



THE ADECCO GROUP

Resetting Normal: defining the new era of work

June 2020

Objectives of the research

- The research was designed to allow us to make future facing predictions about the world of work
- We did this through looking at 3 moments in time;

Pre-pandemic

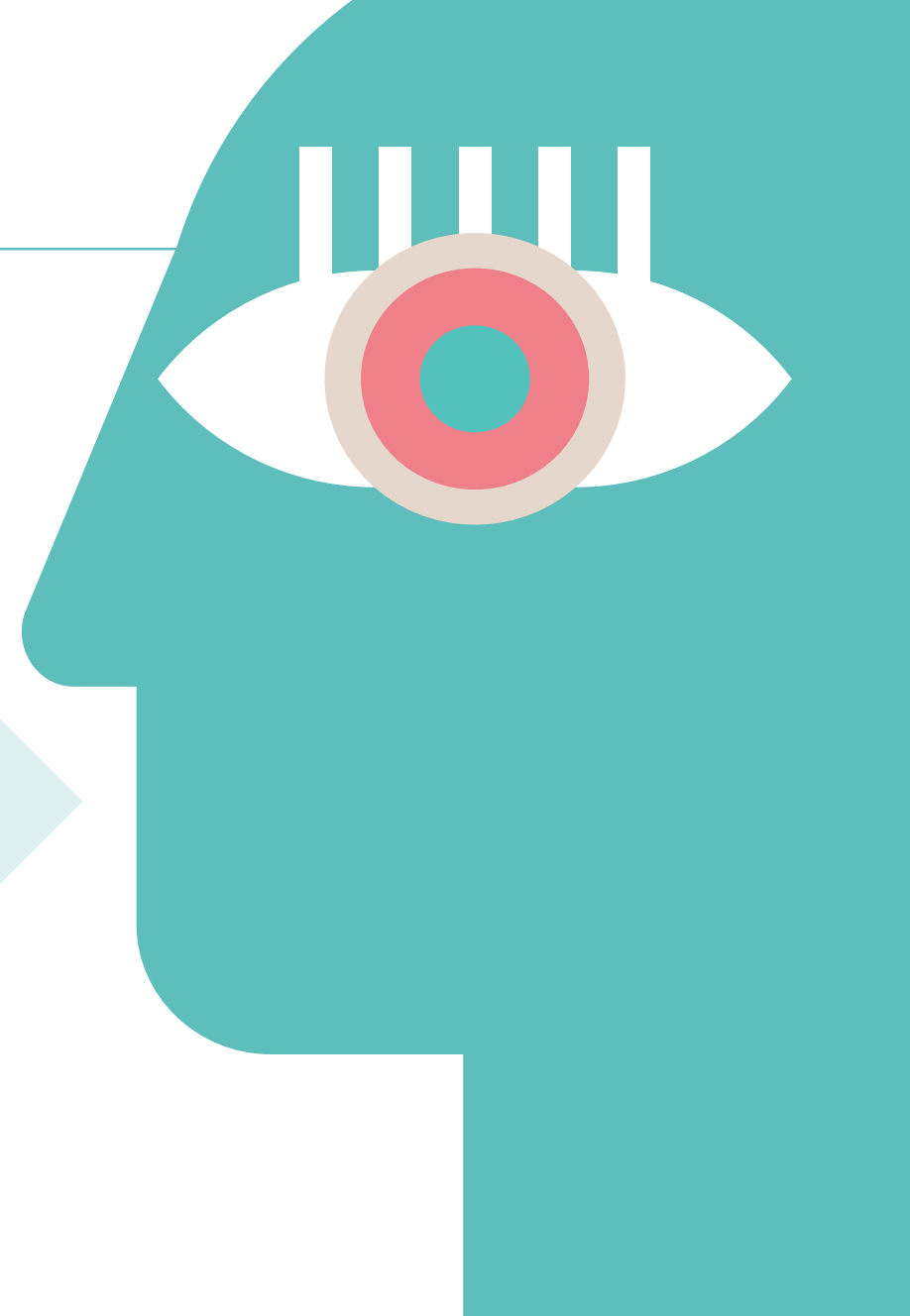
To understand key working attitudes & behaviours in the recent past to act as a baseline for comparison now

During

How working during the pandemic has impacted work and attitudes and therefore influenced future needs / wants

Post-pandemic

To understand workers hopes and expectations on how the post pandemic working world will take shape



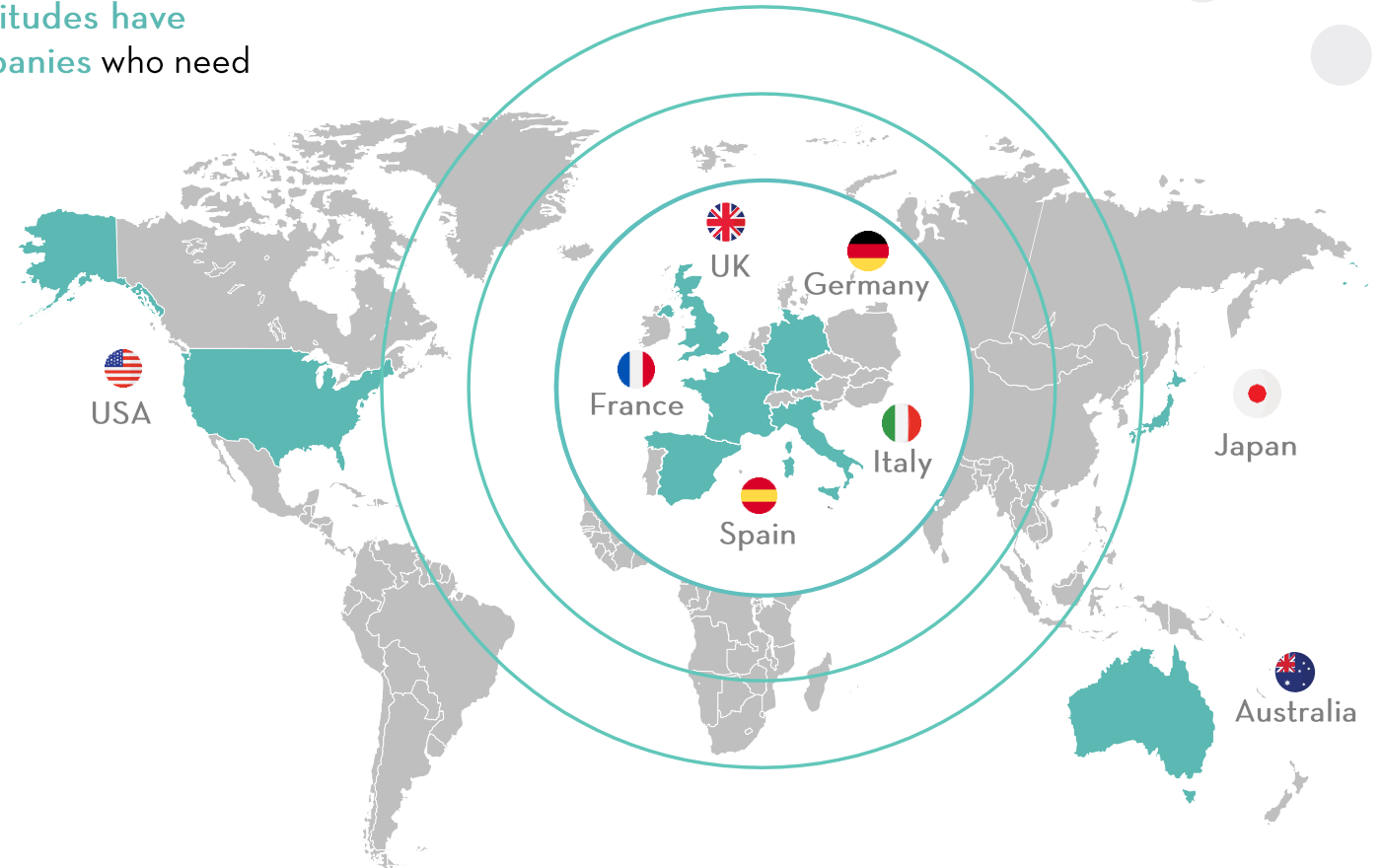
Methodology overview

This research was designed to understand **how employee attitudes have shifted during the pandemic**, and the **implications for companies** who need to successfully adapt to this new world of work.

8000 respondents
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 & 26th May 2020 in local language.



We surveyed 1,000 respondents per country (total 8,000)
All respondents answered a 15-minute online survey.



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Key insights



From the research, five key themes have emerged as the most pertinent for organisations to consider in the post-pandemic era of work

1

The future is flexible

The world is ready for 'hybrid working'

2

End of the 9-5?

Tracking results, not hours, emerges as the new way to measure productivity

3

Reinventing Leadership

Emotional intelligence is the new gold standard

4

New skills for a new era

Accelerated digitisation and the reskilling imperative

5

The trust equation

Employers trusted to deliver, employees empowered to thrive



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Opening Context: The Pandemic Experience

The Pandemic Experience: Summary

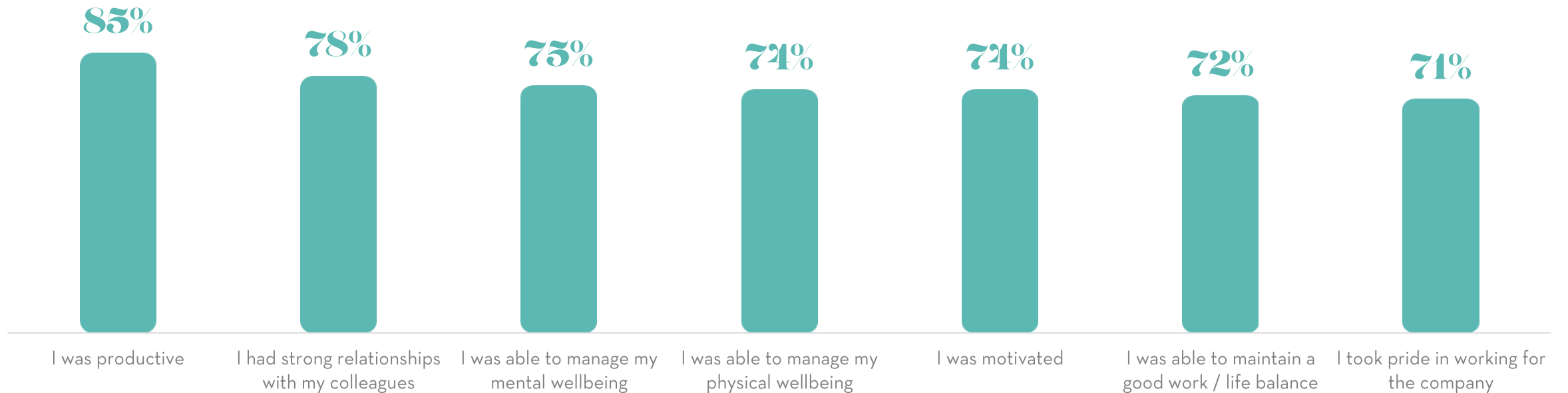
- Before the pandemic, most were experiencing a generally positive working life; they were motivated, had good relationships with colleagues and were able to manage their physical and mental wellbeing
- On the whole, **since businesses have shifted to remote working, the majority of workers have had a neutral / positive experience**
- **Work / life balance** has clearly improved. And while many elements of work have actually gotten better, there are some **watch-outs for employers**
- Areas such as **collaboration, relationships with colleagues, and mental wellbeing** have faced significant challenges which need to be addressed as businesses transition towards new working practices and 'reset normal'



Prior to the pandemic, the majority of workers had a positive relationship with their jobs



% Who agree with the following statements about working life before the Covid-19 outbreak (NET Agree)

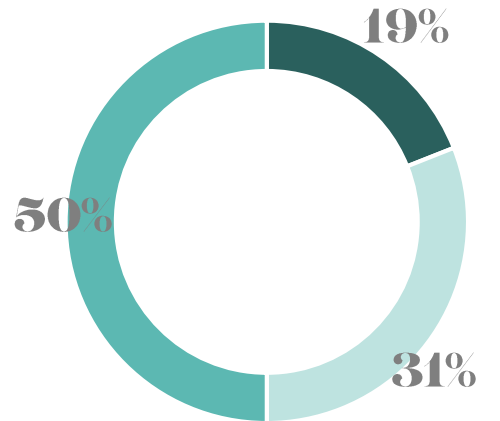


Q3. Thinking about your working life before the pandemic, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (n=8,000)

During the pandemic, job satisfaction remained high for the majority with consistency across markets and age breaks

