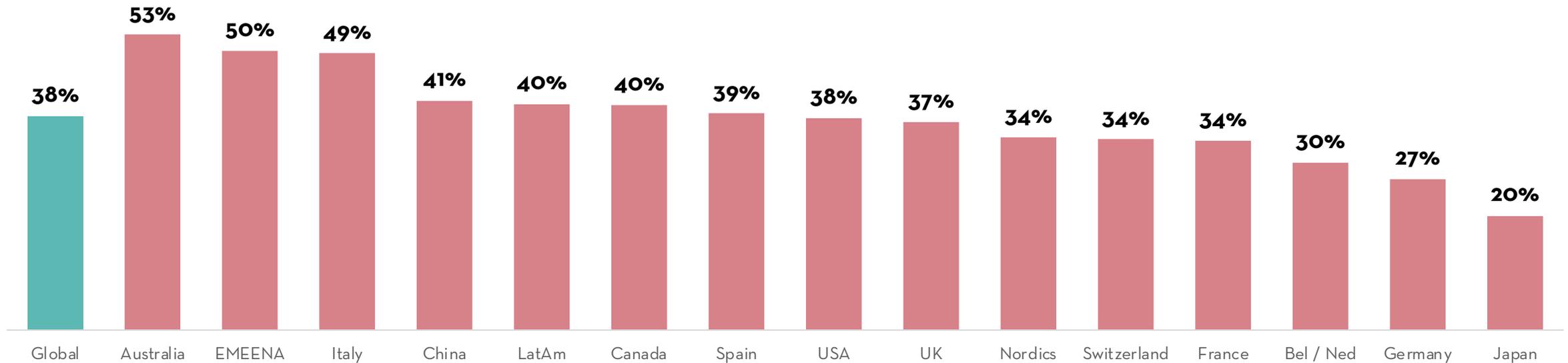
% Who say they have suffered from **working too hard / burnout** during the last 12 months (NET Agree)



Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353)

Those from Australia, EMEENA and Italy most likely to admit to suffering burnout

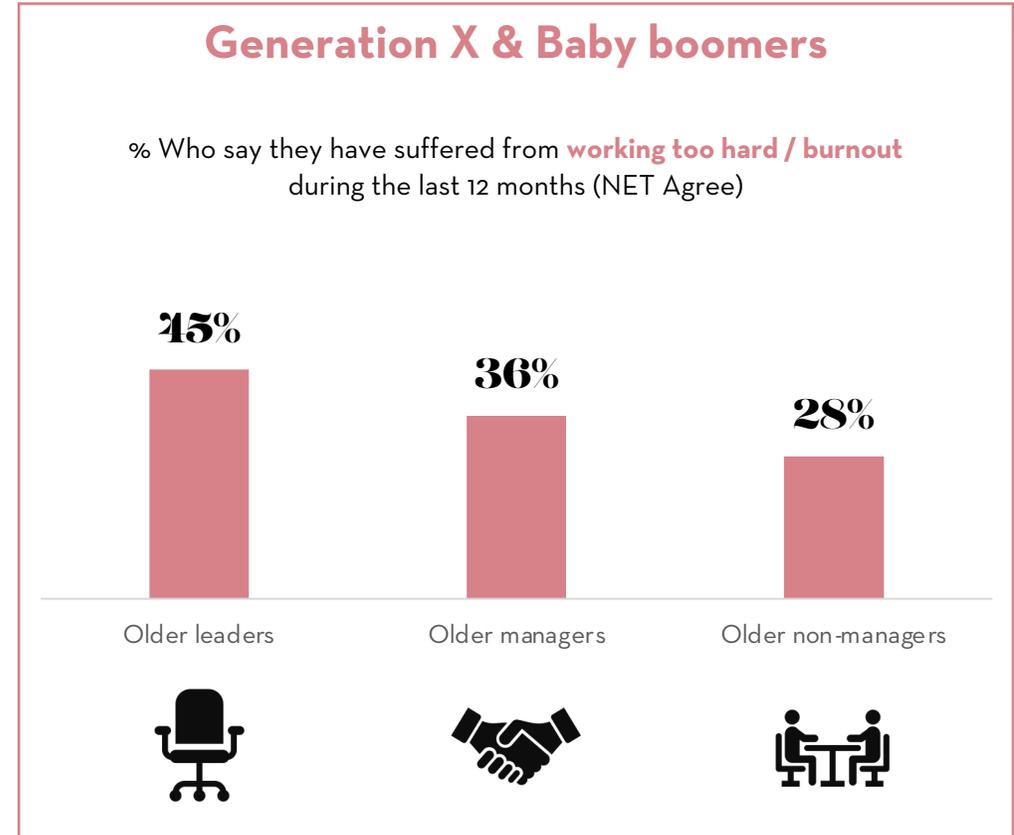
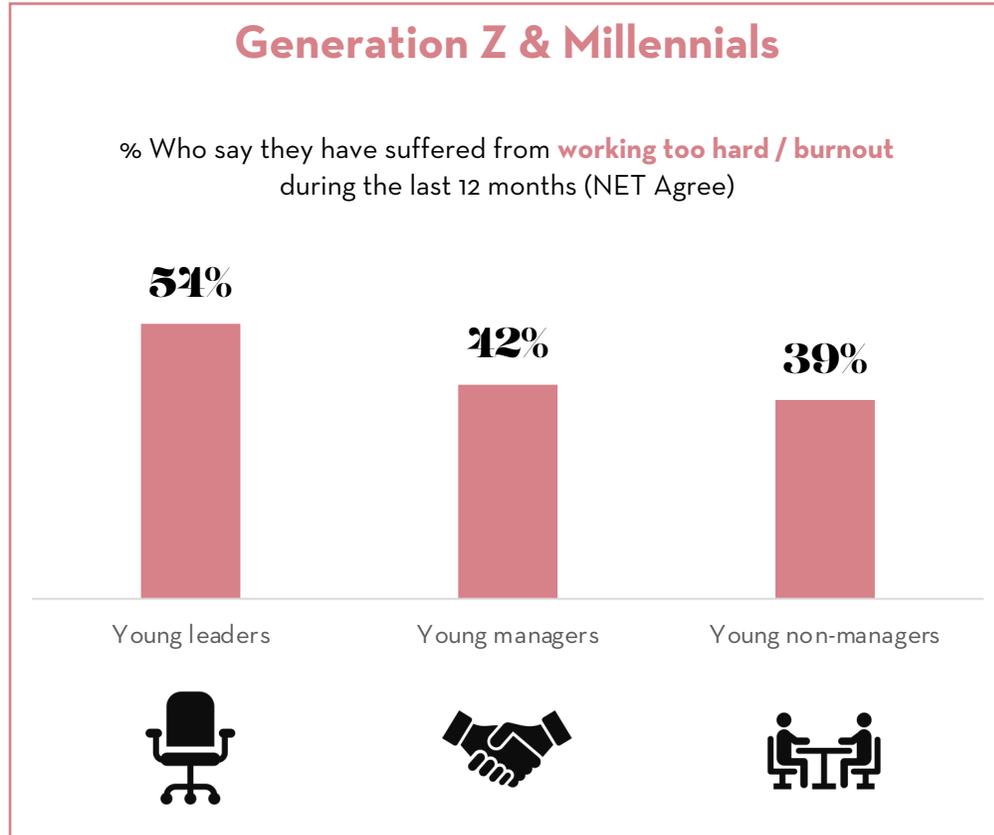
% Who say they have suffered from working too hard / burnout **during** the last 12 months (NET Agree)



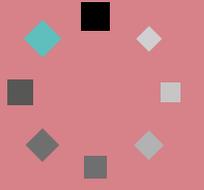
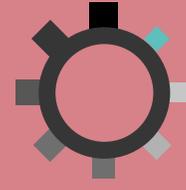
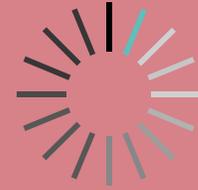
Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following?

Q36. Which of the following do you think your company will actually do in response to the changes in working life over the last 12 months? Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

More than half of young leaders are suffering from burnout, the same group who shoulder significant responsibility for future progress



Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? Base: Generation Z & Millennials (7,288), Generation X & Baby boomers (7,512), Young leaders (871), Young managers (3,499), Young non-managers (2,813), Older leaders (556), Older managers (3,479), Older non-managers (3,358)

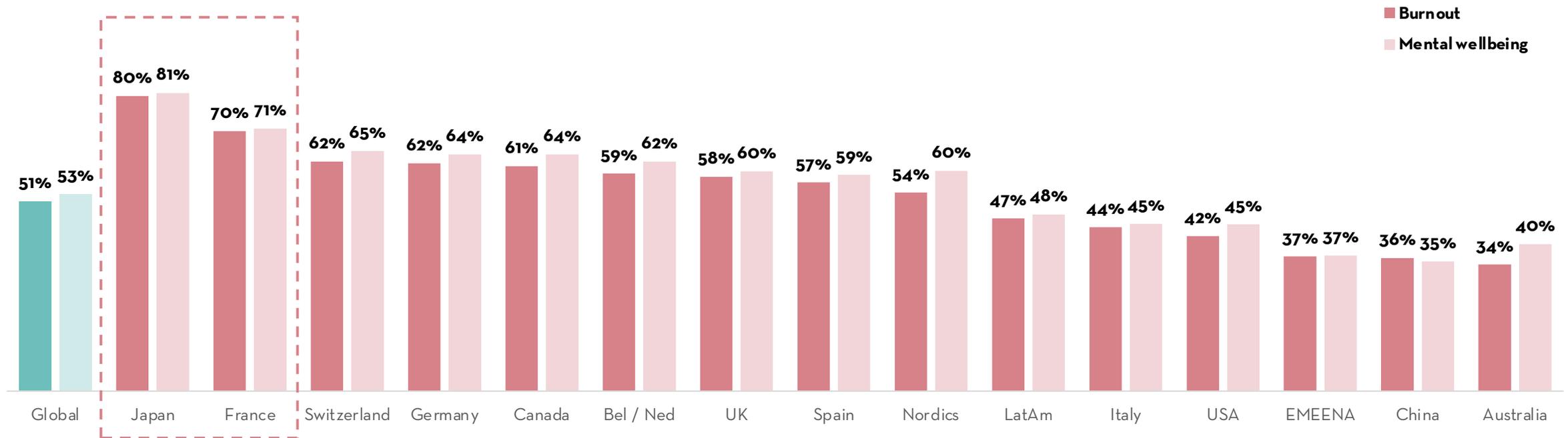


51% of managers did not find it easy to identify when staff may be struggling with overwork / burnout



Over half of managers have not found it easy to manage others on issues of burnout and mental wellbeing, especially in Japan and France

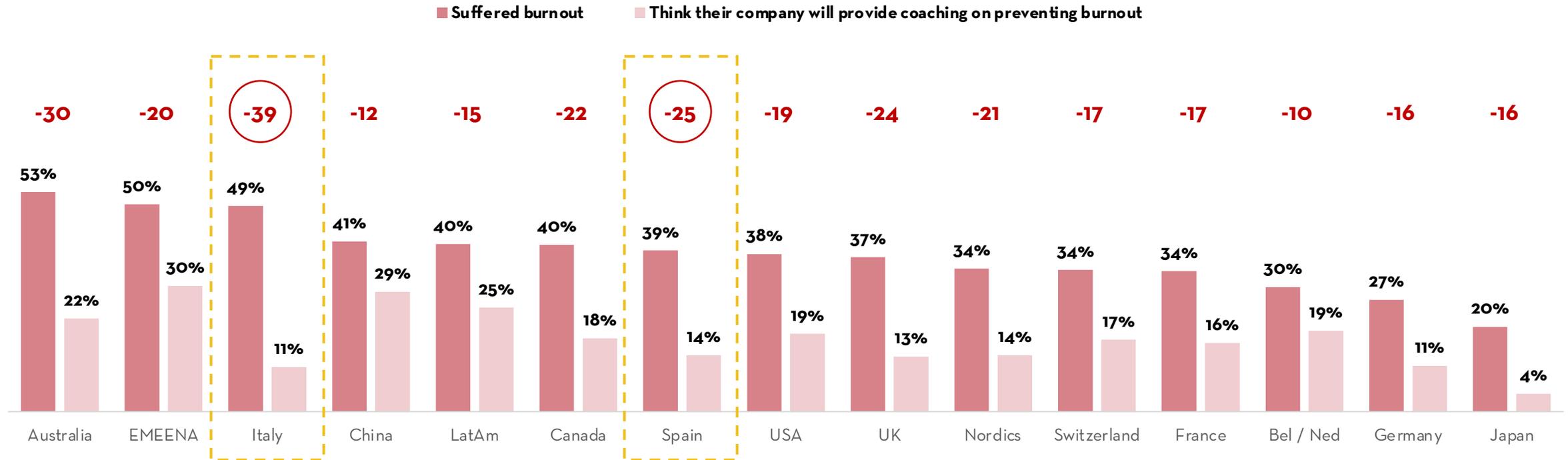
% Who that have NOT found it easy to manage others in relation to the following (NET Not easy)
[Ranked by burnout]



Q12. Thinking this time about how you have found the experience of managing other people during the last 12 months, how easy or difficult have you found the following? (NET Not easy) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

There is a vast disconnect between how burnt out people feel and expectations of this being addressed in the future, especially in Italy and Spain

% Who say they **have suffered burnout** during the last 12 months (NET Agree) vs. who think their company will provide coaching on preventing burnout
 [Ranked by suffered burnout]



* Caution: Differences may look wrong due to rounding issues

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree)

Q36. Which of the following do you think your company will actually do in response to the changes in working life over the last 12 months? Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

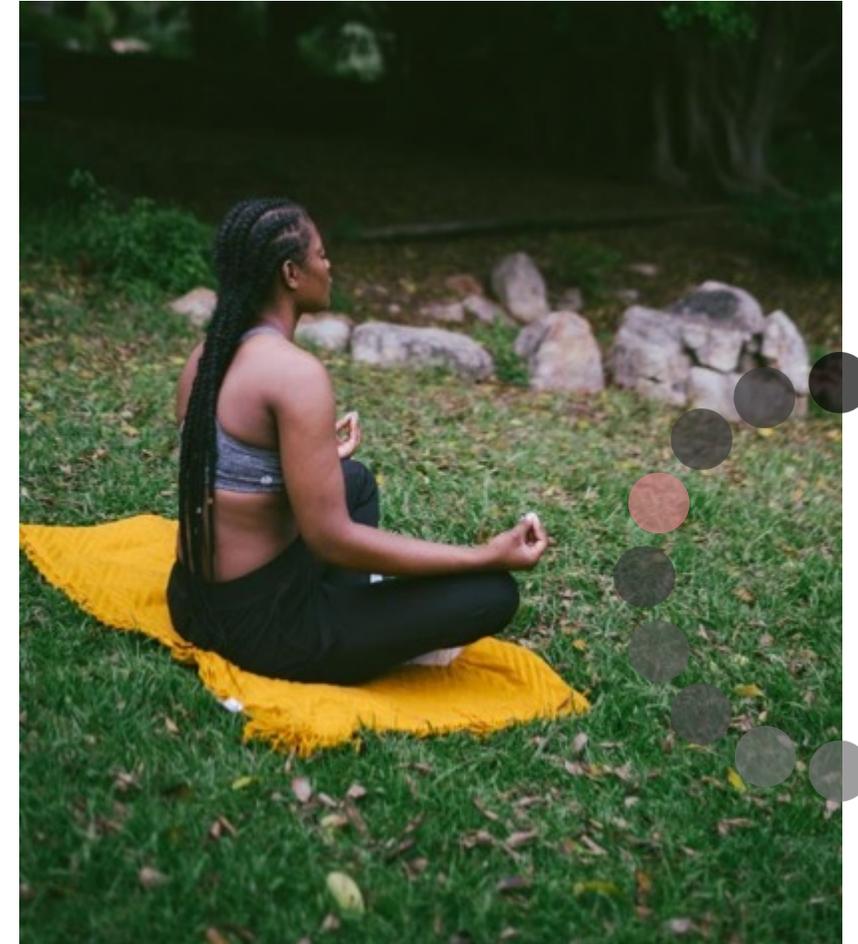
There is more room for improvement in supporting employee physical and mental wellbeing across sectors

% Who said their physical wellbeing has improved **during** the last 12 months (NET Better)
[Top and bottom 5]

% Who said their mental wellbeing has improved **during** the last 12 months (NET Better)
[Top and bottom 5]

Creative arts and design	45%
Online retail	45%
Construction	43%
Digital / IT	42%
Media / Journalism	39%
<hr/>	
Charity and voluntary work	33%
Automotive and mobility	32%
Hospitality	31%
Science, pharmaceuticals and biotechnology	29%
Education	28%

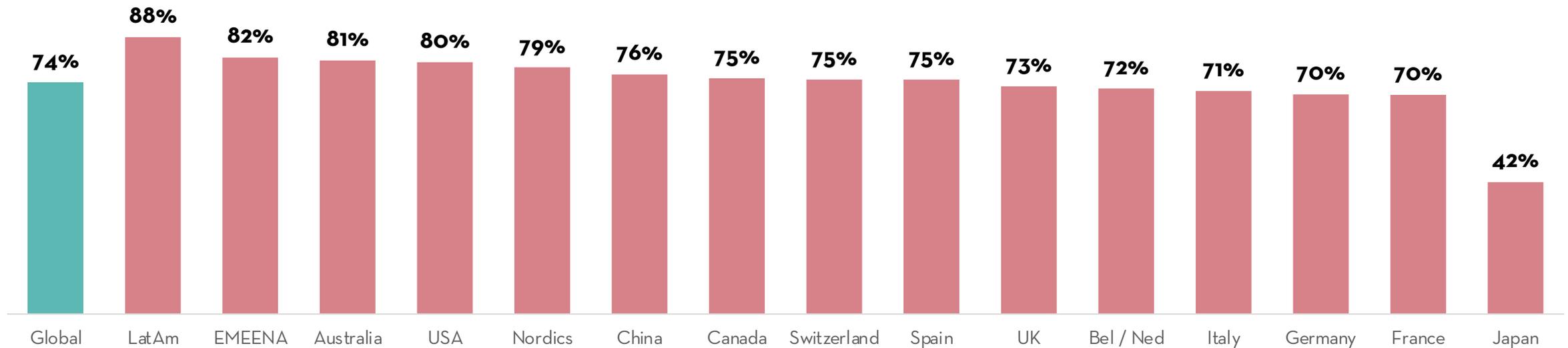
Creative arts and design	50%
Online retail	45%
Digital / IT	41%
Offline retail	41%
Construction	41%
<hr/>	
Agriculture	30%
Automotive and mobility	29%
Science, pharmaceuticals and biotechnology	28%
Education	24%
Charity and voluntary work	21%



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better) Base: All respondents (14,800)
[Detailed sector bases in appendix]

The Latam region takes the strongest view on focusing on staff wellbeing after the pandemic

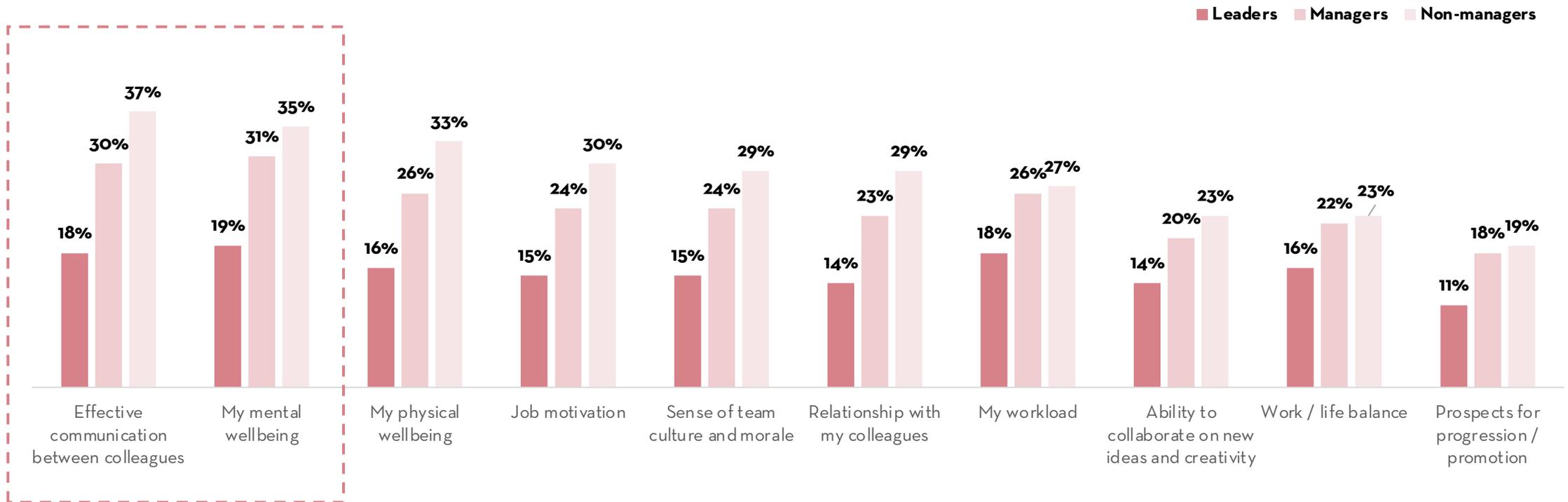
% Who say it is important to increase the focus on staff wellbeing **after** the pandemic (NET Important)



Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Disparity between what has got worse for non-managers compared to leaders is vast, especially in communicating with colleagues and impact on mental wellbeing

% Who say that aspects of their working life has got worse **during** the last 12 months (NET Worse)
 [Ranked on Top 10 aspects that got worse for non-managers]

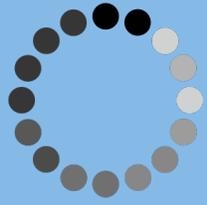
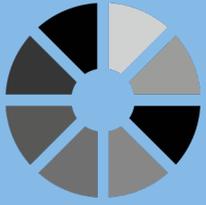
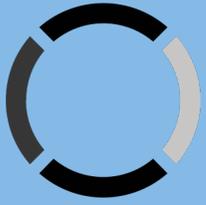


Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Worse) Base: Leaders (1,427), Managers (6,978), Non-managers (6,171)

Burnout Might Be the Next Worker Pandemic: Key Takeaways

- **Companies must re-evaluate how they can better support and provide wellbeing resources** to their employees within the new hybrid working model. **Building pro-wellbeing working environments, cultures and skillsets from top to bottom** will be key in the next normal
- With the majority of managers saying they have not found it easy to identify when staff may be struggling with mental wellbeing, overwork or burnout, and almost 4 in 10 workers suffering with overwork or burnout it's increasingly urgent for companies to set up processes, resources and tools to foster openness and listen to employee needs, as well as helping workers develop resilience to prevent it.
- Moreover, 67% of non-managers say their leaders don't meet their expectations for checking on their mental wellbeing. **Leadership development, coaching and resources for managers on how to deal with and respond to these situations is key.**
- The usage of cognitive technologies for employee wellbeing can provide increased visibility into burn-out warning indicators and generate awareness amongst individuals and leaders to address the issue.

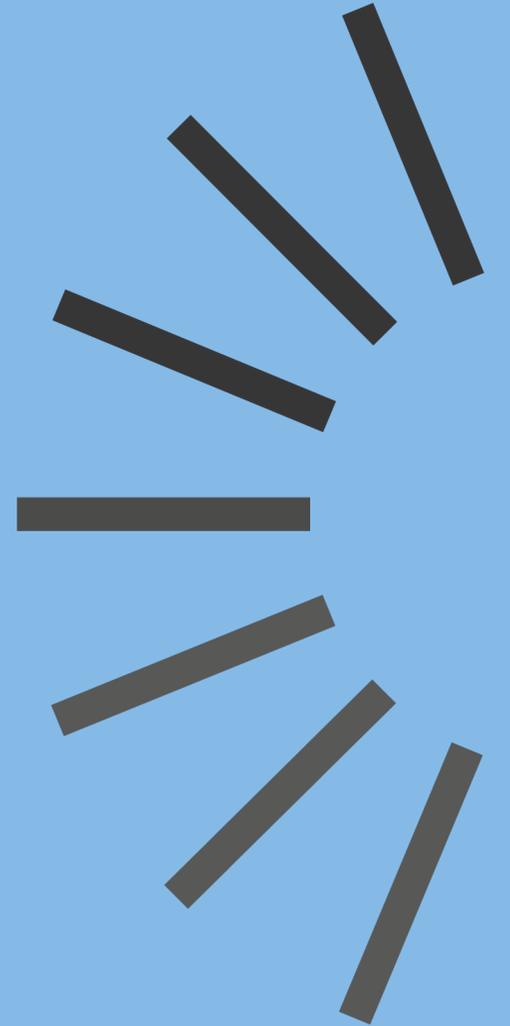




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LEADERS MUST RECONNECT THE DISCONNECT

At a time when we are connected all the time, the workforce has never felt more disconnected. Leaders hold the key to reconnecting employees and re-inventing culture

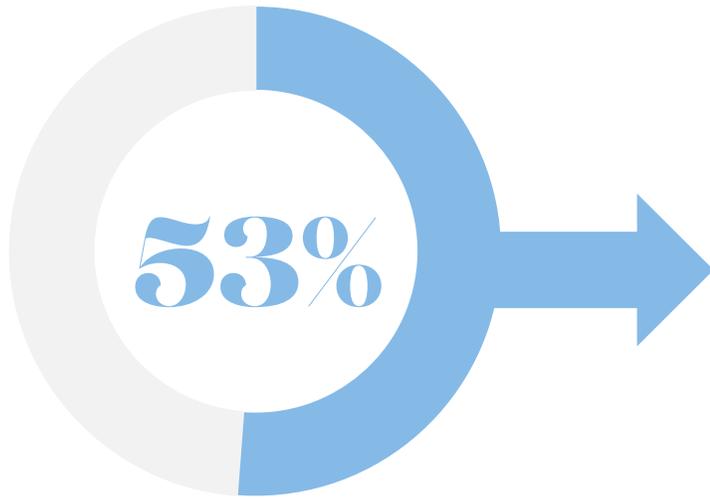


Leaders Must Reconnect the Disconnect: Summary

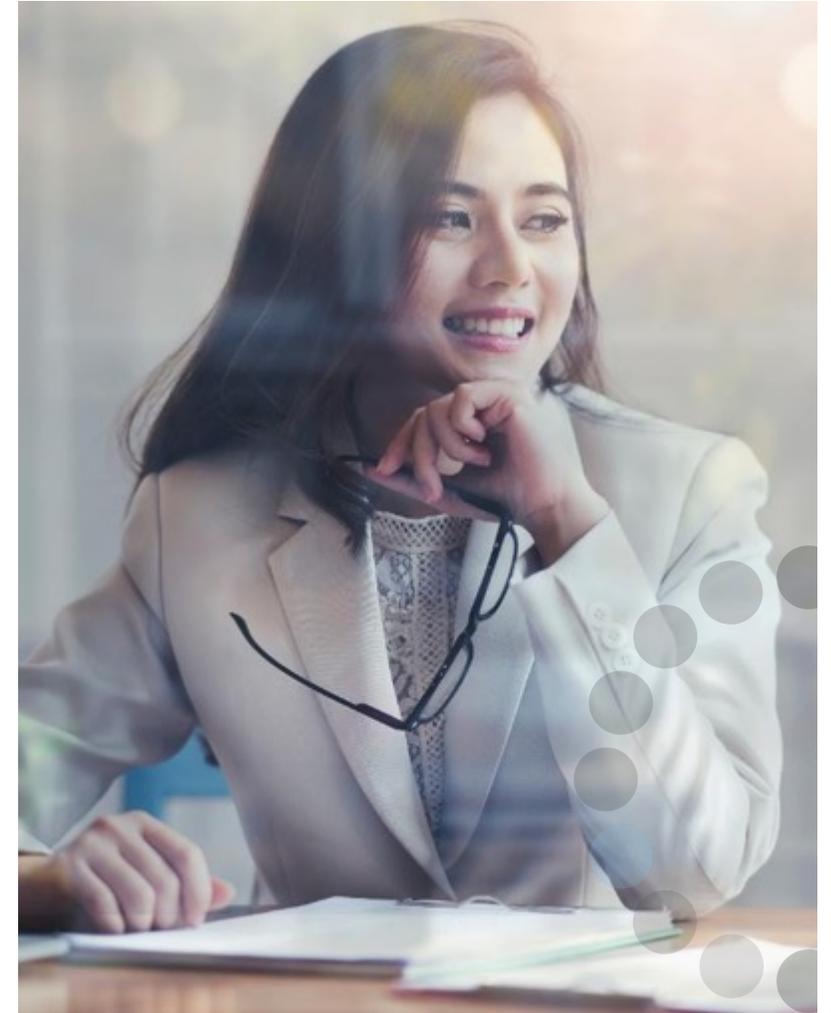
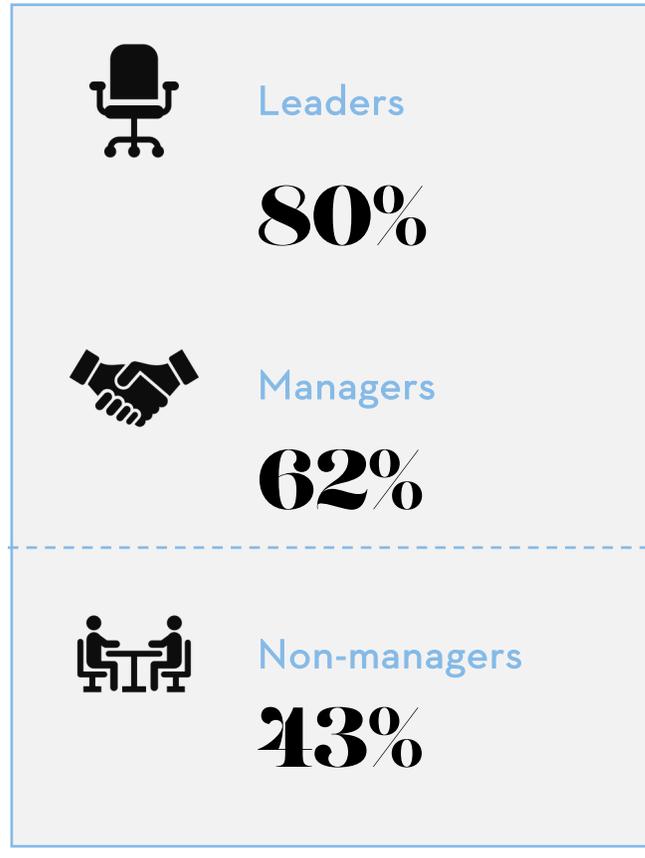
- There is a **big disconnect between management views of their own performance and the opinion of their employees**
- **Relationships, motivation and sense of team / company culture have regressed.** With perspectives of leaders and non-management at odds, the disconnect poses a major threat to company cohesion
- **Only a third of non-managers feel they are getting due recognition within the business,** and only half of all workers say their managers met or exceeded expectations for encouraging a good working culture (48%) or helping support their work/life balance (50%)
- **Nearly half (46%) of managers say they have NOT found the overall experience of managing other people easy over the past 12 months,** struggling especially with onboarding, identifying when staff may be struggling and supporting their career development (48%)
- **Disconnect is also clear between leader and non-manager perceptions of the company talent strategy and development** with most leaders feeling the company has a strategy, but less than half of non-managers believe it



