

Resetting Normal

Defining the New Era of Work 2021



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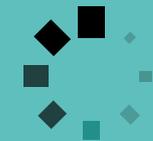
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Introduction

In early 2020, the pandemic caused by the Covid-19 virus began to accelerate shifts in working practices. Because of this - and to fully understand the rising expectations of both employees and managers in this new era - the Adecco Group commissioned and produced an eight-market study to unearth insights into attitudes, behaviours and the outlook of office-based workers on the future of work. Entitled *Resetting Normal: Defining the New Era of Work*, this study helped businesses and organisations understand the best paths to navigate through what was an uncertain time.

The second edition of this study, *Resetting Normal 2021*, builds upon the original publication, focusing on the outlook for 2021 and beyond.

While the study in 2020 surveyed 8,000 people across eight countries (Australia, France, Germany, Italy, Japan, Spain, the UK and the United States), this latest research includes 14,800 respondents across 25 countries. The

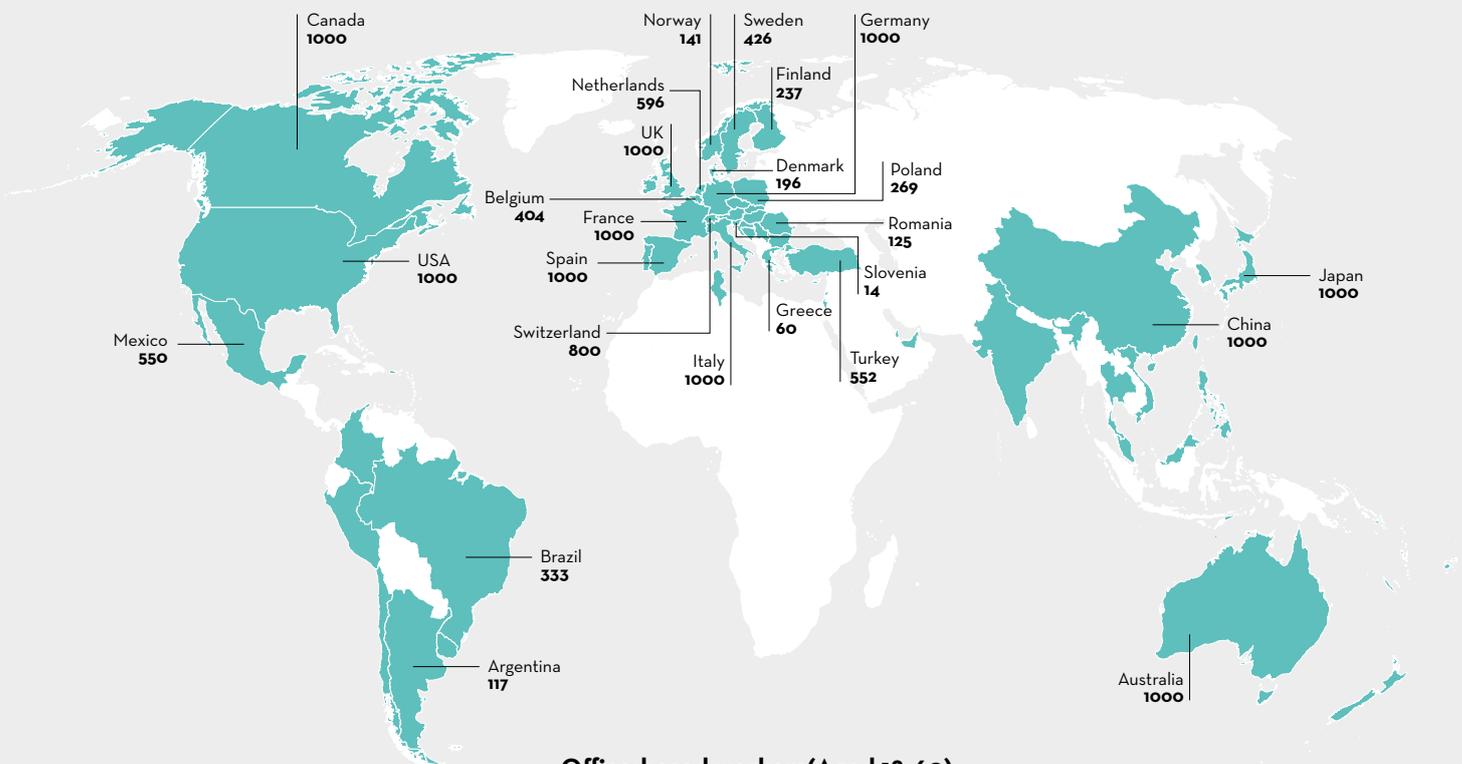
countries surveyed in 2020 remained part of the scope and were joined by respondents from: Argentina, Belgium, Brazil, Canada, China, Denmark, Finland, Greece, Mexico, the Netherlands, Norway, Poland, Romania, Slovenia, Sweden, Switzerland, and Turkey.

All respondents were between the ages of 18-60, must have had a desk-based job of more than 20 hours per week and had their work altered during the pandemic (for example, by having to shift to a more remote work environment). The fieldwork was conducted in the local language and took place between 13 May - 4 June 2021.

The results provide insights into working practices, behaviours and attitudes, and will help organisations continue to evolve and adapt as we look forward to a post-pandemic world and new ways of working.

The Adecco Group and its brands stand ready to help organisations navigate this new path.

14,800 respondents across 25 countries answered a 15-minute online survey. Fieldwork was conducted between 13th May & 4th June 2021 in local languages.



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.

2020 original 8 markets (8000): Australia, France, Germany, Italy, Japan, Spain, UK, USA

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

The trend towards hybrid working, as set out in the original 2020 Resetting Normal research, has been confirmed. However, there are polarised experiences for workers and some areas have got worse. The challenge for leaders is to capitalise on the opportunities brought

by the new normal and build structures and resources to ensure this new way of working is future-proof. Companies must focus on wellbeing, reconnecting leaders and workers, and acknowledge that ‘one size will not fit all’ when addressing employee needs.

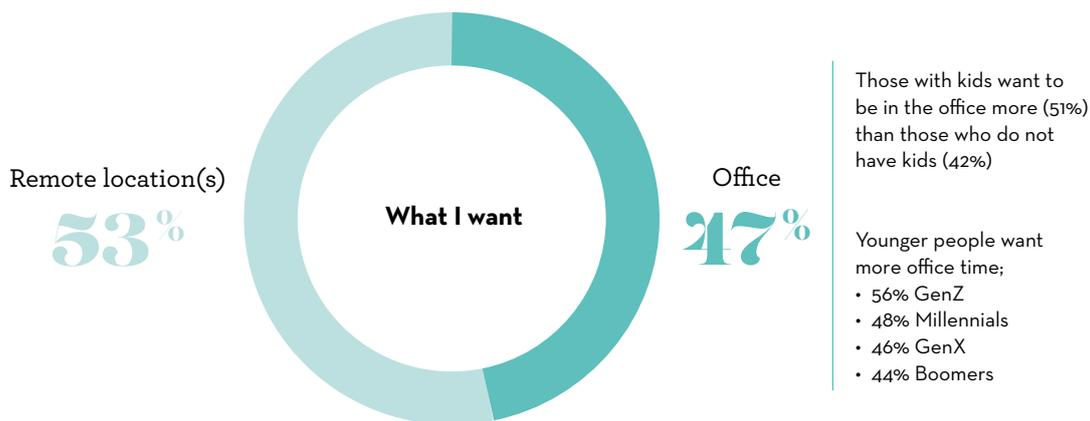
The Next Normal Continues to be Universally Hybrid

Globally, workers want to maintain a hybrid working model where more than half of their time is spent working remotely (53%), with the rest of the time in the office (47%).

Interesting trends lie within this. Younger generations want to be in the office more. Gen Z workers, for example, want to spend 56% of their working time at the office. Generally, the more junior the respondent, the more likely they are inclined to want to spend time at the office. This suggests that they need the onboarding, structure and to have experienced people around to support them in person, while senior workers already have the autonomy and knowledge that experience has brought them.