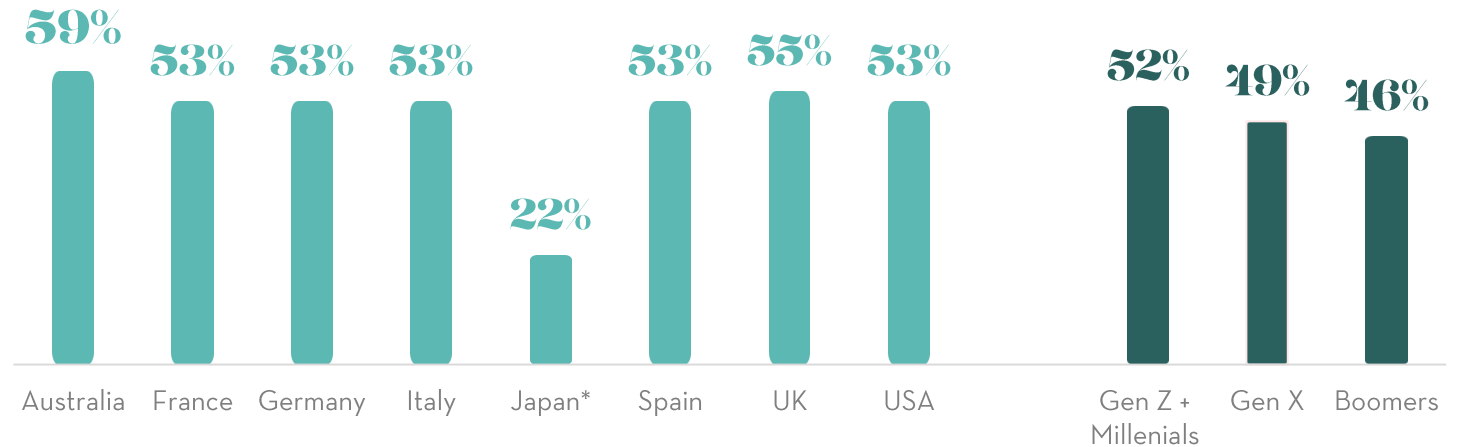


% Who have had a positive experience of working life during the pandemic



■ Negative ■ Neutral ■ Positive

% Who have had a positive experience of working life during the pandemic



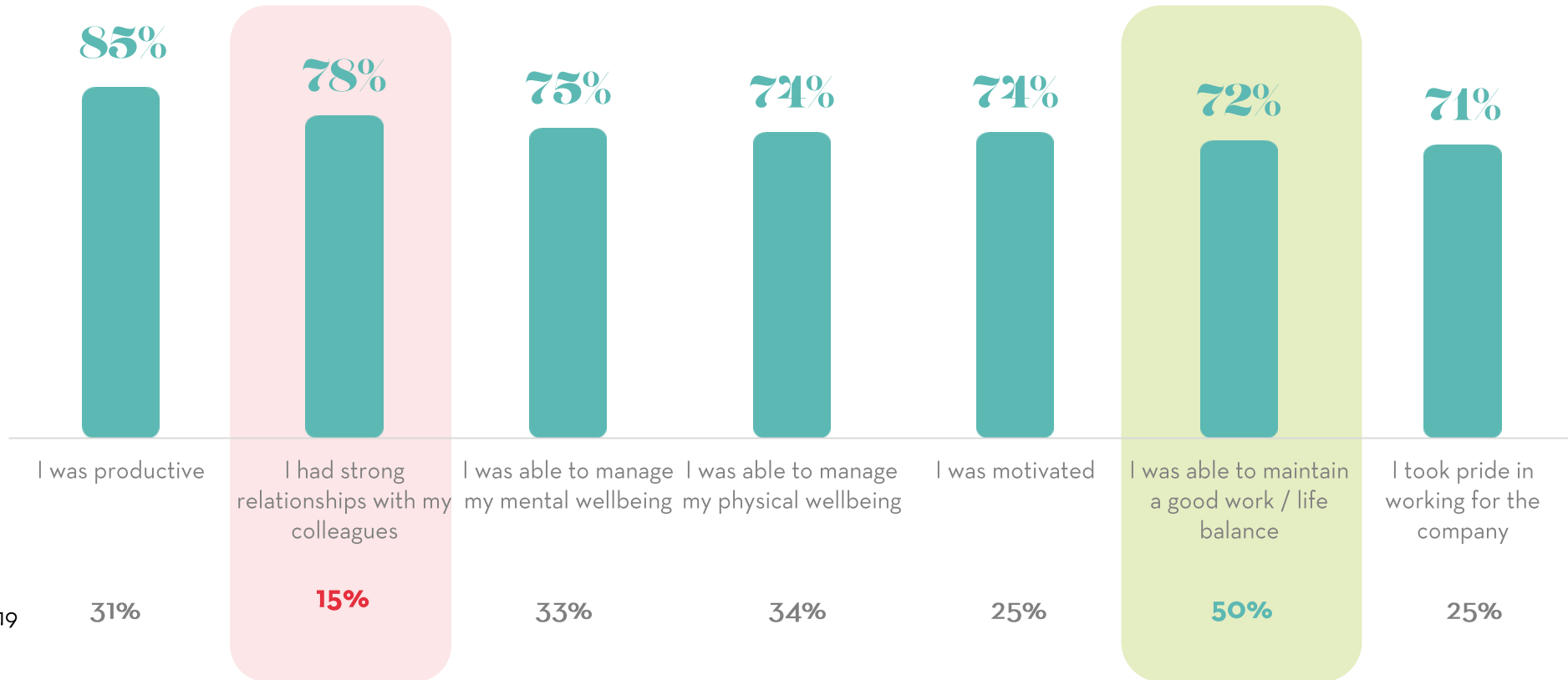
**Note scores for Japan in online surveys in general are consistently lower than many other countries. Even more so in this research given the significantly longer working hours inherent in Japanese culture (e.g. 70% worked 40-plus hours / week in Japan vs. Global average of 48% during the pandemic)*

Q4. Overall, would you say that your experience of working life during the pandemic has been...? Base: All respondents (n=8,000)

Work/life balance has improved during the pandemic, however workers feel that relationships with colleagues have weakened



% Who agree with the following statements about working life before the Covid-19 outbreak (NET Agree)



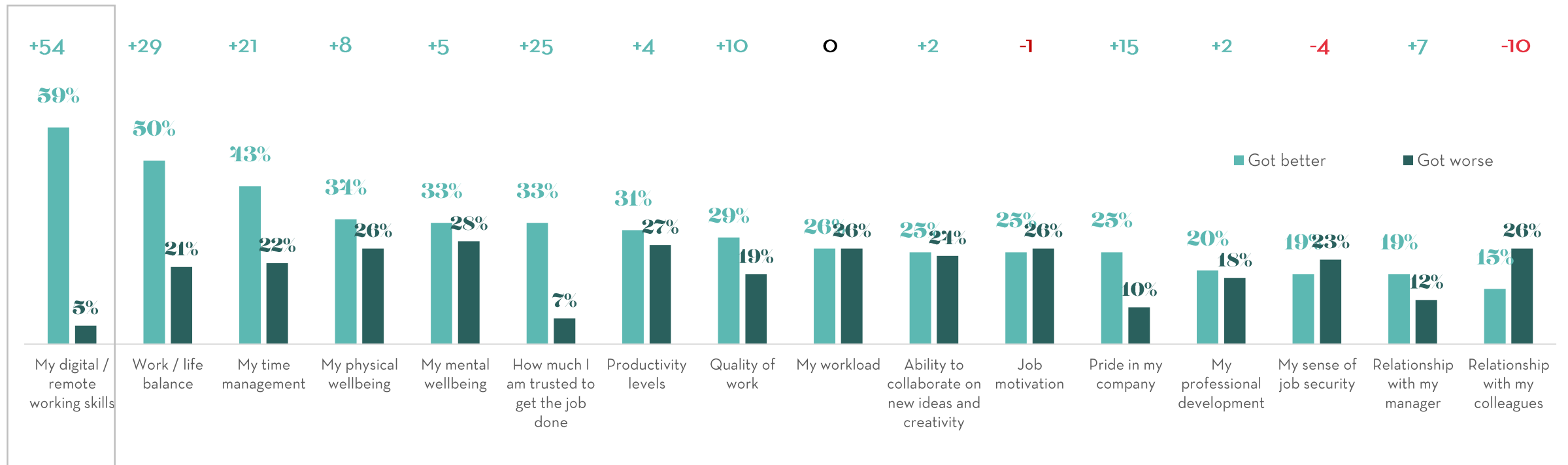
% Who say these aspects improved during the Covid-19 outbreak

Q3. Thinking about your working life 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 pandemic, and which have stayed the same or got worse? (NET Better) Base: All respondents (n=8,000)

While digital skills, work/life balance, and trust have improved, experiences relating to wellbeing, collaboration, motivation and relationships has been mixed

% Who say following have got better / worse during the Covid-19 outbreak (NET Better vs. NET Worse)

Difference between got better and got worse



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Better) Base: All respondents (n=8,000)



**In the future,
work/life balance is
expected to return as a
concern**

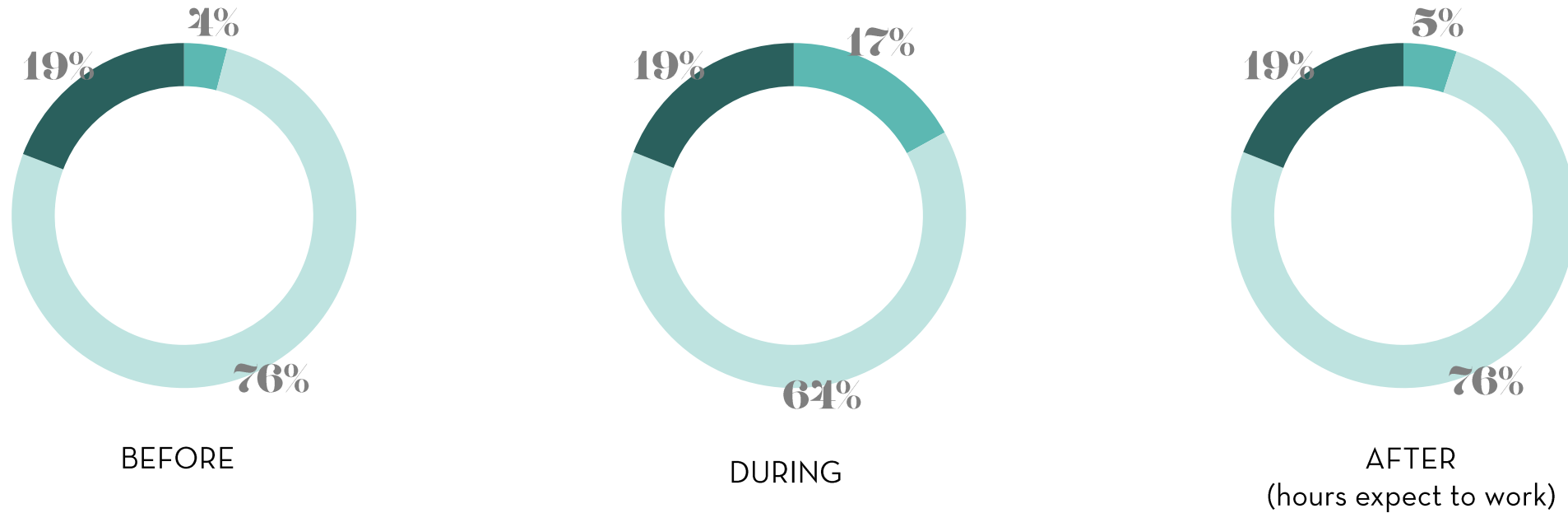
**Addressing remote
team collaboration is
an area for
improvement**

Lower working hours expected to be a temporary facet of the pandemic



% Who worked the following hours **before** vs. **during** vs. expect to work **after** the Covid-19 outbreak

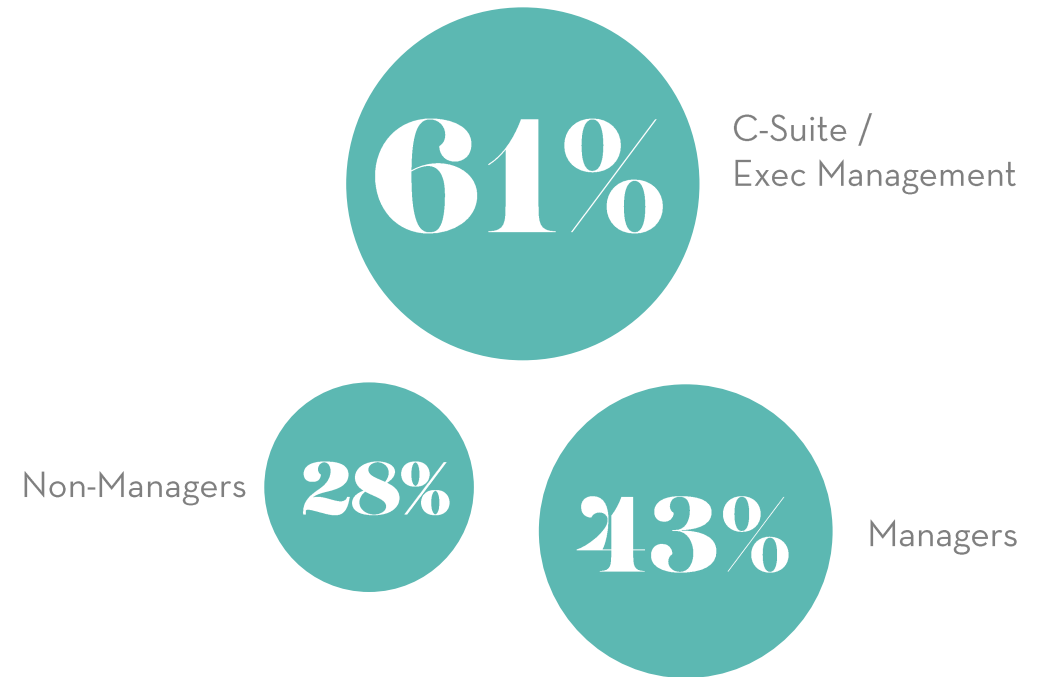
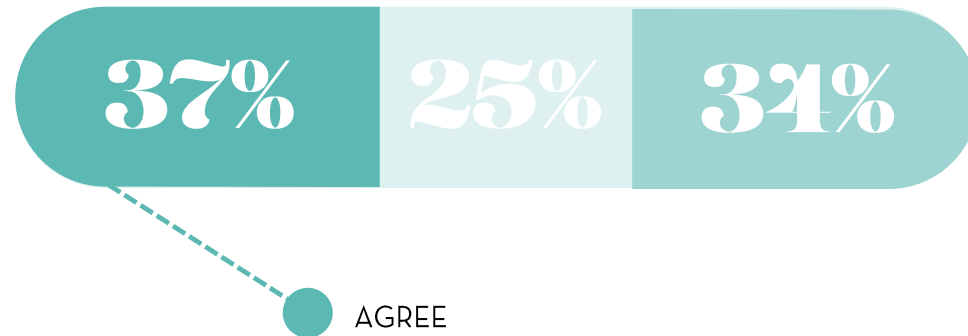
■ Short hours (Less than 28 hours) ■ Standard hours (28-42 hours) ■ Long hours (43 or more hours)



Q1. Thinking back to before the main coronavirus pandemic period, how many hours did you work in an average week? Q9. Has your company taken any of the following specific measures in response to the pandemic, that you are aware of? Q10. How many hours would you say you have been working during the pandemic in an average week? Base: All respondents (n=8,000)

Nearly 2 in 5 expect their hours to be excessively high in the future, with those at a managerial level or above expecting to be impacted the most

“I expect my working hours to be excessively high after the pandemic”