Satisfaction with senior leadership is polarised with only 43% satisfied at non-management level



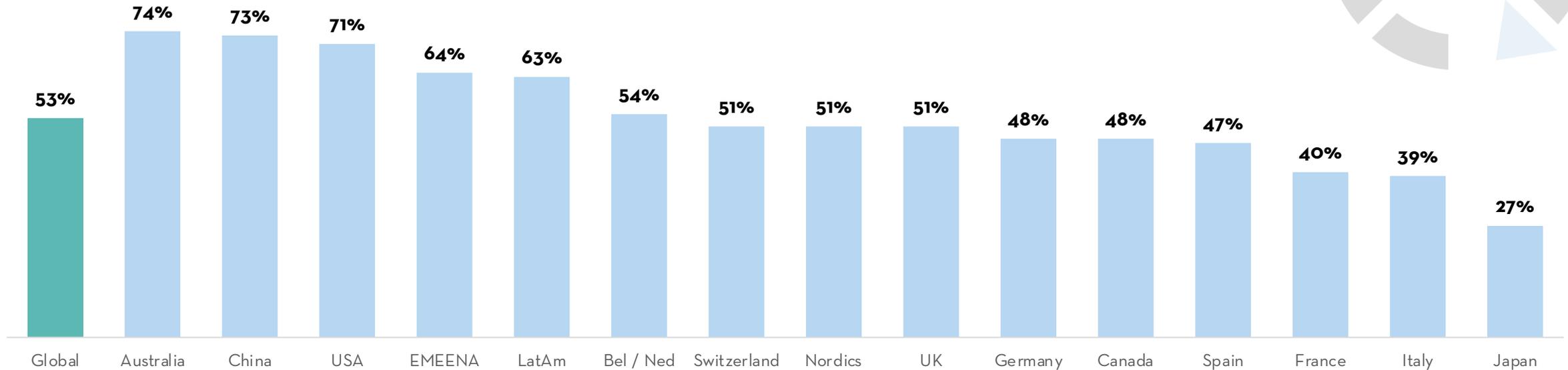
Say they are satisfied with their company's senior leadership



Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)

Satisfaction with senior leadership tends to be lowest in Western Europe and Japan

% Who say they are satisfied with senior leadership of their company (NET Satisfied)

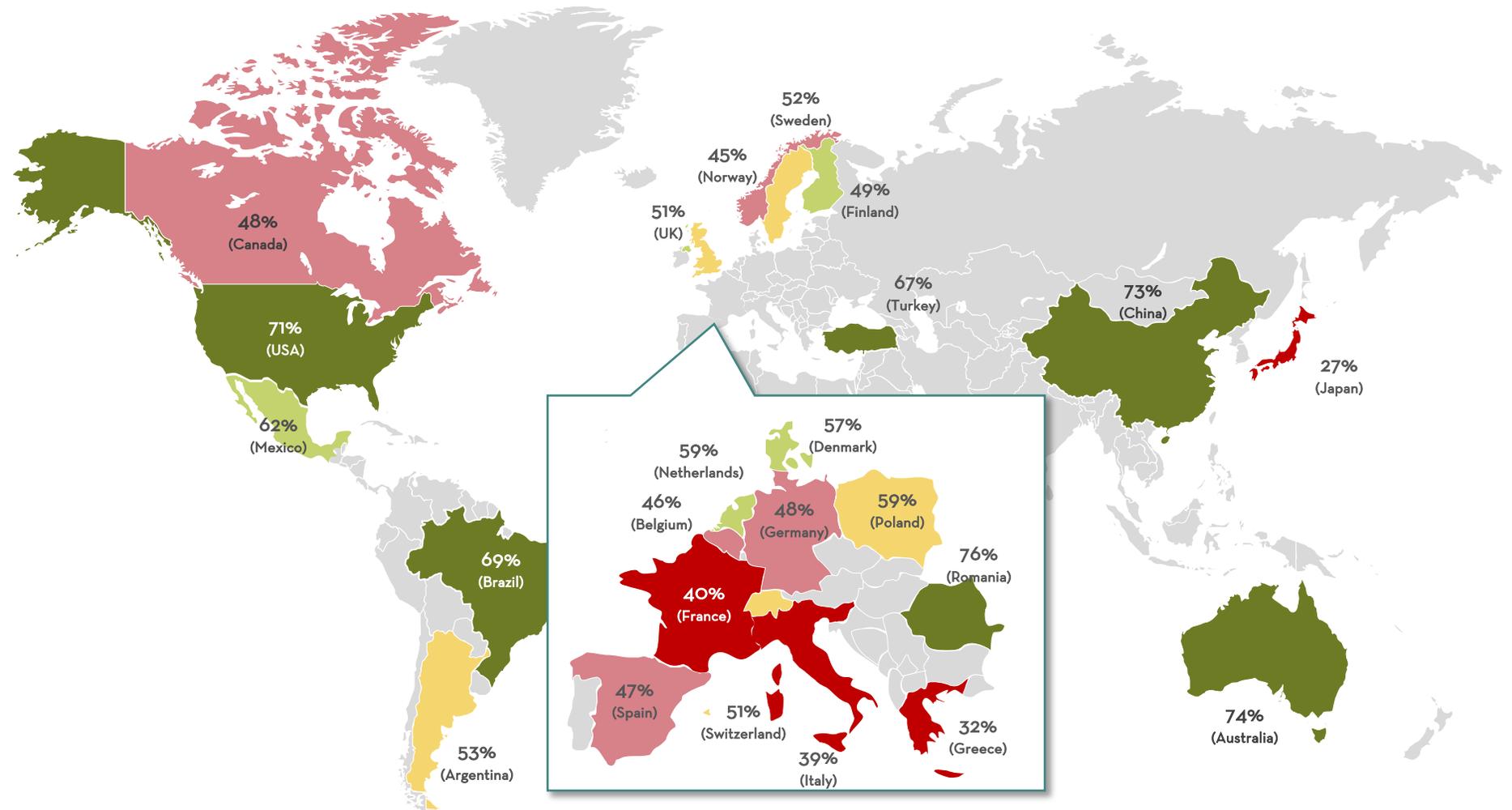
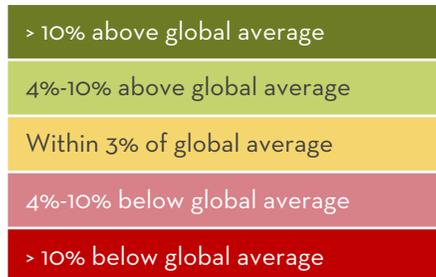


Q31.How satisfied would you say you currently feel about the following? (NET Satisfied) Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Satisfaction with senior leadership tends to be lowest in Western Europe and Japan

53%

Say they are satisfied with the senior leadership of their company



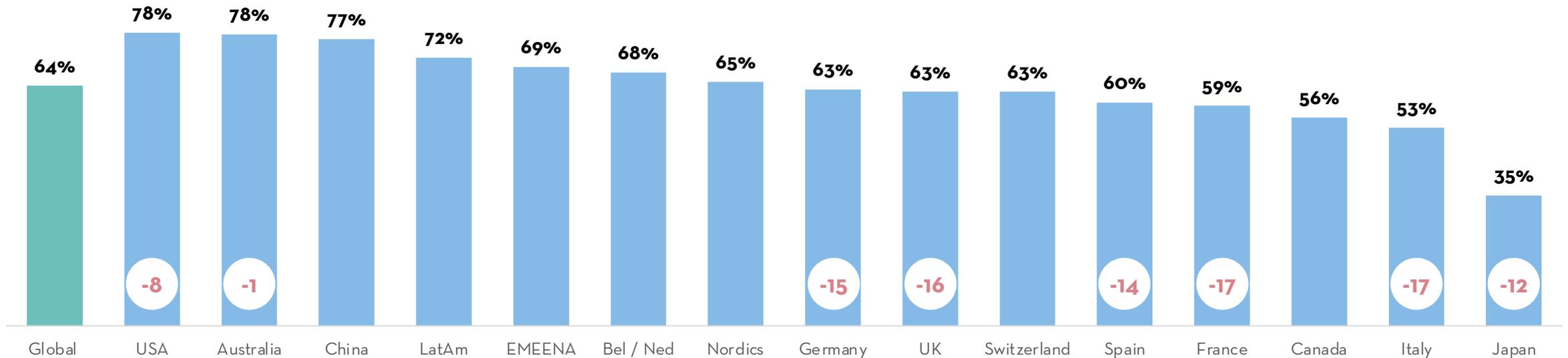
Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800) [Detailed country bases in appendix]

Motivation has regressed across the workforce and tends to be lowest in Western Europe and Japan

% Who say they are motivated (NET Agree)

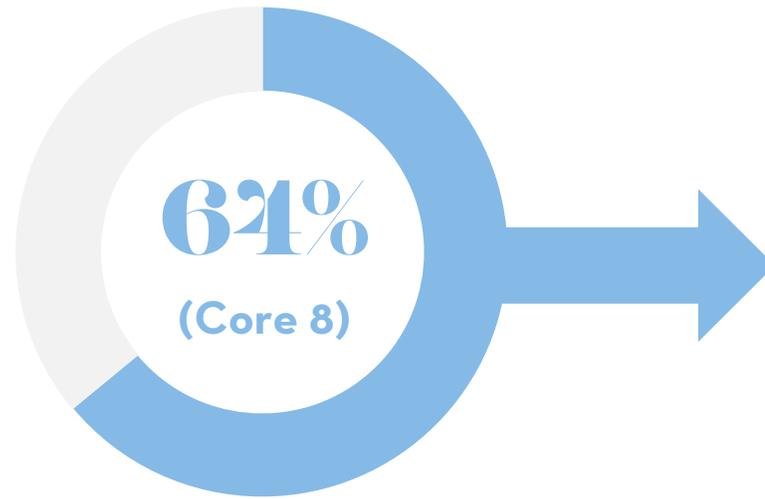


8-market benchmark
-13
vs. 2020

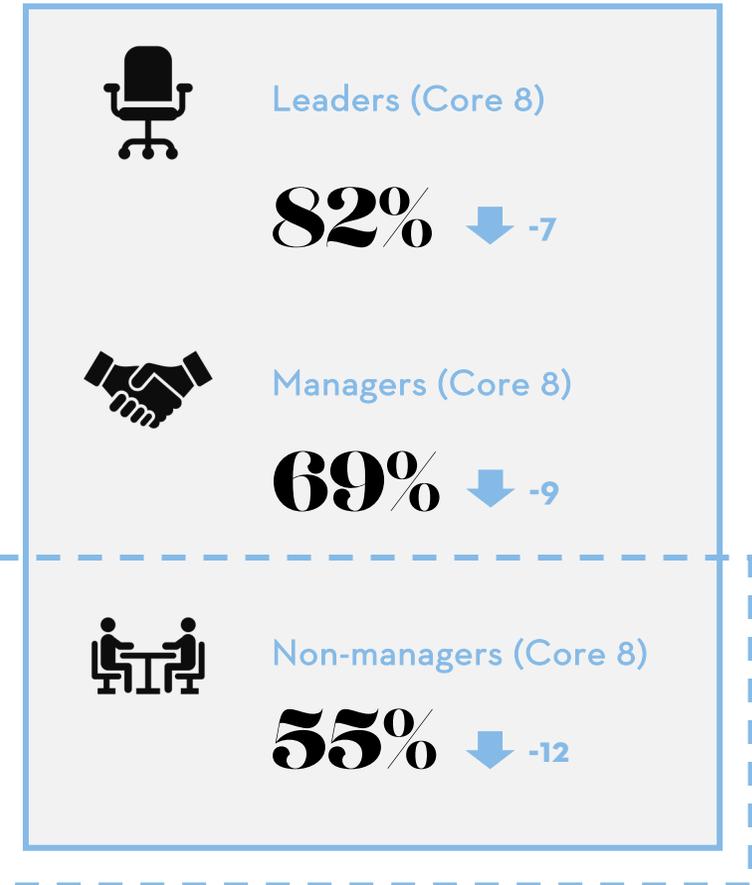


Q3. Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Non-managers have seen the largest drop in motivation over the last year

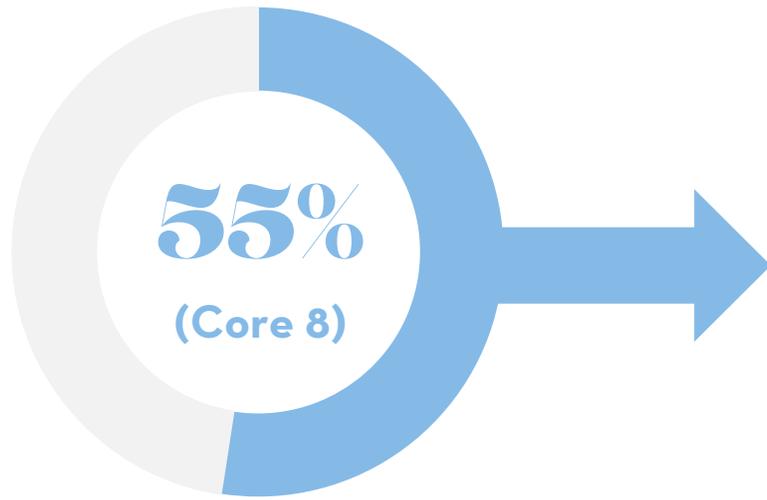


Say they are motivated

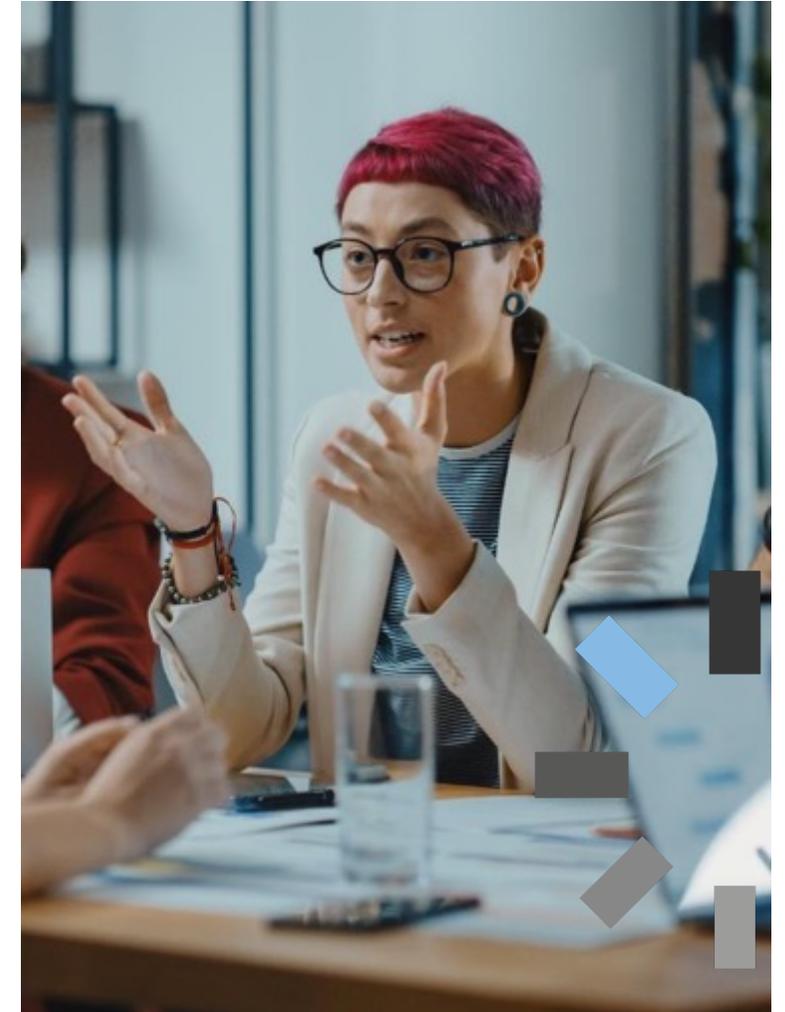
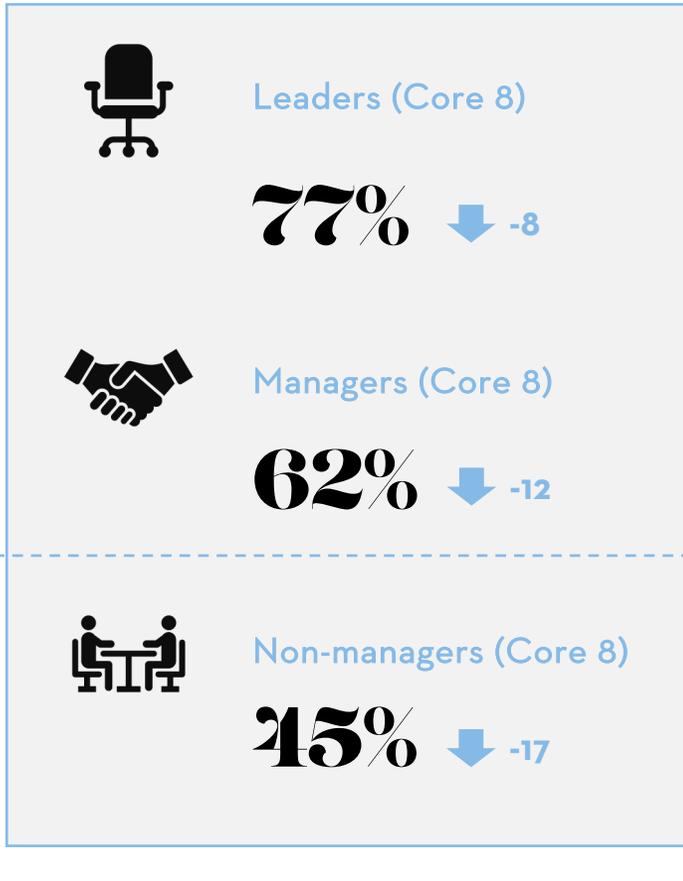


Q3.Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Agree) Base: Core 8 2021 (8,000), Core 8 Leaders (670), Core 8 Managers (3,677), Core 8 Non-managers (3,545)

Staff / manager relationships have deteriorated with less than half feeling the relationship is strong among non-managers



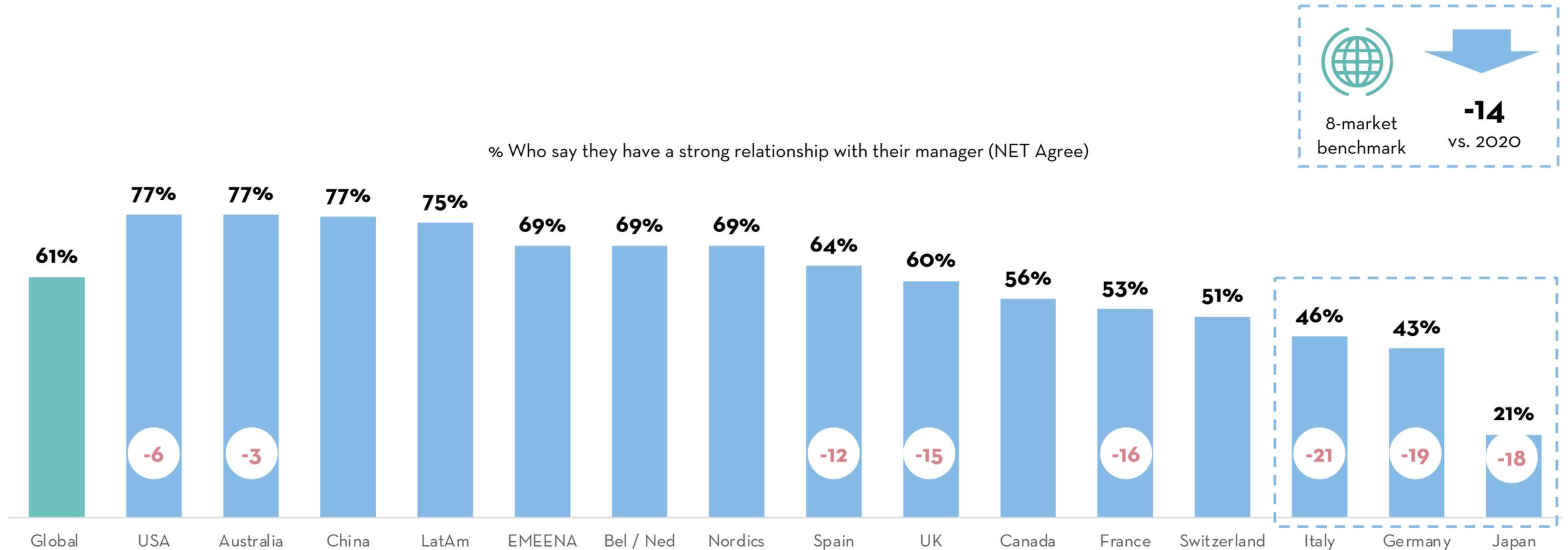
Say they have a strong relationship with their manager



Q3.Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Agree) Base: Core 8 2021 (8,000), Core 8 Leaders (670), Core 8 Managers (3,677), Core 8 Non-managers (3,545)

Less than half of employees in Italy, Germany and Japan have a strong relationship with their manager

% Who say they have a strong relationship with their manager (NET Agree)



8-market benchmark vs. 2020 **-14**

Q3. Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)



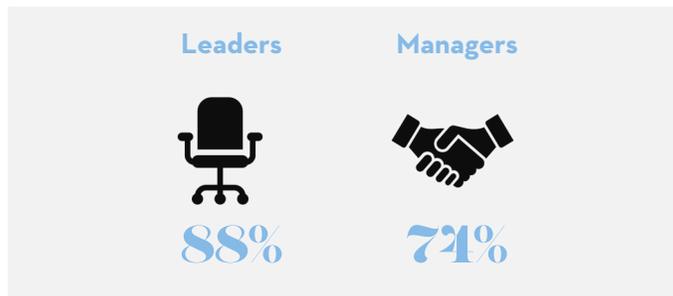
77% of managers say they are satisfied with their own performance while only 57% of non-managers are satisfied with the performance of their manager



There is a disconnect between management views of their own performance and the opinion of their employees

77%

Of managers say they are satisfied with their own performance



57%

Of non-managers say they are satisfied with their line manager



Global average 63%



Q31. How satisfied would you say you currently feel about the following? (NET Satisfied)

Q32. Thinking specifically about your own opinion on how you perform as a manager, how satisfied do you currently feel with yourself? (NET Satisfied) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)



74% say it is important for managers to promote and nurture strong team morale and culture

But only 37% of non-managers say their manager is encouraging a good working culture

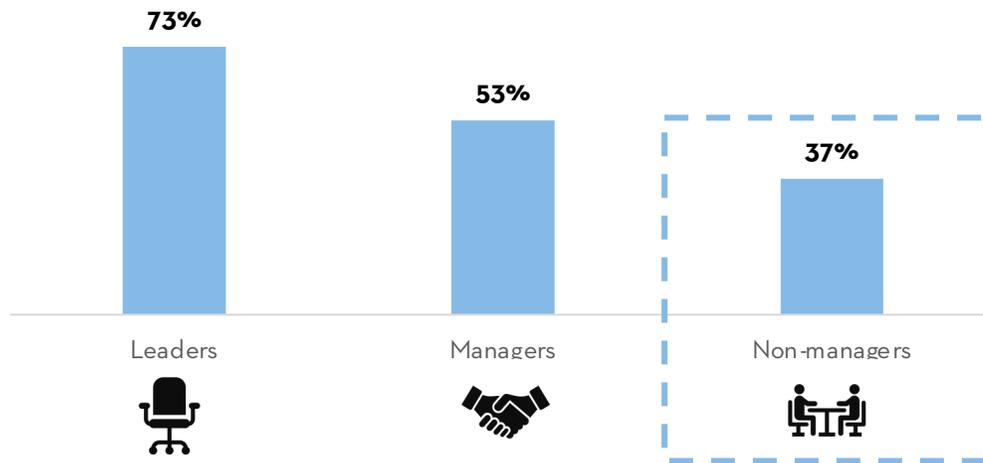


Managers are falling short on promoting a good working culture

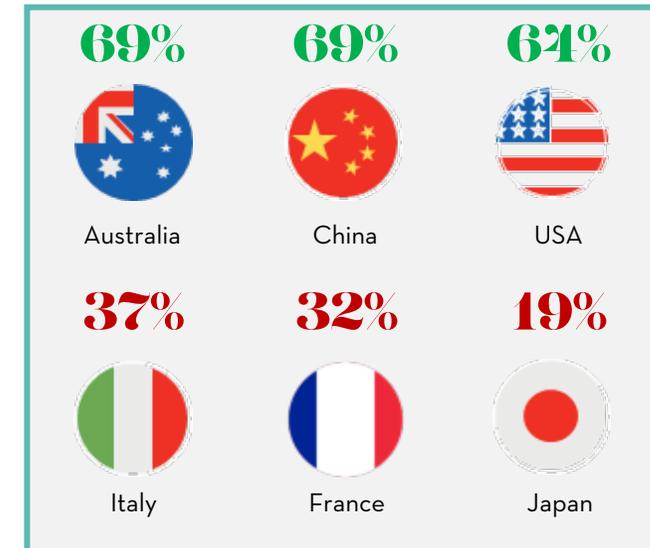
Half

(48%) say their managers met or exceeded expectations for encouraging a **good working culture**

% Who say their manager has met or exceeded expectations in encouraging a **good working culture** (NET Met or exceeded expectations)



Some country / regions have been more successful than others at encouraging a **good working culture** within the team (NET Met or exceeded expectations)



3/4 (74%) say it is important for managers to promote and nurture strong team morale and culture

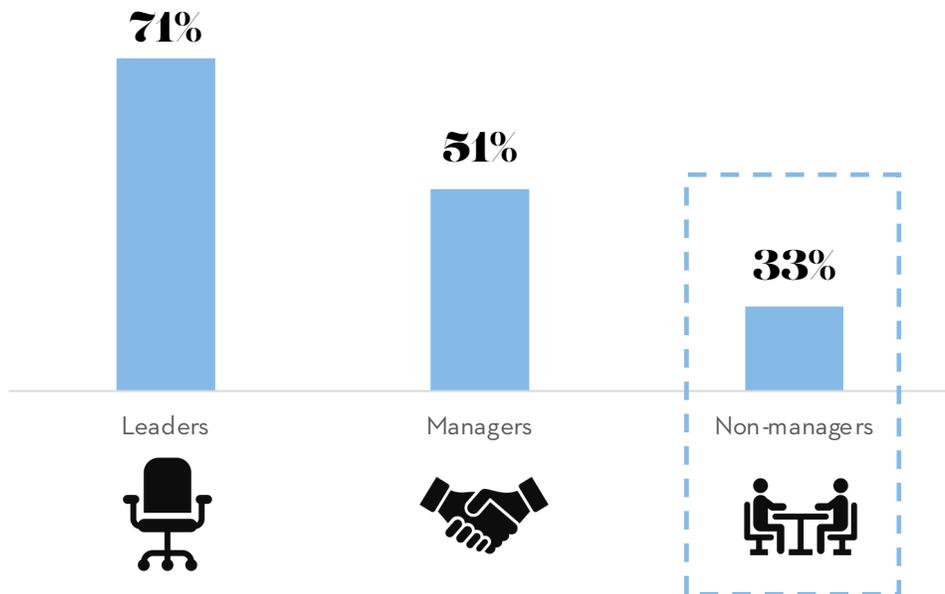
Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? (NET Met or exceeded expectations) Base: All respondents (14,800), Australia (1,000), China (1,000), USA (1,000), Italy (1,000), France (1,000), Japan (1,000), Leaders (1,427), Managers (6,978), Non-managers (6,171)

Only a third of non-managers feel they are getting due recognition within the business

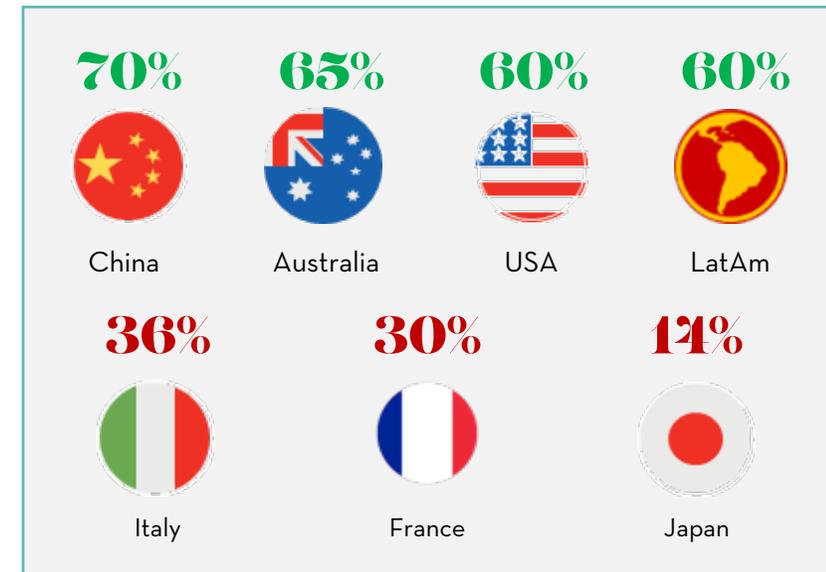
Less than half

(46%) say their managers have met or exceeded expectations for **keeping staff contributions visible / recognised in the business**