“On average workers want to spend at least 53% of their work time remotely”

% 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):

Japan	64%	Germany	54%	France	50%
UK	63%	LATAM	54%	Switzerland	49%
Canada	62%	USA	54%	Australia	47%
Spain	59%	Italy	52%	EEMENA	43%
Nordics	54%	Bel/Ned	52%	China	23%

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)

While it might seem counterintuitive, the data shows that those with children also want to spend more time working from the office (51%) than those who do not have kids (42%), suggesting those with children prefer to set boundaries between work and family life.

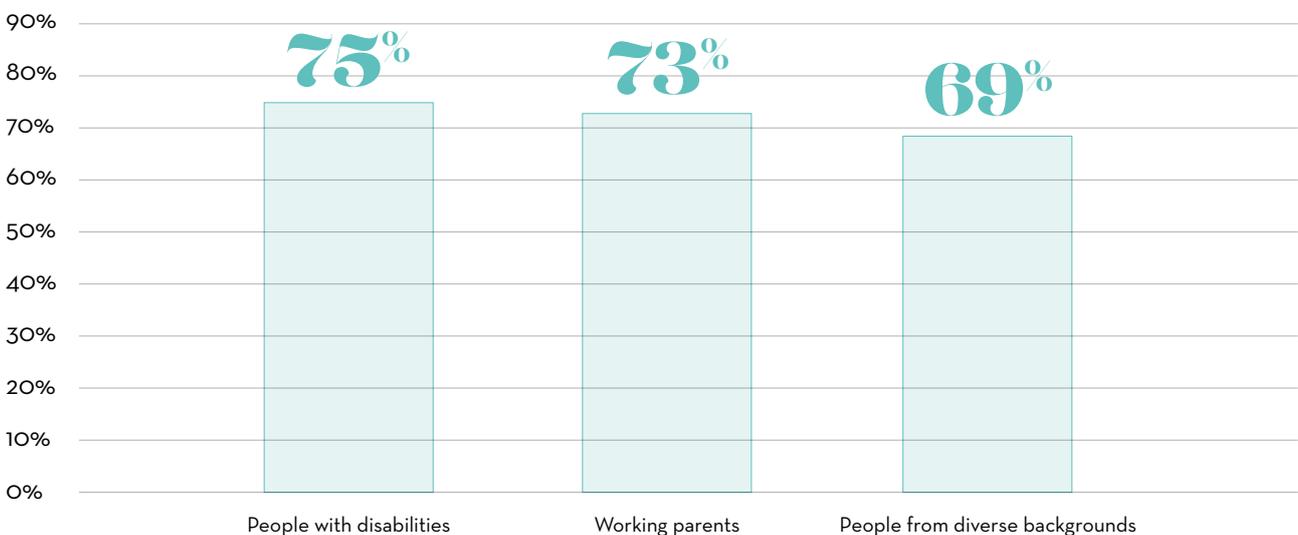
In terms of geographical split, people in most countries – with the exception of China – want to spend at least 40% of their time working remotely, with Japan (64%), the UK (63%) and Canada (62%) being most in favour of remote working.

Hybrid Models Will Create a More Diverse and Inclusive Workforce

A year and a half after the pandemic forced workers and companies to shift to remote and hybrid ways of working, flexibility is still deemed to have universal benefits with strong buy-in from executive management. Both workers and leaders agree on the benefits of hybrid working in the new normal, with 8 in 10 agreeing that employees as well as businesses will benefit from having increased flexibility around the time spent at the office and remote working.

Moreover, the majority believe that hybrid working patterns offer opportunities for creating a more diverse and inclusive workforce, that will benefit those with disabilities (75%), working parents (73%) and people from diverse backgrounds (69%).

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



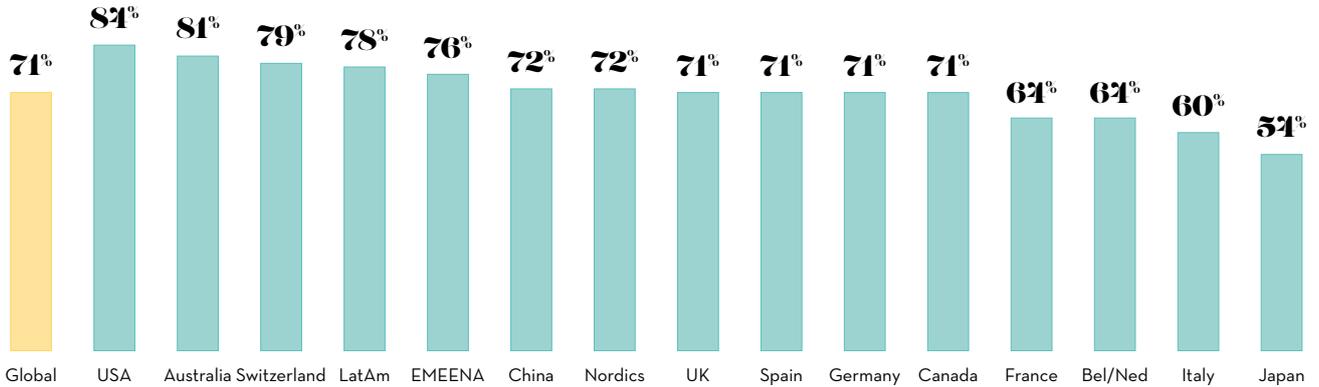
Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800)

Employees have embraced this new working life, adapting their living space for working. Globally, 71% of people have created effective remote working environments for themselves, and exactly the same proportion say that working remotely more often than they did before the pandemic will be important to them in future.

There is universal approval of hybrid and flexible working, across business structures and geographies, generations and parental status. It is a clear affirmation that hybrid working was not a temporary effect of the pandemic but an expectation for workers in the new normal.

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

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



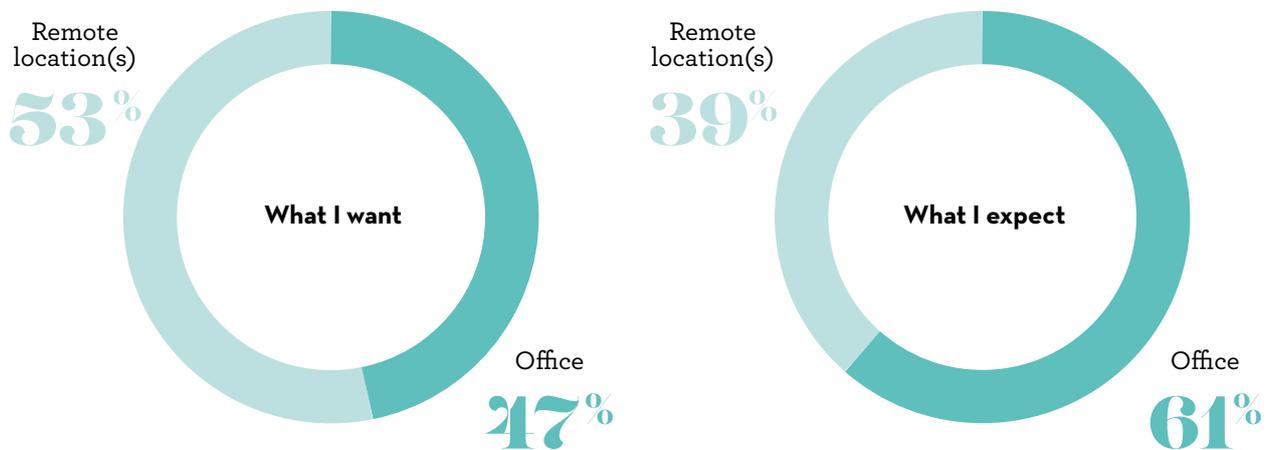
Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800). Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000),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

Returning to the Office. Trouble Ahead?

Despite the overall positive attitude towards hybrid working, tensions do exist between how employees want to work post-pandemic and what they expect companies will allow. There is a general concern that companies will enforce more in-office time, especially among non-managers.