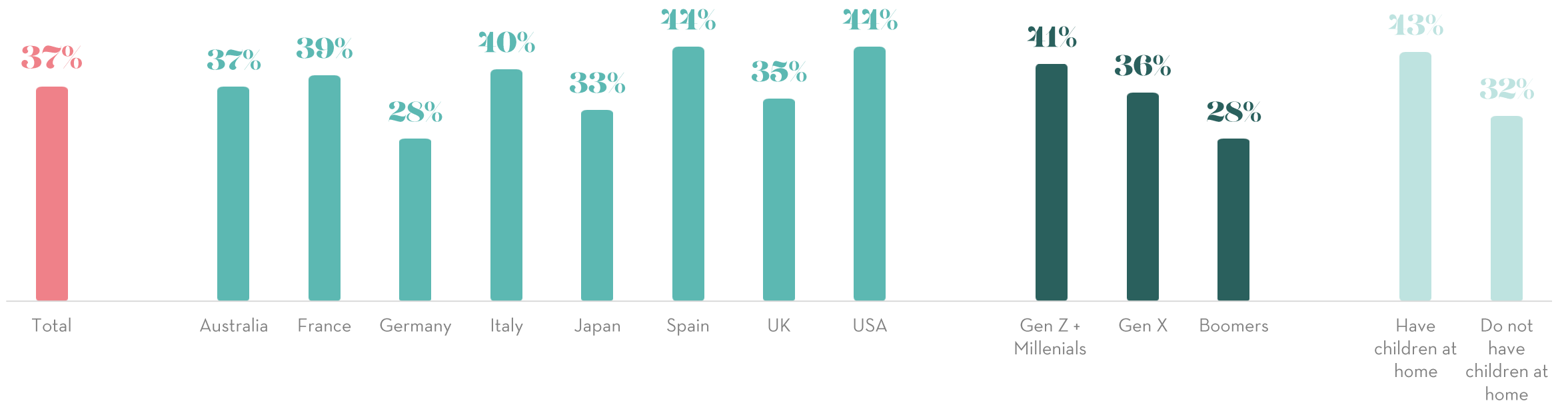
% Who expect working hours to be excessively high after the pandemic (NET Agree)

Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree; Disagree) Base: All respondents (n=8,000)

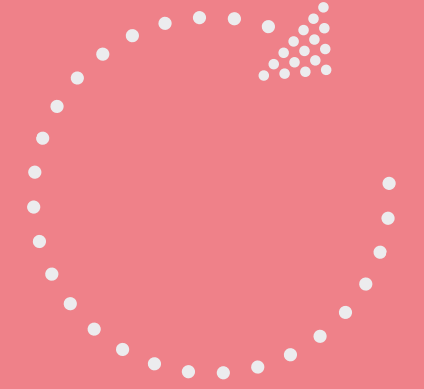
Younger generations more likely to fear they will have excessive workloads after the pandemic, as well as those who have children at home



% Who expect working hours to be excessively high after the pandemic (NET Agree)



Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? Base: All respondents (n=8,000)



**The future is flexible:
The world is ready for
'hybrid working' as
companies and employees
call for greater flexibility
in wake of COVID-19**

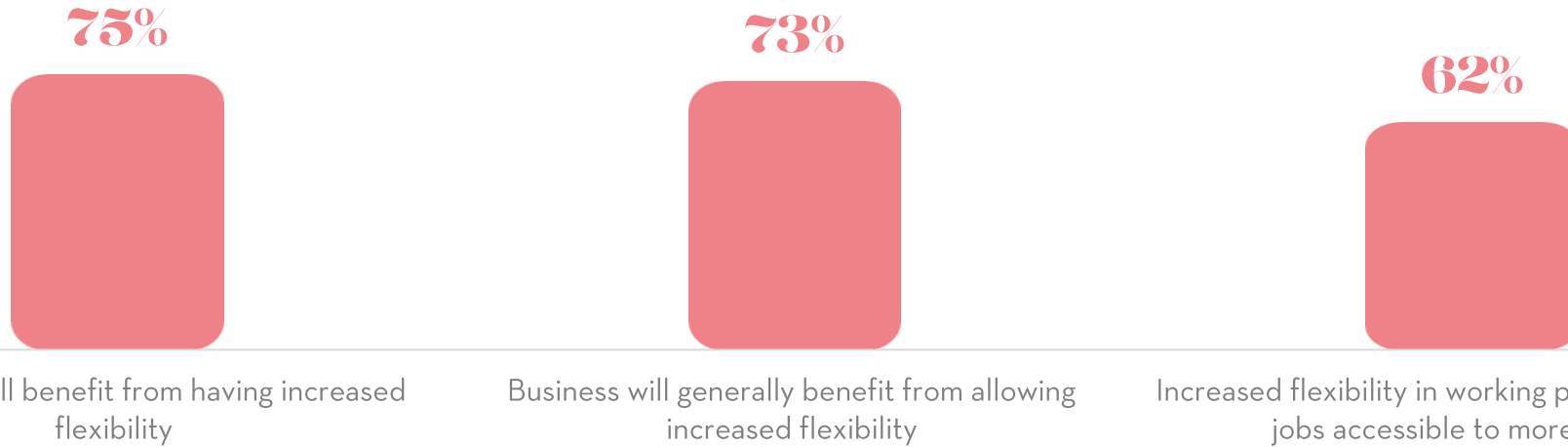
The future is flexible: Summary

- The benefits perceived from flexibility raise a challenge for employers, as **employee preferences no longer align with the norms of the past**
- **Senior management are buying into the benefits of change** and recognising the complementary value of an office / remote work hybrid model
- This presents an **opportunity to re-think operating models** to identify the best new balance of flexible working to maximise benefit to their own employees and business



The future is flexible: Increased flexibility deemed to have universal benefits with strong buy-in from C-suite / Executive management

% Who agree with the following statements about flexibility after the pandemic (NET Agree)



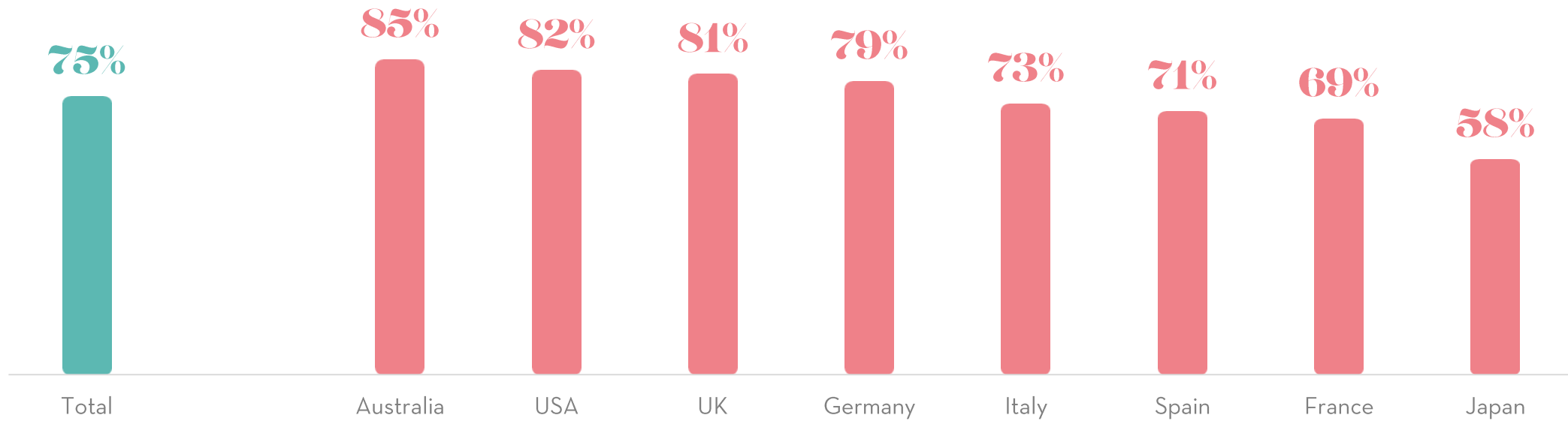
C-Suite / Exec Management



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 (n=8,000)

The benefits of flexibility are felt across countries

% Who agree that employees will benefit from increased flexibility (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 (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

The new hybrid model: optimal mix of 50/50 remote vs. in-office working

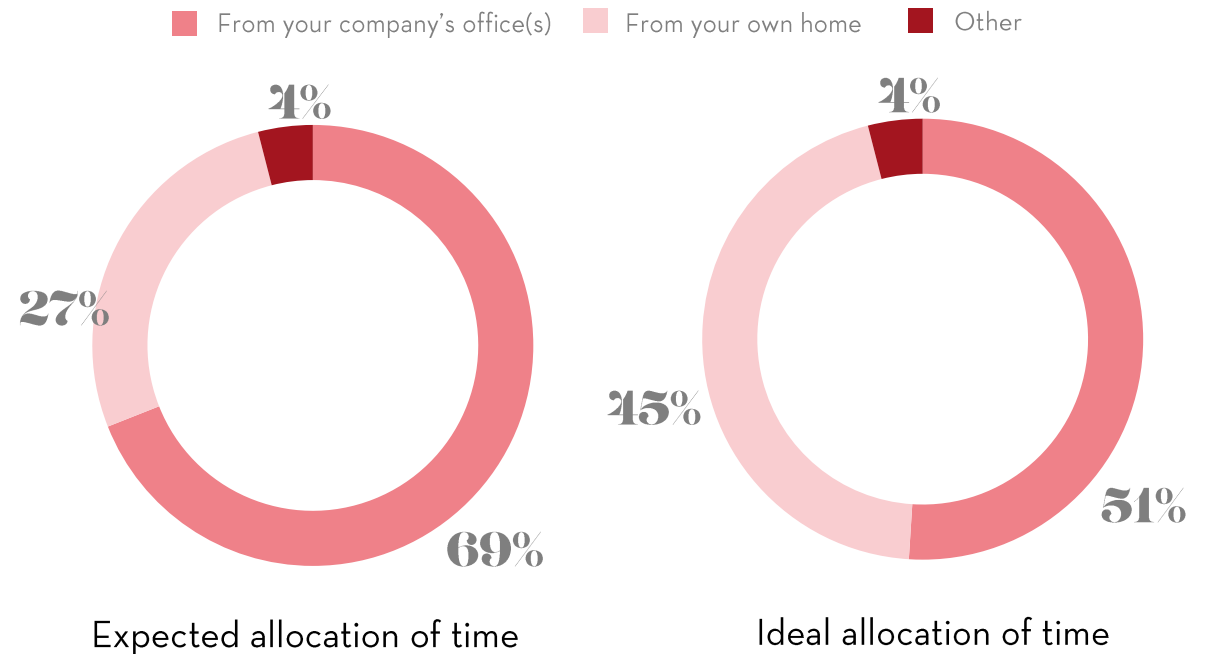
49%

On average, employees want to spend around **half their working week remotely**

75%

of employees want **flexibility around office and remote working** after the pandemic

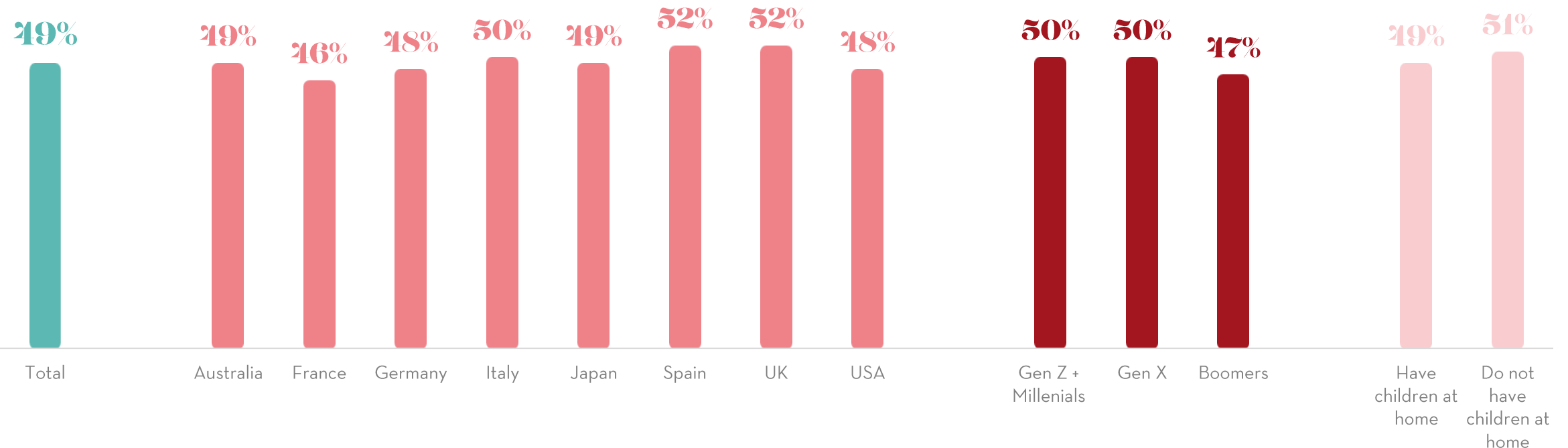
% of working week expected to spend vs. wanted to spend in the following environments after the Covid-19 outbreak



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 Other: From a client's office(s) + From someone else's home (e.g. family member / friend / colleague) + From a communal venue (e.g. café, public space, etc.) + Other (e.g. shop, factory, etc.)) 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 (n=8,000)

A universal ideal: The remote vs. office 50/50 time split holds across geographies, generations and parental status

% of working week workers want to spend working remotely after the pandemic



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 Remote working (From a client's office(s) + From your own home + From someone else's home (e.g. family member / friend / colleague) + From a communal venue (e.g. café, public space, etc.) + Other (e.g. shop, factory, etc.)) Base: All respondents (n=8,000)



However, whilst increased flexibility and working from home is an aspiration for workers, employers must ensure that collaboration and colleague relationships do not suffer as remote working remains

There are concerns that team collaboration may suffer under remote working

1 in 2

Say that team collaboration will suffer if full-time remote work becomes the norm (51%)

65%

C-Suite /
Exec Management

2 in 3

Say it is important to have the opportunity to meet with colleagues face-to-face (63%)

76%

C-Suite /
Exec Management

1 in 4

Feel the ability to collaborate on new ideas creatively has deteriorated during the pandemic (24%)

18%

C-Suite /
Exec Management

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Worse) Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (n=8,000)



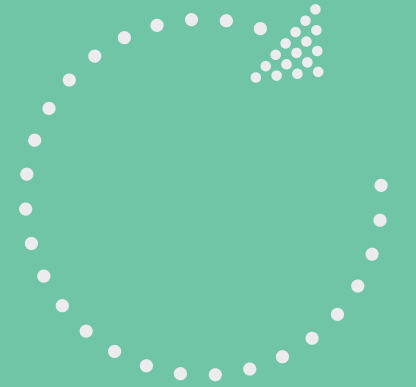
As a result 3 in 4

Say a mix of office-based and remote working
will be the best way forward (74%)

The future is flexible: Key takeaways

- It is clear that there will be **more flexibility in our future**, but the question of how this is **sustained in the longer term** beyond the pandemic remains a key **challenge for businesses**.
- With all workplace parties calling for greater flexibility, it is imperative that everyone is involved in aligning on the optimal model. **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 the new norm**.
- To ensure success, **leaders** must consider the **shifts that need to be made** in working styles, communication rhythm and team organization **when adopting a hybrid working model**, and avoid simply applying the structures of the past.
- With the preference being an even split between office and remote working, leaders will need to **consider the functionality and purpose of the office** and how **the shared work space can bring the most value** to a workforce that can and will work anywhere in the world.