% Who say their manager has met or exceeded expectations in keeping staff contributions visible / recognised in the business (NET Met or exceeded expectations)



Some country / regions have been more successful than others at helping keep staff contributions visible / recognised in the business by multiple (NET Met or exceeded expectations)



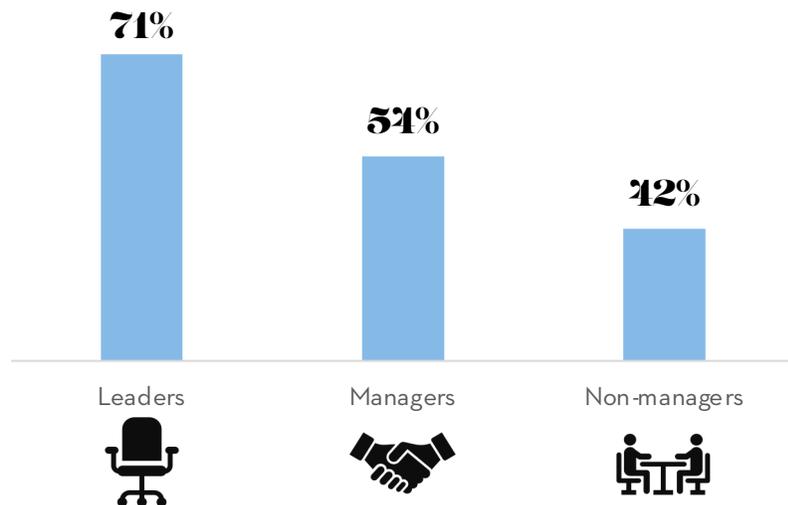
Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? (NET Met or exceeded expectations) Base: All respondents (14,800), Australia (1,000), China (1,000), USA (1,000), LatAm (1,000), Italy (1,000), France (1,000), Japan (1,000), Leaders (1,427), Managers (6,978), Non-managers (6,171)

Less than half feel that their manager is helping support their work/life balance among the non-management tier

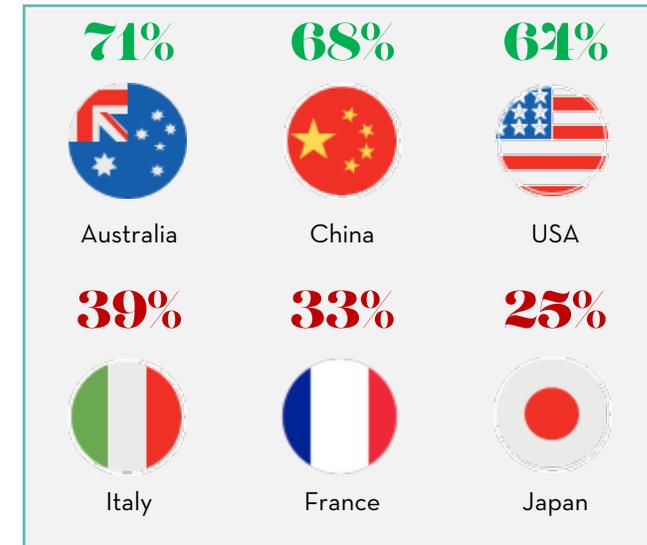
Half

(50%) say their managers have met or exceeded their expectations for **supporting work/life balance**

% Who say their manager has met or exceeded expectations in supporting work/life balance (NET Met or exceeded expectations)



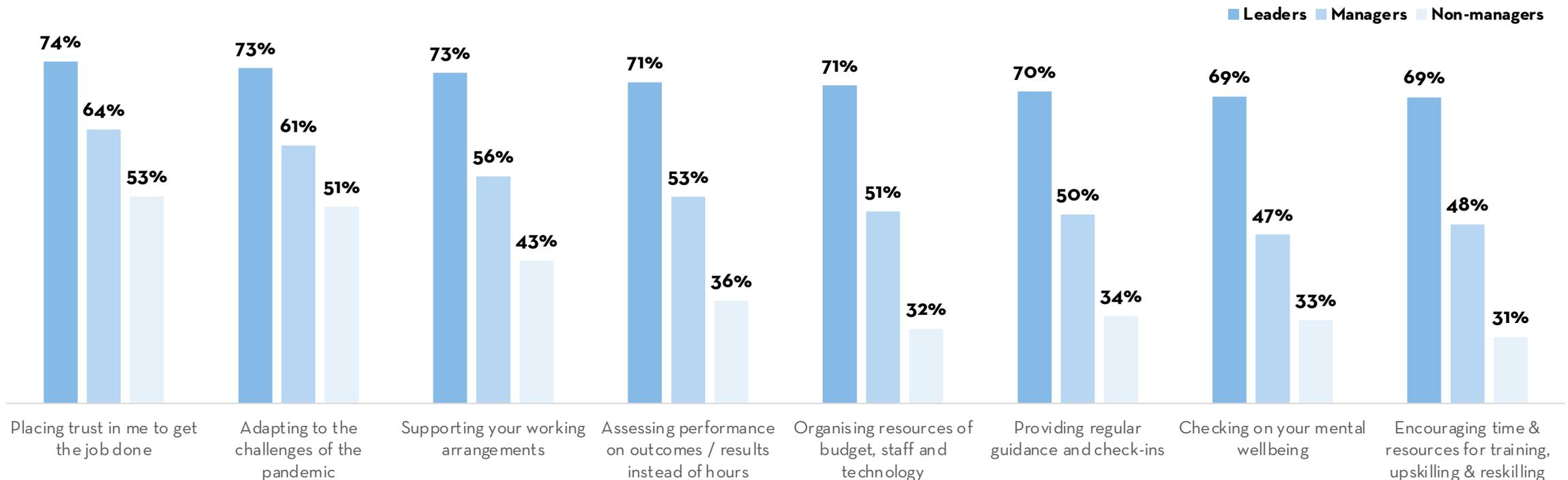
Some country / regions more successful than others at supporting employee work/life balance (NET Met or exceeded expectations)



Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? (NET Met or exceeded expectations) Base: All respondents (14,800), Australia (1,000), China (1,000), USA (1,000), Italy (1,000), France (1,000), Japan (1,000), Leaders (1,427), Managers (6,978), Non-managers (6,171)

Non-management take a much less favourable view of managerial performance across a range of leadership tenets

% Who say their manager has met or exceeded their expectations in the following (NET Met or exceeded expectations)



Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)

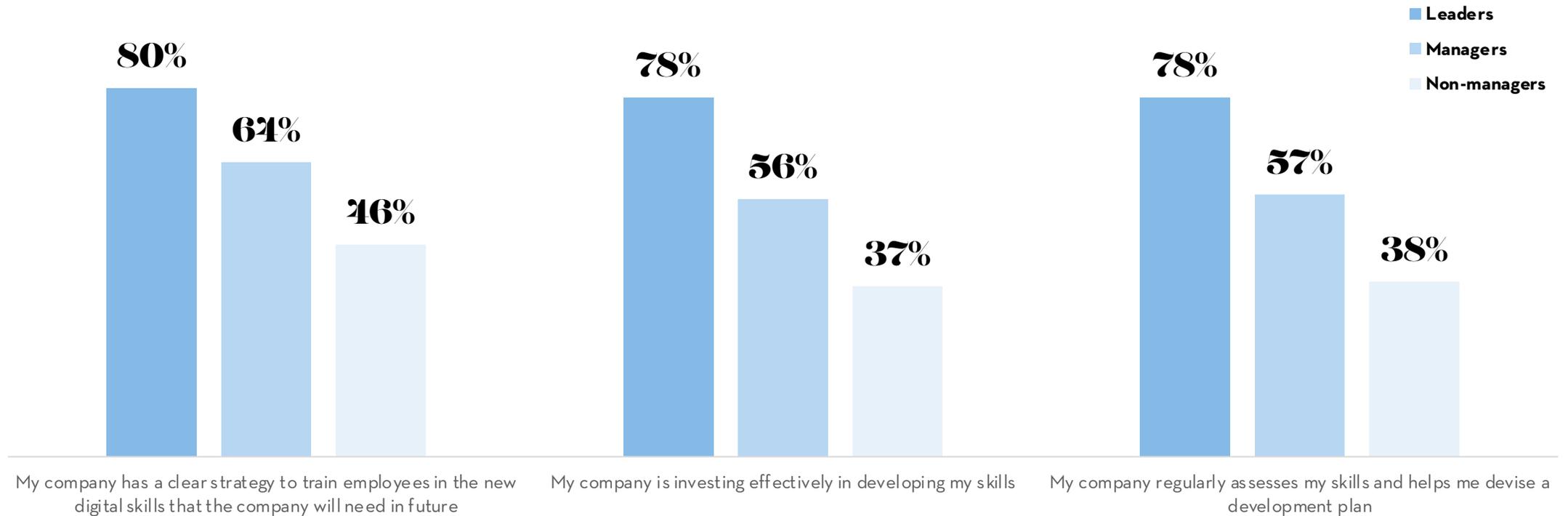


Just 37% of non-managers believe their company is effectively investing in developing their skills



Importance of skills and career development may be a belief among leadership, but it is not a reality felt throughout the business

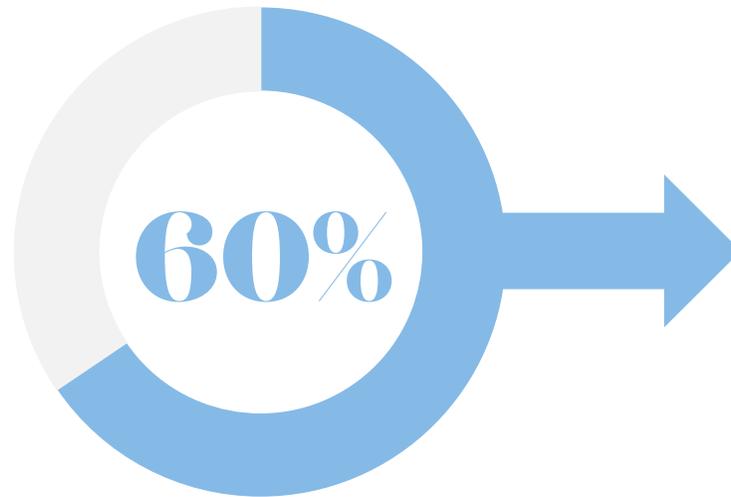
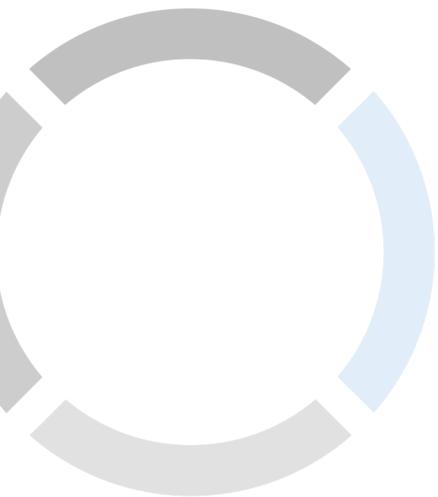
% Who say their company is doing the following (NET Agree)



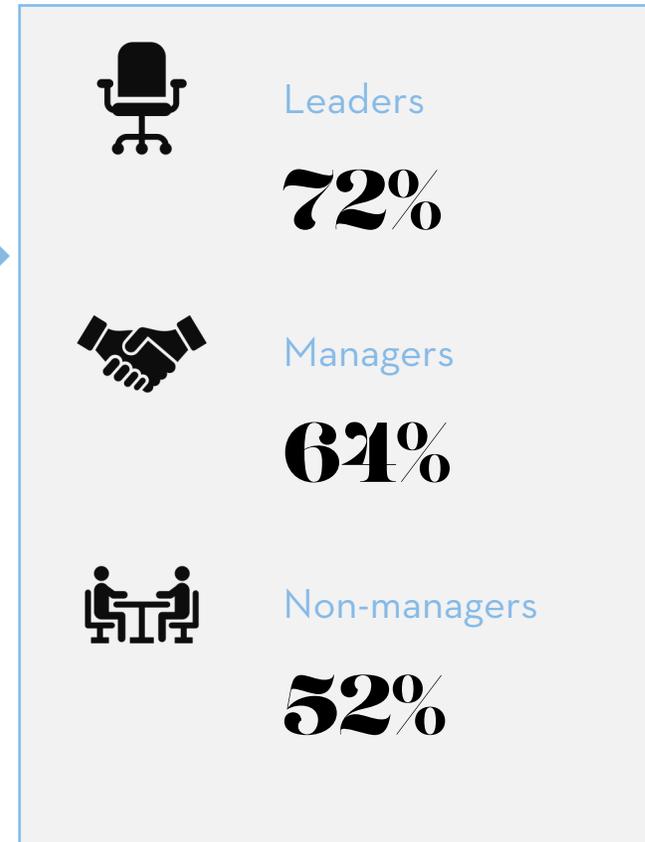
Q7. Thinking about how well-equipped you currently are for work, how far would you agree or disagree with the following? (NET Agree)

Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: Leaders (1,427), Managers (6,978), Non-managers (6,171)

Since companies are not taking steps to upskill them, 60% of workers are taking it upon themselves to do new courses and qualifications



Say they have already taken / are taking / are considering taking a new course / qualification / other professional development

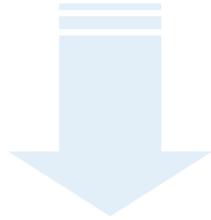


Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)

China and Australia perform better on skills and development

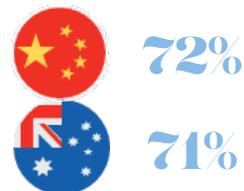
58%

Say their company has a clear strategy to train employees in the new digital skills that the company will need in future



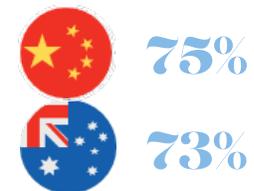
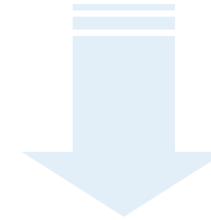
50%

Say their company is investing effectively in developing their skills



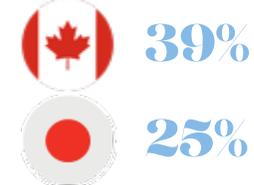
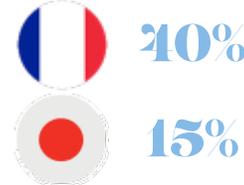
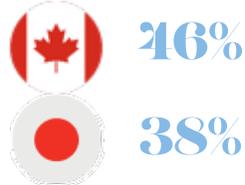
51%

Say their company regularly assesses their skills and helps them devise a development plan



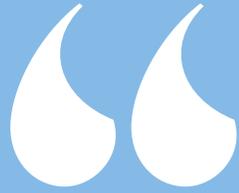
Top scoring countries

Bottom scoring countries



Q7. Thinking about how well-equipped you currently are for work, how far would you agree or disagree with the following? (NET Agree)

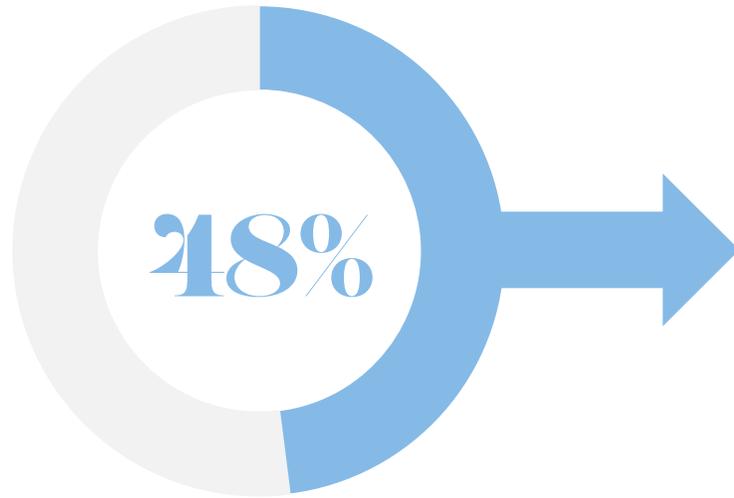
Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800), Australia (1,000), China (1,000), France (1,000), Japan (1,000),



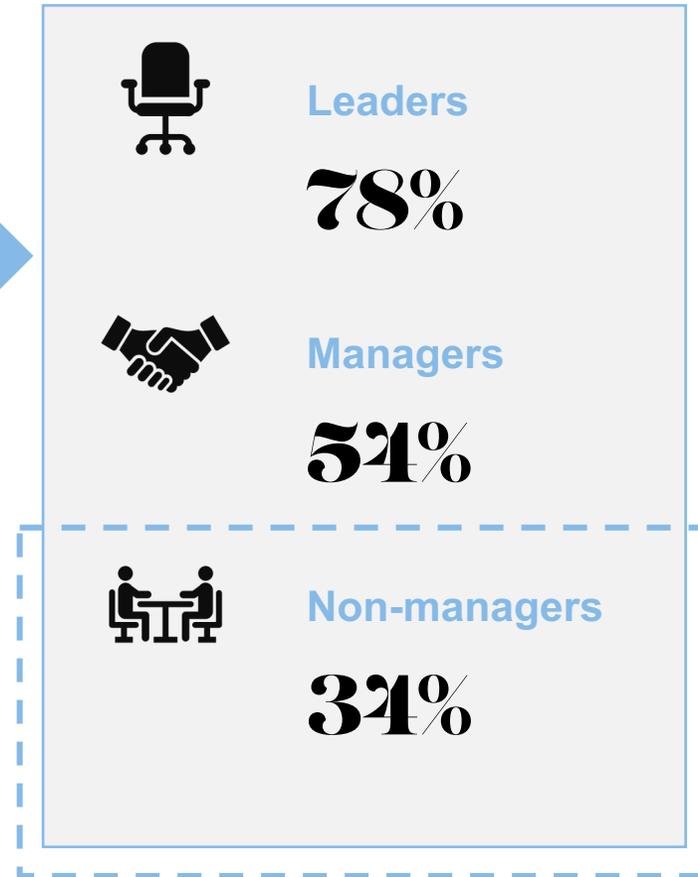
**Only 34% of non-managers
are satisfied with
career prospects at their company**



People need to see and feel opportunity - less than half are satisfied with career prospects at their company



Say they are satisfied with career prospects at their company

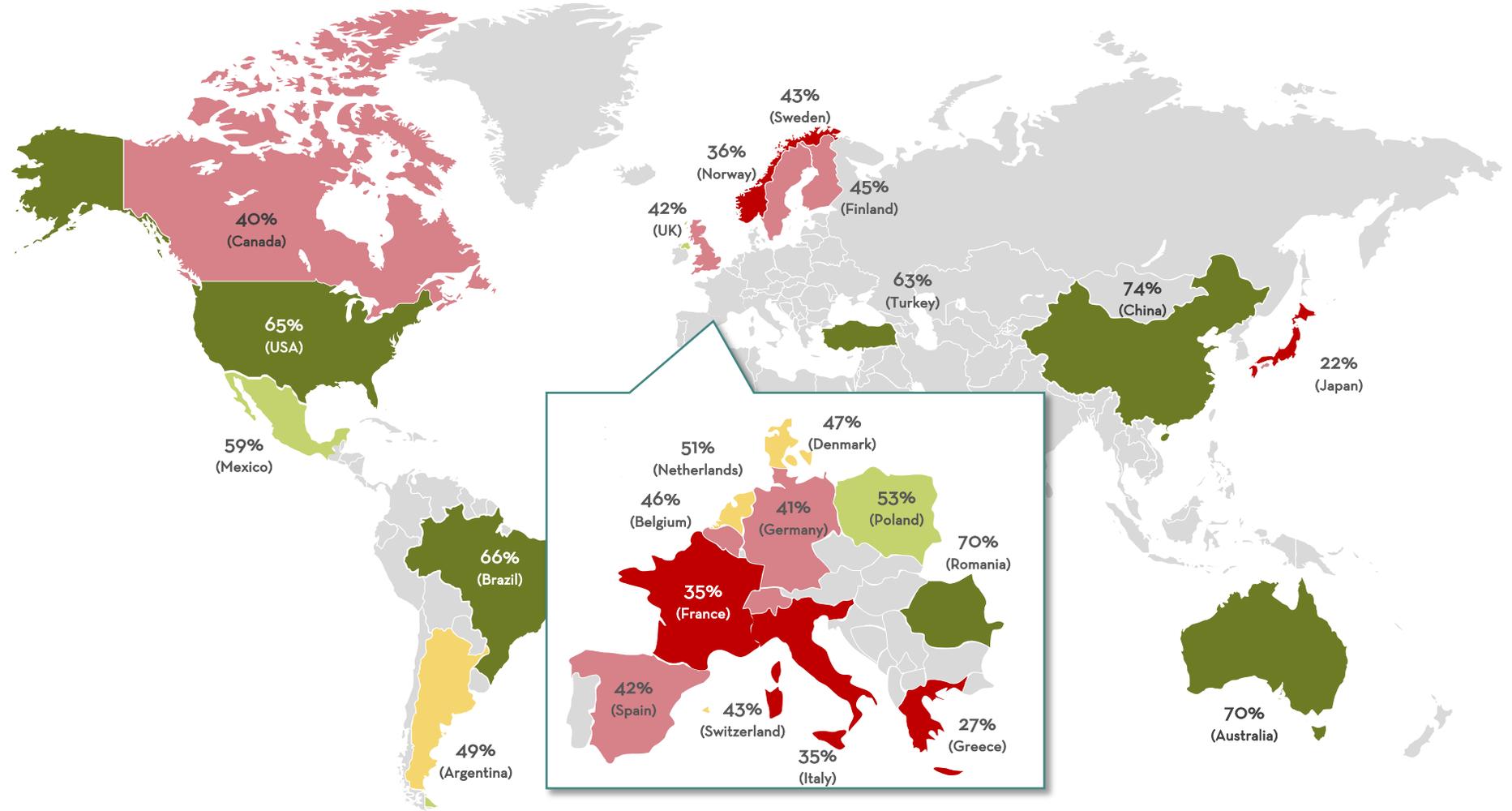
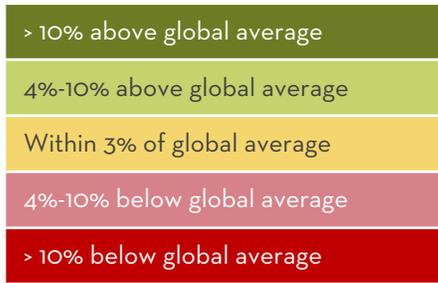


Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)

Less than half are satisfied with career prospects at their company, especially low in Japan and Western Europe

48%

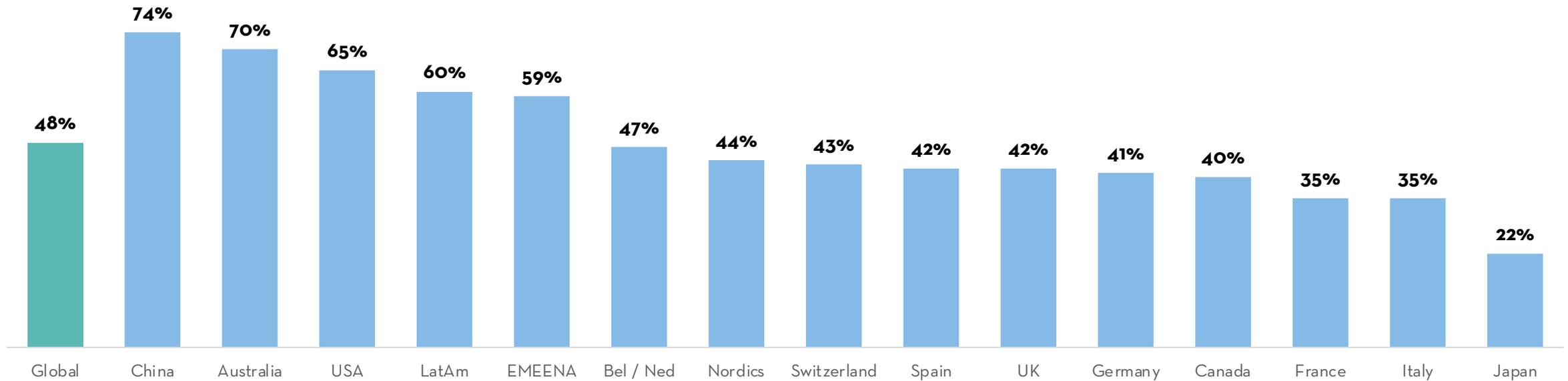
Say they are satisfied with the career prospects at their company



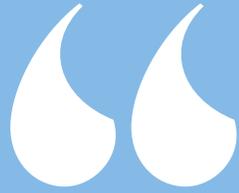
Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800) [Detailed country bases in appendix]

China, Australia and the USA are the most satisfied with career prospects in their company

% Who say they are satisfied with the career prospects at their company (NET Satisfied)



Q31.How satisfied would you say you currently feel about the following? (NET Satisfied) Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

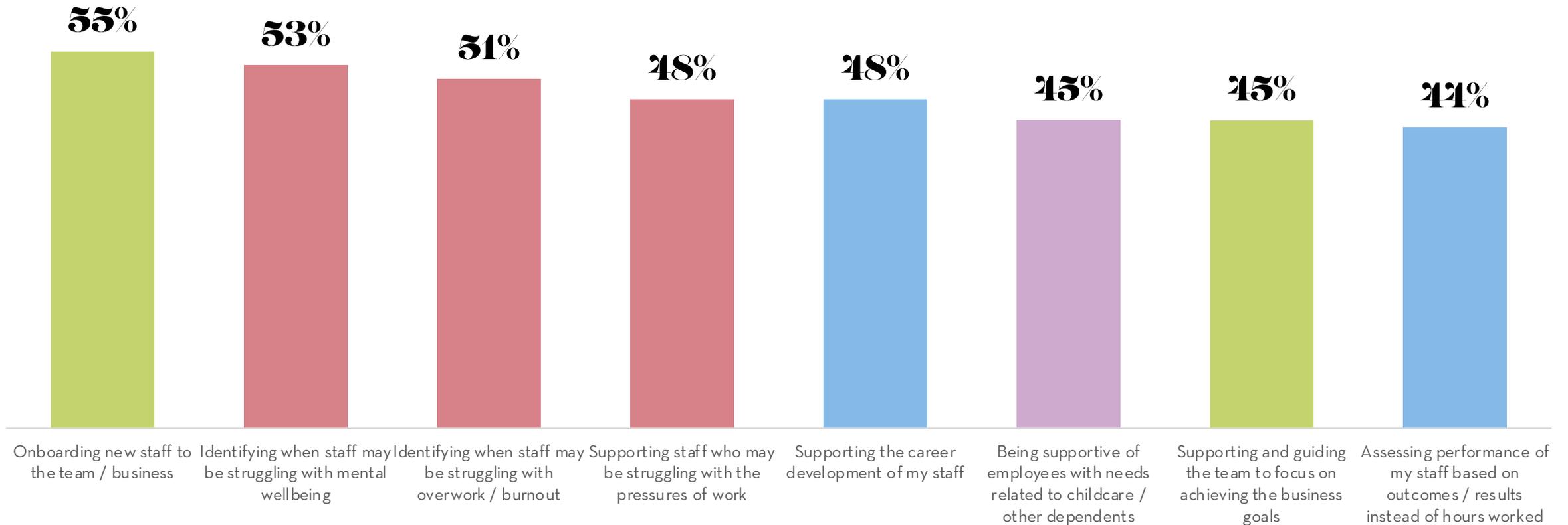


Nearly half (46%) of managers have NOT found the overall experience of managing other people easy over the past 12 months



Leaders recognise difficulties managing in areas like onboarding staff, supporting the team's wellbeing and keep them engaged with the business goals

% Of managers who have NOT found the following easy over the past 12 months
[Top 8]