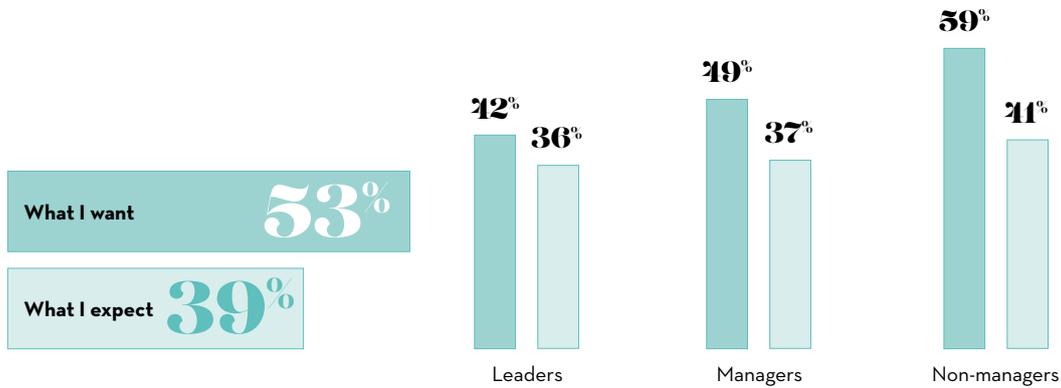
Ideally, workers want to spend 47% of their time working at the office, but fear companies will expect them to be on-site at least 61% of the time. This tension appears more significantly among non-managers, who would like to work remotely 59% of their week but expect companies to only allow as much as 41% of remote working time.

% 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)

% 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)

“42% of workers say they feel or have felt a lot of anxiety about returning to the office”

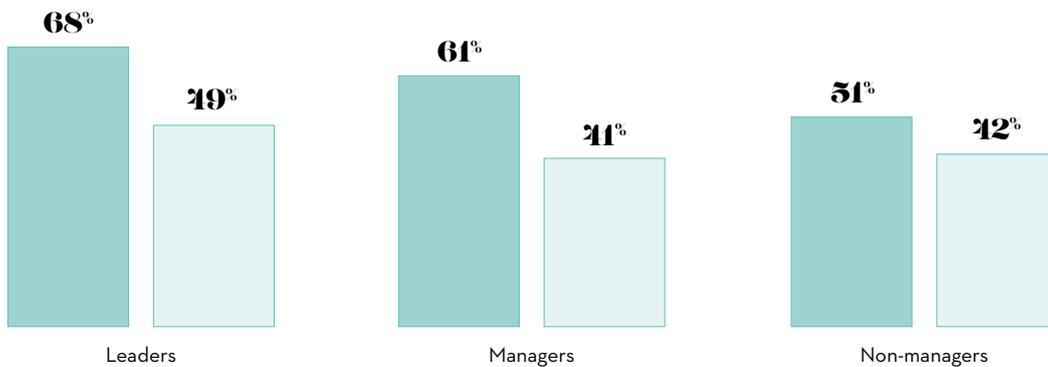
Although there is excitement about returning to the physical office and seeing colleagues for 57% of respondents, there is also some anxiety (42%).

Those who are anxious about a return to the office seem to be more concerned about losing the benefits of remote work. They feel stronger about their productivity improving during the past 12 months, and rate working remotely and being able to manage caring for others as more important than those who don't feel anxious.

Striking the right balance and acknowledging that 'one size will not fit all' will be key for companies to navigate this transition.

% 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)

Want to see colleagues in person Feel/have felt anxiety about going back to 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) Base: Leaders (1,427), Managers (6,978), Non-managers (6,171)

Hybrid Working: Key Takeaways

- The last 18 months have shown that remote work does not automatically equate to 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 is important for companies to consider a hybrid working model that strikes the right balance between office and remote working for all their employees and to appreciate that 'one size will not fit all' when addressing employee needs. A mindset of mass customisation will be required.
- Flexible and remote working options are no longer a 'nice-to-have', but are an expectation of workers as part of company policies 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 about a 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, and to support these groups.



Shorter and Flexible: The New Week in Demand

Productivity has survived the shift to hybrid working as people become better time managers and work/life balancers. More than 8 in 10 people surveyed (82%) say their productivity has stayed the same or improved during the last 12 months.

As such, nearly three quarters (72%) want employers to revisit the length of the working week and the number of hours people are expected to work, with over half (57%) believing their job can be done in under 40 hours. These findings are supported by the overwhelming numbers of staff (75%), who think it is important to retain flexibility as part of the return to normal.

But if flexible working patterns are to become the norm, the 9 to 5 hour-based contract becomes outdated. There are calls from both workers and leaders for work to be measured by outcomes and results rather than hours spent working, confirming a trend that was already emerging strongly in the 2020 report.

However, companies and leaders are yet to adapt to the demand for outcome-based approaches rather than hours-based. Only 36% of non-managers feel their managers are assessing their performance based on results rather than the number of hours worked.

The Positives of Remote Working

During the last twelve months, whilst the world was in the midst of the pandemic, there were many positives found within the workforce. For example, 63% of respondents said their digital and remote working skills got better; 50% said their work/life balance had improved; 47% said their time-management had got better; and 39% reported an improvement in how much they felt they were trusted to get the job done.

Given that a majority (67%) of people globally enjoyed

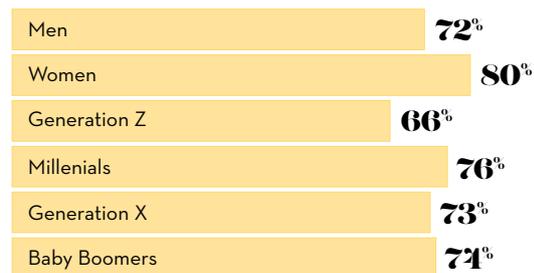
some autonomy over their own schedule, a correspondingly high proportion of workers (76%) want to retain this flexibility over how and when to work going forward.

This flexibility is highly valued across geographies, gender, age and life-stage, especially by those with children and caring responsibilities. Unsurprisingly, those within the Gen Z category feel less strongly about retaining flexibility.

76%
say support for flexible working needs will be important **after** the pandemic

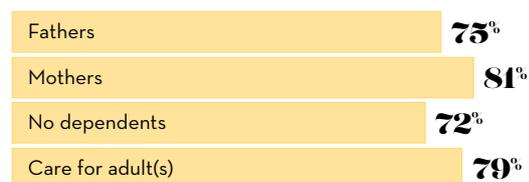
Supporting my flexible/remote working needs

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



Supporting my flexible/remote working needs

% 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”