End of the 9-5 and a more effective way to measure productivity?

Tracking results, not hours, emerges as a clear trend



End of 9 to 5?: Summary

- Whilst working locations are important, so too are **flexible hour schedules**
- Employees are keen to **retain the increased autonomy over working hours and schedules** enjoyed during the pandemic
- This has called into question the **relevance of the entrenched hours-based contract model**
- **New models of measuring employee productivity** are emerging

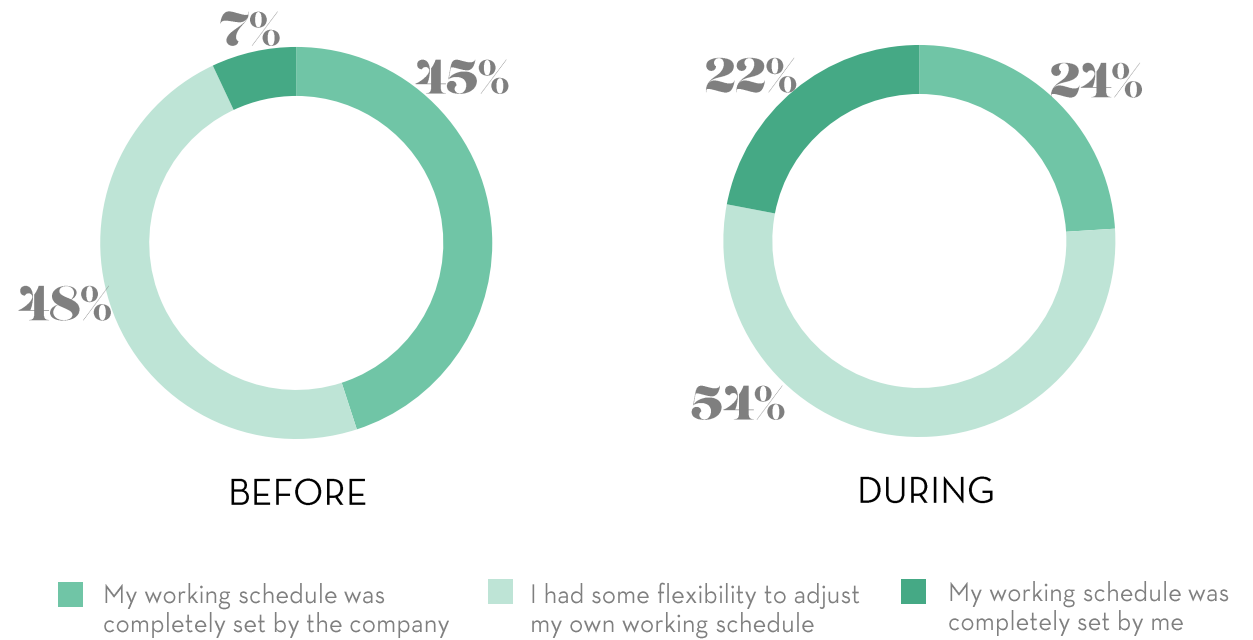


Autonomy over work schedules tripled during the pandemic ...

Say their work/life balance has improved as a result of the pandemic

50%

Level of flexibility regarding working schedule before vs. during the Covid-19 outbreak



Q2/ Q11. Before / During the main pandemic period, which of the following statements best described your weekly working schedule? Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Better) Base: All respondents (n=8,000)

...it has been a success, and employees don't want to lose this autonomy

3 in 4

The success of flexi-working has made its continuation an aspiration for most workers

Think it is important for employees to **retain flexibility** over working hours / schedule (75%)

And to **implement more flexibility** in how and where staff can work (77%)

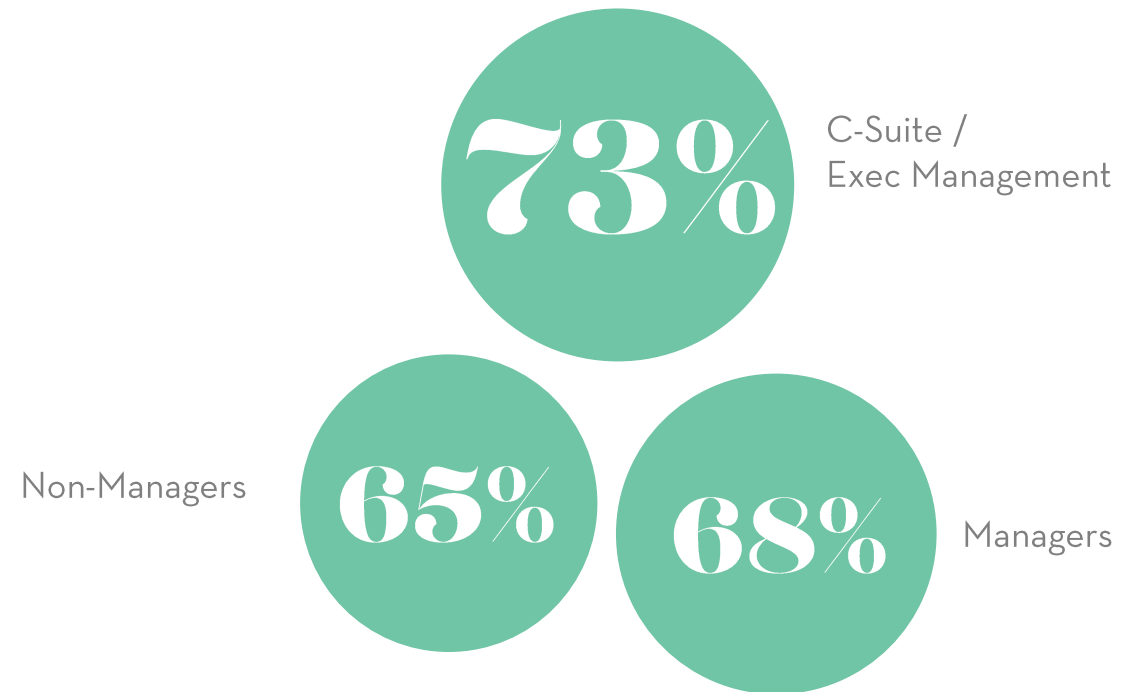
Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (n=8,000)

Specifically for parents, flexibility around childcare is important for managers to support

2 in 3

parents say it is **important** their manager flexes around their childcare needs after the pandemic (67%)

Management are on board and supportive of this need:



Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: All respondents (n=8,000)



Could we be in the twilight of the hours-based contract?

Workers feel the structure of employee contracts should be revisited, moving away from hours to focus more on output

Questions are raised over employee contracts and working hours

69%

feel that employee contracts should focus more on **meeting the needs of the business** than hours worked

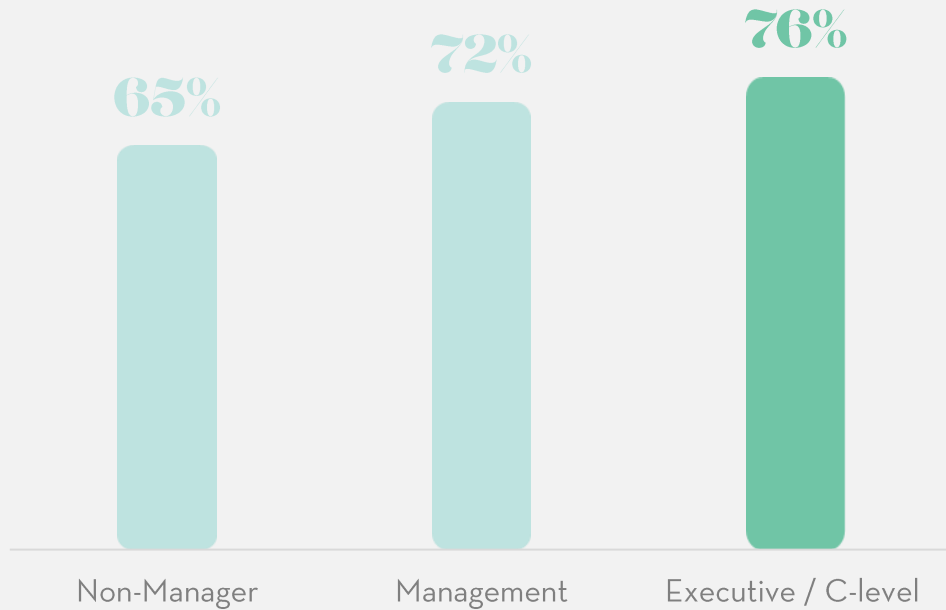
67%

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

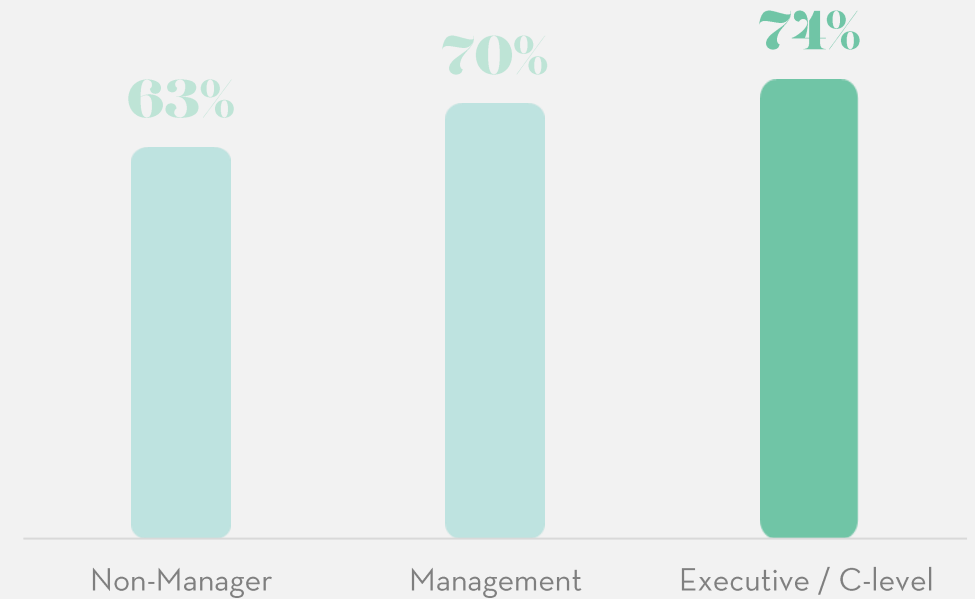
Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (n=8,000)

Interestingly, this view is shared by those in C-Suite / Exec management

Employee contracts should focus more on **meeting the needs of the business** than hours worked (69%)



Employers should **revisit the length of the working week** and the hours that employers are expected to work (67%)



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 (n=8,000)

End of the 9-5: Key Takeaways

- As flexibility increases and employees gain greater control over working schedules, they will also look to gain **greater autonomy over how to manage working time**
- As the importance of knowledge-based work increases, the practice of **compensating an employee based on a fixed set of hours** during a certain time of the day, rather than results delivered, **will no longer stand as reference for a working relationship.**
- Historically, for many jobs, wages have been calculated on the basis of attendance rather than impact. Going forward, **the concept of correlating output with hours will be outdated.** Many individuals work at a different pace to each other, and work volumes are often not linear.
- **Redefining the measurement of productivity** is complex and goes to the heart of Industrial Relations and Labour Legislation. **An individualised approach must be considered going forward.** In an era of work vastly different from the one based on an industrial 9-5 scheme, it is inevitable that the hours based model of productivity measurement will be revisited.

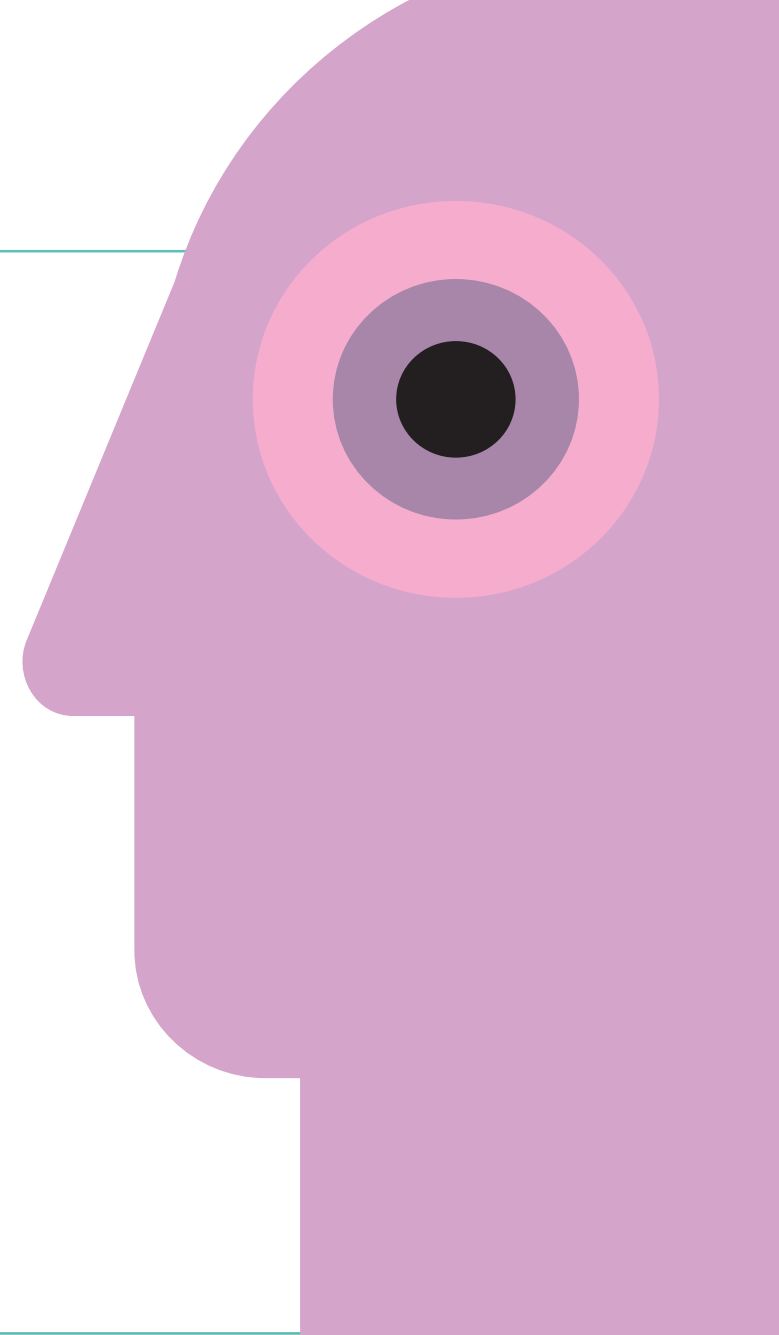




**Reinventing leadership:
emotional intelligence is
the new gold standard,
but leaders are
currently not well-
equipped**