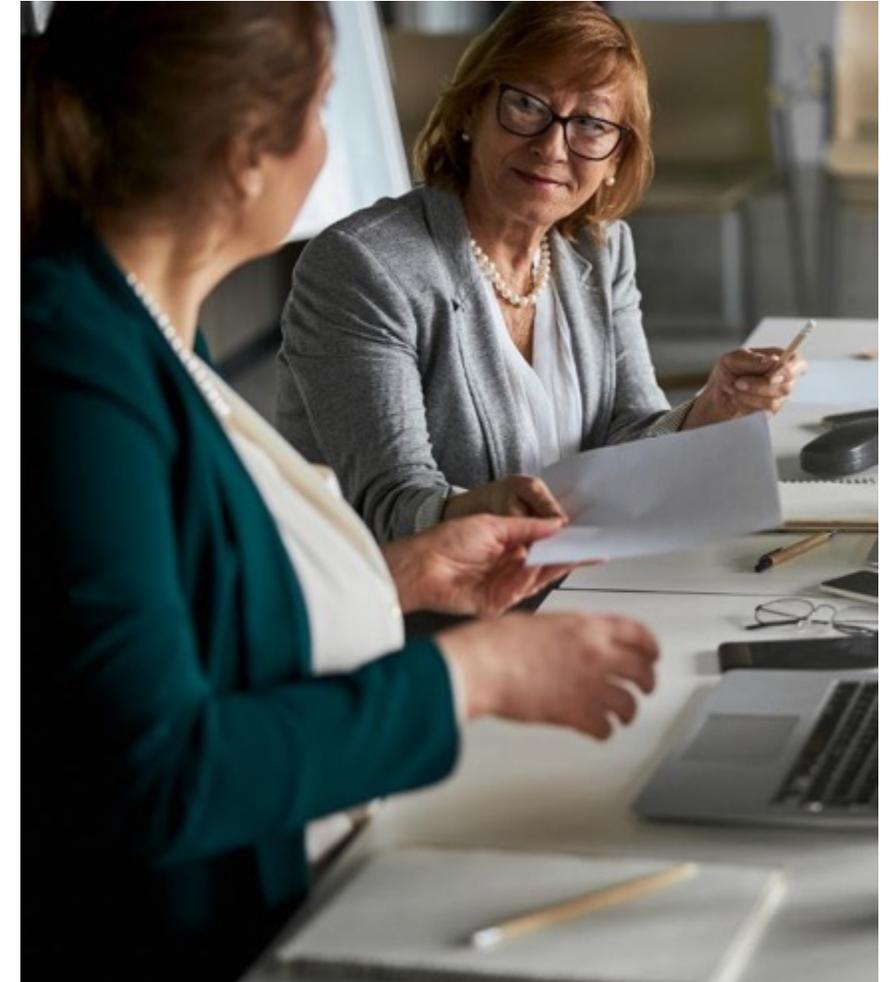
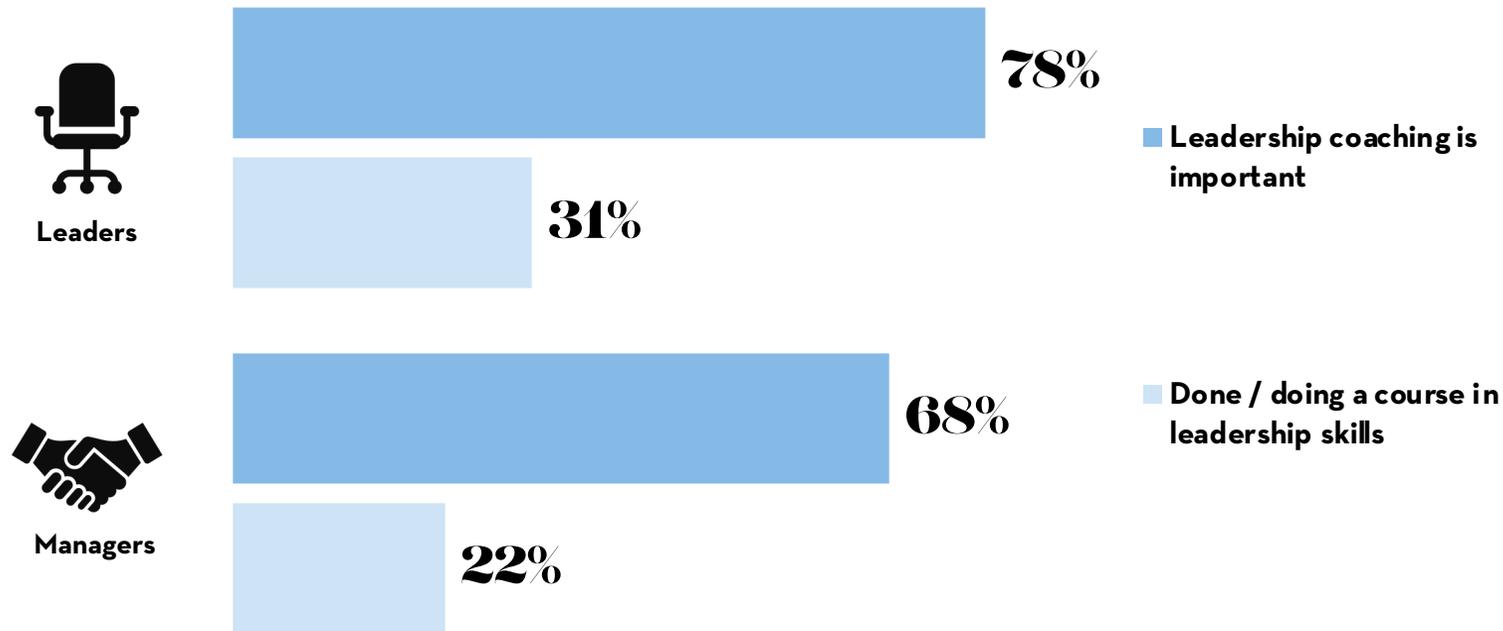


Q12. Thinking this time about how you have found the experience of managing other people during the last 12 months, how easy or difficult have you found the following? (NET Not Easy) Base: All managers (8,405)



There is wide disparity between perceived importance of leadership training and those that are actually doing it

% Who say coaching on leadership skills is important (NET Important)
vs. who have done / are doing, a course on leadership skills



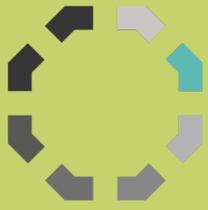
Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important)

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? Base: Leaders (1,427), Managers (6,978)

Leaders Must Reconnect the Disconnect: Key Takeaways

- With workers' motivation, relationships, feeling of recognition and sense of team and culture deteriorating, **leaders hold the key to re-connecting people to the company purpose, helping them feel like they belong and providing them with development and career opportunities that can motivate them**
- **However, they are struggling to see the issues. Companies must support the new breed of leaders** who will be best placed to address major threats to company cohesion
- Equipping leaders with upskilling, coaching, resources and technology that will **help them to better listen to and manage their teams, increase and nurture motivation, and a strong team morale and culture** is a priority for businesses in the new hybrid working model.





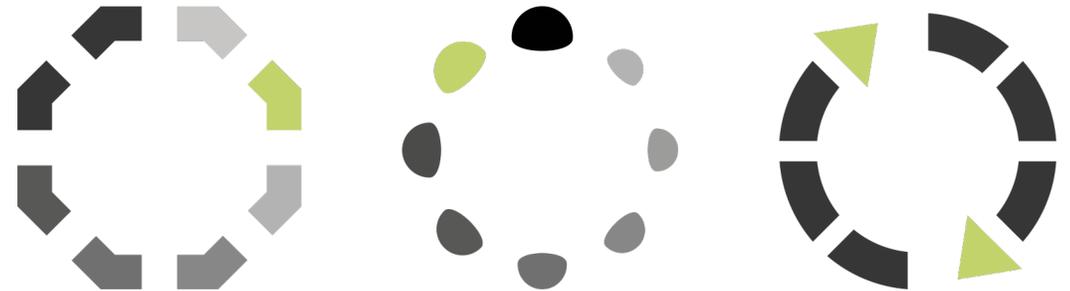
THE GREAT RE-EVALUATION

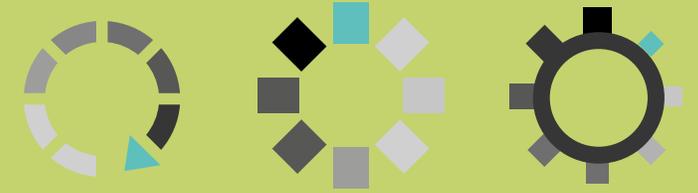
No great resignation on the horizon but there are warning signs for companies as workers re-evaluate what work means to them



The Great Re-Evaluation: Summary

- The predicted ‘mass-resignation’ or ‘mass exodus’ may be overstated for now, but the nascent normal is triggering many to re-evaluate working life
- **Nearly 2 in 5 are changing or considering new careers.** With two-thirds of workers confident that companies will start significant hiring again, and less than half satisfied with career prospects at their company. **Career reassessment looks set to converge with career opportunity**
- **While pay, work/life balance, trust and security are fundamental needs, people also want to retain agency** over their work life and expect flexibility. **2 in 5 (41%) are moving or are considering moving to jobs with more flexible working options**
- A ‘mass-exodus’ is not expected to happen, but 1 in 4 have or are considering moving to another country / region either full-time or temporarily
- Men and women are equally re-assessing options in their working lives with the same priorities for the next normal
- **Skills and career development opportunities are a big part of the re-evaluation and a key for individuals and companies to become future-proof.**
- There is a clear appetite to learn new skills: 66% workers believe they need to train and gain new skills to stay employable in the years ahead and over 6 in 10 workers are taking or considering taking a new qualification / skills
- However, less than 4 in 10 non-managers believe their company is assessing their skills and effectively investing in upskilling. And less than half of them believe the company has a strategy to upskill workers in the digital skills that companies will need in the future.



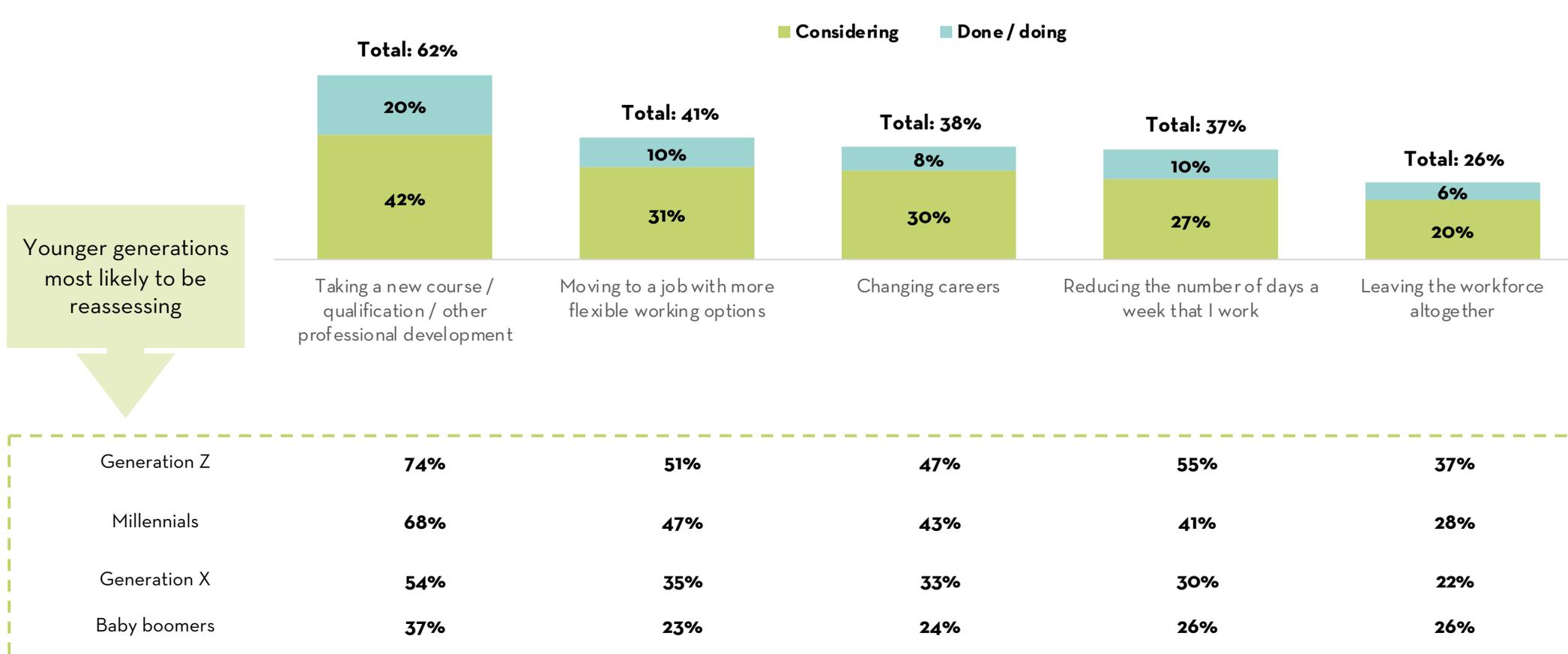


41% of workers have or are considering moving to a job with more flexible options



Many people are reassessing their working life in a variety of ways with almost 2 in 5 changing or considering new careers

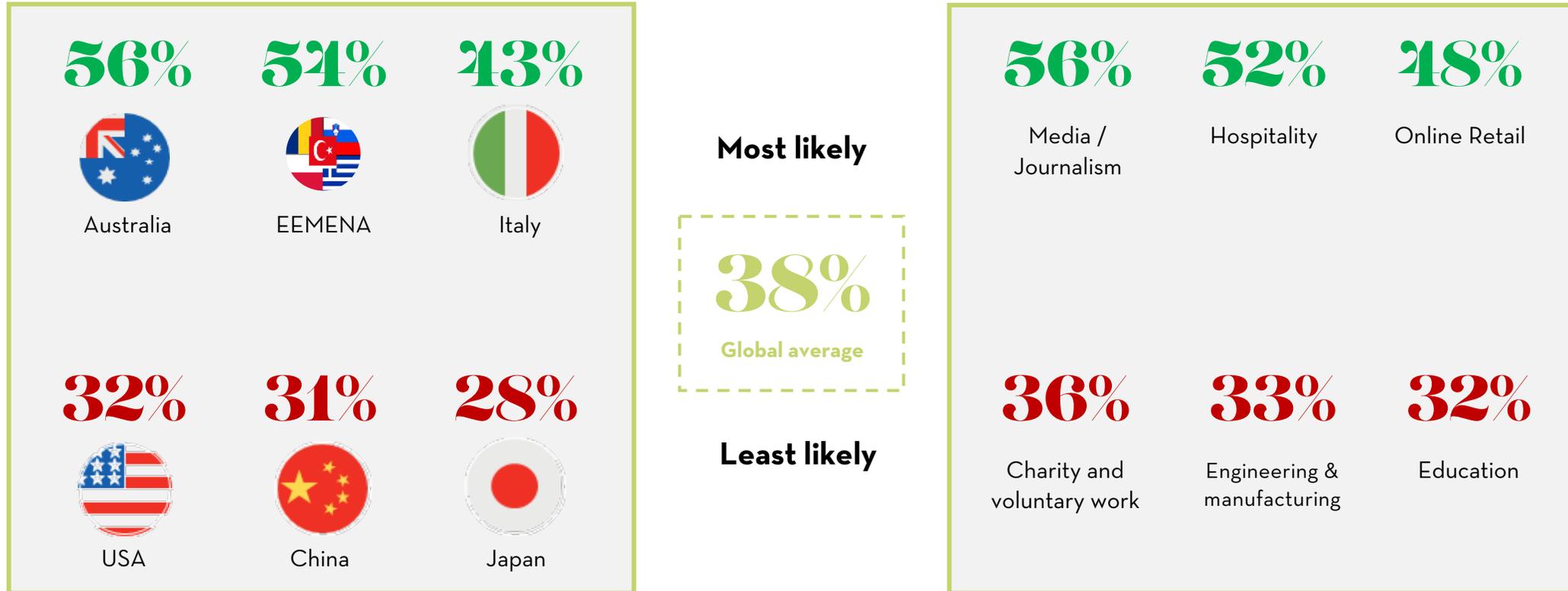
% Who say they have done, are doing or are considering the following (NET Already done / doing / considering)



Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET: Already done / doing / considering) Base: All respondents (14,800), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353)

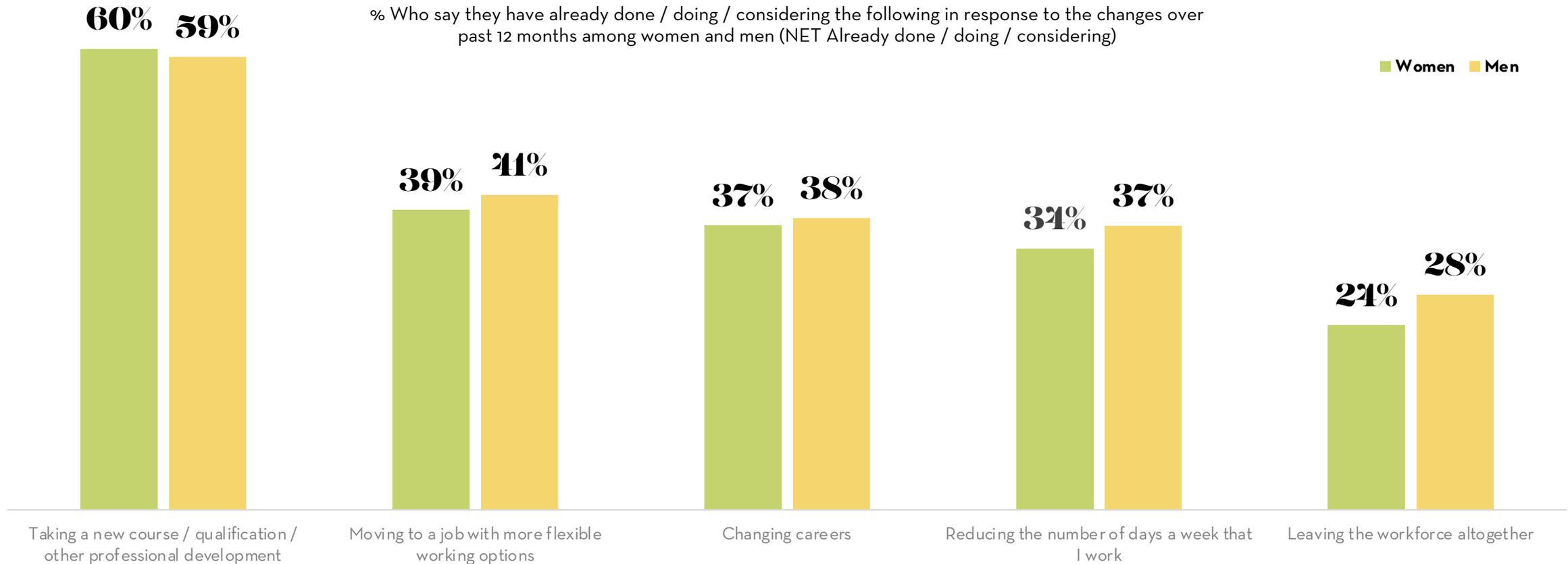
In Australia and EEMENA over half are looking at career changes, likewise in the Media / Journalism and Hospitality sectors

% Who say they have done, are doing, or are considering changing careers (NET Already done / doing / considering)



Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: All respondents (14,800), Australia (1,000), EMEENA (1,000), Italy (1,000), USA (1,000), China (1,000), Japan (1,000), Media/Journalism (170), Hospitality (165), Online retail (354), Charity and voluntary work (131), Engineering & manufacturing (1,402), Education (1,236)

Men and women are equally re-assessing options in their working lives



Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: Women (7,324), Men (7,442)

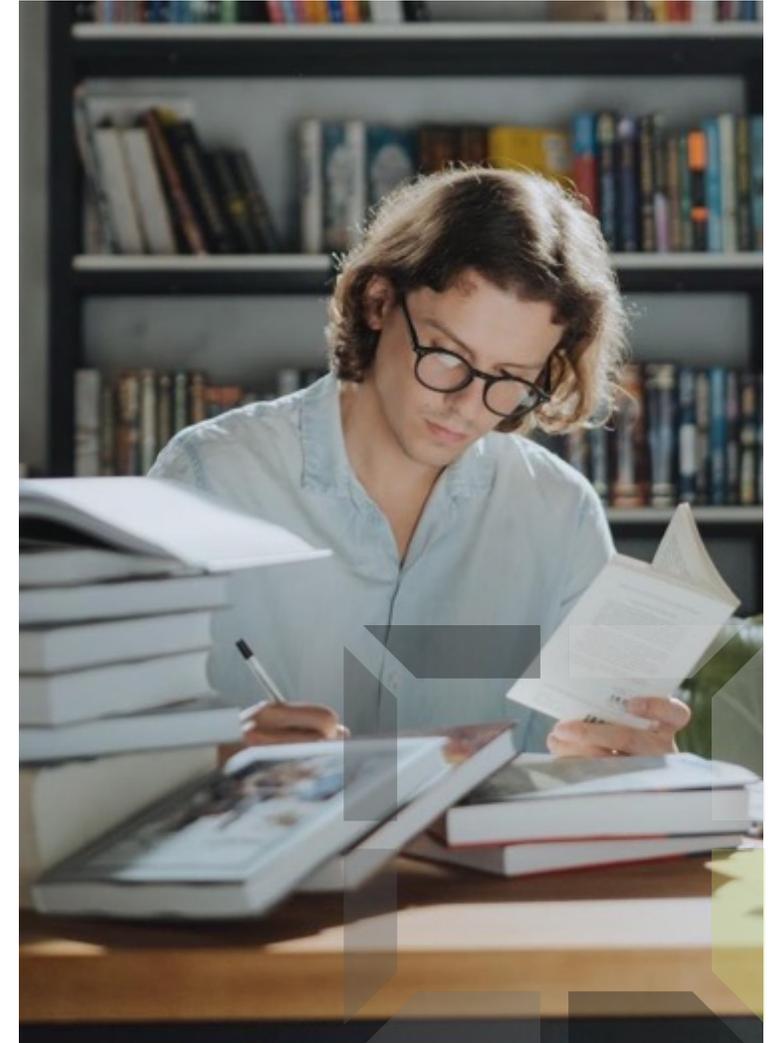
Up and reskilling one of the most relevant areas for workers re-evaluation

62%

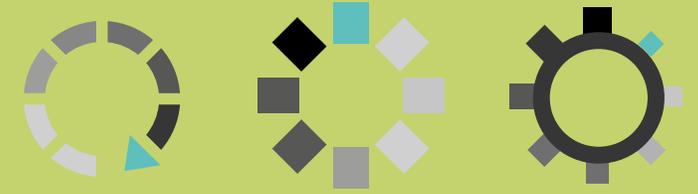
of workers have done or are considering **new courses, qualifications or career development.**

66%

workers believe they **need to train** and gain **new skills to stay employable** in the years ahead



Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET: Already done / doing / considering) Base: All respondents (14,800), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353); Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic

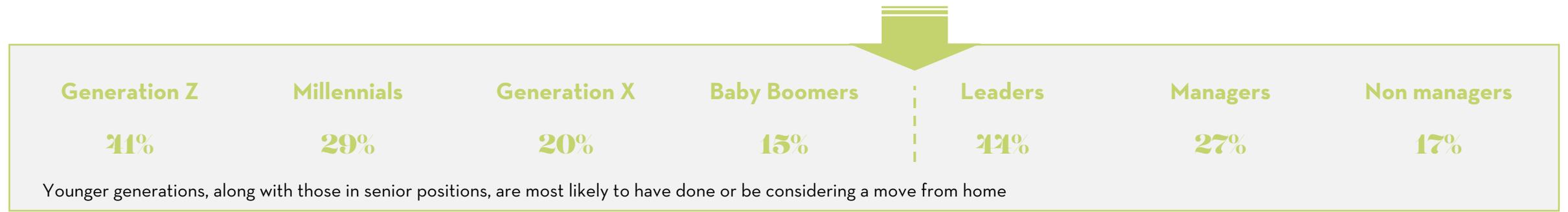
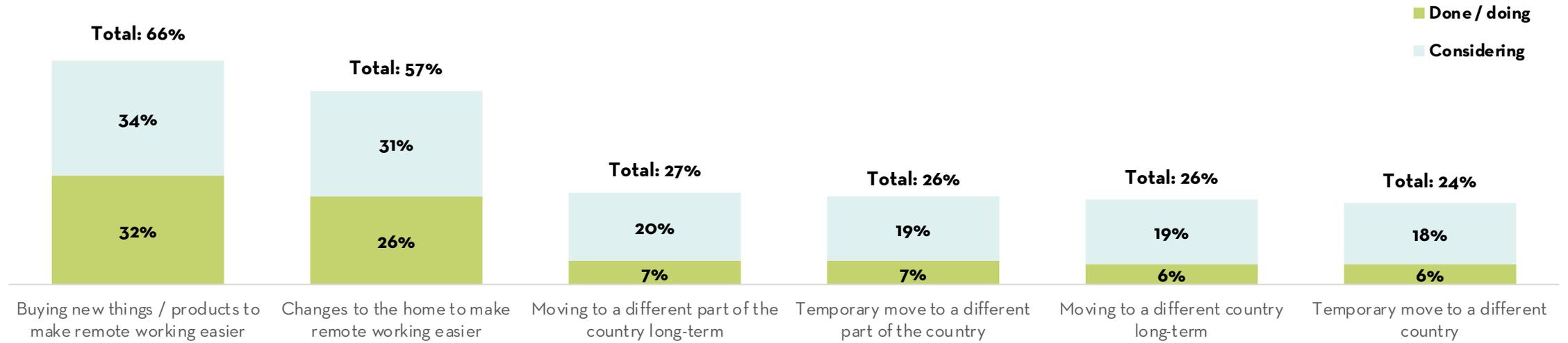


1 in 4 have done or are considering moving to another country or region temporarily in the next normal – especially Gen Zs and leaders



While changes in working life are triggering relocations, adapting the home is more common than making a major move

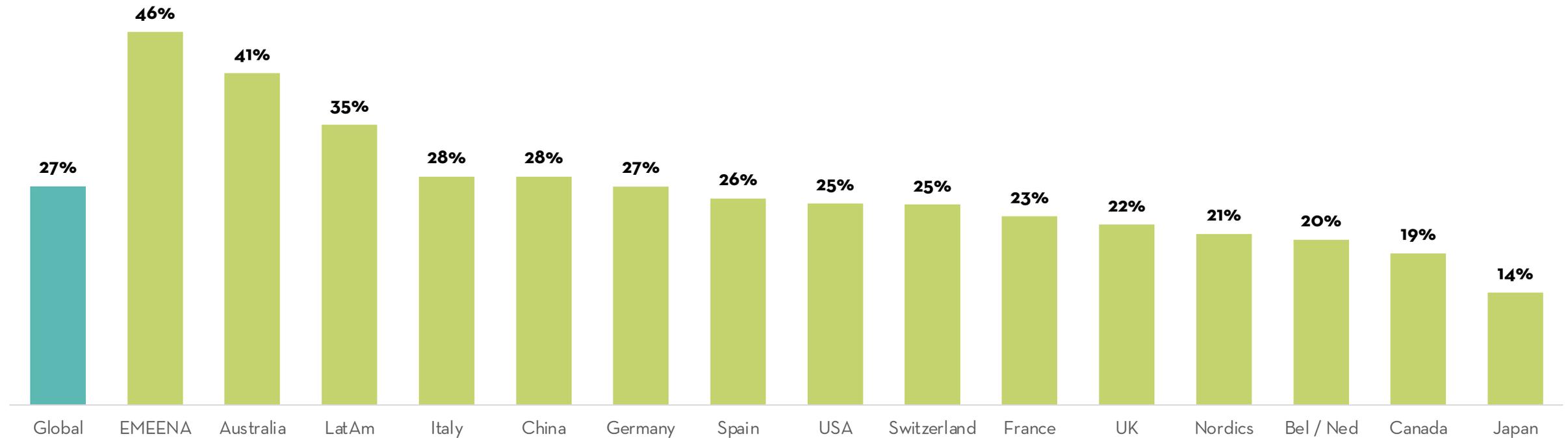
% Who have done / are doing vs. are considering doing the following in response to working life changes following



Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? Base: All respondents (14,800), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353), Leaders (1,427), Managers (6,978), Non-managers (6,171)

EMEENA and Australians are most likely to have considered a move or actually moved to a different part of the country

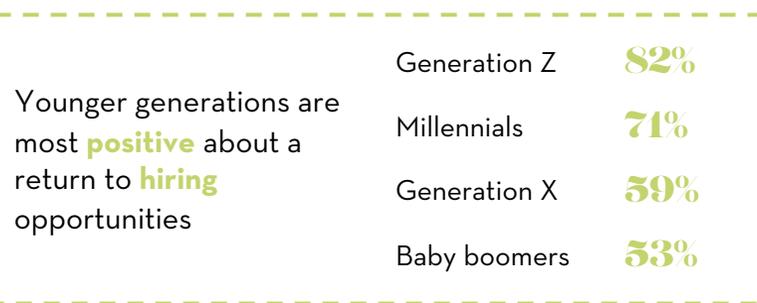
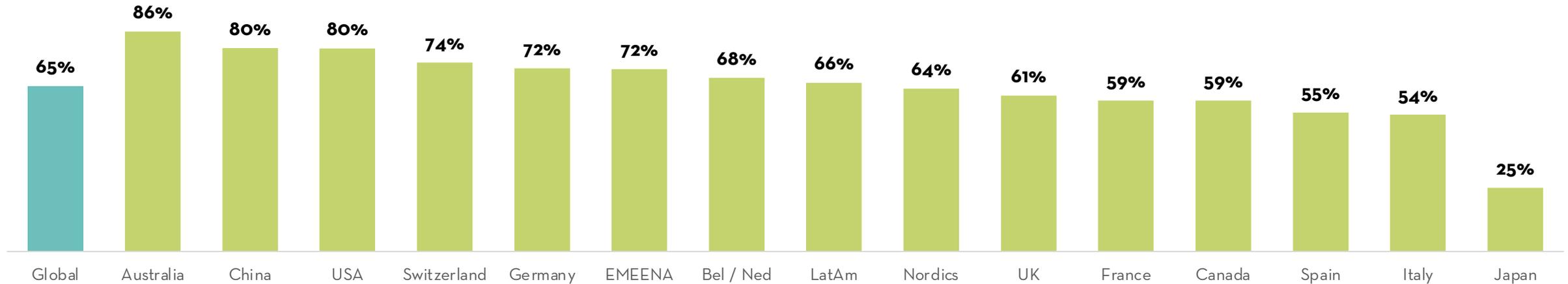
% Who have done / doing / considering moving long-term to a different part of the country (NET Already done / doing / considering)



Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Two thirds are confident that companies will start hiring significant numbers again within the next year (confidence highest in Australia, China and USA)

% Who believe companies have already started hiring significant numbers of people or will start doing so in the next 12 months (NET Within 12 months)



Q36a. When, if at all, do you expect most companies in your country to start hiring significant numbers of people again? Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353)

Security, agency, culture, wellbeing and development are most important to workers going forward