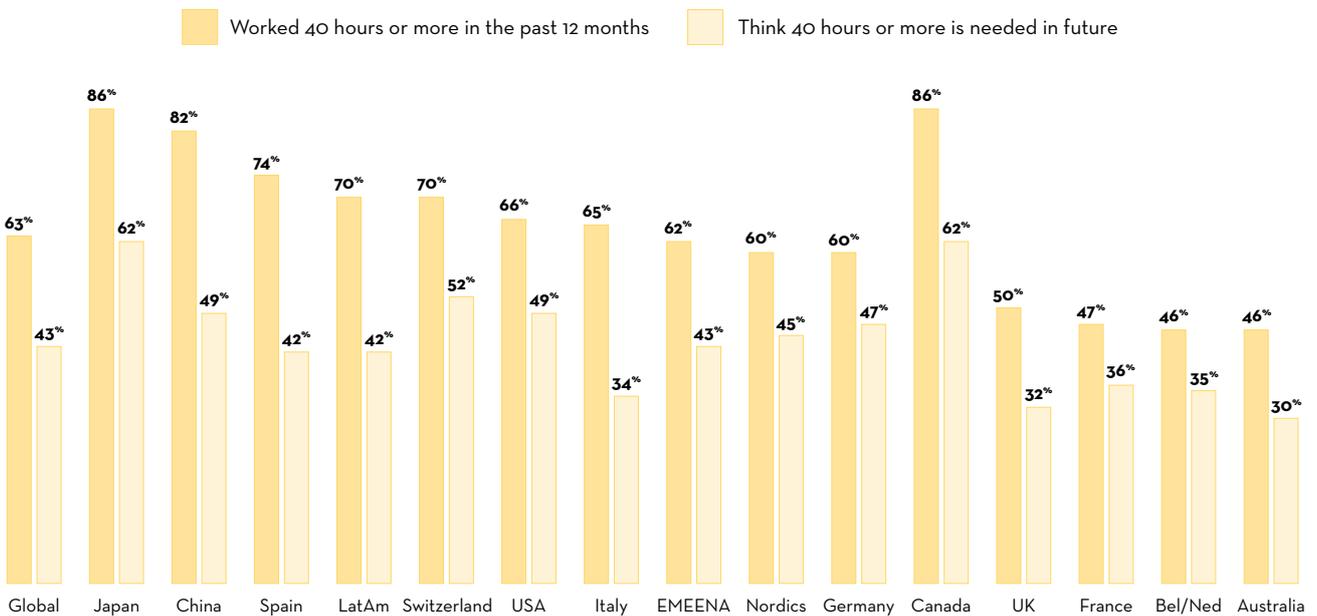
Productivity has survived the shift to hybrid work with 82% feeling they are as productive or more productive than before. This trend shows a 7% increase from the same question last year, suggesting that the longer people have worked remotely, the more they have adapted and the more confident they feel that their productivity is as good, or better, compared to working in the office.

A Shorter Week is in Demand

The number of hours worked have increased by 14% since 2020, with 63% of workers saying they work over 40 hours per week. However, 6 in 10 employees say they would be able to complete their weekly tasks in less than 40 hours. This disconnect between hours worked and hours deemed necessary is clear across geographies, with Japan, China and Spain showing the largest disconnect.

“63% of employees are working over 40 hours per week. But 6 out of 10 say they would be able to do their work in less than 40 hours”

% 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)

This explains why most (72%) respondents want employers to revisit the length of the working week, and 73% say contracts should focus on the needs of the role rather than the number of hours worked. On both of

these issues, there is strong agreement from executive management, which also believes employers should focus on these topics going forward.



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)

Outcome-Based Performance Remains a Challenge

With flexible working becoming the norm, the 9 to 5 hour-based contract is outdated. More workers and leaders are calling to be measured by outcomes and results rather than hours spent working, a trend that was already strong in 2020.

While 73% of workers say companies should be measuring performance based on their results rather than the number of hours they work (81% of leaders agree with this), more than half (52%) also say that their line managers don't meet their expectations for assessing them based on outputs rather than hours worked. For non-managers, the number is much lower, with only 36% feeling their performance is based on results.

“Only 36% of non-managers say managers are assessing them on outputs and results, rather than hours worked”

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

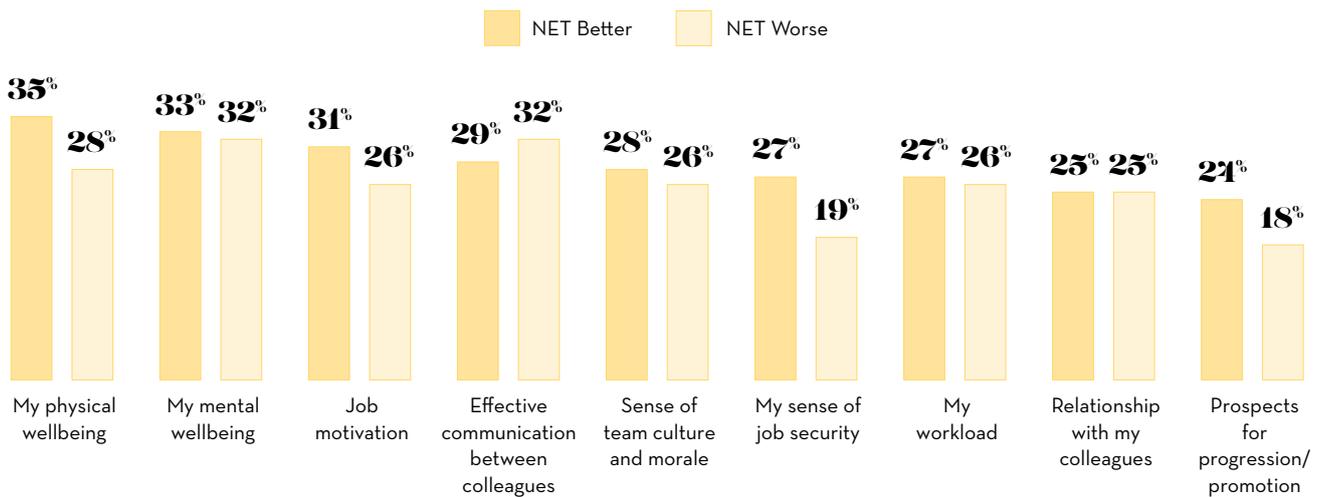
Line managers admit to facing difficulties, with 55% saying it has not been easy to onboard new staff. Similarly, 45% say it has not been easy to support and guide their teams to focus on achieving business goals, and 44% say it has not been easy to assess performances based on outcomes rather than hours worked.

One Size Will Not Fit All

Despite the universal approval of the hybrid and flexible working model for most workers, a polarised experience is evident across different aspects of work, spanning wellbeing, career, relationships and company engagement.

Listening to employees to identify which elements of flexible working have worked well and where there remains room for improvement is the first step to establishing a new norm that works for everyone. Businesses must acknowledge that 'one size does not fit all'.

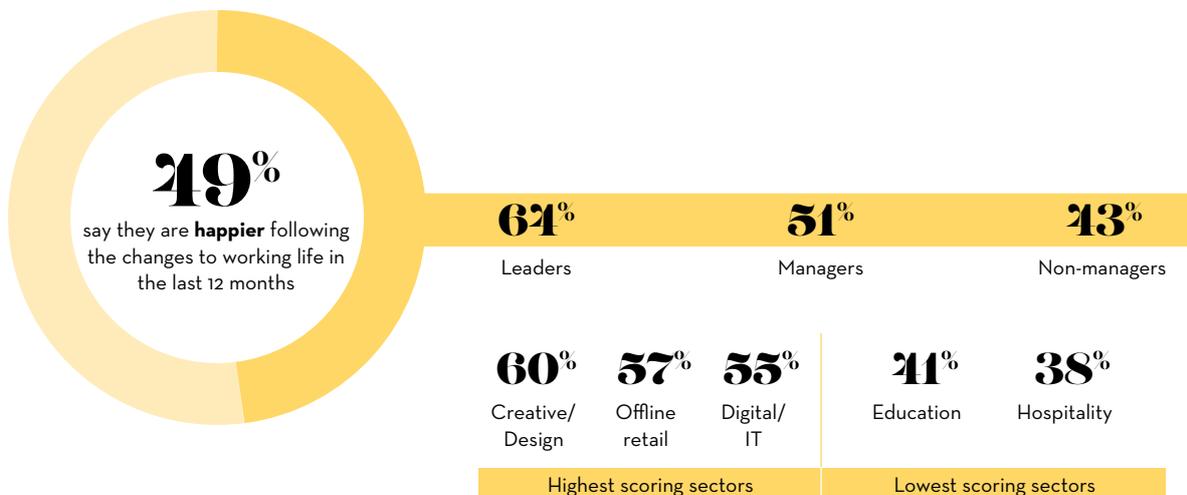
% Who said that the following aspects of their working life has got better/ got worse during the last 12 months (NET Better / NET Worse)



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)

More generally, just under half of employees (49%) are happy with the new working normal, though parents appear happier with the new conditions than those

without dependents. Leaders feel happier than non-managers following 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 (2,35), Digital / IT workers (7,440), Offline retail (2,075), Education (1,236), Hospitality (165)

Shorter and Flexible, the New Week in Demand: Key Takeaways

- With all workplace parties calling for greater flexibility, it is imperative that businesses listen to employee needs to ensure a sustainable and engaging workplace for everyone.
- 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.
- Within this scenario, key performance indicators related to output and impact should be the main metric by which a knowledge-economy employee is measured, as opposed to how many hours they have worked.
- Measuring employee performance based on their activity and time spent online is outdated and inadequate in the next normal. Companies must move towards providing support, guidance and ultimately training to assist managers to transition from evaluating work and workers on an hours input basis, to a results output criteria.
- With only 36% of non-managers being measured based on their results, performance management appears to be 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 company success.
- Calls for companies to revisit hours-based contracts and to refocus on outcomes and results continue to be strong, and leaders share that vision. Automation of repetitive tasks via technologies such as AI and machine learning will play an important role in this shift.
- Businesses and governments must work towards creating a hybrid model that encourages and fosters a better working regime 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 New Worker Pandemic

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



Burnout Might Be the New Worker Pandemic

Mental health is a global and universal issue, spanning all respondents, regardless of age or gender. Compared to the 2020 survey, more people are saying their mental

health has suffered. It is therefore a key future challenge for companies and leaders.