Reinventing Leadership: Section Summary

- A range of **high expectations** are placed on company leaders for delivering a better future world of work. With remote working here to stay, leaders and businesses must **adapt how they support their staff**
- The pandemic has highlighted the extent of the leadership challenge and the **importance of supporting managers to deliver against new expectations** with a focus on soft skills and emotional intelligence
- While employees are seeking **emotionally intelligent leadership**, managers are not equipped to reinvent themselves, highlighting a **soft skills gap**



To support a shift in working structures, employees are placing importance on *trust and empathy*

What employees expect of the company:



What employees expect of the manager:



Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Q20. How important will the following be to your working life after the pandemic? (NET Important) Q21. Thinking about types of training, resources and support that a company may provide, how important will the following be after the pandemic? (NET Important) Base: All respondents (n=8,000)

With remote working an increasing part of working life, it is important that managers find effective ways to organise and coordinate their virtual teams

7 in 10

71%

Say it is important that managers find effective ways to collaborate on new ideas / creativity across locations

7 in 10

71%

Say effective organisation and coordination of team members across different locations from managers is important

Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (n=8,000)

Trust comes top in the majority of markets but there are a range of soft skills and leadership qualities that are expected of managers in the future

% Who think it is important that their managers do the following after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Placing trust in staff to get the job done	79%	85%	75%	79%	79%	59%	82%	85%	88%
Strong skills in communicating with staff remotely	76%	83%	68%	74%	77%	60%	78%	81%	84%
Supporting my flexible / remote working needs	75%	83%	69%	73%	76%	60%	81%	79%	82%
Leadership style focused on collaboration, problem solving and adaptability	74%	81%	64%	77%	77%	55%	79%	78%	82%
Effective organisation and coordination of team members across different locations	74%	81%	66%	72%	75%	56%	79%	79%	82%
Leadership style focused on empathy and a supportive attitude	74%	83%	63%	76%	74%	55%	76%	81%	82%

Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (n=8,000)

Employees feel their relationship with managers has improved – and they value this

9 in 10

88%

Say their relationship with their manager has improved or stayed the same during the pandemic (88%):

69% said it stayed the same,
19% said it got better

7 in 10

72%

Say maintaining a good relationship with their manager is important to them (72%)

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Better) Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (n=8,000)

However, it has not been easy for managers to maintain support for their employees while working remotely, highlighting a gap

58%

of managers say it was not easy to **provide support on the career development** of their staff during the pandemic

47%

said it was not easy to **ensure staff have the right equipment / platforms** for remote working

45%

said it was not easy to **provide effective advice to staff on remote working**

Majority believe training on managing staff in remote working environments is important post pandemic

75%

C-Suite / Exec Management

69%

Managers

60%

Non-Managers

Q12. Thinking this time about how you have found the experience of managing other people during the pandemic, how easy or difficult have you found the following? (NET Not Easy: B3B) C-Suite / Exec management (n=4,244)

The soft skills gap: The majority of leaders say it has not been easy to provide employees with advice around mental wellbeing

54%

say it was not easy to provide effective advice to staff on their mental wellbeing during the pandemic

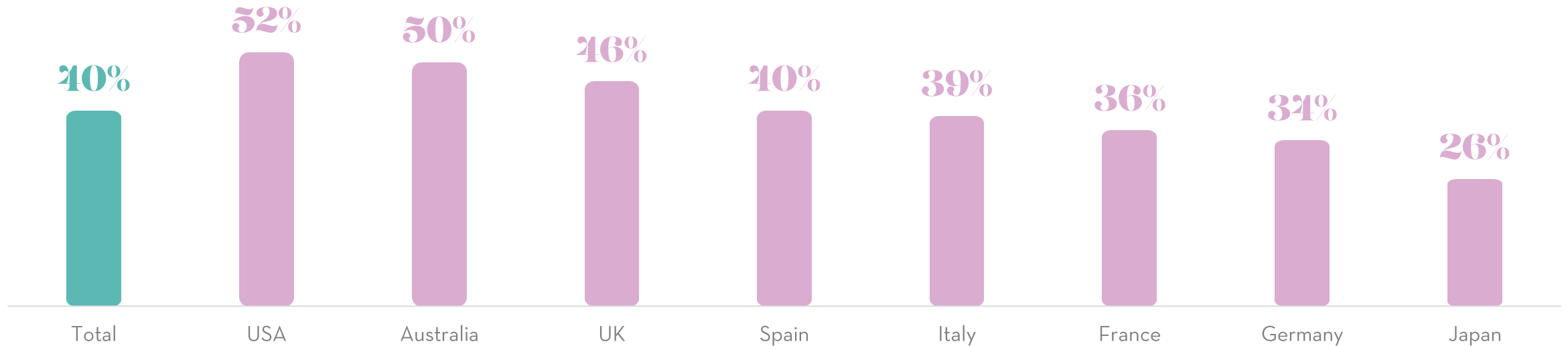
50%

say it was not easy to keep aware of how their staff were feeling during the pandemic

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Better) Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (n=8,000)

Meeting expectations on checking in on employee mental wellbeing was particularly low in Japan, France and Germany

% Who say their manager exceeded their expectations for checking in on their mental wellbeing (NET Exceeded expectations)



Q8. Thinking about how your manager / employer has performed in the following areas during the pandemic, to what extent, if at all, have they met your expectations? (NET Met or exceeded expectations) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

The holistic wellbeing imperative: mental health needs of employees is a key area to be addressed going forward

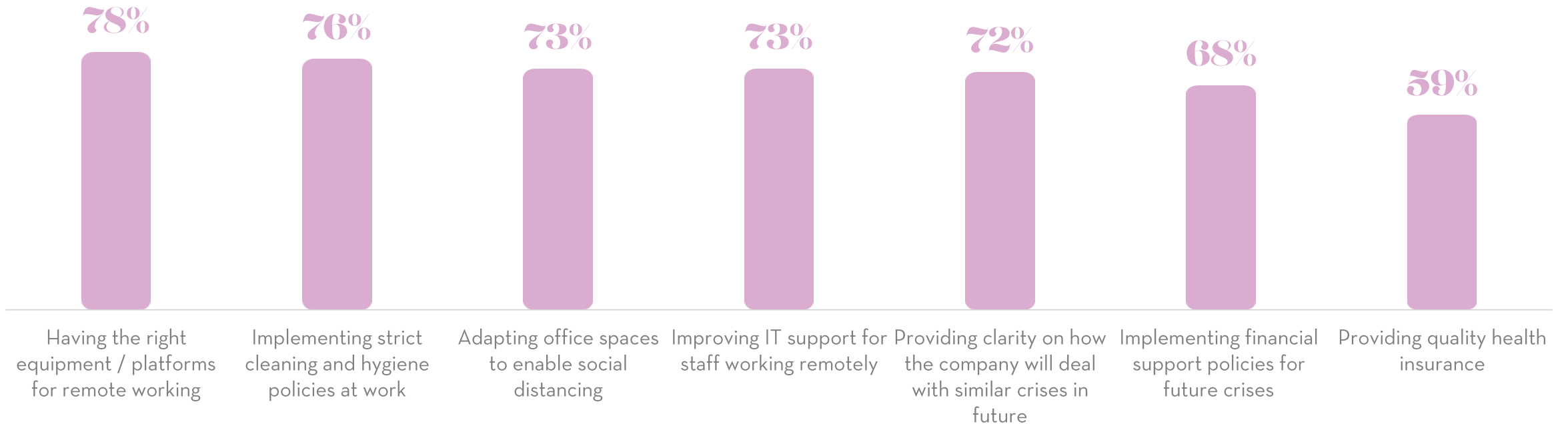


say their managers have **met or exceeded expectations** on checking their mental wellbeing

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Worse) Q8. Thinking about how your manager / employer has performed in the following areas during the pandemic, to what extent, if at all, have they met your expectations? (NET Met or exceeded expectations) Base: All respondents (8,000)

Brilliant Basics: Important for employers to also step up on material needs and contingencies

% Who think it is important that their employers do the following 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 (n=8,000)

Brilliant Basics: Important for employers to also step up on material needs and contingencies

% Who think it is important that their managers do the following after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Ensuring staff have the right equipment / platforms for remote working	78%	83%	76%	79%	80%	57%	83%	80%	85%
Implementing strict cleaning and hygiene policies at work	76%	83%	74%	66%	77%	54%	83%	83%	86%
Adapting office spaces to enable social distancing	73%	79%	70%	63%	78%	56%	78%	81%	82%
Improving IT support for staff working remotely	73%	78%	67%	65%	76%	58%	79%	79%	80%
Implementing financial support policies for future crises	68%	70%	58%	59%	72%	55%	73%	71%	81%
Providing quality health insurance	59%	50%	58%	40%	69%	48%	61%	59%	86%

- English speaking countries and Spain typically place the most importance on strong company policy covering material needs and contingencies after the pandemic
- Strong health insurance provision particularly key in the US given reliance on employers for supplementing health needs there (important to 86%). Less of a priority in Germany and Japan where less than half rate this as important

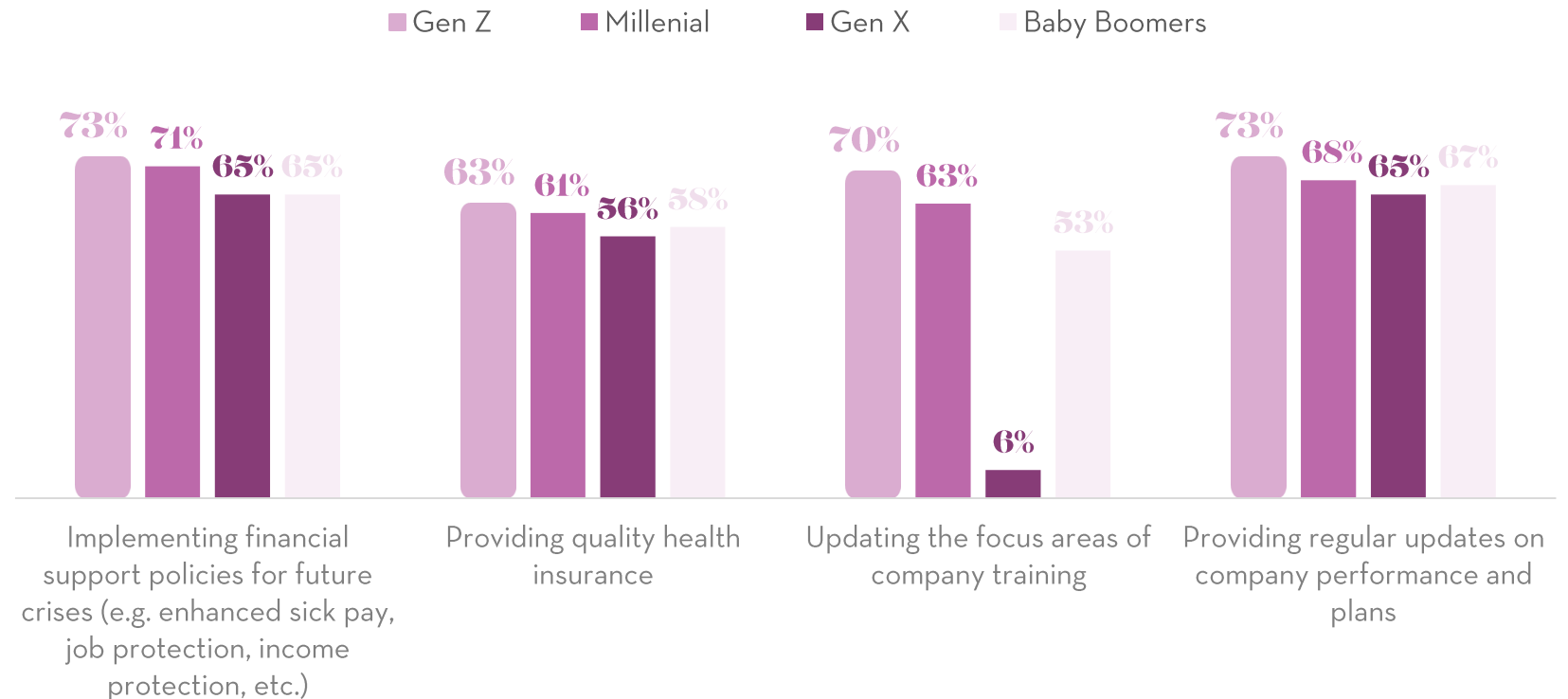
Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Younger employees are most focused on the need for strong company policy on material needs and contingencies after the pandemic

% Who think it is important that their employers do the following after the pandemic (NET Important)

Younger workers consider **quality of life policies** such as financial support and health insurance as more important compared to older workers.