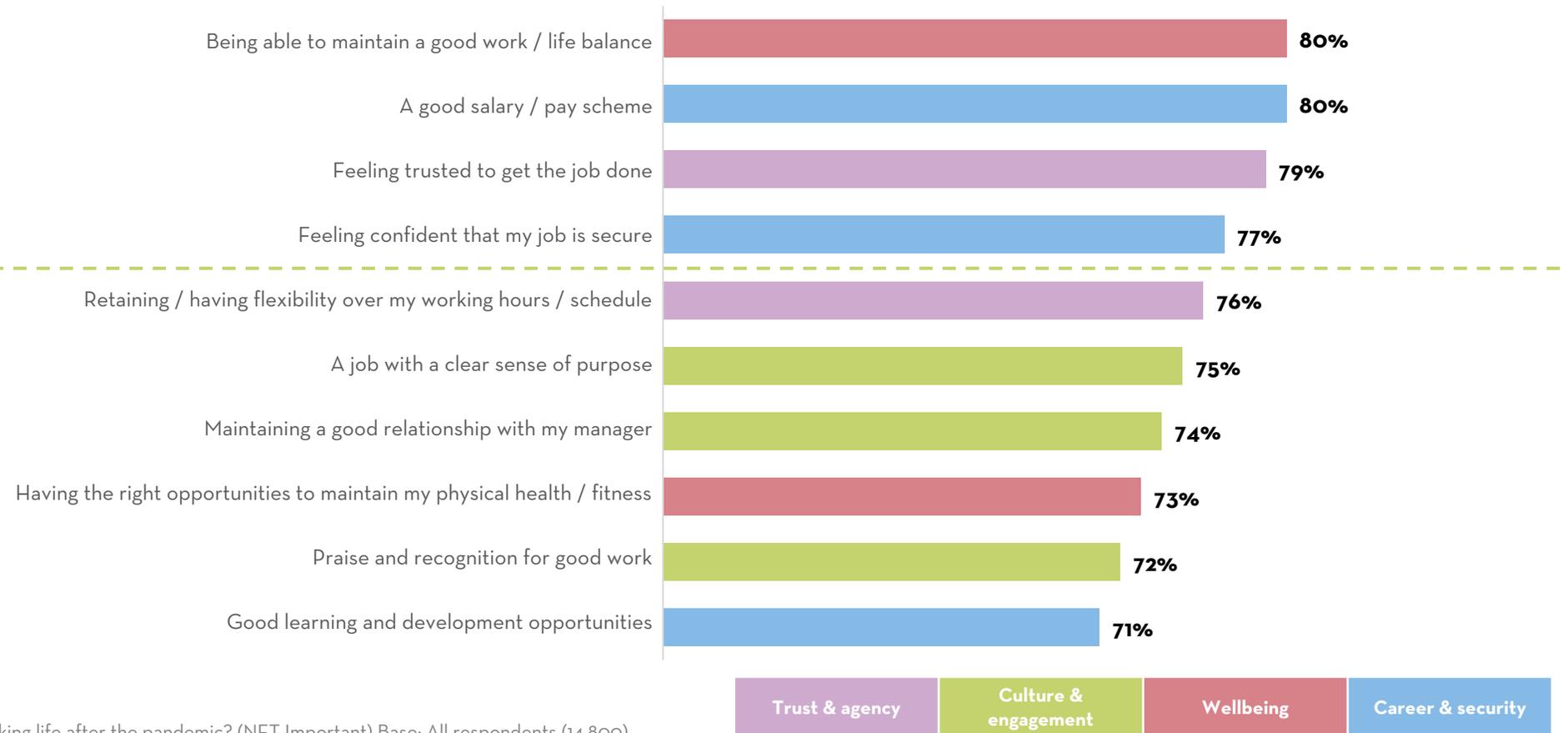


Pay, work / life balance, trust and job security remain the top fundamental needs of workers

Flexibility, a clear sense of purpose, recognition and the chance to learn and develop are also important



% Who believe these factors will be important to their working life **after** the pandemic (NET Important) [Top 10]



Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (14,800)

Generation Z prioritise recognition, culture and development, while older generations lean more towards agency and security

Important aspects of working life by Generation
[Top 5 - % not shown]

	Generation Z	Millennials	Generation X	Baby boomers
1 st	Praise & recognition for good work*	Good salary / pay scheme		Being able to maintain a good work / life balance
2 nd	Good salary / pay scheme	Being able to maintain a good work / life balance		Feeling trusted to get the job done
3 rd	Strong enjoyable company culture*	Feeling trusted to get the job done		Good salary / pay scheme
4 th	Good learning & development opportunities*	Feeling confident that my job is secure		
5 th	Feeling trusted to get the job done	Retaining / having flexibility over my working hours / schedule		

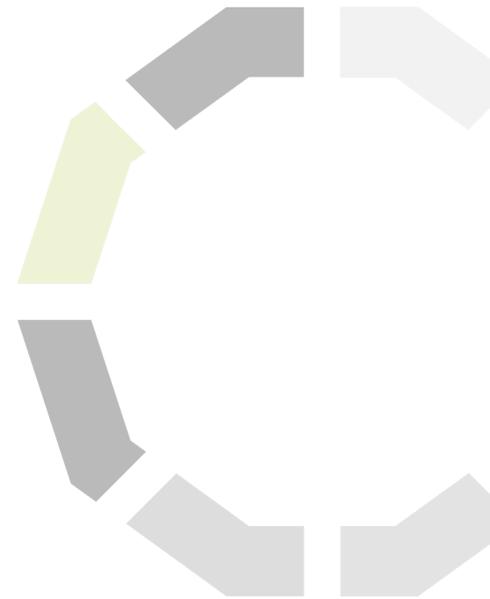
N.B. ***Bold Statements** in Top-5 for Gen-Z only



Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353)

Nurturing trust in staff, flexibility, morale and emotional intelligence will be key qualities of the successful manager going forward

% Who believe the following skills and behaviours will be important in the role of managers **after** the pandemic (NET Important)
[Top 8]



Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: All respondents (14,800)



Women show slightly higher strength of feeling on important facets of work but their priorities are similar to men

% Who believe the following skills and behaviours will be important in the role of managers after the pandemic (NET Important)
[Top 8]



Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: Women (7,324), Men (7,442)

In addition to ensuring the right infrastructure is in place, companies are expected to focus on wellbeing and talent development

% Who expect the following from their company after the pandemic (NET Important)
[Top 8]



Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important) Base: All respondents (14,800)



Workers envisage a tech-enabled future where employers help them optimise their remote work environments

Selected Verbatim Comments - 'Try to imagine what your ideal future working environment would be like and tell us about it'

"I'd like all the right technology and support so that I could perform my function in the best possible way."

Manager, Logistics



"I imagine my employer will make sure that I receive the **equipment necessary** to comply with **health and safety** legislation in relation to the layout of my home workplace."

Non-manager, Tech / Telco



"I see a future where I make **more efficient use of technology through chat and other software** that allows me to collaborate with my team or keep in touch with the office at all times."

Manager, Online retail



"I'd need to **improve the equipment** a little at home, because it's been provisional during the pandemic."

Non-manager, Government



"I'd have a **correct chair** at home to avoid muscular-skeletal disorders."

Non-manager, Tech / Telecoms



"I would like the company to provide us with **equipment and furniture** to be able to work remotely."

Non-manager, Administration



Q34. Try to imagine what your ideal future working environment would be like and tell us about it in the box below

To improve company culture, companies should focus on regular company engagement, support, recognition, and nurturing an open, trusting environment

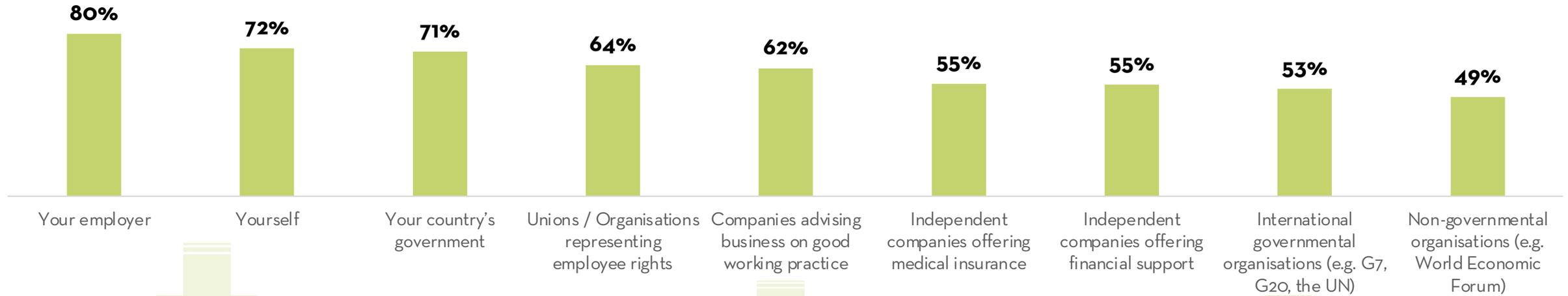
% Who say the following are effective at maintaining a strong team/company culture in the new working world
[Top 10]



Q39. What would you say are particularly effective ways of maintaining a strong team / company culture in the new working world? Base: All respondents (14,800)

Companies are the most trusted by workers to create a better working world

% Who say the following are responsible for ensuring a better working world in the future (NET Responsible)



Some regions put as much responsibility on the **individual** as on the **employer**:

-  LatAm (87% vs. 87%)
-  Australia (84% vs. 85%)
-  USA (81% vs. 83%)
-  Nordics (75% vs. 77%)
-  Italy (72% vs. 74%)

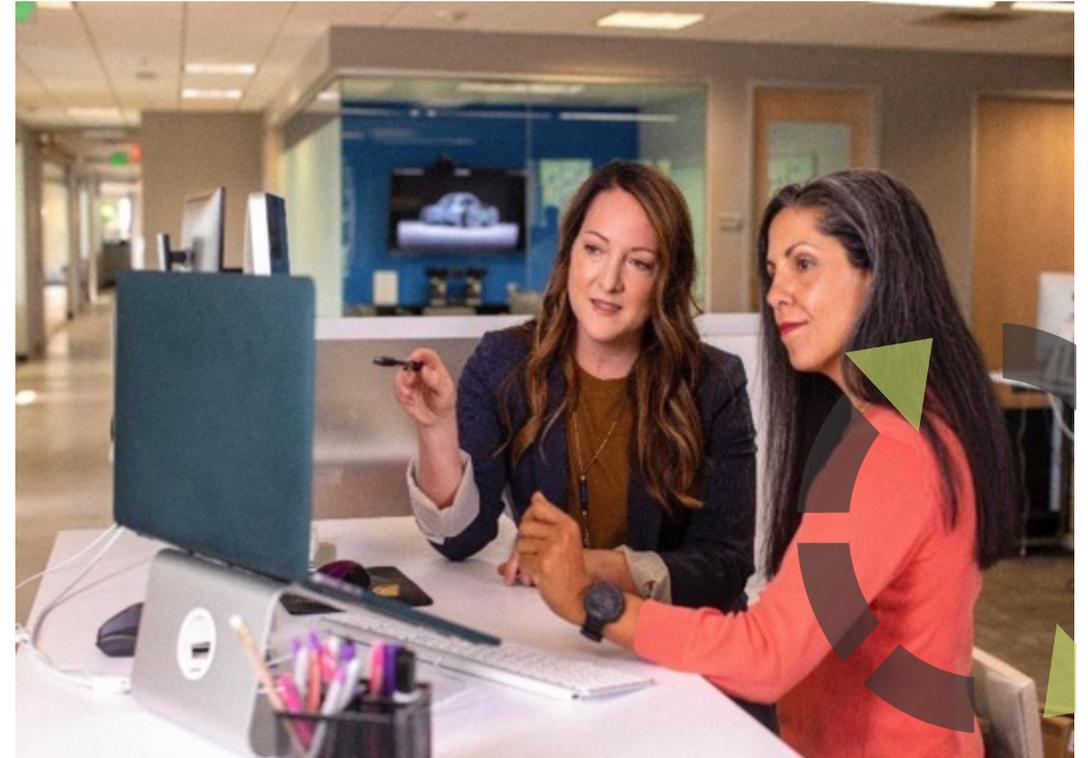
-  China (83%)
-  LatAm (77%)
-  Australia (75%)
-  EEMENA (73%)
-  Spain (69%)

-  China (74%)
-  EMEENA (72%)
-  Australia (70%)
-  LatAm (67%)
-  Spain (57%)

Q22: Thinking about all aspects of working life, how responsible are the following in ensuring a better working world in future after the pandemic? (NET Responsible) Base: All respondents (14,800), Australia (1,000), USA (1,000), Italy (1,000), LatAm (1,000), Nordics (1,000), EEMENA (1,000), China (1,000), Spain (1,000)

The Great Re-Evaluation: Key Takeaways

- **There is no turnover-tsunami on the horizon** but there are warning signs for companies with employees re-assessing their careers. The time is now for organisations to reconnect with their workforce rather than hastily turn to external hiring out of fear of a mass resignation.
- **People need to see and feel opportunity.** During the last 12 months, people have become more autonomous, agile, adaptable and proactive taking it upon themselves to get new skills. They are ready for change, and they are looking for more agency, career development, mobility opportunities or upskilling and reskilling into the next chapters.
- **Workers have a wealth of new skills,** and they are ready to action them. **Companies must use the momentum to re-assess their talent and put those new skills to use.** Not only will it future-proof the organisation but it can also help people re-discover themselves and reconnect with their purpose.
- With only 37% of non-managers believing their company is effectively investing in developing their skills, Assessing and upgrading employees' tech skills can open new career paths for them, as well as provide them with a renewed sense of purpose and connection to the company.
- In addition to IT and digital infrastructures, security, agency, culture, wellbeing and development are the most important to workers going forward. Companies need to prioritize them to keep workers engaged. **Nurturing stronger relationships and instilling a stronger sense of culture is key** - one that encourages healthy working styles, engagement with company goals and psychological freedom.
- Workers continue to trust companies the most to deliver a better working world. They believe individuals and governments will also play a role. 79% of workers believe Governments should do more to encourage adoption of good flexible working conditions.



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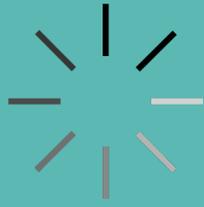
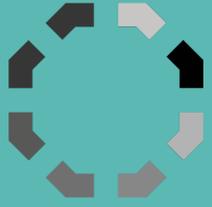
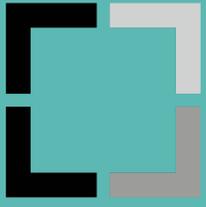
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Spotlight On: Gender



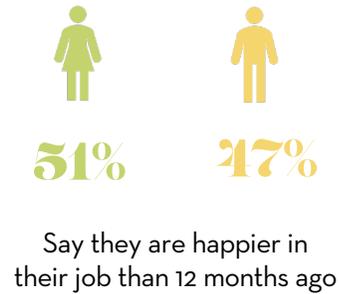
The experience of men and women is similar in many aspects although women have struggled more with mental and physical wellbeing



Gender Comparison

Overall

Men and women feel similar about work/life balance and general happiness in their jobs with women being slightly happier following the changes in the last 12 months



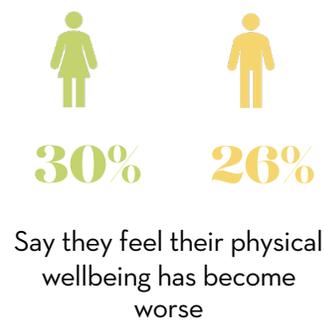
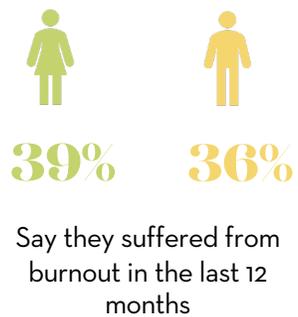
Culture & engagement

More than half have confidence in senior leadership and well over half say they have a strong relationship with their manager. More female managers found managing their teams easy than male managers



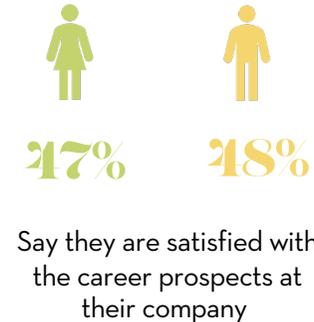
Wellbeing

Women are slightly more likely to have felt the mental and physical pressures of the pandemic with almost 4 in 10 suffering from burnout



Job security & development

Half of men and women are satisfied with their career prospects but still 3 in 10 are considering career changes



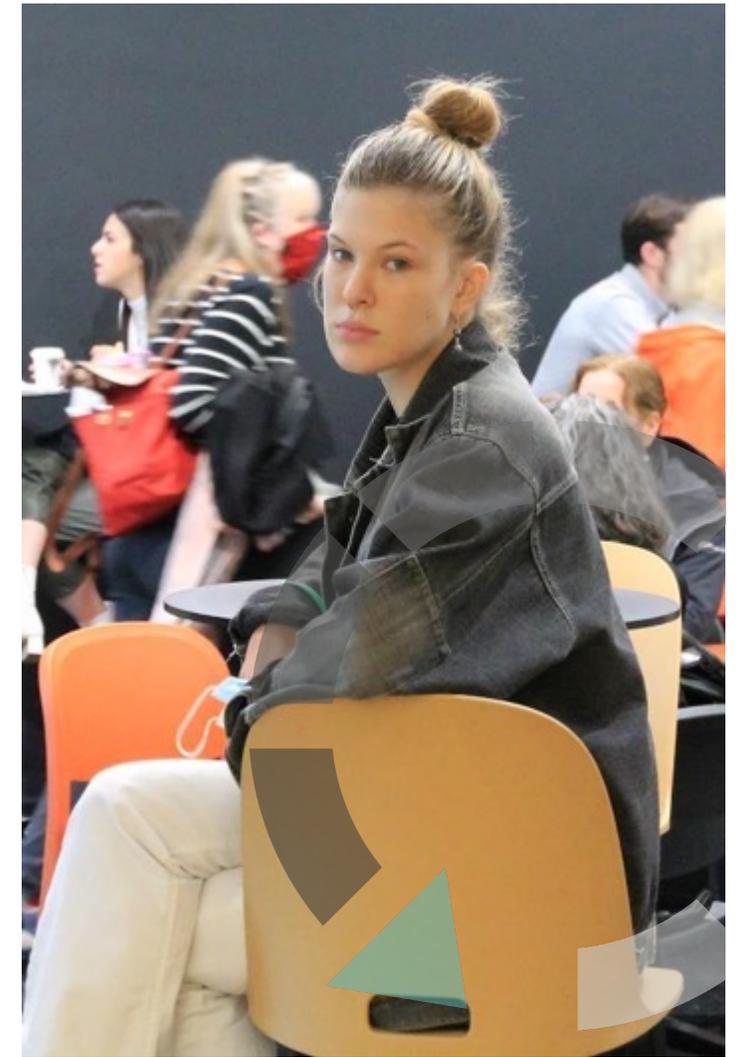
Women have more anxiety about returning to the office than men



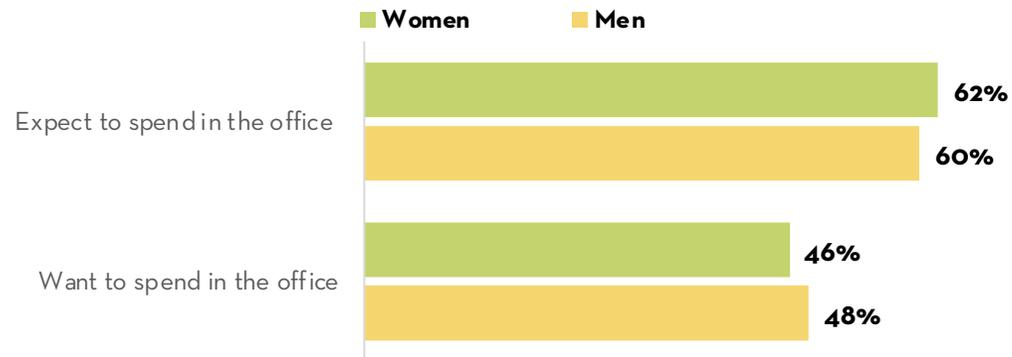
Say they have anxiety about returning to the office



Say it is important that their manager is sensitive about anxieties they have relating to returning to the office



% Of time men / women want to spend in the office after the pandemic vs. time they expect to spend in the office

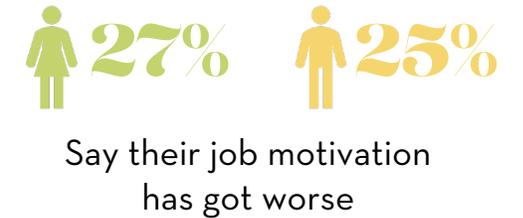
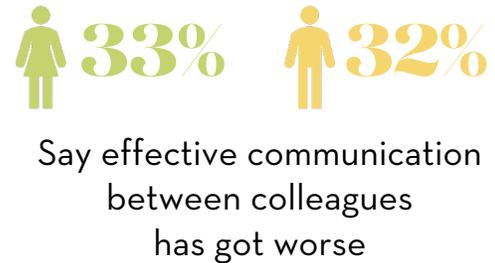


Q30: Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree)

Q13: Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Q16: After the pandemic, what proportion of your time do you expect to spend working in the following locations? Q17: If you could choose for yourself, what proportion of your time would you want to spend working in the following locations in an average week after the pandemic? Base: Women (7,324), Men (7,442)

Men and women have had similar experiences in terms of motivation, workload and caring for others

Communication, workload and motivation have suffered the most over the last 12 months with women feeling fractionally stronger than men



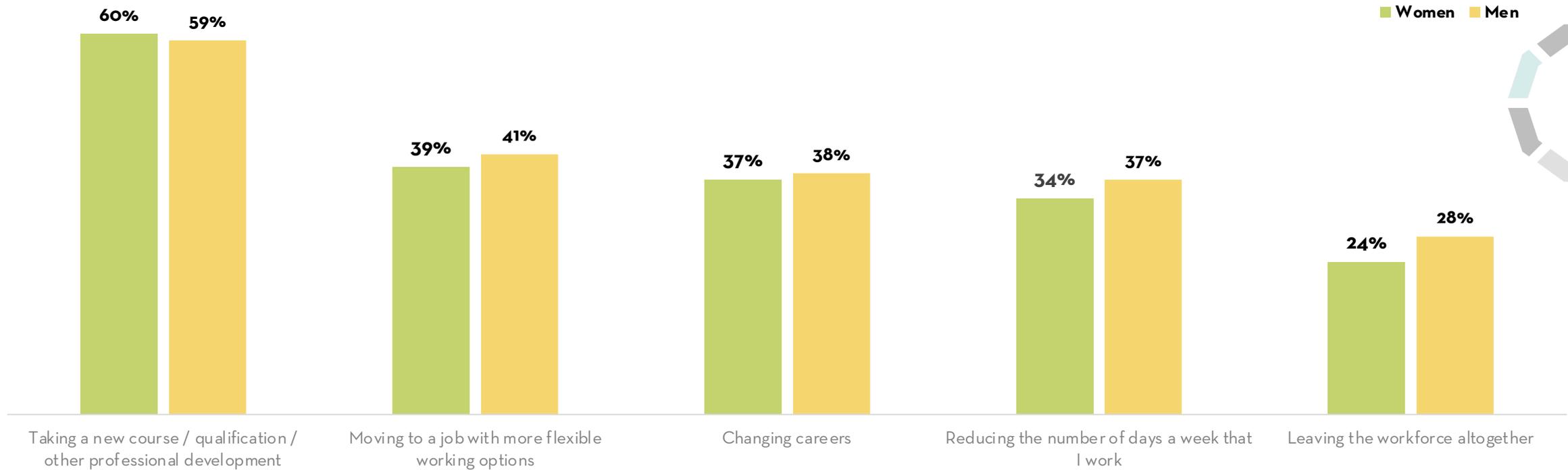
Meanwhile, sense of trust, relationships with managers and ability to care for others have suffered the least, with women and men sharing similar views



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Worse) Base: Women (7,324), Men (7,442)

Men and women are equally re-assessing options in their working lives

% Who say they have already done / doing / considering the following in response to the changes over past 12 months among women and men (NET Already done / doing / considering)



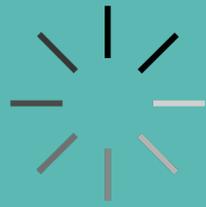
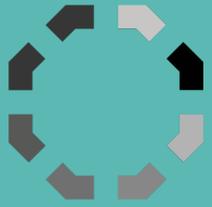
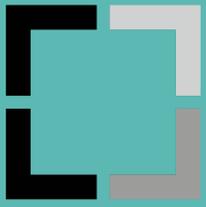
Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: Women (7,324), Men (7,442)

Women show slightly higher strength of feeling on important facets of work but their priorities are similar to men

% Who believe the following skills and behaviours will be important in the role of managers after the pandemic (NET Important)
[Top 8]



Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: Women (7,324), Men (7,442)



Spotlight On: Caring For Others



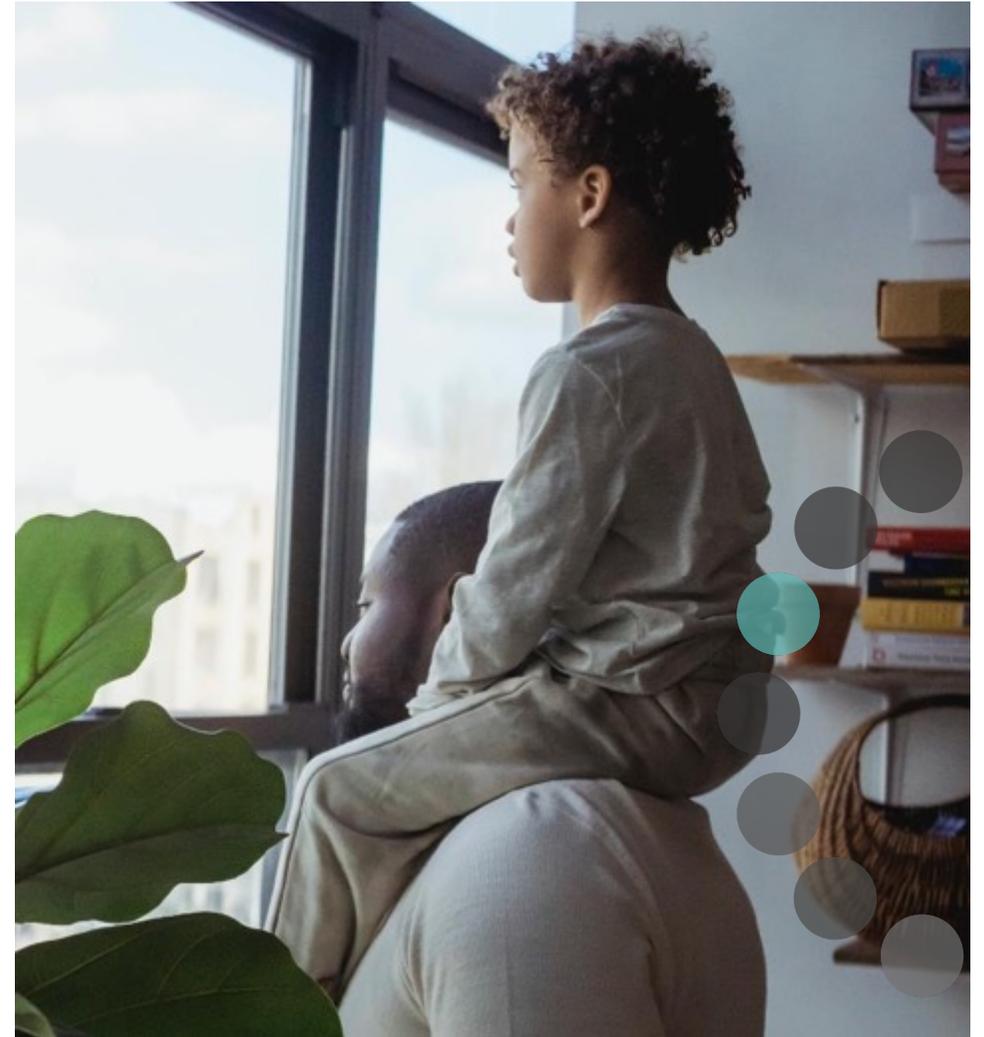
Providing flexibility for child / caring needs has been a challenge



of **managers** have NOT found it easy to support needs related to childcare



of **parents** say managers have not met expectations on flexing around commitments for caring for others



Q12: Thinking this time about how you have found the experience of managing other people during the last 12 months, how easy or difficult have you found the following? (NET Not Easy) Base: All managers (8,405).