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

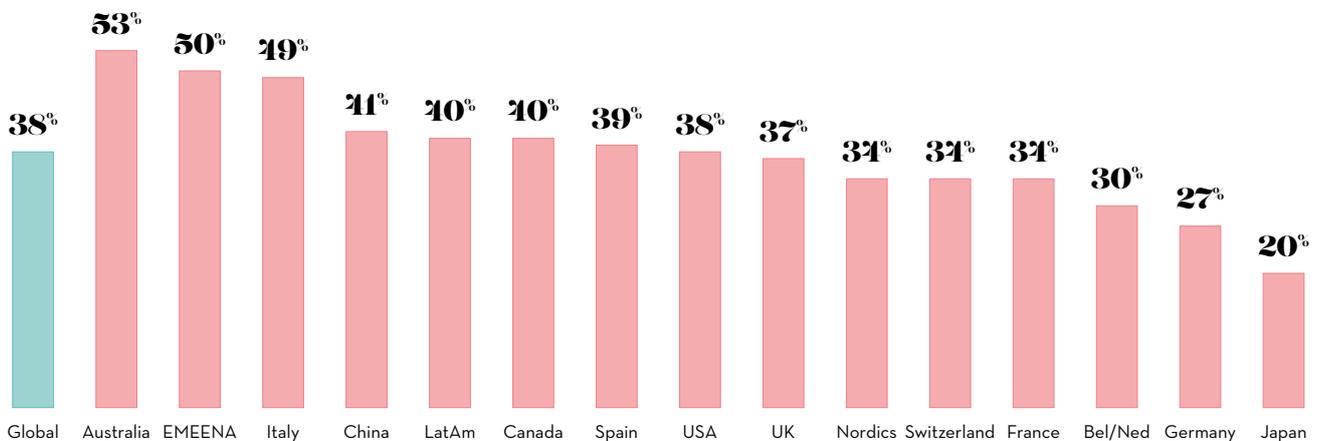


With mental health worsening, working hours increasing by 14% since 2020, and 63% of workers saying that they have worked more than 40 hours per week over the last 12 months, it is not surprising that burnout is highlighted as a cause for concern by almost 40% of the workforce across geographies. Those in Australia, EEMENA and Italy are most likely to admit to suffering burnout.

This has been felt most amongst younger generations, with more than half of young leaders (54%) reporting that they have experienced burnout. Significantly, this is the same generation that will shoulder substantial responsibility for the company's future progress.

“54% of young leaders report that they have experienced burnout, the same group who shoulder significant responsibility for future progress”

% 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)

Supporting Mental Health

The decline in mental health and physical wellbeing throws up another disconnect, as 7 in 10 (71%) say having the right support for mental health at work will be important to them in the future. Nearly three-quarters (74%) expect their company to increase the focus on this issue.

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

As we look beyond the pandemic, the increased expectations on mental health support are here to stay. Already a growing concern before Covid-19, workers now expect employers to put the right measures in place to support their wellbeing at work going forward. It is a consensus too significant to be ignored.

“71% say having the right support for mental health at work will be important to them in future”

But leaders do not appear to be equipped to support employee wellbeing. More than half of all managers find it hard to identify when staff may be struggling with mental health issues (53%) or overwork and burnout (51%). This is backed up by non-managers, 67% of whom say that their leaders do not meet their expectations for checking on their mental wellbeing.

Burnout Might Be the Next Worker Pandemic: Key Takeaways

- Mental health is a global and universal issue, spanning all workers, regardless of age or gender. Compared to the 2020 survey, more people are saying their mental health has suffered. It is therefore a key future challenge for companies and leaders.
- Companies must re-evaluate how they can better support good mental health among their employees within the new hybrid working model. Building and creating working environments, cultures and skill sets that promote and support positive mental health at all levels of the organisation 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, urgent interventions are needed.
- It is increasingly necessary for companies to establish processes, resources, coaching and tools to foster openness and to listen to employees' needs in order to help workers develop resilience.
- With two thirds (67%) of non-managers saying their leaders do not meet their expectations for checking on their mental health, leadership development, coaching and resources for managers on how to deal with and respond to these situations is essential.
- 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.





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

Managers, leaders and C-suite executives have faced a steep learning curve in the past year as new ways of working emerged and expectations for their performance rose. A year ago, a soft skills gap was uncovered across the management and C-suite layers. Leadership development, coaching and upskilling appeared an effective way to equip management with the emotional intelligence deemed necessary to lead the workforce forward. The 2021 survey shows that the gap still exists and that more needs to be done to support leaders in this transition.

At a time when we are constantly connected, workers have never felt more disconnected. Leaders hold the key to reconnecting employees and re-inventing corporate culture. However, there is a big disconnect between management views of their own performance and the opinions of their employees.

Relationships, motivation and sense of team and company culture have regressed since 2020. With perspectives of leaders and non-management at odds, these disconnects pose a major threat to company cohesion.

Disconnected Workers: Warning Signs for Leaders

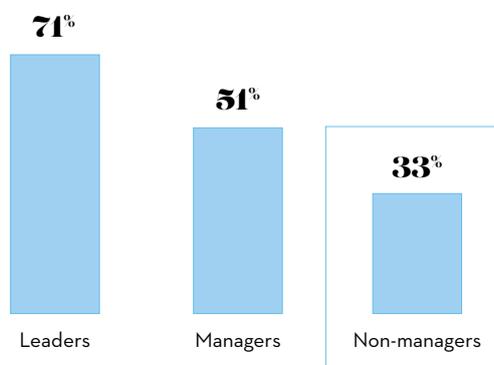
Globally, the relationships between staff and their leaders have deteriorated, with less than half of non-managers (45%) feeling their relationship is good, 17 points lower than in 2020. And only a third (33%) of non-managers feel they are getting due recognition for their contributions within the business.

Most workers (74%) say it is important for managers to promote and nurture strong team morale and culture, but less than half (48%) say their managers meet or exceed expectations for creating good team morale and a good working culture. From the group in non-management positions, only 37% feel that their leaders are succeeding at encouraging a good working environment and team culture.

“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”

When it comes to supporting employees' work/life balance, only half (50%) of the workforce say their managers are meeting expectations. The number is reduced to 42% when asking those in non-management positions.