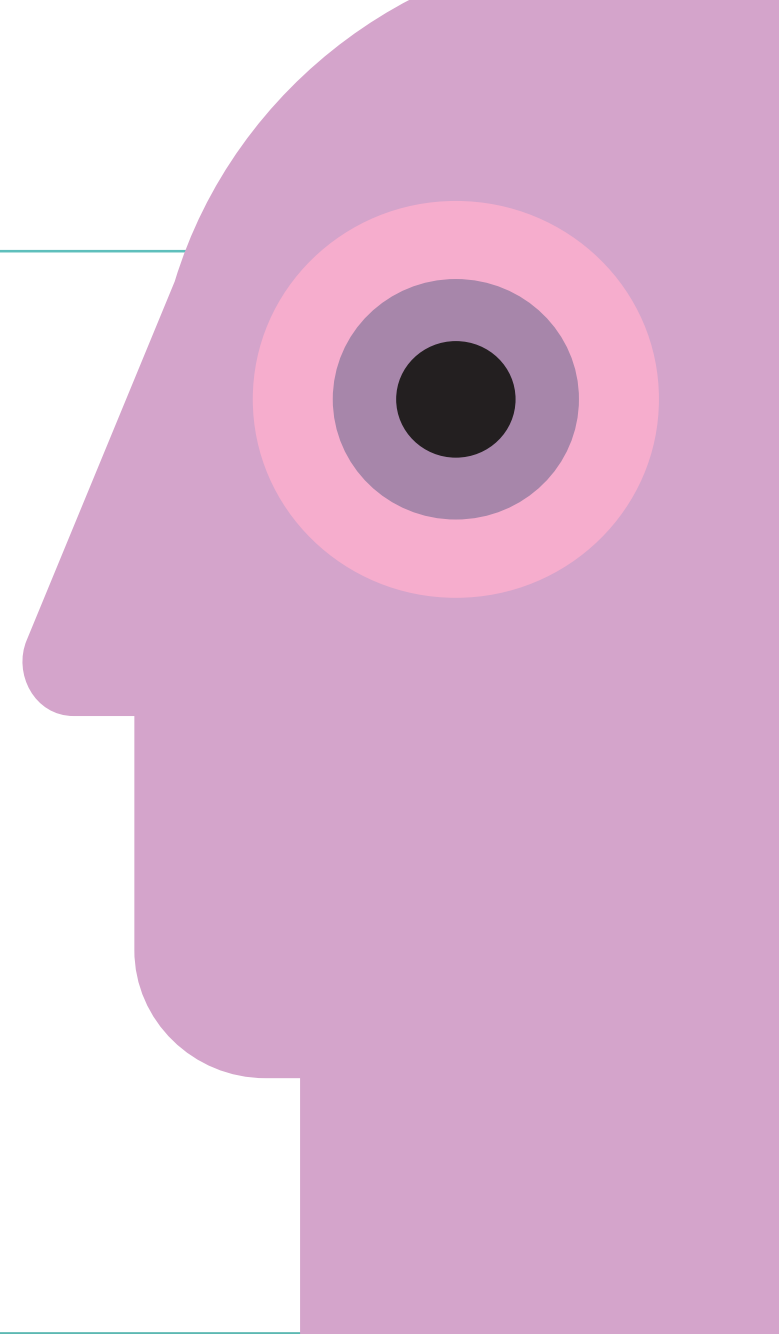
This shows that **wellbeing initiatives** could become an **increasingly important** aspect of a company's consideration following the pandemic

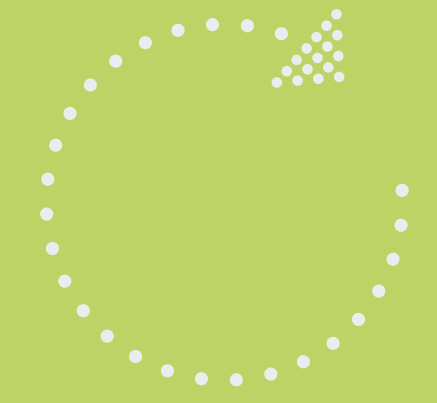


Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important) Base: All respondents (n=8,000)

Reinventing leadership: Key takeaways

- **Managers, leaders and C-suite executives all face a steep learning curve** as we begin to reset norms and standards in the workplace. Employees have high expectations of their leaders and want reassurance that their wellbeing and safety remains the utmost priority as we exit the pandemic.
- What leaders do now will be remembered. Those that can prove to be agile, resilient, and supportive in the most challenging of times will be most effective in leading their workforces into the new working world. **This will play a huge part not only in talent retention** in the immediate future, but **talent attraction** for years to come.
- **Maintaining relationships and collaboration** within a **primarily virtual working environment** will prove challenging for leaders. While employees could be anywhere, it's important that they are given the **support and resources to help them feel like they belong somewhere** when they 'show up' to work every day.
- It is clear that a **"soft skills gap" exists across the management and C-suite layers**. **Leadership development, coaching and upskilling** is one way to solve this challenge. A second is to recruit a different profile of leader, better suited to workforce of tomorrow. This is an area of opportunity as organisations work to become more resilient and future-ready.





**New skills for a new era:
Accelerated digitisation
and the reskilling
imperative**



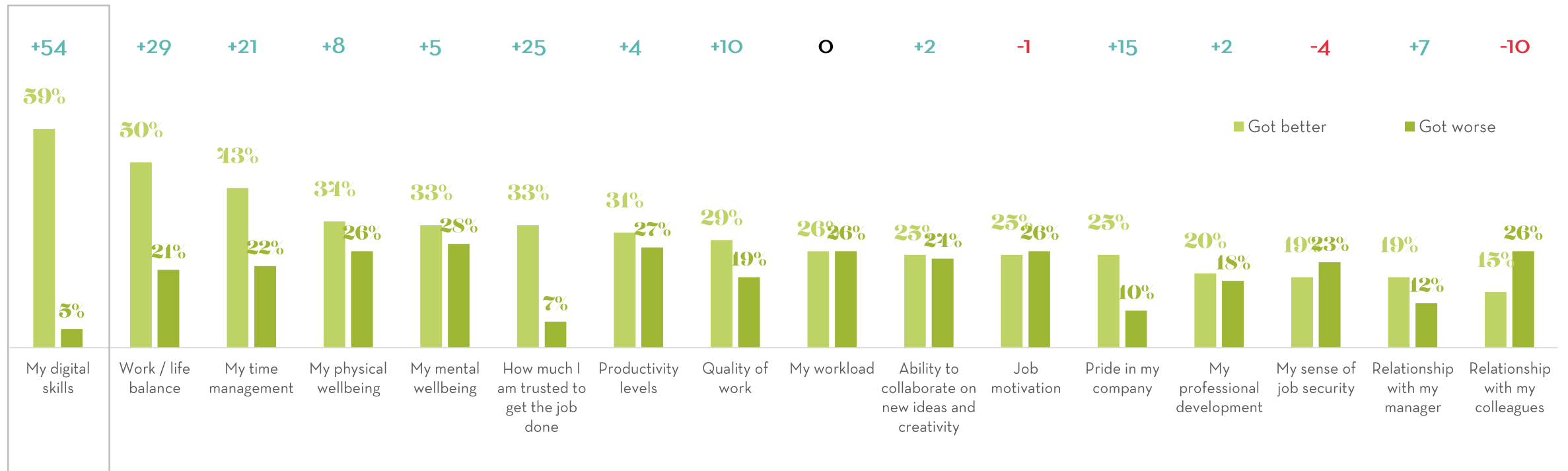
New skills for a new era: Section Summary

- There is a **clear need and appetite for a wide range of re/upskilling** to better equip the workforce for the new world of work.
- **Skill acquisition** itself is a **key motivator** to people when considering their next career move
- **Digital and soft skills are key imperatives** for the future of world of work
- **Managers must be furnished with the skills and ability to support** and get the best out of their teams in the new world where remote working is set to remain a prominent feature



Digital skills have improved for six-in-ten workers with the increase in remote working

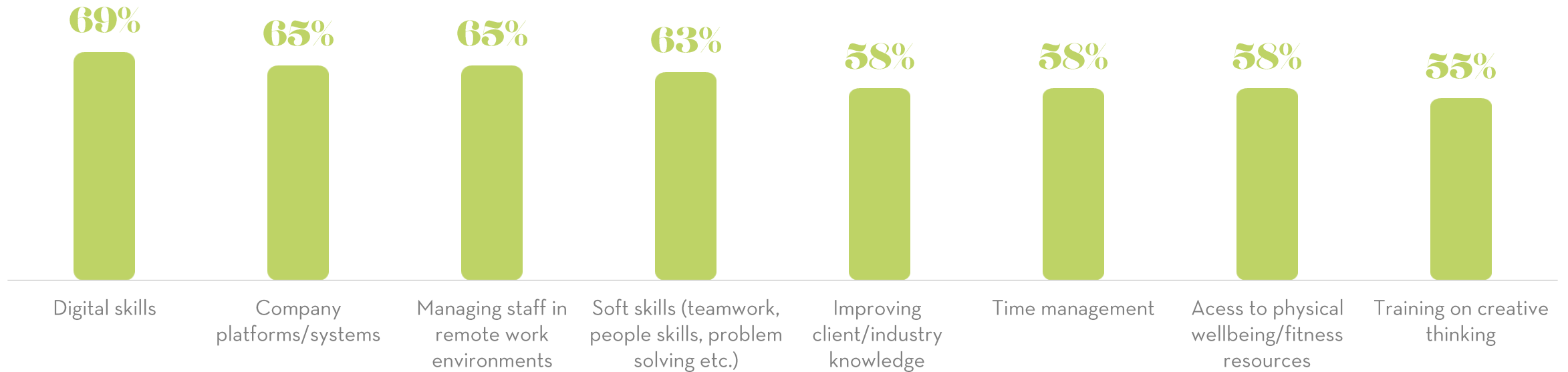
% Who say following have got better / worse during the pandemic (NET Better vs. NET Worse)
Difference between got better and got worse



Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Better) Base: All respondents (n=8,000)

Strong need and appetite for a wide range of re / upskilling is evident, particularly areas relating to digital and soft skills

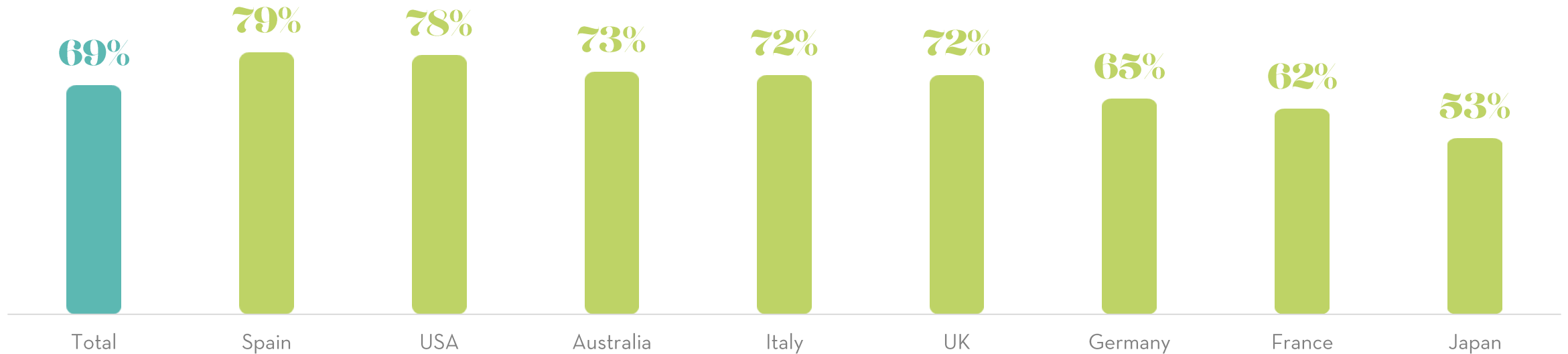
% Rating the following types of training resources and support as important after the pandemic



Q21. Thinking about types of training, resources and support that a company may provide, how important will the following be after the pandemic? (NET Important) (Base: n=8,000)

Digital skills seen as the top priority across all countries

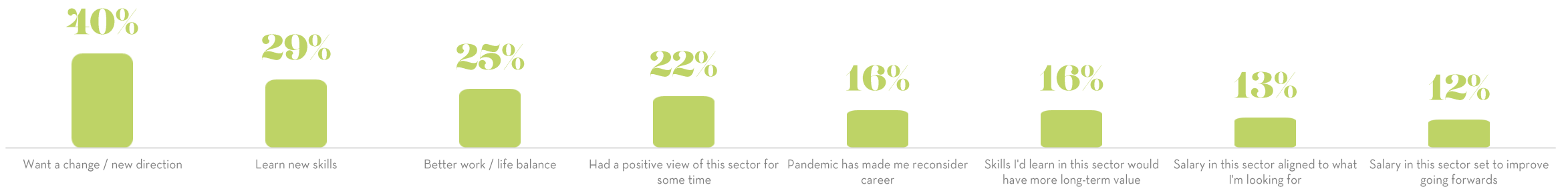
% Rating digital / remote working skills as important after the pandemic



Q21. Thinking about types of training, resources and support that a company may provide, how important will the following be after the pandemic? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Skills development is also a key reason why workers seek new roles

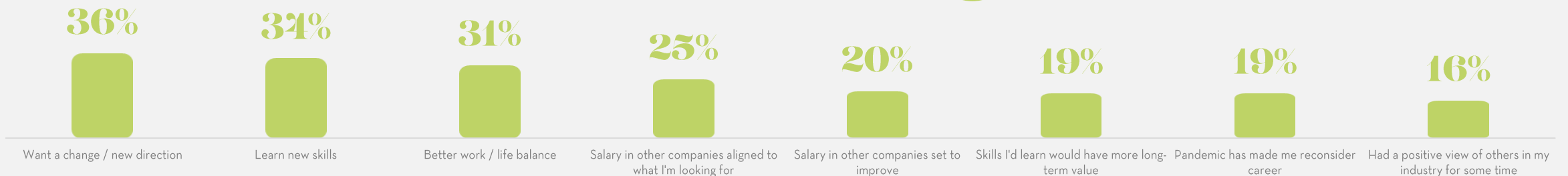
Main reasons for being attracted to a job in a different sector



37%

Cited skills as their main reason ('Want to learn new skills' OR 'Skills I'd learn would have more long term value')

Main reasons for being attracted to a job in the same sector



43%

Cited skills as their main reason ('I want to learn new skills' OR 'Skills I would learn would have more long term value')

Q28. What are the main reasons attracting you to the [...] sector [selected at Q27]? Base: Those looking for a new role in new industry (n=855) Q29. What are the main reasons attracting you to a different job in the same industry? Base: Those looking for a new role in same industry (n=729)

Digital skills: Key takeaways

- Businesses have rightly taken a 'rapid response' approach to ensuring workers have the digital infrastructure and knowledge required to work remotely and upskill themselves under lockdown restrictions. **But to facilitate hybrid working long term, employees must be equipped not only to survive, but to thrive.**
- There is a broad appetite by employees to improve themselves as individuals through reskilling and now is the time to seize the opportunity. Those **organisations that embrace lifelong learning** on a constant continuum, rather than hiring employees and hoping their skills remain current, **will emerge as the most competitive in the future marketplace.**
- The fast-paced nature of technology evolution means that digital skills quickly lose their currency, if not continually updated. As digitisation accelerates into the future, there is a clear business case for ongoing re-skilling and up-skilling. **It is time to view this as an investment in human capital that delivers clear ROI,** rather than as simply a cost to organisations.