Q8: Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? (NET Have not met my expectations) Base: Have children at home (8,148)

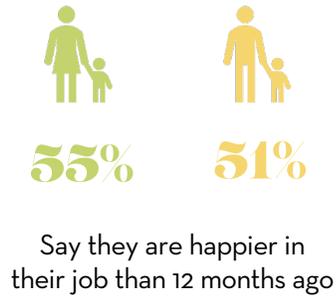
Generally, mothers have been happier with their job despite having suffered slightly more burnout and slightly worsened mental wellbeing



Mothers vs. Fathers

Overall

Mothers are slightly happier in their job in the last 12 months even though fathers have noted more of a change in work / life balance



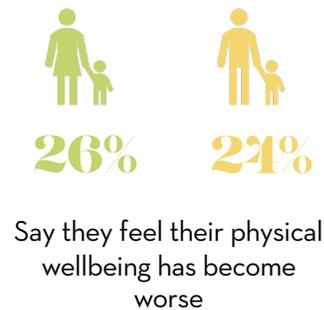
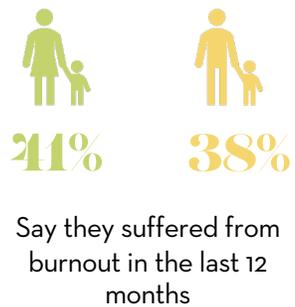
Culture & engagement

Mothers have generally found the management process easier than fathers, while managees who are mothers are more likely to have a strong relationship with their boss



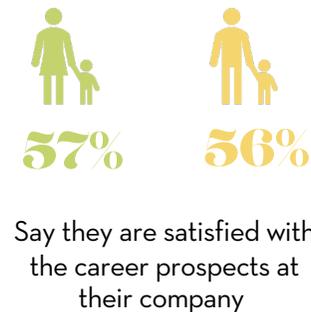
Wellbeing

Mothers have suffered slightly regarding mental and physical wellbeing, possibly a result of burnout from which they have also experienced more than fathers



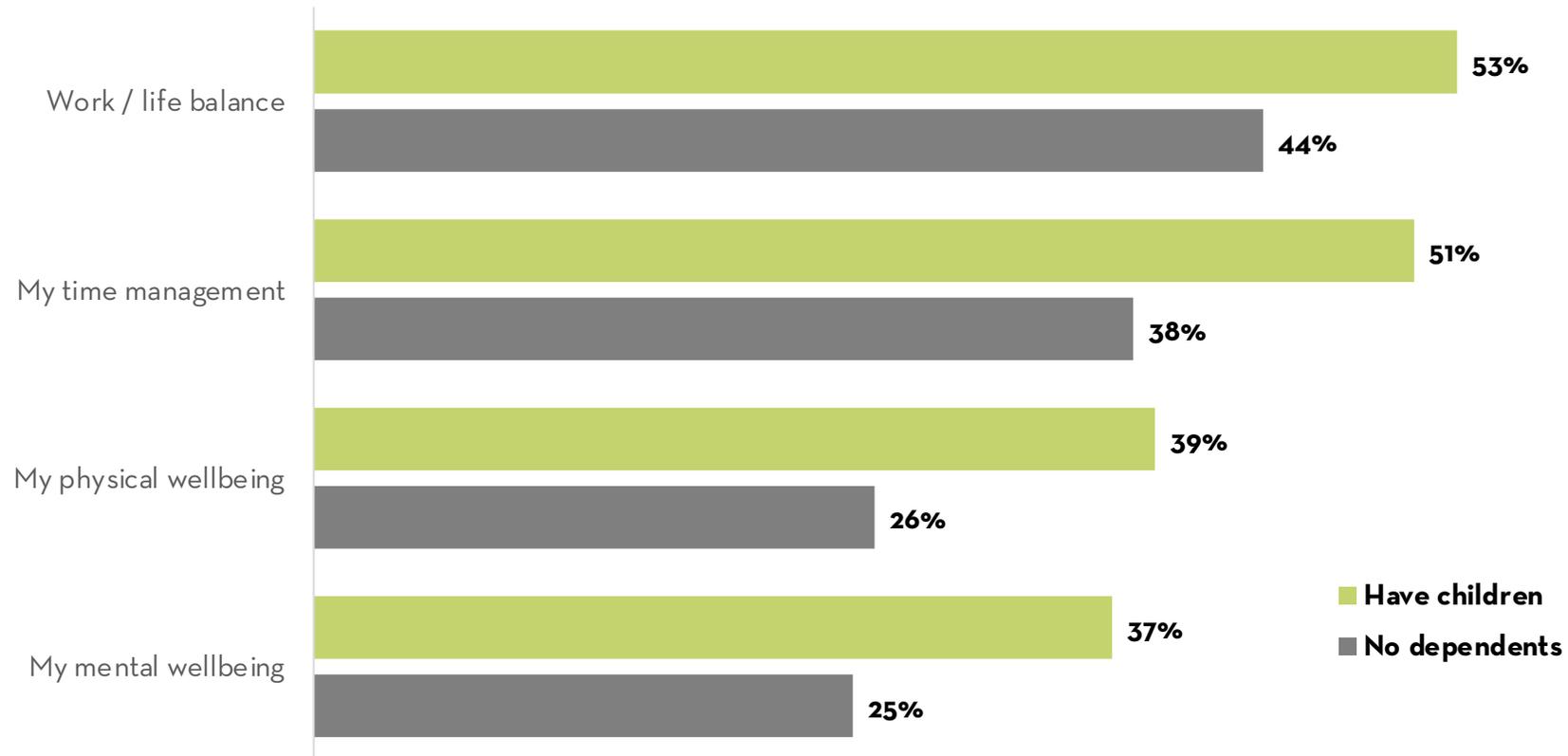
Job security & development

Over half of parents are satisfied with their career prospects but still 3 in 10 are considering career changes



Those with children are more likely to feel that aspects of their working life have improved

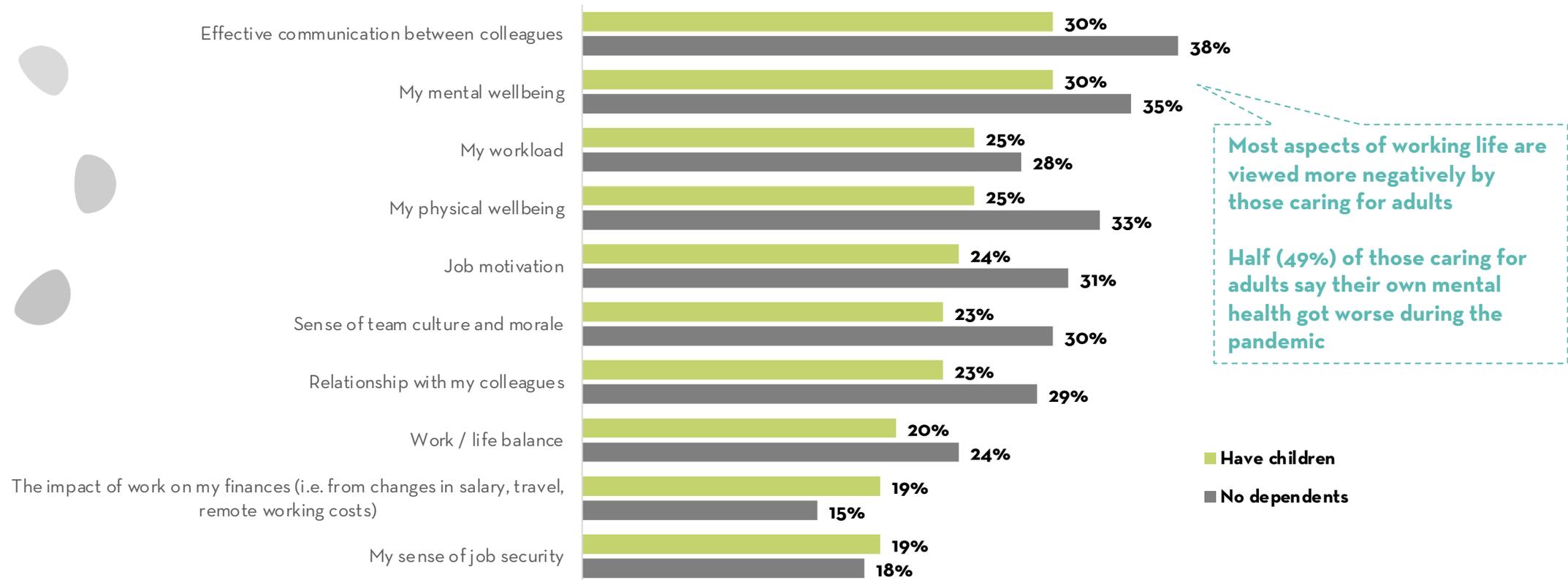
% Who say that aspects of their working life have got better **during** the last 12 months (NET Better)
[Ranked by global score]



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better) Base: Have children at home (8,148), No dependents (3,434)

Those with no dependents are more likely to feel aspects of working life have got worse

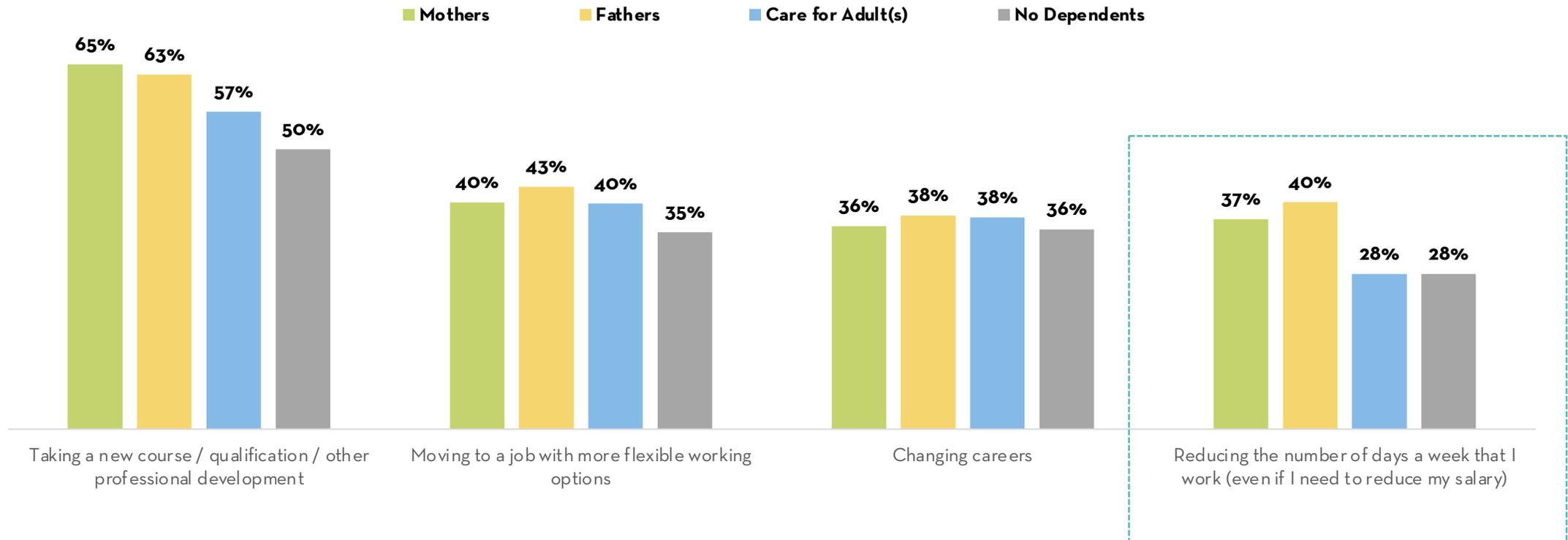
% Who say that aspects of their working life have got worse **during** the last 12 months (NET Worse)



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Worse) Base: Have children at home (8,148), No dependents (3,434)

Parents are much more likely to have made a reduction in the number of days per week they work or are considering doing so

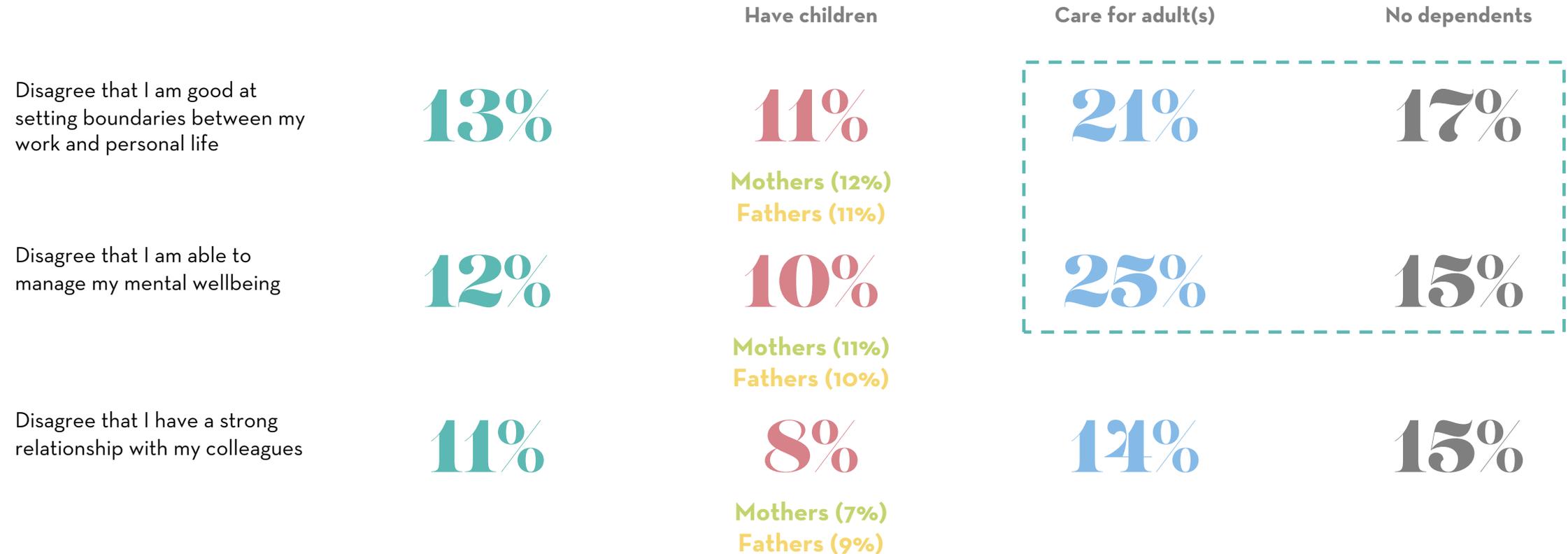
% Who have done / are doing or are considering doing the following in response to working life changes (NET Already done / doing / considering)



Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: Mothers with children at home (3,829), Fathers with children at home (4,299), Have an adult reliant on care (159), No dependents (3,434)

Those that are carers for adults and those with no dependents are more likely to have struggled with boundary setting and their mental health

% Who disagree with the following (NET Disagree)



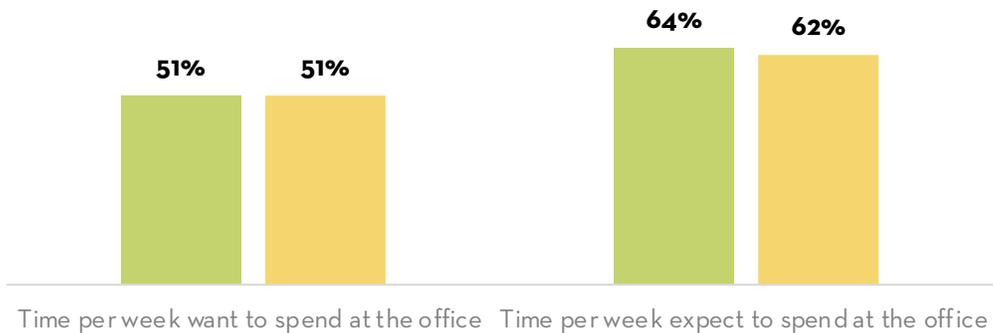
Q3. Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Disagree) Base: All respondents (14,800), Have children at home (8,148), Mothers with children at home (3,829), Fathers with children at home (4,299), Have an adult reliant on care (159), No dependents (3,434)

The majority feel they will be expected to spend more than half of their time at the office, but people with no caring responsibility want less hours at the office

% Who want to spend vs. expect to spend their working week in the following locations **after** the pandemic (NET From the office)



■ Mothers ■ Fathers



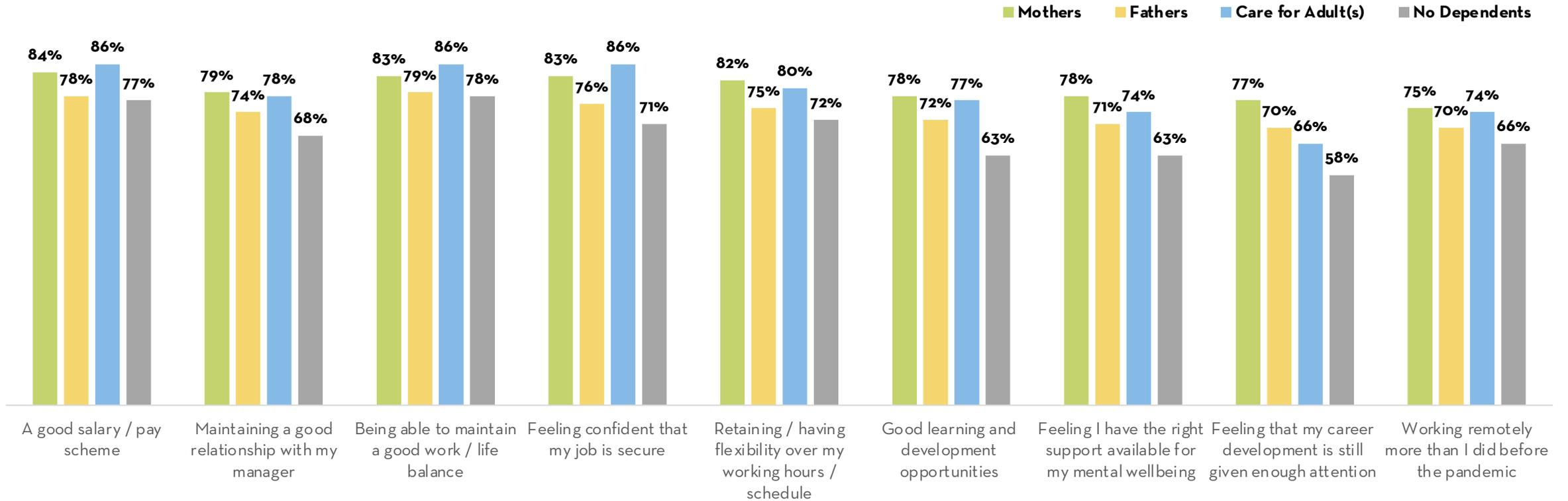
	Have children	Care for adult(s)	No dependents
Want to spend in the office	51%	44%	42%
Expect to spend in the office	63%	64%	58%

Q16. After the pandemic, what proportion of your time do you expect to spend working in the following locations?

Q17. If you could choose for yourself, what proportion of your time would you want to spend working in the following locations in an average week after the pandemic? (NET From the office) Base: All respondents (14,800), Have children at home (8,148), Fathers with children at home (4,299), Mothers with children at home (3,829), Have an adult reliant on care (159), No dependents (3,434)

Mothers and fathers, and those with caring responsibilities, place greater importance on flexibility, managerial relationship and learning development

% Who say the following will be important to their working life after the pandemic (NET Important)



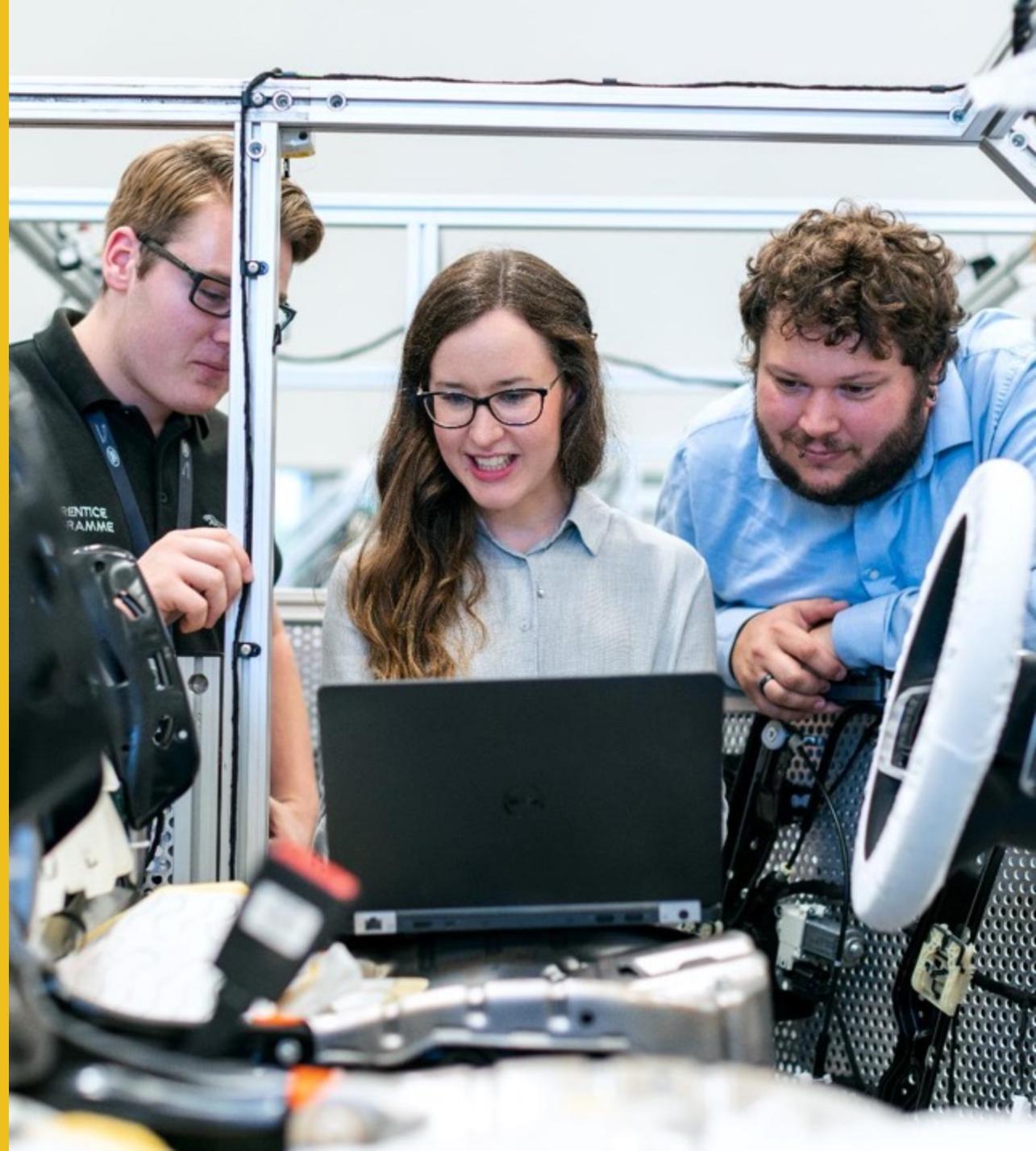
Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: Fathers with children at home (4,299), Mothers with children at home (3,829), Have no dependents (3,434), Have an adult reliant on care (159)



Spotlight On: Tech Workers

modis

The Adecco Group



Tech workers: Summary

Technology has been the key enabler of the new hybrid and flexible normal. As a consequence, workers' top expectations from companies going forward are: good IT infrastructure and systems, and investment in technology to facilitate better remote work.

As the world becomes more and more remote, digital skills have continued improving for over 6 in 10 workers globally. But cyber attacks are a growing concern for half of employees.

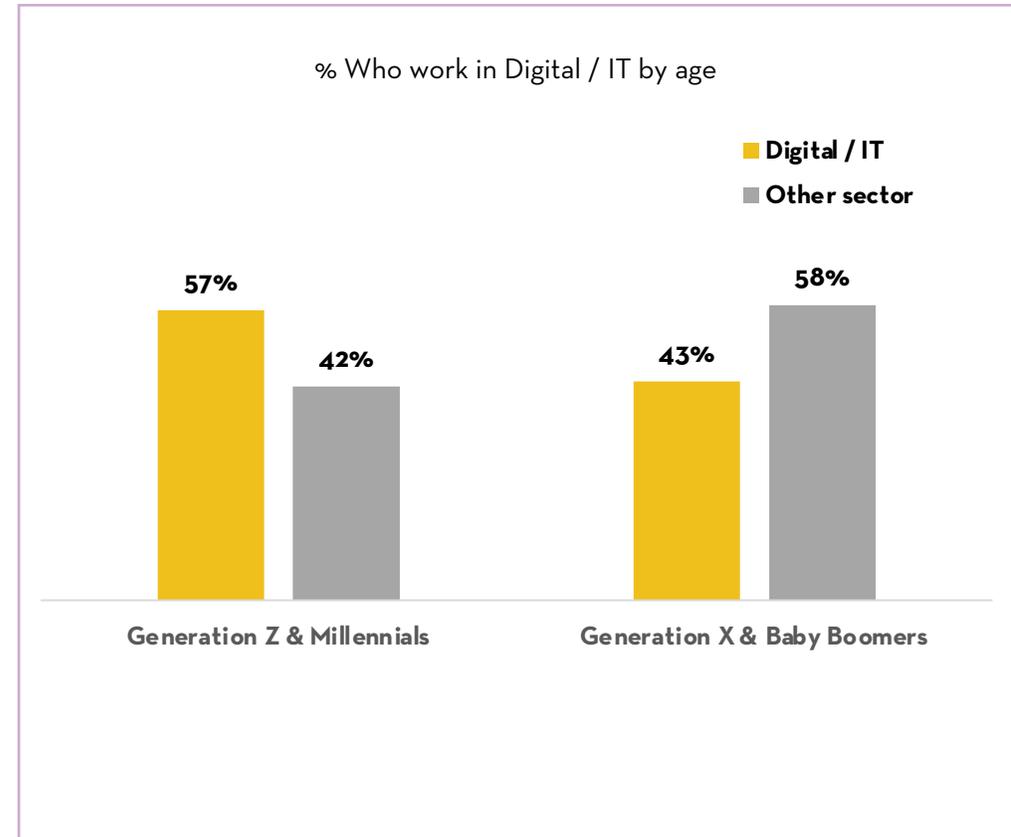
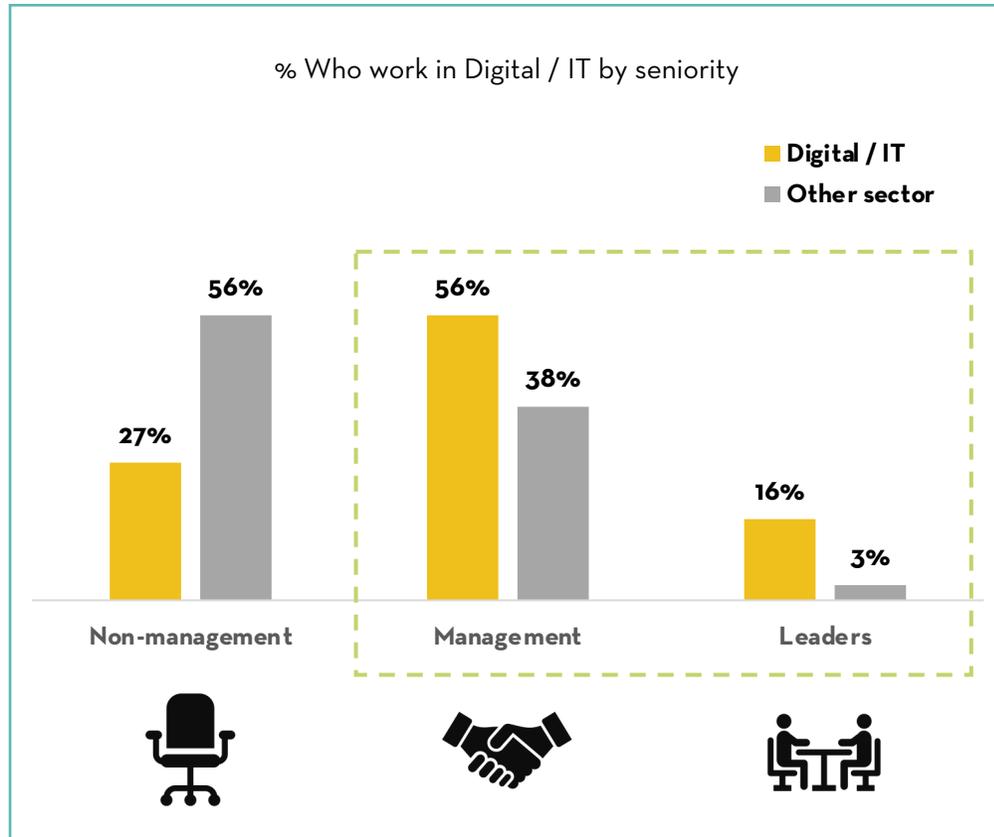
For **employees working in technology, digital or IT** the shift to a remote and hybrid world of work has been more positive in general, compared to those in other industries:

- Workers in technology share the vision of a universally hybrid and flexible normal with workers in other sectors, but they want more office time (51%) than those on other sectors (43%)
- Tech workers have felt significantly more improvement than workers in other sectors in areas like their professional learning and development, their ability to collaborate, the pride in their company, and their understanding of company culture

- Tech workers are more satisfied with their leaders, their career prospects and feel happier in their jobs than workers in other sectors, but when looking at non-managers, only 45% are satisfied with their prospects at their company
- There is still a “great re-evaluation” happening in the tech industry: These workers are more proactive and ready to re-evaluate their careers than workers in other sectors. Almost half are considering or changing to jobs with more flexible options, half are considering reducing the days they work per week and almost 4 in 10 are moving or considering moving to a different region



Digital / IT sector shows an inherently higher proportion of younger staff but also less in non-management roles

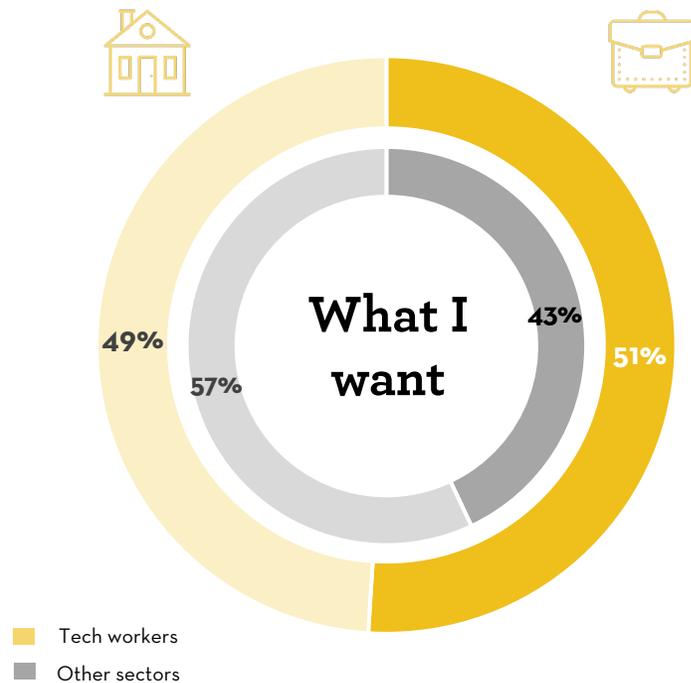


In general, those in more senior roles tend to be more positive about their working life. Younger generations are more positive in some aspects. As a result, the higher proportion of both more senior / qualified but also younger people are likely to contribute to those in Digital / IT being more positive

S3: How old are you? S11: Which of the following best describes your position or level within your company or organisation? All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171), Generation Z & Millennials (7,288), Generation X & Baby boomers (7,512)

Workers in tech want more office time than other workers, but share the vision of a universal hybrid and flexible working model with workers in other sectors

% Who want to spend their working week in the following locations **after** the pandemic



73% of tech workers say that working remotely more than they did before the pandemic will be important for them in the future

80% of tech workers believe Businesses and employees will both benefit from allowing increased flexibility office and remote working

76% tech workers think Employers should revisit the length of the working week and the hours that employees are expected to work

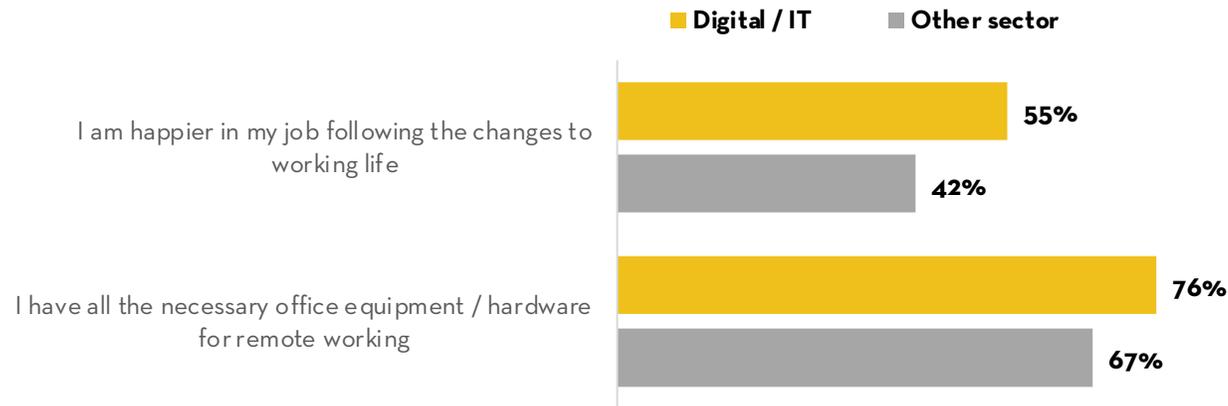
71% believe that set-hours contracts are no longer relevant to modern ways of working

6 in 10 are satisfied with their senior leadership and line managers

Q17: If you could choose for yourself, what proportion of your time would you want to spend working in the following locations in an average week after the pandemic? (NET From the office, NET Remotely) Base: All respondents (14,800) Digital / IT workers (7,440), Other sectors (7,360), Leaders Digital / IT (1,173), Leaders Other sectors (254), Non-management Digital / IT (2,044), Non-management Other sector (4,127) Q20: How important will the following be to your working life after the pandemic? Q8: Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations.