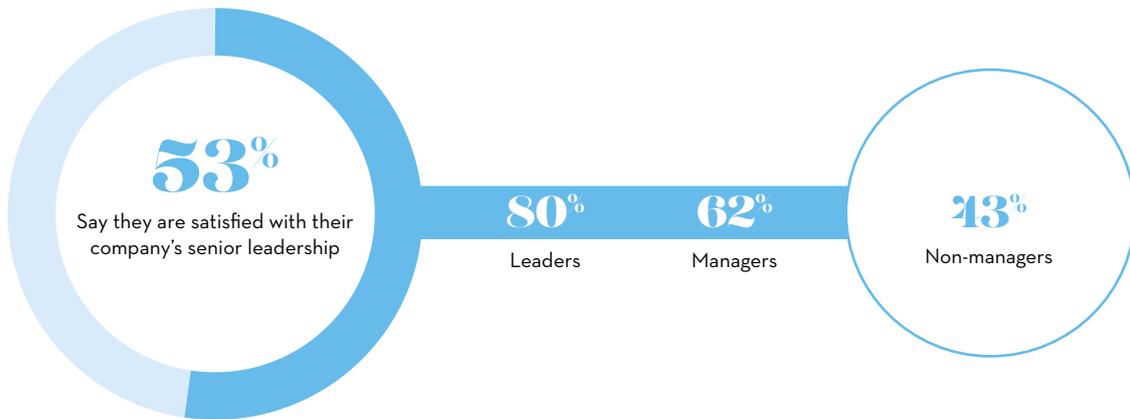
% Who say their manager has met or exceeded expectations in keeping staff contributions visible / recognised in the business (NET Met or exceeded expectations)



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)

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%).

There is also a clear disconnect 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 believing or sharing that.



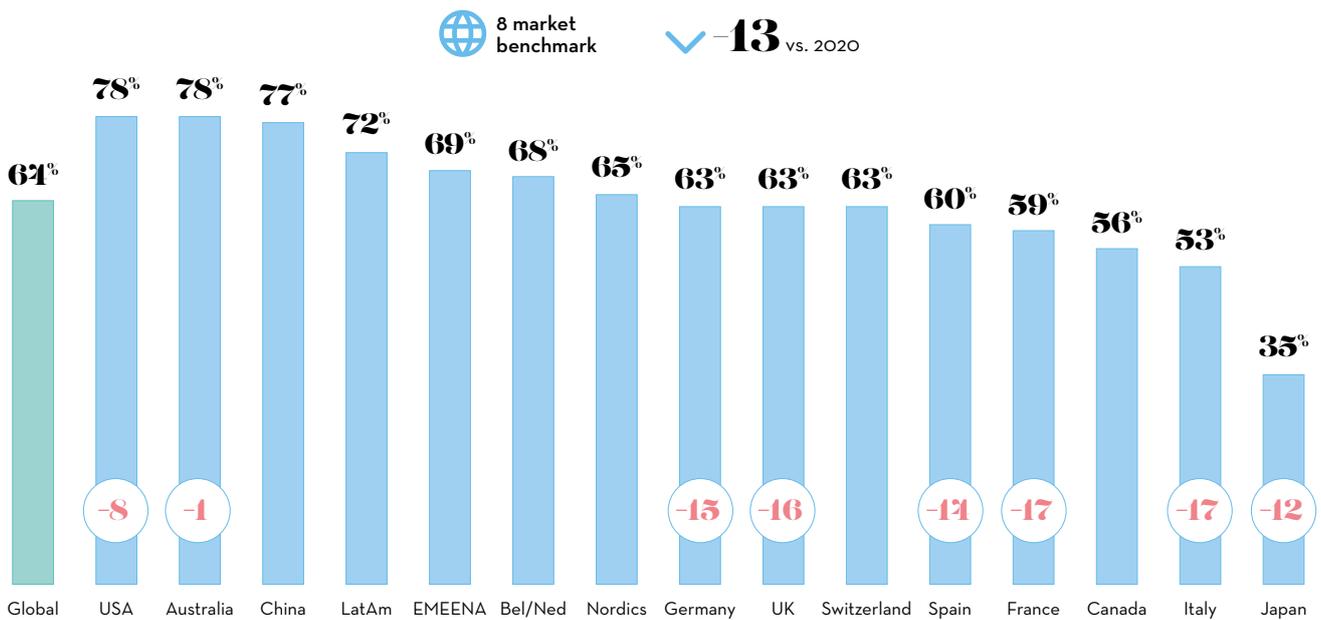
Motivation Fatigue

Only 43% of non-managers say they are satisfied with their boss, while motivation has regressed across the workforce. While nearly two thirds (64%) of respondents worldwide saying they feel motivated. This represents a

13-point decrease versus the study in 2020. Non-managers reported the worst motivation levels and the biggest deterioration in motivation levels (12%) compared to this time last year.

Motivation has Regressed Across the Workforce

% Who say they are motivated (NET Agree)



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)

Parallel Performance Views

Relationships between staff and their managers are on a downward track, with less than half of non-managers (45%) feeling that they have a good relationship, 17 points lower than in 2020. In addition to a deterioration in relationships, there is also a pronounced disconnect between how managers view their own performance and how non-managers judge leadership achievements.

More than three quarters (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 are a number of areas where these disconnects are apparent, and include important areas such as trust, training and providing regular guidance and check-ins.

“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”

% 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)

Workers Call For Skills Development and Career Prospects

People need to see and feel opportunity, but less than half (48%) are satisfied with career prospects at their company. This number falls to 34% for those with non-managerial positions. France, Italy and Japan are the least satisfied with career prospects in their company. China, Australia and the USA are the most optimistic about development opportunities.

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

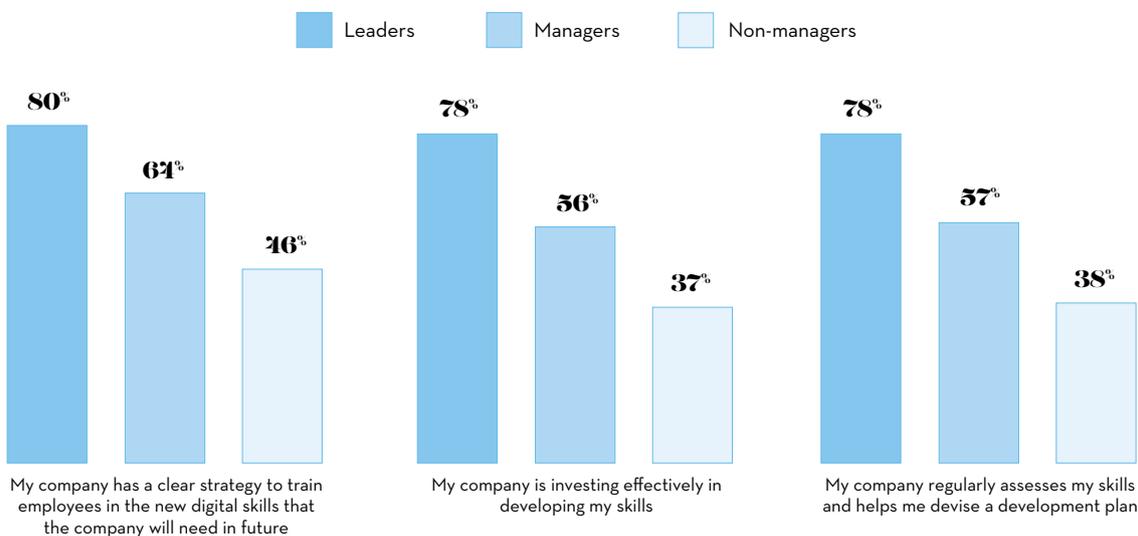
When it comes to career and skills development, just over a third (37%) of non-managers believe their company is effectively investing in their skills development. Only 4 in 10 (38%) of workers without management responsibilities believe their company is regularly assessing their skills and helping them devise a development plan.

When asked about their company’s strategy to train employees in the new digital skills needed for the future, less than half (46%) of non-managers believe the company has a plan.

“66% of workers believe they need to gain new skills to stay employable in the years ahead, but only 37% of non-managers feel their company is investing in their skills development”

The disconnect mentioned previously is further reinforced as leaders have a dramatically different view of their company’s efforts to assess, develop and invest in their skills. For example, 8 in 10 leaders believe their company has a clear strategy and is assessing and developing their skills effectively.

% 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)

In the absence of efforts by companies to upskill or reskill workers, 60% of them are taking it upon themselves to undertake courses and work for additional skills or qualifications. Just over half (52%) of non-managers are upskilling themselves.