The trust equation:
Employers trusted to
“reset normal”, employees
empowered to thrive

The primacy of trust: Section Summary

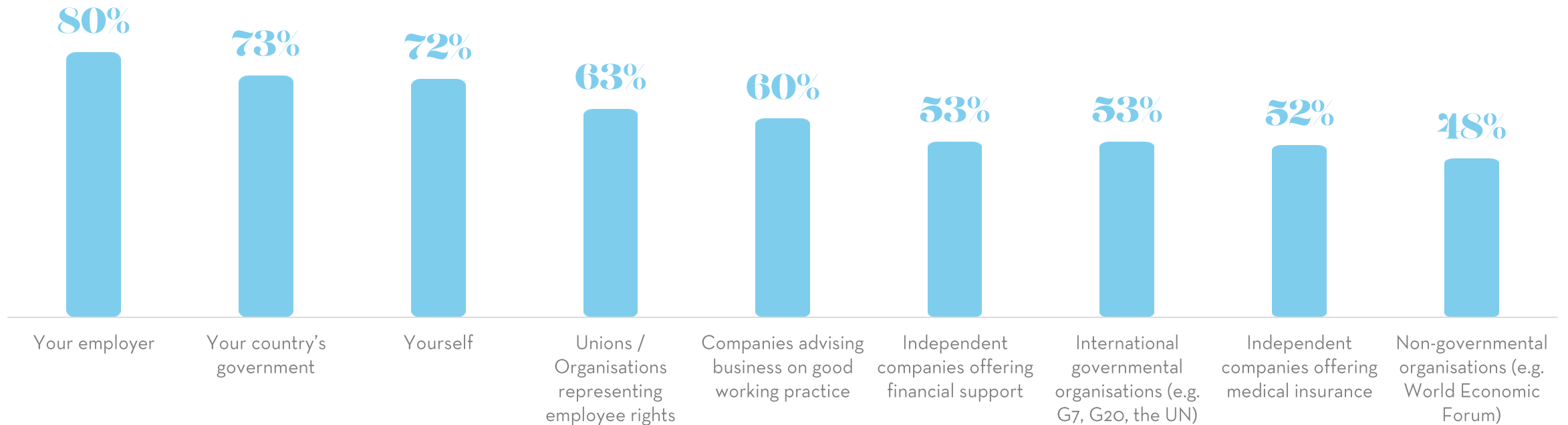
- The **primary** responsibility for delivering a better future world of work is primarily entrusted to employers
- **Governments, individuals and unions** also expected to play a role
- While employers are entrusted to help deliver a better future world of work, it also **important that employees themselves feel trusted to get the job done**



The primary responsibility for delivering a better working world after Covid-19 is placed on the employer



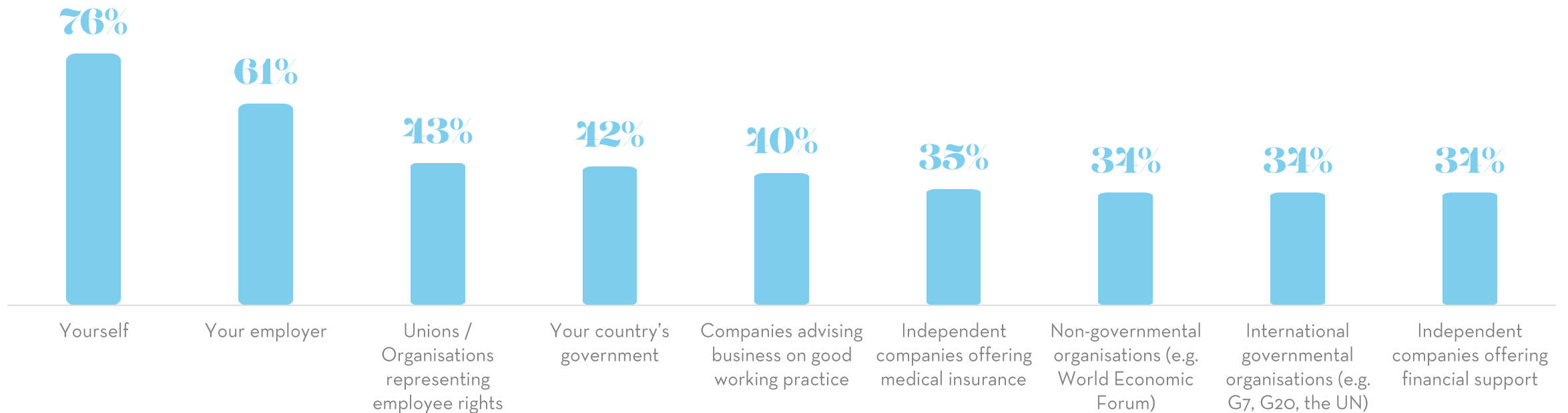
% Who say the following institutions are responsible for ensuring a better working world after the pandemic (NET Responsible)



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 (n=8,000)

Workers are also placing a large degree of trust in their employers to support them during any future crises

% Who say they trust the following institutions to support them during any future crises (NET Trust)



Q23. How much do you trust the following to support you during any future crises such as the coronavirus pandemic? (NET Trust) Base: All respondents (n=8,000)

Trust and delivery needs to be reciprocal

80%

Say their employer is responsible for ensuring a better working world after the pandemic

78%

Of employees say that feeling trusted to get the job done is important to their working life after the pandemic

61%

Trust their employer to support them in a future crisis

Q20. How important will the following be to your working life after the pandemic? (NET Important) 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) Q23. How much do you trust the following to support you during any future crises such as the coronavirus pandemic? (NET Trust) Base: All respondents (n=8,000)



Following the pandemic workers have a generally positive view of their company and industry.

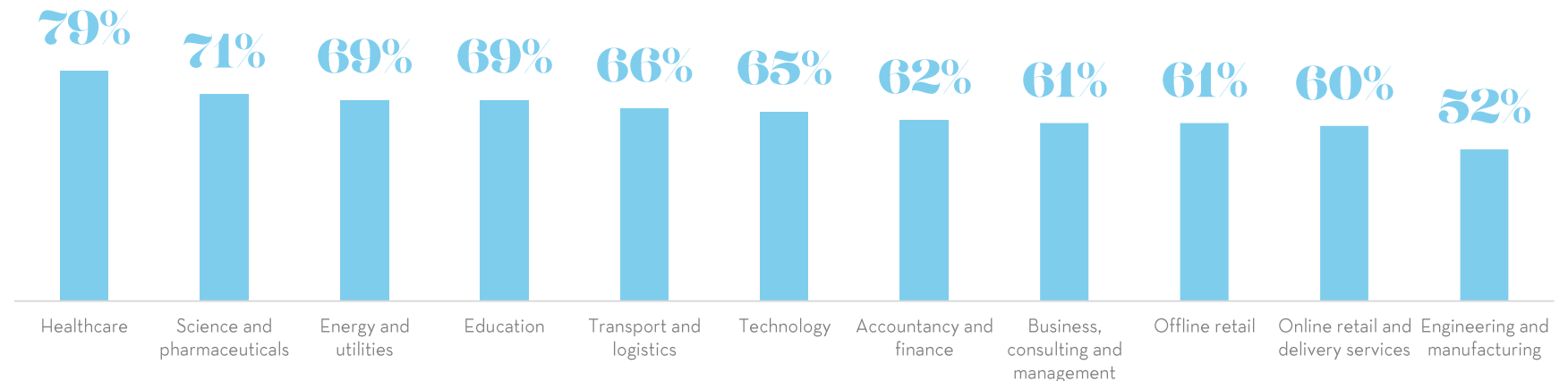
This is a key driver of employee retention

There is a high degree of pride in many sector workers

6 in 10

Say they are proud of the role their industry has played during the pandemic (62%)

% Who say they are very proud of the role their industry played during the pandemic (NET Proud by industry)

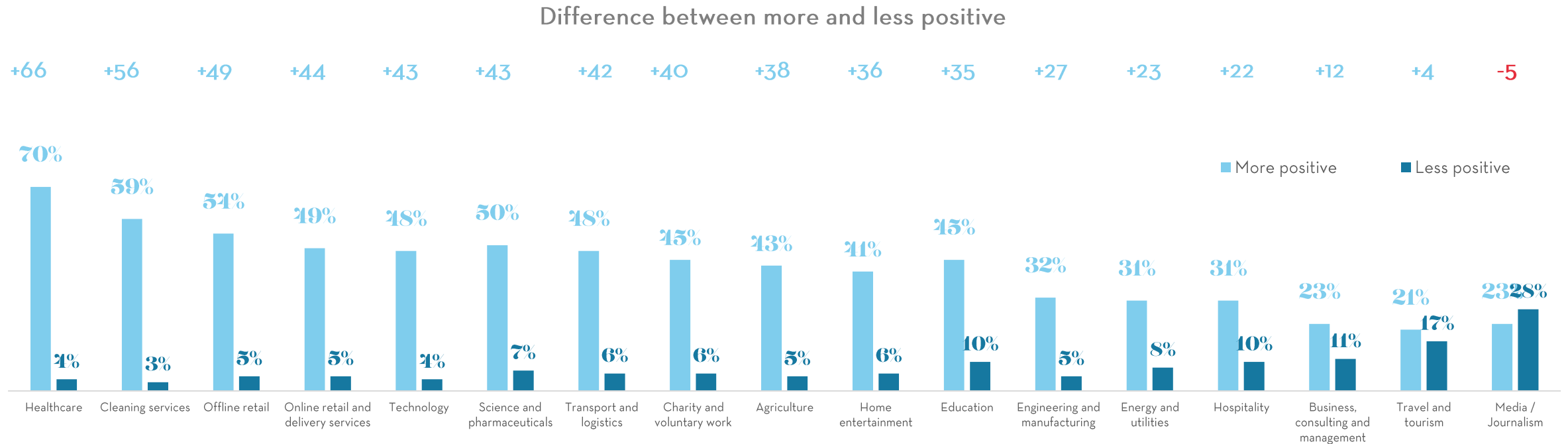


NB: Industries with less than 100 respondents not included

Q25. Do you feel proud of the role your industry has played during the pandemic? (NET Proud) Base: All respondents (8,000)

Since the pandemic began, positivity surrounding almost all industries has increased, particularly regarding healthcare (media and journalism is the exception)

% Who say they have a more / less positive view of the following industries since the pandemic (Top 2 Box vs. Bottom 2 Box)



Q24. Following the onset of the pandemic, have you changed your views on the value that the professionals from the following sectors contribute to society? (NET More positive; Less positive) Base: All respondents (n=8,000)

The majority are not looking to change jobs in the next 12 months

8 in 10

Say they would like to stay with their current company / employer

50%

would like to stay in their current job

30%

would like to progress in their company

2 in 10

Say they would like to find a new employer

9%

would like to find a job in the same industry

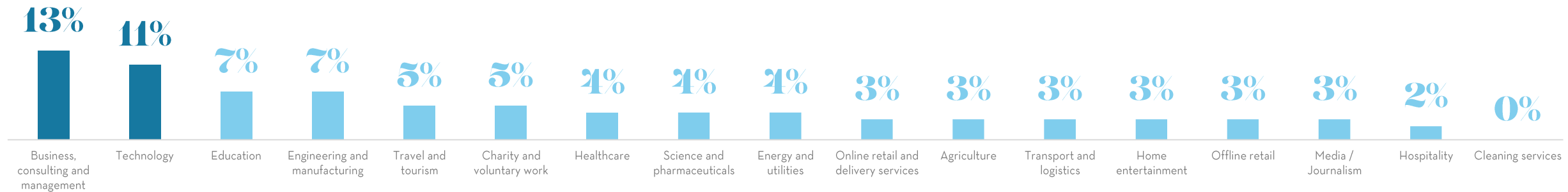
11%

would like to find a job in a different industry

Q26. Thinking about your career plans in the next 12 months, which of the following statements best applies to you? Base: All respondents (8,000)

Of those looking for a job in a different industry, business and technology are the standout destinations

% Who say they are considering moving into the following industries in the next 12 months



Q27. Which industry are you considering the most in the next 12 months? Base: Respondents who plan to take a different job in a different industry in the next 12 months (n=855)



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Country Summaries

USA Topline Insights

Three quarters (76%) say a mix of office-based and remote working is the best way forward



- The responsibility for delivering a better future world of work for the USA is shared between employers and employees, with the government playing a secondary role. Compared to other countries, US workers have a particularly strong sense of self-responsibility:

% Who say the following are responsible

Your Employer	Yourself	Government
84% (+4)	83% (+13)	71% (-2)

- 82% say it will be important in the new world of work for **leaders to focus on collaboration, problem solving and adaptability**, while 82% also say a **leadership style focused on empathy and a supportive attitude** are important

- Work/life balance, job security** and **trust** are key elements to post pandemic working life

Top 5 most important to their working life after the pandemic

Job security	87%	(+9)
Work / life balance	87%	(+7)
Trusted to get the job done	86%	(+8)
Good relationship with manager	83%	(+11)
Maintain physical health	81%	(+8)

- Top training needs relate to **digital and soft skills**

Top 5 most important training, resources and support after the pandemic

Digital / remote working skills	78%	(+9)
Company platforms / systems	77%	(+12)
Managing staff remotely	75%	(+10)
Soft skills	71%	(+8)
Resources / support on mental health	69%	(+9)

N..B. () = % POINT DIFFERENCE VS. GLOBAL across the 8 countries surveyed: USA, UK, Italy, Spain, France, Australia, Germany, Japan. Future of work survey with white collar workers USA (n=1,000), Global (n=8,000)

UK Topline Insights

Nearly 8 in 10 (77%) say a mix of office-based and remote working is the best way forward



- The primary responsibility for delivering a better future world of work for the UK is placed on the employer. Government and employees themselves playing a secondary role:

% Who say the following are responsible	Your Employer	Yourself	Government
	86% (+6)	76% (+4)	78% (+5)

- 78% say it will be important in the new world of work for **leaders to focus on collaboration, problem solving and adaptability**, while 81% also say a **leadership style focused on empathy and a supportive attitude** are important

- Work/life balance, job security** and **trust** are key elements to post pandemic working life

Top 5 most important to their working life after the pandemic

Work / life balance	85%	(+5)
Job security	82%	(+4)
Trusted to get the job done	82%	(+4)
Maintain physical health	77%	(+4)
Flexibility over hours / schedule	76%	(+1)

- Top training needs relate to **digital and soft skills**

Top 5 most important training, resources and support after the pandemic

Digital / remote working skills	72%	(+3)
Managing staff remotely	70%	(+5)
Company platforms / systems	70%	(+5)
Resources / support on mental health	68%	(+8)
Soft skills	67%	(+4)

N..B. () = % POINT DIFFERENCE VS. GLOBAL across the 8 countries surveyed: USA, UK, Italy, Spain, France, Australia, Germany, Japan. Future of work survey with white collar workers UK (n=1,000), Global (n=8,000)

France Topline Insights

Nearly three quarters (73%) say a mix of office-based and remote working is the best way forward



- French workers feel less strongly about who is responsible for the working world compared to other countries. However, the employer and yourself are ranked as the most responsible:

% Who say the following are responsible	Your Employer	Yourself	Government
	69% (-11)	69% (-3)	57% (-16)

- 64% say it will be important in the new world of work for **leaders to focus on collaboration, problem solving and adaptability**, while 63% also say a **leadership style focused on empathy and a supportive attitude** are important

- Work/life balance, being trusted** and **flexible hours** are key elements to post pandemic working life