Tech workers are more satisfied with their career prospects and happier in their jobs than workers in other sectors

% Who agree with the following (NET Agree)



Leaders		Non-Management	
Digital	Other Sector	Digital	Other Sector

79% 73% 41% 30%

82% 80% 70% 66%

% Who feel satisfied with the following (NET Satisfied)



67% 50% 45% 43%

NB: Scores for Digital / IT at overall level may be higher due to lower proportions of non-management staff

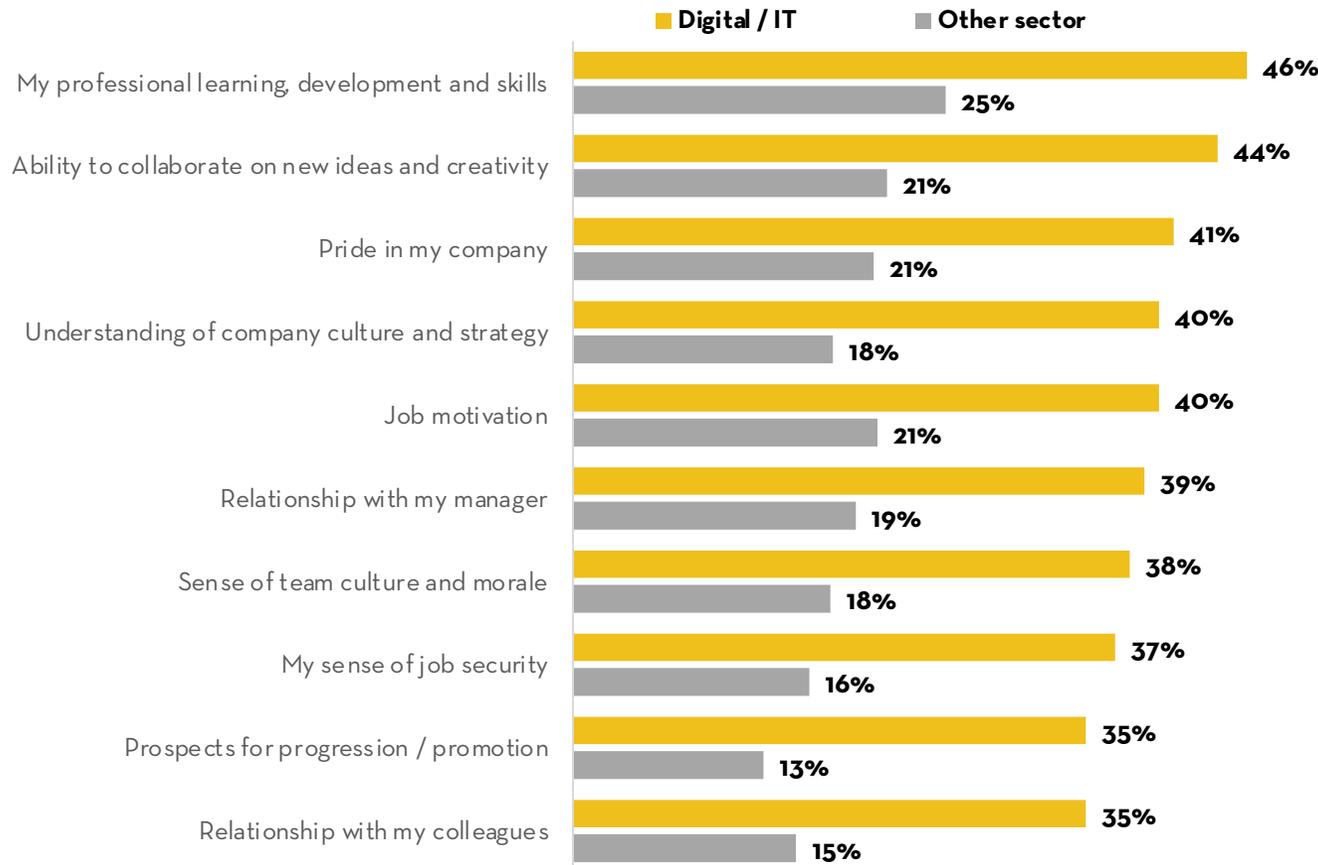
Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree)

Q7: Thinking about how well-equipped you currently are for work, how far would you agree or disagree with the following? (NET Agree) Q31. How satisfied would you say you currently feel about the following? (NET Satisfied)

Base: All respondents (14,800) Digital / IT workers (7,440), Other sectors (7,360), Leaders Digital / IT (1,173), Leaders Other sectors (254), Non-management Digital / IT (2,044), Non-management Other sector (4,127)

Although non-management are often less positive than leaders, people in tech feel consistently more improvement in many aspects of their working life than workers in other sectors.

% Who say that aspects of their working life has improved during the last 12 months (NET Better) [Based on Top 10 for Digital / IT workers]



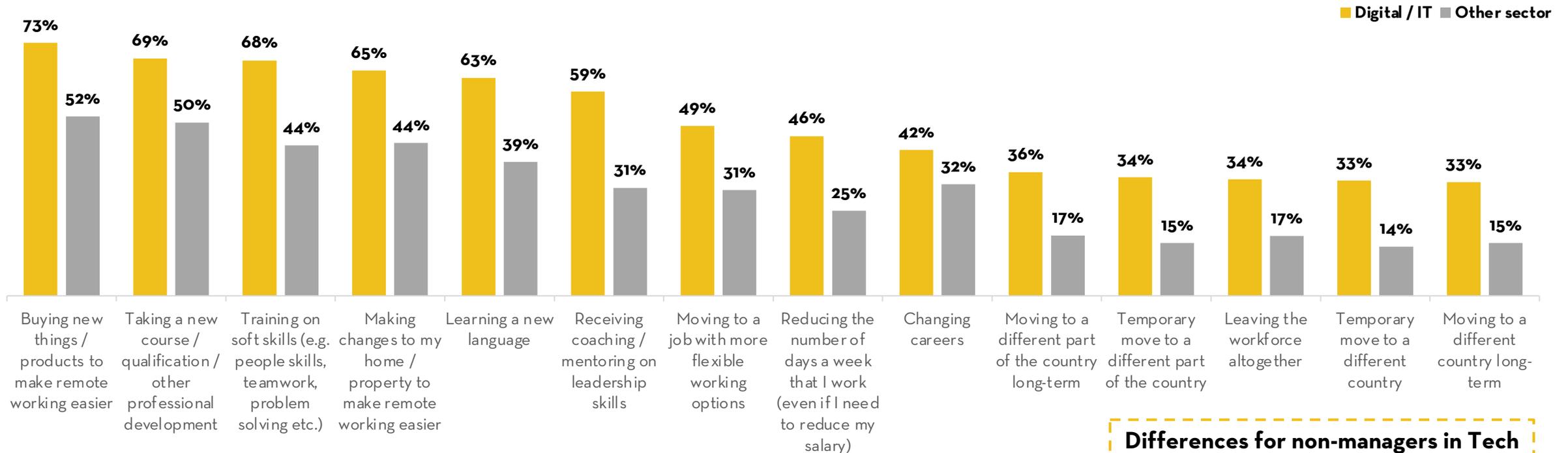
Leaders		Non-Management	
Digital	Other Sector	Digital	Other Sector
65%	54%	51%	46%
61%	54%	49%	46%
64%	46%	44%	40%
64%	46%	35%	26%
59%	45%	39%	31%
62%	46%	34%	22%
61%	37%	34%	25%
63%	44%	29%	17%
58%	44%	30%	26%
60%	43%	27%	17%

NB: Scores for Digital / IT at overall level may be higher due to lower proportions of non-management staff

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better) Base: All respondents (14,800) Digital / IT workers (7,440), Other sectors (7,360), Leaders Digital / IT (1,173), Leaders Other sectors (254), Non-management Digital / IT (2,044), Non-management Other sector (4,127)

Tech workers are far more proactive and ready for change in all elements of their career and development compared to those in other fields

% Who say they have already done / doing / considering the following the changes over past 12 months among Digital / IT vs. Non-digital / IT workers (NET Already done / doing / considering)



Differences for non-managers in Tech and Other sector follows the same pattern

NB: Scores for Digital / IT at overall level may be higher due to lower proportions of non-management staff

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: All respondents (14,800), Digital / IT workers (7,440), Non-digital / IT workers (7,360)

Employees from technology sectors are more likely to have skills, assessments and development plans than in other sectors. But less than half of non managers in the same sector say the company regularly assesses their skills

% of Digital / IT and Other sector workers who agree with the following

63%



Digital / IT

39%



Other sector

My company regularly assesses my skills and helps me devise a development plan

But **Only 4 in 10 non-managers** in tech say their company regularly assesses their skills

7 in 10 tech workers are considering or taking on new courses and qualifications

Q7. Thinking about how well-equipped you currently are for work, how far would you agree or disagree with the following? (NET Agree) Base: Digital / IT workers (7,440), Non-digital / IT workers (7,360)

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: Digital / IT workers (7,440), Non-digital / IT workers (7,360)

The technology sector is making progress on digital transformation but others have a distance to go

% Say their company is ready for greater automation through areas such as digital transformation and AI (NET Agree)

72%



Digital / IT

48%



Other sectors

% Say their company is ready for greater automation through areas such as digital transformation and AI (NET Agree)

71%

Technology /
Telecoms

70%

Offline Retail

69%

Construction

Highest scoring sectors

51%

Charity and
voluntary work

49%

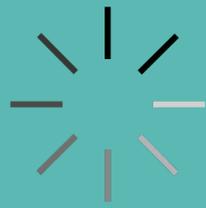
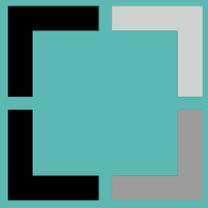
Agriculture

47%

Education

Lowest scoring sectors

Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: Digital / IT workers (7,440), Non-digital / IT workers (7,360), Technology / Telecoms (2,418), Offline retail (354), Construction (548), Charity and voluntary work (131), Agriculture (77), Education (1,236)



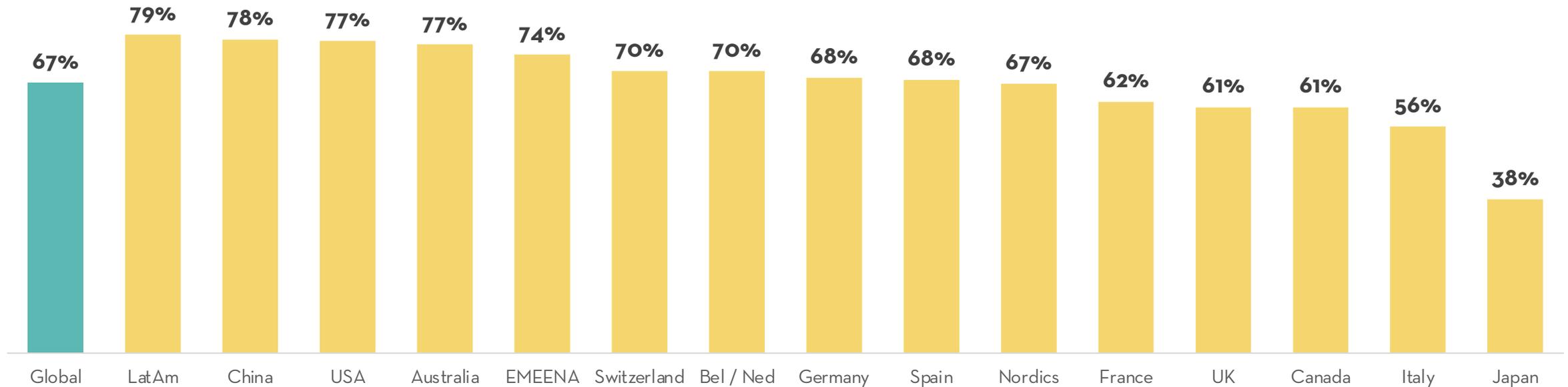
9

Further Insights



The majority of workers across almost all countries have been satisfied with their jobs overall over the last 12 months

% Who say they are satisfied with their jobs overall (NET Satisfied)



Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)

Two thirds are satisfied with their job overall and satisfied with the company they work for

67%

Say they are satisfied with their job overall

Leaders	Managers	Non-managers
83%	72%	60%

Generation Z	Millennials	Generation X	Baby Boomers
71%	70%	65%	61%

Males	Females	Parents	Non-parents
67%	67%	72%	60%

66%

Say they are satisfied with the company they work for

Leaders	Managers	Non-managers
82%	69%	60%

Generation Z	Millennials	Generation X	Baby Boomers
69%	70%	63%	59%

Males	Females	Parents	Non-parents
67%	66%	72%	59%

Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171), Women (7,324), Men (7,442), Have children at home (8,148), No children (5,595), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353).

Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following (NET Agree)

	Global	Australia	France	Germany	Italy	Japan	Spain	UK	USA	Canada	China	Switzerland	LatAm	Bel / Ned	Nordics	EMEENA
I'd like to change jobs but there is too much uncertainty to risk making a change for now	37%	51%	35%	24%	37%	40%	35%	36%	35%	35%	40%	35%	38%	24%	32%	53%
I am happier in my job following the changes to working life in the last 12 months	49%	70%	39%	42%	44%	20%	50%	52%	58%	46%	67%	48%	57%	39%	47%	56%
I can't wait to start seeing more of my colleagues in person again	57%	66%	55%	53%	50%	40%	58%	48%	58%	53%	66%	58%	62%	59%	65%	68%
Cyber attacks at work such as phishing are a growing threat	53%	67%	63%	37%	44%	31%	61%	47%	58%	48%	60%	55%	54%	52%	52%	65%
Work has had a negative impact on my personal life	29%	47%	27%	23%	27%	24%	25%	28%	23%	24%	33%	31%	23%	27%	26%	44%
I have a space and set-up at home that allows me to work well remotely	71%	81%	64%	71%	60%	54%	71%	71%	84%	71%	72%	79%	78%	64%	72%	76%
I am able to work remotely without too many interruptions or other difficulties	70%	73%	68%	70%	62%	49%	71%	74%	78%	70%	69%	75%	70%	71%	76%	72%
I am concerned that remote working may be used as a reason to reduce my pay	34%	53%	20%	20%	41%	32%	43%	28%	30%	27%	46%	24%	52%	19%	19%	52%
I am concerned that my company may relocate to somewhere less suitable for me	29%	50%	21%	23%	35%	20%	36%	23%	24%	17%	39%	26%	35%	16%	21%	43%
I am concerned about future job losses / temporary non-working schemes (e.g. furlough)	39%	56%	36%	23%	50%	34%	41%	35%	38%	34%	40%	37%	50%	25%	29%	58%
I am concerned about how to develop the right skills to remain relevant / attractive in the new world of work	42%	64%	37%	26%	37%	28%	42%	38%	41%	37%	74%	35%	51%	29%	35%	57%
Working through difficult tasks / problems that require teamwork is very difficult when working remotely	48%	58%	47%	40%	46%	40%	45%	45%	46%	47%	50%	49%	50%	47%	47%	59%
I don't need to earn as much as I used to due to the money I can save from working remotely	25%	46%	16%	20%	27%	10%	22%	26%	26%	18%	41%	22%	25%	15%	20%	42%
Working remotely makes me feel less comfortable about taking time off sick	40%	50%	37%	35%	36%	27%	37%	37%	39%	41%	40%	40%	43%	33%	40%	61%
I feel / have felt a lot of anxiety about returning to the office	42%	53%	38%	31%	41%	37%	42%	52%	49%	51%	37%	35%	46%	31%	38%	50%
I feel like I've suffered from working too hard / burnout during the last 12 months	38%	53%	34%	27%	49%	20%	39%	37%	38%	40%	41%	34%	40%	30%	34%	50%

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800) [Detailed country bases in appendix]

Australian, American and Chinese workers are generally more satisfied with all aspects of working life than workers in other countries

	Global	Australia	France	Germany	Italy	Japan	Spain	UK	USA	Canada	China	Switzerland	LatAm	Bel / Ned	Nordics	EMEENA
Your job overall	67%	77%	62%	68%	56%	38%	68%	61%	77%	61%	78%	70%	79%	70%	67%	74%
The company you work for	66%	78%	60%	65%	56%	41%	65%	61%	77%	62%	76%	69%	78%	68%	66%	72%
Your sense of job security	65%	75%	62%	68%	59%	49%	64%	58%	72%	58%	75%	66%	71%	70%	68%	67%
Working schedule (i.e. times of day / week you spend working)	67%	79%	61%	63%	55%	51%	63%	69%	79%	67%	73%	67%	69%	72%	69%	68%
Amount of hours you work	62%	78%	56%	56%	51%	45%	55%	63%	72%	59%	69%	60%	65%	68%	63%	70%
The career prospects at your company	48%	70%	35%	41%	35%	22%	42%	42%	65%	40%	74%	43%	60%	47%	44%	59%
The senior leadership of your company	53%	74%	40%	48%	39%	27%	47%	51%	71%	48%	73%	51%	63%	54%	51%	64%
Your immediate line manager(s)	63%	77%	53%	62%	49%	40%	61%	63%	78%	59%	71%	64%	69%	65%	63%	66%

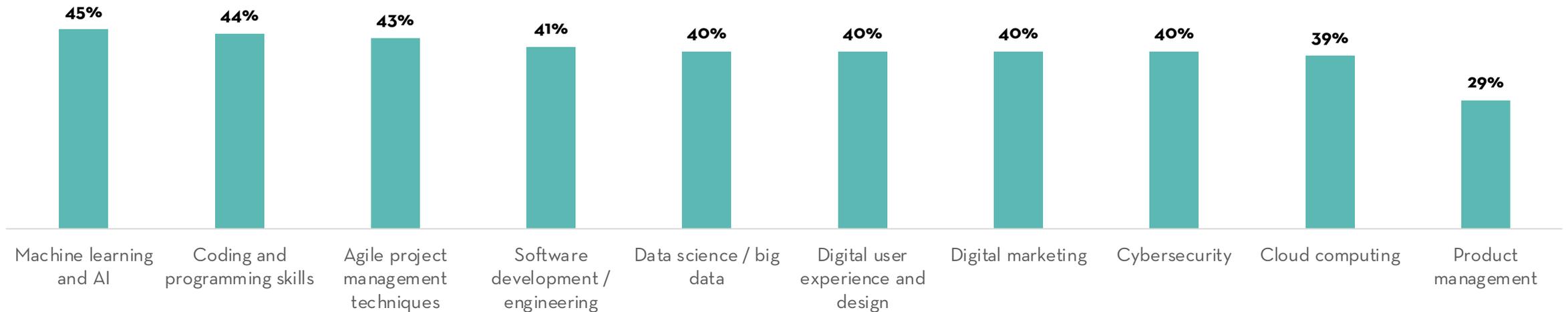
Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800) [Detailed country bases in appendix]

Skills gap: Around 4 in 10 see a lack in tech skills amongst the workforce

4 in 10 (40%)

Believe workers lack technical digital skills
(average % NOT skilled for all digital skills)

% Who believe workers are NOT skilled in the following tech skill types
(NET Not skilled)



Q35. Thinking about the qualities people may need for long-term success at work, how skilled do you think people generally are in the following areas? (NET Not skilled) Base: All respondents (14,800)

Skills Gap: 1 in 4 feel people are not skilled on the personal soft skills needed for long-term success at work with many seeking to retrain

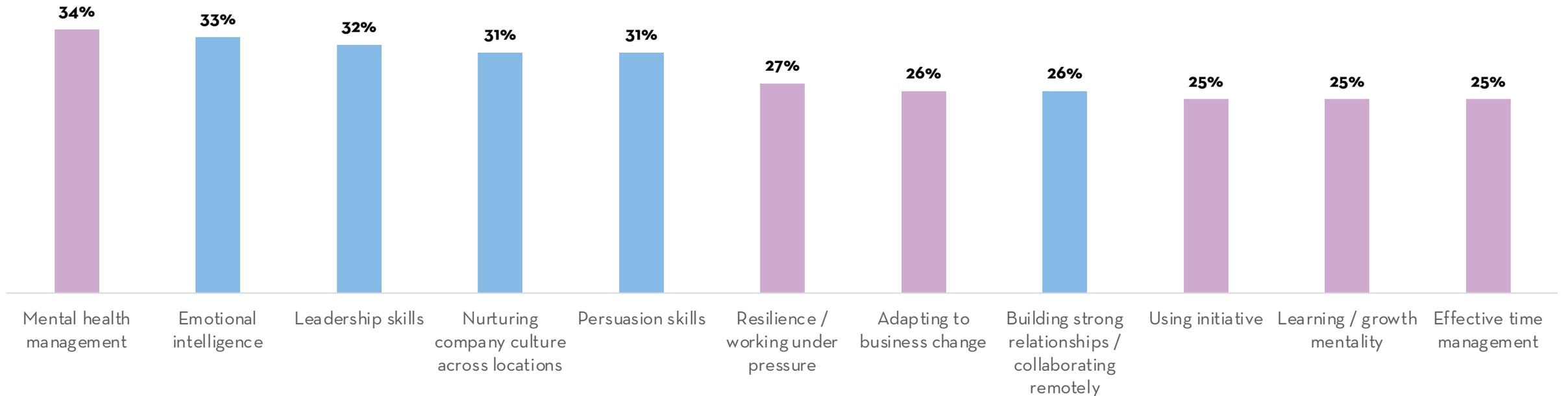
Over • (27%)

Believe workers lack personal soft skills
(average % NOT skilled for all personal soft skills)

Nearly a third (31%)

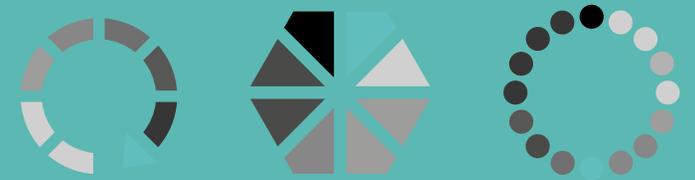
Believe workers lack interpersonal soft skills
(average % NOT skilled for all interpersonal soft skills)

% Who believe workers are NOT skilled in the following areas (Soft skill types) (NET Not skilled)



Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering)

Q35. Thinking about the qualities people may need for long-term success at work, how skilled do you think people generally are in the following areas? (NET Not Skilled) Base: All respondents (14,800)



56% have done / are considering training on soft skills in response to the changes in working life over the last 12 months



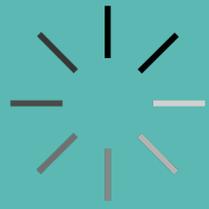
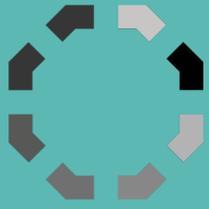
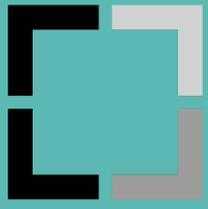
The biggest disparity in skills gaps are within digital skills, particularly for those working in home entertainment and charity sectors

Personal soft skills gap by sector (NET Not skilled) [Top and bottom 5]	
Media / Journalism	37%
Automotive and mobility	34%
Charity and voluntary work	32%
Travel and tourism	31%
Science, pharmaceuticals and biotechnology	29%
<hr/>	
Technology / telecoms	24%
Healthcare	24%
Creative arts and design	24%
Offline retail	23%
Construction	22%

Interpersonal soft skills gap by sector (NET Not skilled) [Top and bottom 5]	
Media / Journalism	40%
Automotive and mobility	38%
Travel and tourism	35%
Science, pharmaceuticals and biotechnology	35%
Charity and voluntary work	33%
<hr/>	
Business, consulting and management	27%
Healthcare	27%
Creative arts and design	26%
Construction	25%
Offline retail	23%

Digital skills gap by sector (NET Not skilled) [Top and bottom 5]	
Charity and voluntary work	54%
Education	48%
Travel and tourism	48%
Automotive and mobility	46%
Media / Journalism	45%
<hr/>	
Creative arts and design	34%
Online retail	33%
Construction	31%
Offline retail	31%
Technology / telecoms	31%

Q35. Thinking about the qualities people may need for long-term success at work, how skilled do you think people generally are in the following areas? (NET Not skilled) Base: All respondents (14,800) [Detailed sector bases in appendix]



10

Country
Spotlights



Australia: Happier in their job than all other countries but will still consider if they can find something better elsewhere



Overall

Australians are among the top countries regarding work / life balance and job happiness



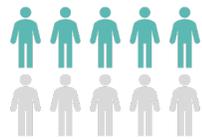
Culture & engagement

Confidence in senior leadership is strong in Australia, as non-managers are a lot closer to leadership in their opinions than other countries



Wellbeing

Though Australians are more likely to say they have experienced burnout, the impact on their mental and physical wellbeing is lower than most countries



53% Suffered from burnout in the last 12 months (vs. 38% globally)



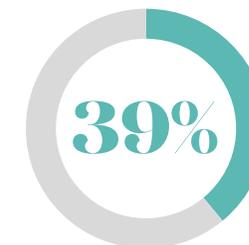
14% Feel their mental wellbeing has become worse (vs. 32% globally)



14% Feel their physical wellbeing has become worse (vs. 28% globally)

Job security & development

Although the majority are satisfied with career prospects at their company, more than a third are considering a career change



Top Skills Gaps:
(Ranked by NET Unskilled)

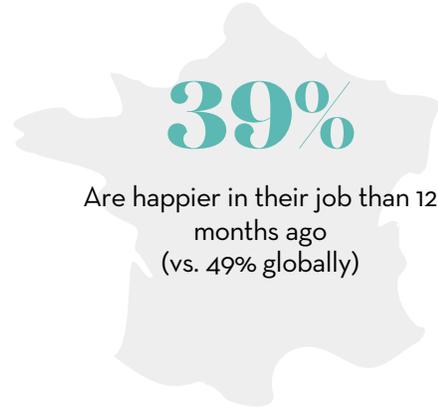
1. Machine Learning / AI (27%)
2. Coding & Programming (25%)
3. Agile project management techniques (25%)

France: Low levels of work happiness, work/life balance and satisfaction with leadership



Overall

French office workers are among the least happy in their jobs and also more likely than average to feel work / life balance has got worse.