However, we must also remember that nearly half of managers (46%) have not found the overall experience

of managing other people easy over the past 12 months, and leaders do recognise that supporting teams has been problematic during the pandemic, particularly around areas such as onboarding (55%), identifying when staff might be struggling with the pressures of work (48%), supporting and guiding teams to focus on business goals (45%) and assessing performance of their teams (44%).

Leaders Hold the Key to Reconnecting the Workforce, But They Need Support

Despite leaders viewing their own performance more positively than non-managers, they recognise difficulties managing others. Nearly half (46%) of managers have not found the overall experience of managing other people easy over the past 12 months.

Onboarding new team members has been challenging for 55% of all managers, as well as identifying when staff might be struggling with mental wellbeing (53%), burnout (51%) or the pressures of work (48%).

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

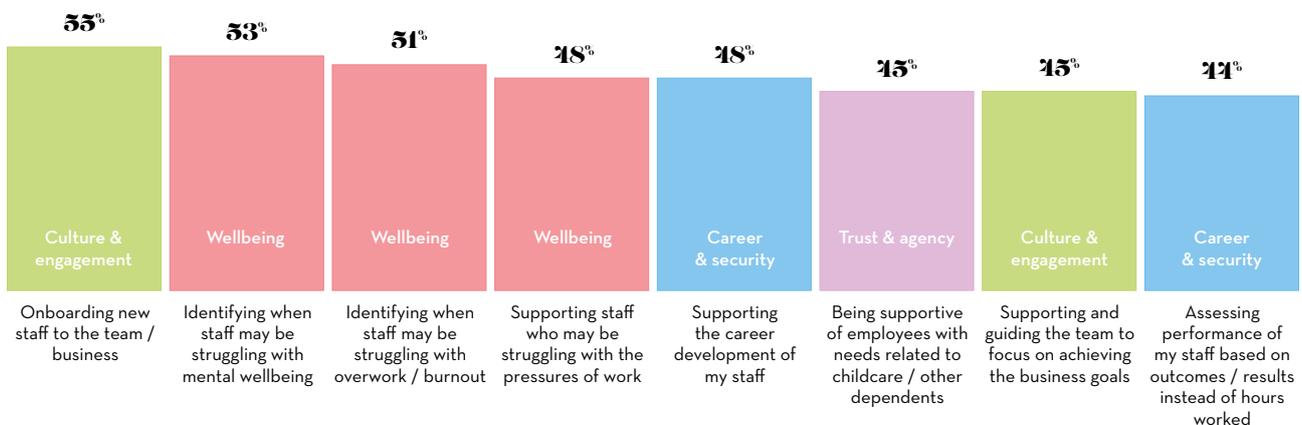
For nearly half of leaders (48%), supporting their teams’ career development has not been easy. They have also struggled with guiding their staff to focus on business goals (45%) and assessing their team’s performance based on outcomes and results rather than hours worked (44%).

Some of these areas – mental wellbeing, onboarding team members, setting goals and assessing performance based on results – are deemed key for companies in the new hybrid normal. Rather than applying old models and blaming the shift to remote work when problems arise, companies and leaders must be deliberate in how they set up the new working structures, resources, training, and team dynamics, and take accountability for actively framing the new model of work. Taking time to invest in building a stronger set of soft skills will be paramount.

“69% of all managers believe it is important for companies to provide coaching and mentoring on leadership skills”

When it comes to training and coaching for leaders, there is wide disparity between perceived importance of leadership training and those that are actually doing it. While 69% of all managers believe it is important for companies to provide coaching and mentoring on leadership skills in the future, only 23% of leaders have received or are receiving coaching or mentoring.

% 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)

Leaders Must Reconnect the Disconnect: Key Takeaways

- With worker motivation, relationships, feelings 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 motivational development and career opportunities.
- However, leaders are struggling to recognise the issues. Companies must support the new breed of leaders to ensure they are well-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 set a strong team morale and culture is a priority for businesses in the new hybrid working model.
- Companies must identify the skills and capabilities required for a competitive future. This should also feed into the creation of a comprehensive range of reskilling and upskilling opportunities for all company workers, regardless of position, in order to future-proof the company and its employees.





The Great Re-Evaluation

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



The Great Re-Evaluation

Media hype around a mass-resignation or a mass worker exodus may be overstated for now, but this survey shows that the emerging new normal is triggering many to re-evaluate working life. Indeed there are warning signs for companies that suggest the time for organisations to reconnect with their workforce is now. Nearly 2 in every 5 people are changing or considering new careers, the same number that are moving or are considering moving to jobs with more flexible working options.

Workers Have a Wealth of New Skills

Skills and 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: Two thirds (66%) of workers believe they need to train and gain new skills to stay employable in the years ahead and over 6 in 10 (62%) are taking or considering taking a new qualification or gaining new skills.

However, less than 4 in 10 non-managers believe their company is assessing their skills and effectively investing in upskilling them. 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% are moving or considering moving to jobs with more flexible working options”

“62% of workers are taking or considering trainings, upskilling and reskilling”

With two thirds of workers confident that companies will start significant hiring again, and less than half (48%) satisfied with career prospects at their current company, career re-assessment looks set to converge with career opportunity.

While it is not clear whether this will result in a feast for some companies and sectors, and famine for others, companies wanting to position themselves to take advantage of this shift must remain open to flexible working and be agile when it comes to skills and career development.



A Mass Exodus is Not Expected

In the last year, 'work from anywhere' policies have become popular and a variety of countries have offered visas for remote workers and digital nomads. However, the data shows that most people have not taken this opportunity to move away.

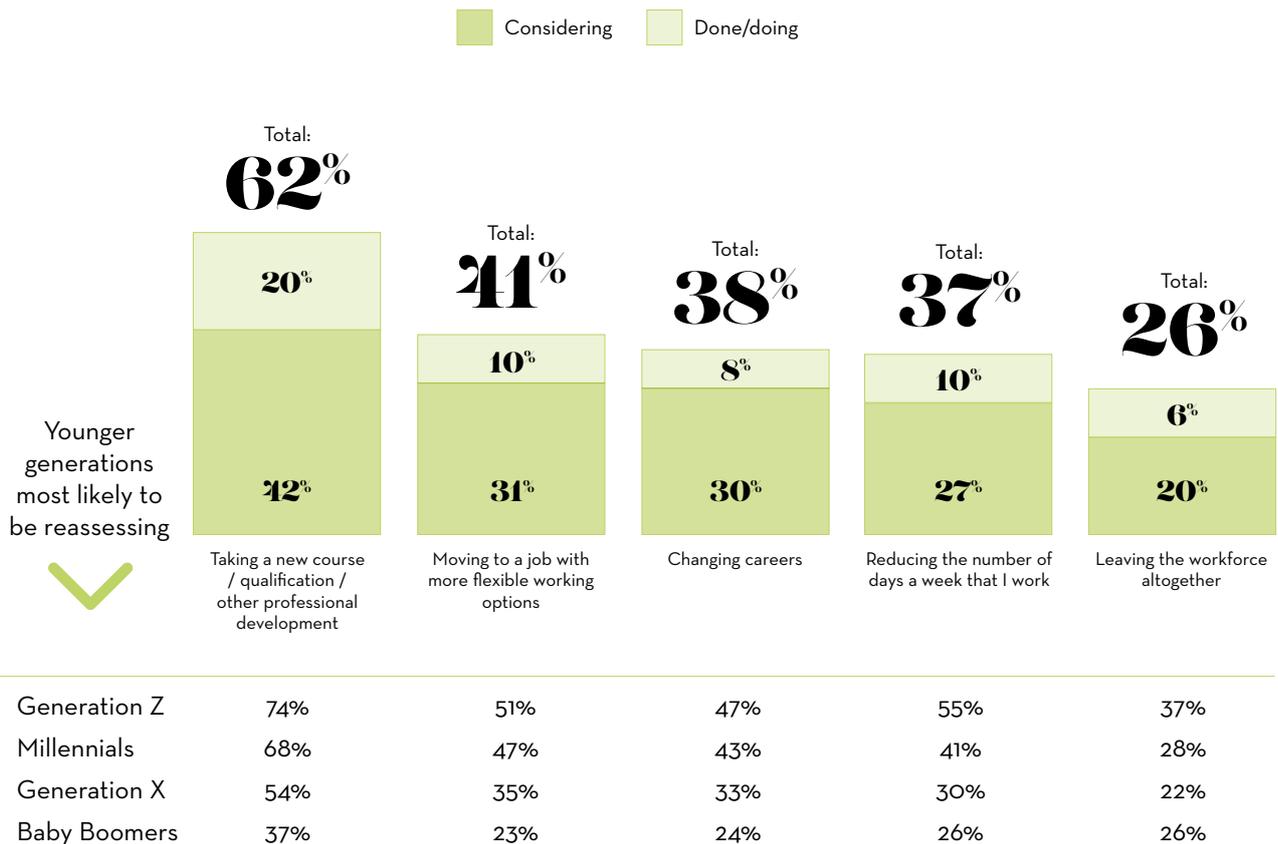
Though a mass exodus is not expected to happen, a quarter of people have or are considering moving to another country/region, either full-time or temporarily. Younger generations – along with those in more senior positions – are most likely to be considering a move. In terms of geographical split, those living in the EMEENA region and Australians are most inclined to have considered a move or have actually moved to a different part of the country.