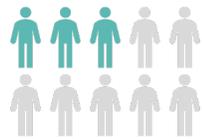
Culture & engagement

Confidence in senior leadership is low and managers have also not found the overall experience of managing easy



Wellbeing

Physical and mental wellbeing have suffered in France and over a third say they are suffering from working too hard / burnout



34% suffered from burnout in the last 12 months (vs. 38% globally)



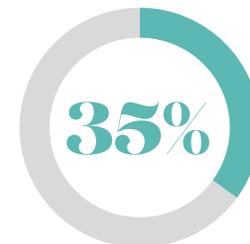
37% feel their mental wellbeing has become worse (vs. 32% globally)



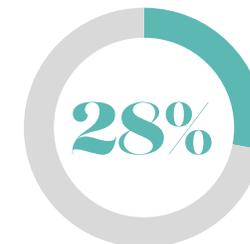
35% feel their physical wellbeing has become worse (vs. 28% globally)

Job security & development

Only a third are satisfied with their career prospects, over a quarter are considering a career change



Are satisfied with career prospects at their company (vs. 48% globally)



Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)

1. Machine Learning / AI (51%)
2. Cloud computing (48%)
3. Coding & Programming (47%)

Germany: Low levels of happiness and satisfaction with leaders compared to the global average



Overall

German office workers are slightly below average regarding work / life balance while less than half say they are happier now than they were 12 months ago



Culture & engagement

Confidence in senior leadership is below average in Germany with less than a third of non-managers feeling that a good working culture is being encouraged



Wellbeing

Despite reporting worse work / life balance and happiness levels, Germans are less likely to say they have suffered from burnout



Suffered from burnout in the last 12 months (27%) (vs. 38% globally)



Feel their mental wellbeing has become worse (26%) (vs. 32% globally)



Feel their physical wellbeing has become worse (29%) (vs. 28% globally)

Job security & development

As less than half are satisfied with career prospects at their company, over a quarter are considering a career change



Top Skills Gaps:
(Ranked by NET Unskilled)

1. Agile project management techniques (**47%**)
2. Machine Learning / AI (**47%**)
3. Software development / engineering (**45%**)

Italy: Relatively high levels of burnout and below average satisfaction with senior leadership and with career prospects



Overall

Happiness levels in Italy are lower than the global average, with work / life balance also suffering



41%

Say their work / life balance has got better in last 12 months (vs. 50% globally)

Culture & engagement

Below average levels of satisfaction in senior leadership with fewer than 2 in 5 satisfied

39%

Are satisfied with senior leadership (vs. 53% globally)



55%

Of managers found the overall management experience easy (vs. 54% globally)



27%

Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)



Non-managers

32%

Wellbeing

Half of Italians feel they have suffered burnout, perhaps a cause of high levels of worsened mental and physical wellbeing. Italy also showed the largest increase in working long hours (65% working 40+ hrs vs. 47% in 2020) which is likely to contribute to burnout



Suffered from burnout in the last 12 months (49%) (vs. 38% globally)



Feel their mental wellbeing has become worse (41%) (vs. 32% globally)



Feel their physical wellbeing has become worse (39%) (vs. 28% globally)

Job security & development

Few are satisfied with their career prospects leading to people thinking of changing careers



Are satisfied with career prospects at their company (vs. 48% globally)



Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)

1. Machine Learning / AI (42%)
2. Agile project management techniques (41%)
3. Data science / big data (40%)

Japan: Lowest levels of happiness and leadership / career satisfaction



*Note scores for Japan in online surveys in general are consistently lower than many other countries. Even more so in this research given the significantly longer working hours inherent in Japanese culture (e.g. 86% worked 40-plus hours / week in Japan vs. Global average of 63% in the last 12 months), and the personal nature of providing opinions on their career. Working these long hours has increased significantly since 2020 (from 70% to 86%) further contributing to a negative outlook in Japan.

Overall

The Japanese have noticed the worst impact of the last 12 months on happiness levels

20%

Are happier in their job than 12 months ago (vs. 49% globally)

44%

Say their work / life balance has got better in last 12 months (vs. 50% globally)

Culture & engagement

Confidence in senior leadership in Japan is extremely low, especially among non-managers, with expectations not being met regarding working culture

27%

Are satisfied with senior leadership (vs. 53% globally)



23%

Of managers found the overall management experience easy (vs. 54% globally)



13%

Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)



Non-managers

24%

Wellbeing

Despite their apparent negative experience of working life and long hours, Japanese workers seem reluctant to acknowledge specifically suffering from burnout



Suffered from burnout in the last 12 months (20%) (vs. 38% globally)



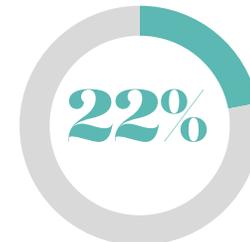
Feel their mental wellbeing has become worse (33%) (vs. 32% globally)



Feel their physical wellbeing has become worse (26%) (vs. 28% globally)

Job security & development

Although less than a quarter are satisfied with their job, the same proportion are considering a change in careers



Are satisfied with career prospects at their company (vs. 48% globally)



Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)

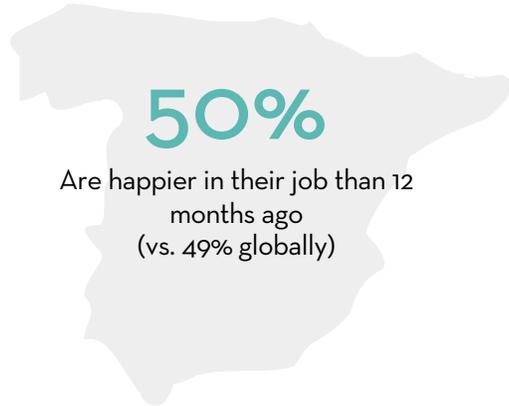
1. Machine Learning / AI (82%)
2. Digital user experience and design (81%)
3. Agile project management techniques (80%)

Spain: below average satisfaction with company leadership and nearly 2 in 5 feel mental health has got worse



Overall

Spaniards are in line with the global average regarding work / life balance and job happiness but still with room for improvement



Culture & engagement

Satisfaction with senior leadership is slightly lower in Spain than the global average



Are satisfied with senior leadership (vs. 53% globally)



Of managers found the overall management experience easy (vs. 54% globally)



Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)



Non-managers



Wellbeing

Spaniards have suffered more regarding physical and mental wellbeing, however, they are in line with the global average regarding burnout



Suffered from burnout in the last 12 months (39%) (vs. 38% globally)



Feel their mental wellbeing has become worse (37%) (vs. 32% globally)



Feel their physical wellbeing has become worse (32%) (vs. 28% globally)

Job security & development

Less than half are satisfied with career prospects at their company while over a quarter are considering a career change



Are satisfied with career prospects at their company (vs. 48% globally)



Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)

1. Coding & Programming (41%)
2. Machine Learning / AI (39%)
3. Data science / big data (37%)



UK: 6 in 10 workers feel work life balance has improved although less than half of managers have found the overall experience easy

Overall

In the UK, 6 in 10 workers have experienced an improvement in work / life balance, while over half are happier than they were 12 months ago but still room for improvement

52%

Are happier in their job than 12 months ago (vs. 49% globally)

59%

Say their work / life balance has got better in last 12 months (vs. 50% globally)

Culture & engagement

Around half Are satisfied with senior leadership but less than half of managers have found things easy

51%

Are satisfied with senior leadership (vs. 53% globally)



47%

Of managers found the overall management experience easy (vs. 54% globally)



41%

Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)



Non-managers

45%

Wellbeing

UK workers are in line with the global average regarding burnout and wellbeing



Suffered from burnout in the last 12 months (37%) (vs. 38% globally)



Feel their mental wellbeing has become worse (35%) (vs. 32% globally)



Feel their physical wellbeing has become worse (26%) (vs. 28% globally)

Job security & development

Only 2 in 5 are satisfied with their career prospects, and a third are considering a change



Are satisfied with career prospects at their company (vs. 48% globally)



Are considering a career change (vs. 30% globally)

Top Skills Gaps: (Ranked by NET Unskilled)

1. Machine Learning / AI (56%)
2. Coding & Programming (55%)
3. Software development / engineering (53%)

USA: Satisfaction with leaders and career prospects stronger than most countries



Overall

Americans feel better than many countries about work / life balance and job happiness but still with room for improvement



Culture & engagement

Confidence in senior leadership and among managers themselves is relatively strong in the USA but improving relationships with staff is still key

71%

Are satisfied with senior leadership (vs. 53% globally)



Non-managers

59%



67%

Of managers found the overall management experience easy (vs. 54% globally)



53%

Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

Wellbeing

Physical wellbeing in the USA has fared better than in many countries although over half feel mental wellbeing has got worse with almost 2 in 5 suffering from working too hard / burnout



Suffered from burnout in the last 12 months (38%) (vs. 38% globally)



Feel their mental wellbeing has become worse (27%) (vs. 32% globally)



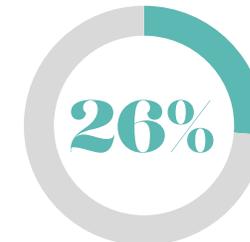
Feel their physical wellbeing has become worse (18%) (vs. 28% globally)

Job security & development

Although two thirds are satisfied with career prospects at their company, over a quarter are considering a career change



Are satisfied with career prospects at their company (vs. 48% globally)



Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)

1. Machine Learning / AI (43%)
2. Coding & Programming (40%)
3. Digital user experience and design (UX) (40%)

Canada: nearly half feeling mental health has worsened and only 2 in 5 satisfied with career prospects



Overall

Canadians are more or less in line with the global average regarding happiness levels but less likely to feel their work / life balance has improved.



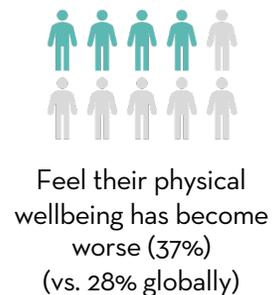
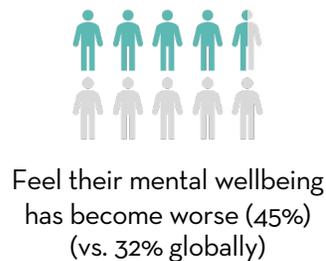
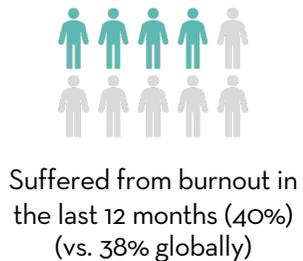
Culture & engagement

Less than half satisfied with senior leadership or feeling that managers met expectation on encouraging good working culture



Wellbeing

Canadians have felt a significant impact on their mental health, with almost half saying mental wellbeing has become worse



Job security & development

A third are considering career changes, perhaps due to low levels of satisfaction with their career prospects



Top Skills Gaps: (Ranked by NET Unskilled)

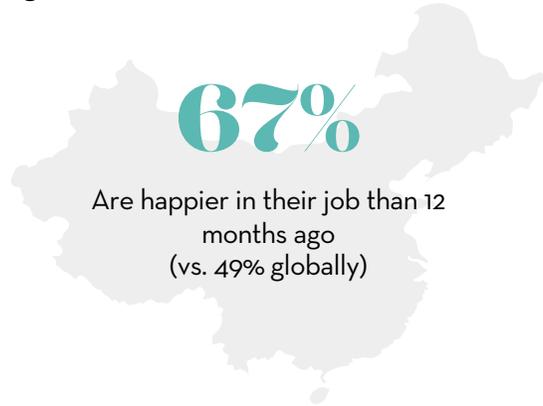
1. Machine Learning / AI (63%)
2. Digital user experience and design (61%)
3. Coding & Programming (59%)

China: Workers take a positive perspective on working life despite 2 in 5 suffering overwork / burnout



Overall

Chinese office workers second only to Australia for feeling happier in their job and having a better work / life balance



Culture & engagement

Confidence in senior leadership, with managers claiming they have found the overall management experience easier than all other countries except Australia



Wellbeing

Although Chinese workers have experienced high levels of burnout, few will acknowledge a worsening of mental or physical wellbeing



Suffered from burnout in the last 12 months (41%) (vs. 38% globally)



Feel their mental wellbeing has become worse (7%) (vs. 32% globally)



Feel their physical wellbeing has become worse (6%) (vs. 28% globally)

Job security & development

Satisfaction with career prospects is high, less than a quarter considering a career change



Top Skills Gaps:
(Ranked by NET Unskilled)

1. Coding & Programming (31%)
2. Software development / engineering (30%)
3. Cloud computing (28%)

Switzerland: Polarised experiences evident with half happier than 12 months ago and 1 in 3 having burnout / wellbeing issues



Overall

Only around half of Swiss office workers feel happier in their job than 12 months ago and that they have a better work / life balance

48%

Are happier in their job than 12 months ago (vs. 49% globally)

51%

Say their work / life balance has got better in last 12 months (vs. 50% globally)

Culture & engagement

Only half are satisfied with senior leadership while managers are less likely to say they found the managing experience easy compared to the global average

51%

Are satisfied with senior leadership (vs. 53% globally)



43%

Of managers found the overall management experience easy (vs. 54% globally)



36%

Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)



Non-managers

45%

Wellbeing

Around a third of Swiss workers have suffered from burnout with similar proportions feeling their mental and physical wellbeing has regressed



Suffered from burnout in the last 12 months (34%) (vs. 38% globally)



Feel their mental wellbeing has become worse (30%) (vs. 32% globally)



Feel their physical wellbeing has become worse (32%) (vs. 28% globally)

Job security & development

Less than half are satisfied with their career prospects with 1 in 3 considering a career change



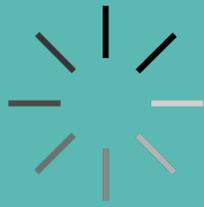
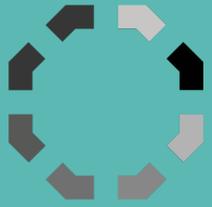
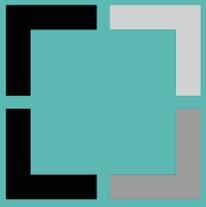
Are satisfied with career prospects at their company (vs. 48% globally)



Are considering a career change (vs. 30% globally)

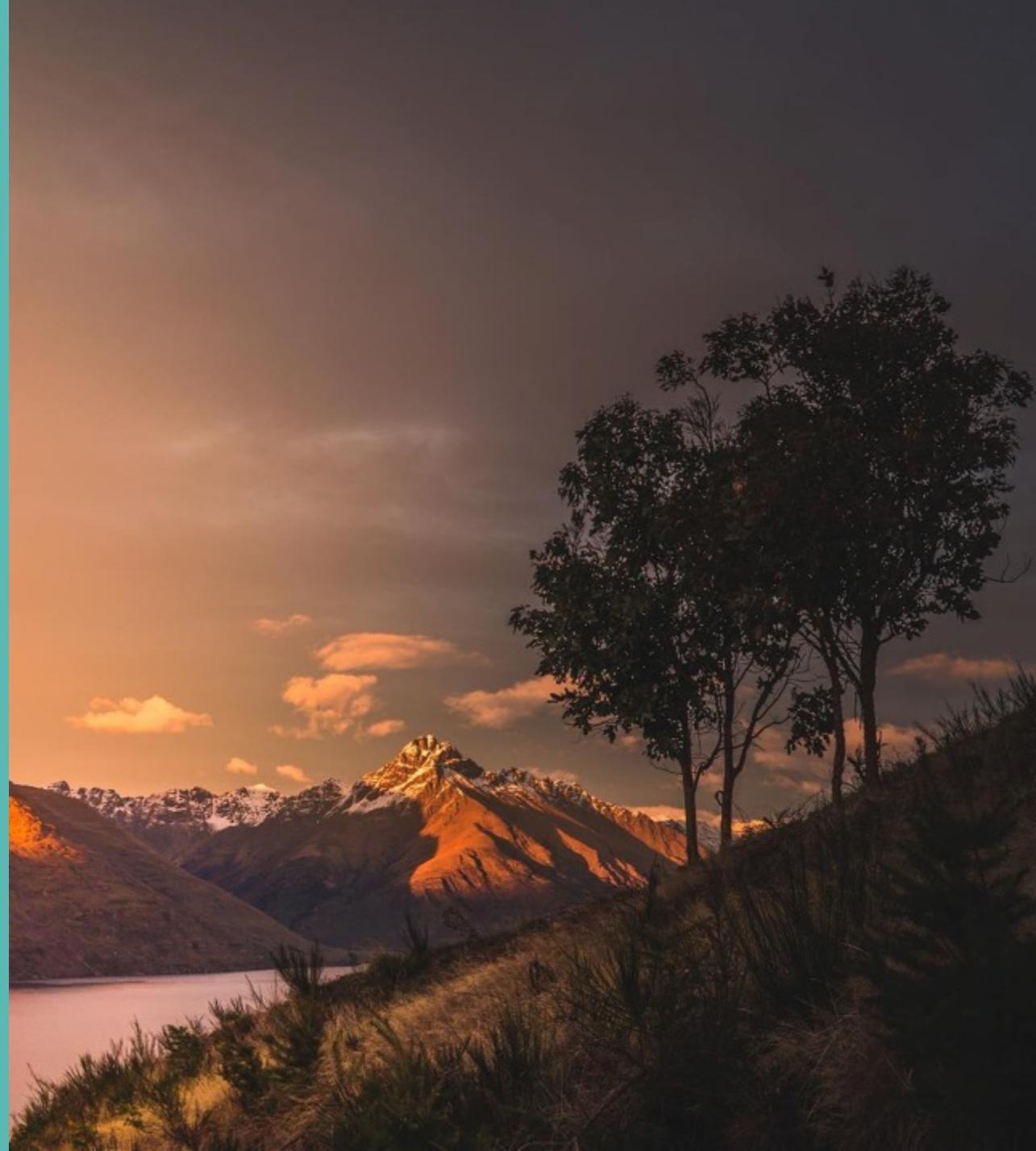
Top Skills Gaps:
(Ranked by NET Unskilled)

1. Machine Learning / AI (46%)
2. Coding & Programming (44%)
3. Software development / engineering (42%)



11

Regional Spotlights



Belgian office workers taking a less positive view of working life while the experience in The Netherlands has been more varied

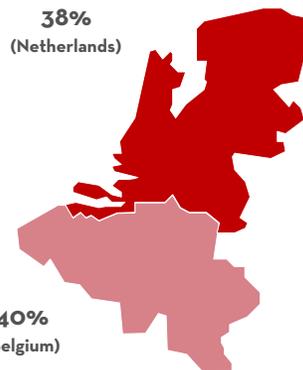


Overall

Belgium / Netherlands score lower than the global average in regards to job happiness compared to 12 months ago

39%

Say they are happier in their job than 12 months ago (vs. 49% globally)



Culture & engagement

Satisfaction with senior leadership is above average but still with room for improvement in The Netherlands but below average in Belgium

54%

Say they Are satisfied with senior leadership (vs. 53% globally)

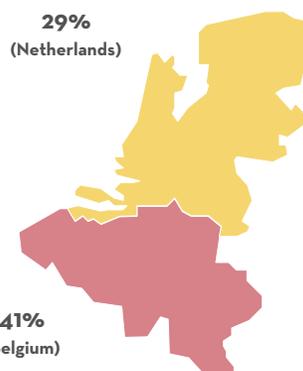


Wellbeing

Belgians workers' mental wellbeing is more likely to have worsened over the last 12 months than that of Dutch workers

34%

Say their mental wellbeing has become worse (vs. 32% globally)

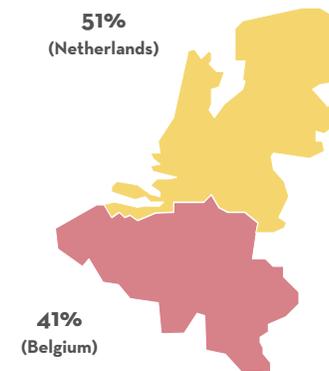


Job security & development

Satisfaction with career prospects is much lower in Belgium although still room for significant improvement in The Netherlands as well

47%

Say they are satisfied with career prospects at their company (vs. 48% globally)



Office workers in LatAm generally taking a more positive outlook although mental wellbeing has declined for around 2 in 5



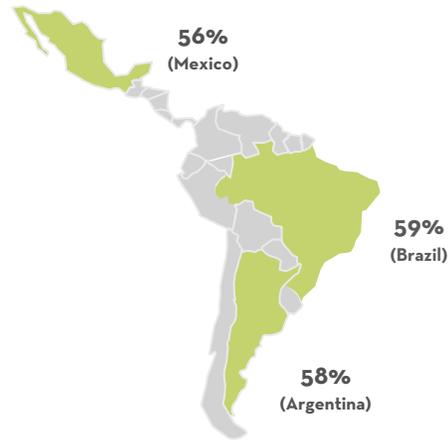
LatAm

Overall

Latin Americans score higher than the global average in regards to job happiness compared to 12 months ago

57%

Say they are happier in their job than 12 months ago (vs. 49% globally)



Culture & engagement

Confidence in senior leadership is especially high in Brazil, while Argentina is in line with the global average and significantly lower than its LatAm counterparts

63%

Say they Are satisfied with senior leadership (vs. 53% globally)



Wellbeing

Brazilians are feeling a larger drop in mental wellbeing. Almost 2 in 5 feel it has got worse in Argentina and a third feeling this way in Mexico

38%

Say their mental wellbeing has become worse (vs. 32% globally)



Job security & development

Brazilian and Mexican office workers feeling relatively positive about career prospects but less than half feel this way in Argentina

60%

Say they are satisfied with career prospects at their company (vs. 48% globally)



Nordics: Perspectives of Norwegian workers tend to be more negative than others in the region. Finland the only country where most are happier



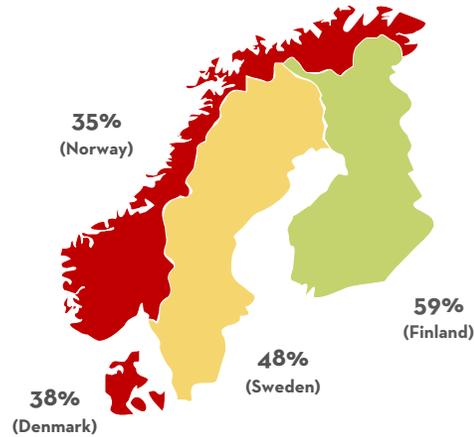
Nordics

Overall

As a region, the Nordics are in line with the global average regarding happiness, although there is a large gap between the less happy Norwegians and Danish and more happy Finns

47%

Say they are happier in their job than 12 months ago (vs. 49% globally)

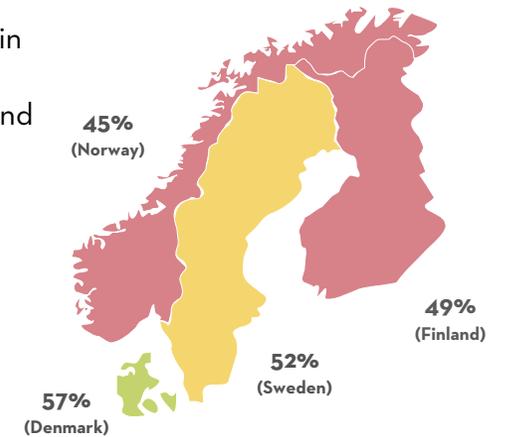


Culture & engagement

Satisfaction with senior leadership is strongest in Denmark but still with room for improvement. Less than half are satisfied in Norway and Finland

51%

Say they Are satisfied with senior leadership (vs. 53% globally)

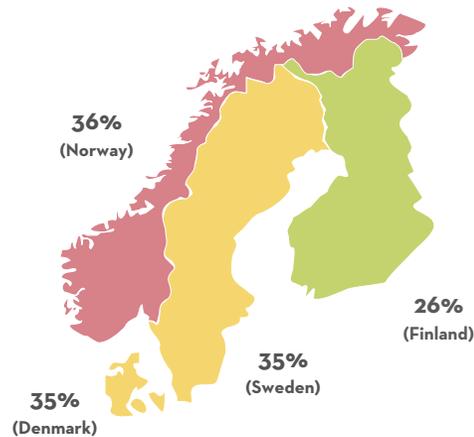


Wellbeing

Decline in mental wellbeing is less common in Finland but still affects a of office workers. Norwegian workers much more likely to have experienced a decline in wellbeing

33%

Say their mental wellbeing has become worse (vs. 32% globally)

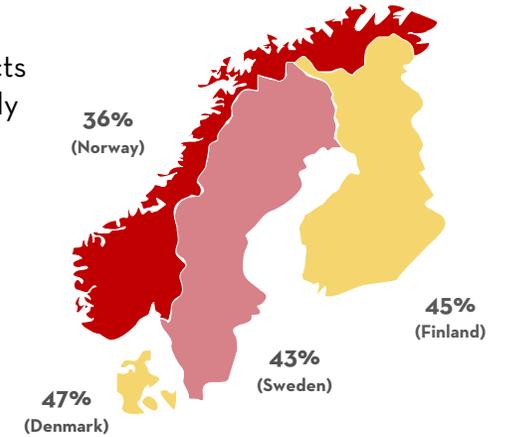


Job security & development

Less than half are satisfied with career prospects at their company across the Nordics, particularly in Norway where only a third are satisfied

44%

Say they are satisfied with career prospects at their company (vs. 48% globally)



EMEENA: Positive perspectives in Romania and Turkey contrast with negative perceptions among Greek office workers



EMEENA

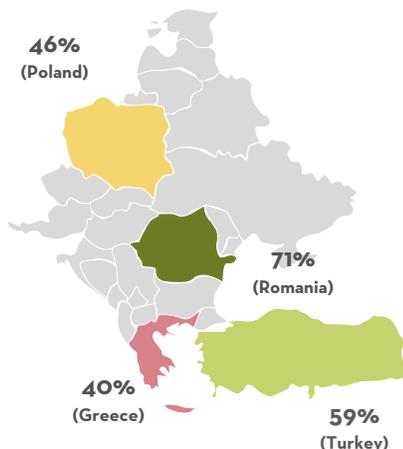
*Slovenia was also surveyed and is included in the EMEENA total but its individual results cannot be shown as the base size (14 participants) is too low. Some caution required for Greek results where base size is also low at 60 participants

Overall

EMEENA is above average for happiness levels driven by positivity in Romania and Turkey while those in Greece are far less positive

56%

Say they are happier in their job than 12 months ago (vs. 49% globally)

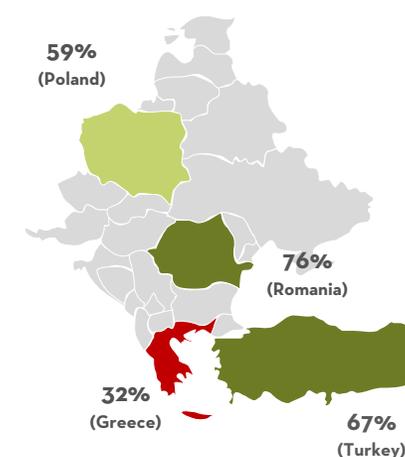


Culture & engagement

Relatively high satisfaction with senior leadership in EMEENA with the exception of Greece where only a third are satisfied

64%

Say they Are satisfied with senior leadership (vs. 53% globally)

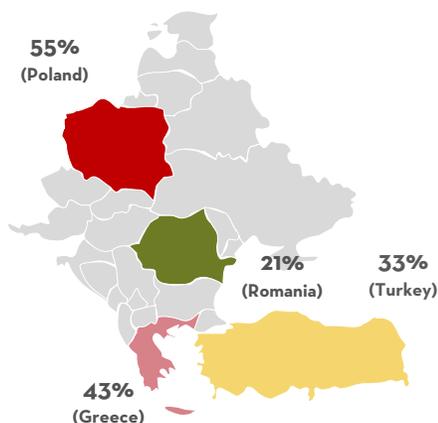


Wellbeing

Over half in Poland feel their mental wellbeing has worsened - more than any other country. Much less of an issue in Romania although 2 in 5 still share this feeling

38%

Say their mental wellbeing has become worse (vs. 32% globally)

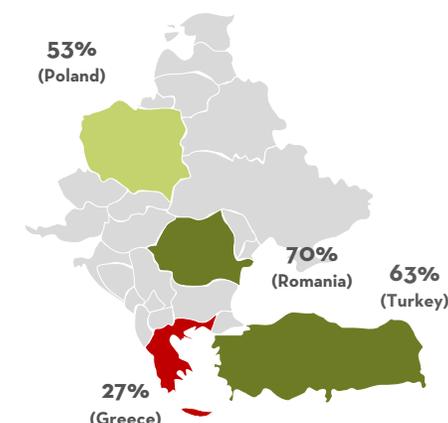


Job security & development

Relatively strong satisfaction with career prospects in Romania and Turkey but less than a third are satisfied in Greece

59%

Say they are satisfied with career prospects at their company (vs. 48% globally)



Methodology: Detailed Bases

Argentina	117
Australia	1,000
Belgium	404
Brazil	333
Canada	1,000
China	1,000
Denmark	196
Finland	237
France	1,000
Germany	1,000
Greece	60
Italy	1,000
Japan	1,000
Mexico	550
Netherlands	596
Norway	141
Poland	249
Romania	125
Spain	1,000
Switzerland	800
Sweden	426
Turkey	552
UK	1,000
USA	1,000

Women	7,324
Men	7,442

Leaders	1,427
Managers	6,978
Non-managers	6,171
All managers	8,405

Generation Z	380
Millennials	6,908
Generation X	6,159
Baby boomers	1,353

Gen Z & Millennials	7,288
Gen X & Boomers	7,152

Young leaders	871
Young managers	3,499
Young non-managers	2,813
Older leaders	556
Older managers	3,479
Older non-managers	3,358

Healthcare	403
Cleaning services	45
Technology / telecoms	2,418
Agriculture	77
Engineering / manufacturing	1,402
Hospitality	165
Energy / utilities	547
Travel / tourism	174
Business / consulting / management	1,018
Charity / voluntary work	131
Home entertainment	85
Science / pharma / biotech	408
Transport / logistics	526
Education	1,236
Online retail / delivery	354
Offline retail	250
Media / journalism	170
Environment	157
Financial services / accountancy / insurance	1,872
Creative arts / design	235
Construction	548
Automotive and mobility	268

Digital	7,440
Non-digital	7,360

Have children at home	8,148
No children	5,595

Mothers	3,829
Fathers	4,299

Pet owners	8,902
Not pet owners	5,853





THE ADECCO GROUP

Making the Future Work For Everyone