“1 in 4 people have moved or are considering a move to another country or region”

While changes in working life are triggering these relocations, adapting the home to have an effective remote working set up is more common than making a major move, with 66% of the workforce investing in products or technology and 57% on changes at home to make remote working easier.

These trends reinforce the expectation from workers that remote and hybrid work should become part of normal working conditions and not just a temporary perk for employees.

% 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)

Men and Women Are Equally Re-Assessing Options in Their Working Lives

With similar priorities for the next normal, men appear slightly more inclined to find jobs with more flexible options, changing careers or reducing the number of days a week they work. However, the difference is marginal, showing an equal re-assessment of working priorities.

Men and women also share views on what skills and behaviours will be important in the role of managers

going forward. Both women and men prioritise placing trust to get the job done (81% of women and 75% of men agree to this), supporting flexible and remote working needs (80% of women and 72% of men) and a leadership style focussed on empathy and a supportive attitude (78% of women and 71% of men). Women show slightly stronger views, but their priorities are equal.

High Expectations on Companies and Leaders for the Future of Work

While the pandemic might have brought a time of uncertainty, two thirds (66%) are confident that companies will start hiring significant numbers again within the next year. This is felt particularly strongly amongst younger generations. And when it comes to priorities in their working life after the pandemic, security, agency, culture, wellbeing and development are most important to workers going forward.

“80% of workers rate being able to maintain a good work/life balance as most important going forward”

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

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



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

However, there are distinct differences in age groups and which aspects of their worklife are most important to them with, for example, Gen Z placing praise and

recognition for good work as most important to them, while Baby Boomers place being able to maintain a good work/life balance as their most important aspect.

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

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

* **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)

In addition to ensuring the right infrastructure is in place, companies are expected to focus on wellbeing and talent development. Workers envisage a tech-enabled future, where employers help them optimise their work. Most workers (76%) expect businesses to provide the

right systems and technologies. But they also expect an increased focus on wellbeing (73%), updated policies that establish conscious and flexible ways of working (73%) and a clear talent and development strategy to give employees skills for the future (70%).



Leading the Workforce Forward

Nurturing trust in staff, providing flexibility, improving emotional intelligence and creating an environment of psychological safety will be key qualities of the successful

manager going forward. While women show slightly higher strengths of feeling on these facets of work, men and women share the same priorities.

% 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)



The Great Re-Evaluation: Key Takeaways

- There is no turnover-tsunami on the horizon, but there are warning signs for companies as employees re-assess their careers. The time for organisations to reconnect with their workforce is now, rather than hastily turning to external hiring because of a fear of mass resignations.
- People need to see and feel opportunity. During the last 12 months, people have become more autonomous, agile and proactive, taking it upon themselves to update their skills. They are ready for change, and they are looking at employers for more agency. Career development upskilling and reskilling opportunities are also key factors in the next chapters of their careers.
- Workers have a wealth of new skills and they are ready to deploy them. Companies must use this 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.
- In future – and aside from IT and digital infrastructures – security, agency, a positive culture that nurtures good mental health and development are most important to workers. Companies must prioritise these to keep workers engaged. Nurturing stronger relationships and instilling a stronger sense of culture is key.
- The successful leaders of the next normal will be those who: Trust their teams to get the job done; show empathy; support their teams to work flexibly; encourage healthy working styles; and provide an environment of psychological safety.
- Workers continue to trust companies the most to deliver a better working world. They believe individuals and governments will also play a role. Nearly 8 in 10 (79%) of workers believe governments should do more to encourage the adoption of good, flexible working conditions.



Ready for the Next Normal?



Ready for the Next Normal?

The last 18 months have proved that hybrid work does not come with a loss of productivity, and that a more inclusive and flexible way of working is possible. 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 for businesses and workers. The results of this global survey provide key consideration points for leaders as organisations transition to the next normal.

Flexibility and hybrid working models have created many opportunities for workers and companies. Most people feel their digital skills, work/life balance, ability to care for others and how trusted they feel to do their job have improved.

Workers do not want to give up this flexibility gained during the last 18 months, and companies need to acknowledge and integrate this into their policies to stay attractive. Hybrid and flexible work is no longer considered an employee benefit, but a new normal for workers, who are also calling for a shorter working week.

As employees gain greater control and autonomy over managing their working schedules, the practice of compensating employees based on a fixed set of hours during a certain time of the day should no longer stand as a reference for performance. Helping leaders move to a system whereby performance is judged on results and outcomes, rather than on the number of hours worked, will be key for companies and leaders going forward.

On the other hand, motivation, a sense of team, company culture, recognition of workers' contributions and satisfaction with career prospects have regressed for those in non-management positions. Leaders hold the key for reconnecting workers to the business, but the data shows a clear disconnect between management views of their own performance and the opinion of their employees. This lack of awareness poses a major threat to company cohesion.

A new focus on coaching and leadership development is therefore needed for those in management and leadership positions, who have struggled with several aspects of leading during this time of transition. For example, leaders have not found it easy to keep their teams focused on business goals, assess outcomes instead of hours, or identify when their teams are suffering from overwork or burnout.

More than half of young leaders are suffering from burnout. Given that this is the same group that will likely take responsibility for the future progress of their company, this is an area of great concern.

Mental wellbeing among staff at all levels has been negatively impacted over the course of the past 12 months. Building and resourcing future working environments and cultures, as well as giving skill sets that promote and support positive mental health and psychologically safe environments, will be key to business success in the next normal. It is increasingly necessary for companies to help their leaders foster openness, listen to employee needs and to develop resilience, for themselves and for their team members.

While the much-hyped 'great resignation' does not appear to be imminent, employees at all levels are making re-assessments of what matters to them, with as many as 2 in 5 considering career changes and moving to jobs with more flexible options. Workers are looking for more agency, career development, mobility or upskilling and reskilling opportunities into the next chapters of their careers.

Workers have become more agile, autonomous and proactive, taking it upon themselves to reskill and upskill themselves. The time for companies to consider their people and help workers re-discover themselves is now, by re-assessing their talent and creating new career paths for them. The result will not only help reconnect workers with their purpose, but it is also a path to future-proof businesses.

The final challenge for companies is that individuals expect to be treated as individuals. The 'one-size fits all' approach will need to adapt to one of mass customisation, where flexibility and results-orientation will hold the key to remaining, or becoming, an attractive place to work.

It is vital that employees, employers and policymakers share the responsibility of shaping a new working model, but with employers selected as the most trusted institution to deliver a better working world, the decisions they make today will influence their status as an employer of choice for many years to come.



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