Top 5 most important to their working life after the pandemic

Work / life balance	81%	(+1)
Trusted to get the job done	77%	(-1)
Flexibility over hours / schedule	76%	(+1)
Job security	76%	(-2)
Good relationship with manager	74%	(+2)

- Top training needs relate to **digital and soft skills**

Top 5 most important training, resources and support after the pandemic

Digital / remote working skills	62%	(-7)
Managing staff remotely	59%	(-6)
Company platforms / systems	55%	(-10)
Soft skills	55%	(-8)
Physical wellbeing	49%	(-9)

N..B. () = % POINT DIFFERENCE VS. GLOBAL () across the 8 countries surveyed: USA, UK, Italy, Spain, France, Australia, Germany, Japan. Future of work survey with white collar workers France (n=1,000), Global (n=8,000)

Germany Topline Insights

Three quarters (74%) say a mix of office-based and remote working is the best way forward



- The responsibility for delivering a better future world of work for Germany should be driven by employers, with less of a role placed on the government:

% Who say the following are responsible	Your Employer	Yourself	Government
	82% (+2)	72% (=)	69% (-4)

- 77% say it will be important in the new world of work for **leaders to focus on collaboration, problem solving and adaptability**, while 76% also say a **leadership style focused on empathy and a supportive attitude** are important

- Being trusted, work/life balance** and **job security** are key elements to post pandemic working life

Top 5 most important to their working life after the pandemic

Trusted to get the job done	81%	(+3)
Work / life balance	81%	(+1)
Job security	80%	(+2)
Socialise with colleagues remotely	73%	(+10)
Flexibility over hours / schedule	73%	(-2)

- Top training needs relate to **digital and soft skills**

Top 5 most important training, resources and support after the pandemic

Digital / remote working skills	65%	(-4)
Soft skills	58%	(-5)
Company platforms / systems	57%	(-8)
Resources / support on mental health	52%	(-8)
Physical wellbeing	50%	(-8)

N..B. () = % POINT DIFFERENCE VS. GLOBAL across the 8 countries surveyed: USA, UK, Italy, Spain, France, Australia, Germany, Japan. Future of work survey with white collar workers Germany (n=1,000), Global (n=8,000)

Italy Topline Insights

Three quarters (76%) say a mix of office-based and remote working is the best way forward



- The responsibility for delivering a better future world of work for Italy is shared between government and employees themselves. Compared to the global score, fewer feel that the employer is responsible for this:

% Who say the following are responsible	Your Employer	Yourself	Government
	78% (-2)	74% (+2)	77% (+4)

- 77% say it will be important in the new world of work for **leaders to focus on collaboration, problem solving and adaptability**, while 74% also say a **leadership style focused on empathy and a supportive attitude** are important

- Work/life balance, job security** and **trust** are key elements to post pandemic working life

Top 5 most important to their working life after the pandemic

Trusted to get the job done	82%	(+4)
Work / life balance	81%	(+1)
Job security	80%	(+2)
Socialise with colleagues remotely	79%	(+4)
Flexibility over hours / schedule	79%	(+6)

- Top training needs relate to **digital and soft skills**

Top 5 most important training, resources and support after the pandemic

Digital / remote working skills	72%	(+3)
Soft skills	72%	(+8)
Company platforms / systems	66%	(+3)
Resources / support on mental health	65%	(+1)
Physical wellbeing	63%	(+5)

N..B. () = % POINT DIFFERENCE VS. GLOBAL across the 8 countries surveyed: USA, UK, Italy, Spain, France, Australia, Germany, Japan. Future of work survey with white collar workers Italy (n=1,000), Global (n=8,000)

Spain Topline Insights

8 in 10 (77%) say a mix of office-based and remote working is the best way forward



- The responsibility for delivering a better future world of work for Spain is shared between employers and government. Compared to the global score, there is a greater reliance placed on the government:

% Who say the following are responsible	Your Employer	Yourself	Government
	81% (+1)	71% (-1)	79% (+6)

- 79% say it will be important in the new world of work for **leaders to focus on collaboration, problem solving and adaptability**, while 76% also say a **leadership style focused on empathy and a supportive attitude** are important

- Work/life balance, being trusted** and **job security** are key elements to post pandemic working life

Top 5 most important to their working life after the pandemic

Work / life balance	84%	(+4)
Trusted to get the job done	84%	(+6)
Job security	82%	(+4)
Flexibility over hours / schedule	81%	(+6)
Maintain physical health	80%	(+7)

- Top training needs relate to **digital and soft skills**

Top 5 most important training, resources and support after the pandemic

Digital / remote working skills	79%	(+10)
Managing staff remotely	78%	(+13)
Time management	74%	(+16)
Soft skills	73%	(+10)
Company platforms / systems	72%	(+7)

N..B. () = % POINT DIFFERENCE VS. GLOBAL across the 8 countries surveyed: USA, UK, Italy, Spain, France, Australia, Germany, Japan. Future of work survey with white collar workers Spain (n=1,000), Global (n=8,000)

Australia Topline Insights

8 in 10 (82%) say a mix of office-based and remote working is the best way forward



- The primary responsibility for delivering a better future world of work for Australia is placed on the employer. Government and employees themselves sharing a secondary role

% Who say the following are responsible

Your Employer	Yourself	Government
85% (+5)	80% (+8)	80% (+7)

- 81% say it will be important in the new world of work for **leaders to focus on collaboration, problem solving and adaptability**, while 83% also say a **leadership style focused on empathy and a supportive attitude** are important

- Being trusted, job security** and **work/life balance** are key elements to post pandemic working life

Top 5 most important to their working life after the pandemic

Trusted to get the job done	86%	(+8)
Job security	86%	(+8)
Work / life balance	86%	(+6)
Flexibility over hours / schedule	80%	(+5)
Good relationship with manager	80%	(+8)

- Top training needs relate to **digital and soft skills**

Top 5 most important training, resources and support after the pandemic

Digital / remote working skills	73%	(+4)
Managing staff remotely	71%	(+6)
Company platforms / systems	71%	(+6)
Resources / support on mental health	70%	(+10)
Soft skills	69%	(+6)

N..B. () = % POINT DIFFERENCE VS. GLOBAL across the 8 countries surveyed: USA, UK, Italy, Spain, France, Australia, Germany, Japan. Future of work survey with white collar workers Australia (n=1,000), Global (n=8,000)

Japan Topline Insights

6 in 10 (59%) say a mix of office-based and remote working is the best way forward

*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. 70% worked 40-plus hours / week in Japan vs. Global average of 48% during the pandemic)

- Japanese workers feel less strongly about who is responsible for the working world compared to other countries. However, the employer and government are ranked as the most responsible :

% Who say the following are responsible -----

Your Employer	Yourself	Government
74% (-6)	53% (-29)	73% (=)

- 55% say it will be important in the new world of work for **leaders to focus on collaboration, problem solving and adaptability**, while 55% also say a **leadership style focused on empathy and a supportive attitude** are important

- Work-life balance, flexibility over hours and remote working** are key to post pandemic working life

Top 5 most important to their working life after the pandemic

Work / life balance	60%	(-20)
Flexibility over hours / schedule	55%	(-20)
More remote working	54%	(-12)
Maintain physical health	52%	(-21)
Trusted to get the job done	48%	(-30)

- Top training needs relate to **digital and soft skills**

Top 5 most important training, resources and support after the pandemic

Digital / remote working skills	53%	(-16)
Managing staff remotely	49%	(-16)
Resources / support on mental health	48%	(-12)
Soft skills	48%	(-15)
Company platforms / systems	47%	(-18)

N..B. () = % POINT DIFFERENCE VS. GLOBAL across the 8 countries surveyed: USA, UK, Italy, Spain, France, Australia, Germany, Japan. Future of work survey with white collar workers Japan (n=1,000), Global (n=8,000)



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Further insights

Those in Japan and USA were more likely to be working longer weeks before the pandemic

% Who work short, medium or long hours before the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
NET Short working hours = Less than 28 hours	4%	6%	2%	5%	7%	3%	2%	7%	3%
NET Medium working hours = 28-42 hours	76%	80%	86%	76%	77%	53%	86%	79%	71%
NET Long working hours = 43 or more hours	19%	15%	12%	18%	15%	44%	11%	14%	26%

Q1. Thinking back to before the main coronavirus pandemic period, how many hours did you work in an average week? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Those in Germany and Japan had greater flexibility to set their own working schedules, whereas those in Italy and Spain had to follow the company's schedule

% Who agree with the following statements about their working life before the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
My working schedule was completely set by the company	45%	44%	40%	21%	59%	34%	61%	47%	51%
I had some flexibility to adjust my own working schedule	48%	51%	52%	65%	40%	47%	37%	46%	44%
My working schedule was completely set by me	7%	5%	8%	13%	1%	19%	1%	6%	5%

Q2. Before the main pandemic period, which of the following statements best described your weekly working schedule? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Those in Australia, UK and USA were more likely to be satisfied with their working life before the pandemic, whereas Japan scores were significantly behind the global average

% Who agree with the following statements about their working life before the pandemic (NET Agree)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
I was motivated	74%	79%	76%	78%	70%	47%	74%	79%	87%
I was productive	85%	90%	88%	86%	91%	47%	89%	91%	95%
I took pride in working for the company	71%	82%	72%	69%	71%	37%	72%	79%	86%
I had strong relationships with my colleagues	78%	85%	81%	77%	82%	47%	84%	84%	87%
I had a strong relationship with my manager	69%	80%	69%	61%	66%	39%	77%	75%	83%
I was able to maintain a good work / life balance	72%	73%	77%	73%	74%	48%	72%	75%	86%
I was able to manage my physical wellbeing	74%	80%	72%	78%	70%	52%	73%	80%	86%
I was able to manage my mental wellbeing	75%	82%	75%	80%	72%	50%	73%	78%	87%

Q3. Thinking about your working life before the pandemic, how far would you agree or disagree with the following? NET Agree Summary Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Employees in Australia, France and the UK were most positive about working life during the pandemic

% Who were satisfied with their working life experience during the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Very negative	2%	1%	2%	1%	2%	5%	3%	3%	2%
Quite negative	16%	15%	13%	16%	16%	22%	15%	18%	15%
Neither negative nor positive	31%	25%	32%	30%	29%	50%	30%	25%	30%
Quite positive	37%	42%	42%	38%	38%	18%	41%	42%	38%
Very positive	13%	16%	11%	15%	15%	4%	12%	13%	15%
NET Negative	19%	16%	15%	17%	18%	28%	17%	20%	17%
NET Positive	50%	59%	53%	53%	53%	22%	53%	55%	53%

Q4. Overall, would you say that your experience of working life during the pandemic has been...? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Employees in Australia, Spain, UK and USA recognise improvements during the pandemic, whereas those in France and Japan had a more negative experience

% Who say following have got better during the pandemic (NET Better)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Job motivation	25%	28%	18%	24%	28%	11%	32%	23%	32%
Productivity levels	31%	37%	26%	31%	38%	17%	34%	30%	36%
Quality of work	29%	34%	23%	25%	35%	16%	34%	30%	33%
Pride in my company	25%	32%	14%	23%	25%	12%	30%	27%	34%
Relationship with my colleagues	15%	22%	12%	10%	14%	7%	16%	21%	21%
Relationship with my manager	19%	28%	14%	13%	17%	8%	21%	23%	26%
Work / life balance	50%	56%	44%	46%	53%	42%	55%	55%	50%
My physical wellbeing	34%	35%	32%	31%	40%	28%	34%	35%	39%

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Better) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Employees in Australia, Italy, Spain, and USA recognise improvements during the pandemic, whereas those in France, Germany and Japan had a more negative experience

% Who say following have got better during the pandemic (NET Better)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
My mental wellbeing	33%	32%	32%	31%	38%	29%	37%	30%	34%
My professional development	20%	25%	16%	12%	22%	8%	27%	21%	30%
How much I am trusted to get the job done	33%	43%	25%	27%	40%	14%	37%	37%	38%
My workload	26%	28%	26%	23%	23%	19%	22%	30%	33%
My time management	43%	42%	42%	39%	60%	32%	51%	34%	42%
Ability to collaborate on new ideas and creativity	25%	26%	26%	20%	31%	14%	32%	23%	30%
My sense of job security	19%	23%	11%	16%	23%	5%	32%	17%	25%
My digital / remote working skills	59%	66%	37%	57%	70%	56%	64%	61%	65%

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the pandemic, and which have stayed the same or got worse? (NET Better) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Employees in Australia, Italy, UK and USA felt they were better equipped to deal with the pandemic compared to those in Japan

% Who agree with the following statements about how well-equipped they were during the pandemic (NET Agree)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
I had to make major changes to my usual ways of working to adapt to the pandemic	60%	62%	60%	49%	60%	61%	57%	63%	69%
I was clear about the hours / days I was expected to work	71%	83%	66%	84%	70%	42%	68%	76%	80%
I was clear about the nature of the work / tasks expected of me	74%	81%	74%	83%	73%	38%	78%	80%	84%
I was trained sufficiently to use any online platforms / systems for doing my job effectively	59%	73%	57%	51%	64%	24%	60%	67%	74%
I was able to use platforms and systems for communicating with others effectively	75%	85%	76%	76%	80%	43%	76%	81%	85%
I had all the necessary technology, tools and platforms to continue my work seamlessly	67%	75%	68%	72%	72%	34%	66%	71%	76%

Q7. Thinking about how well-equipped you were for work during the pandemic, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

However when looking at those who exceeded expectations, Australia, UK and USA lead the markets

% Who say their managers have exceeded their expectations on the following (NET Met or exceeded expectations)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Clear guidance and frequent communication on changes / plans for business continuity during the pandemic	85%	90%	83%	87%	82%	78%	85%	89%	90%
Supporting your working arrangements	86%	94%	80%	85%	82%	80%	86%	89%	94%
Flexing around your childcare needs*	89%	91%	91%	86%	88%	83%	87%	88%	93%
Checking on your mental wellbeing	78%	81%	74%	76%	72%	78%	76%	80%	84%
Resource provision / support	85%	91%	82%	87%	78%	80%	84%	88%	92%
Supporting your career development	79%	82%	76%	77%	75%	75%	83%	78%	88%
Communicating about business performance	86%	89%	83%	87%	81%	82%	84%	89%	91%
Adapting to the challenges of the pandemic	88%	93%	86%	88%	85%	83%	88%	91%	94%

*This statement was only shown to respondents who have children

Q8. Thinking about how your manager / employer has performed in the following areas during the pandemic, to what extent, if at all, have they met your expectations? (NET Met or exceeded expectations) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Those in Australia and USA say their employers were more likely to take action to respond to the outbreak, whereas there was a smaller response in Japan

% Who say their employer took the following measures in response to the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Changed working hours of some or all employees	44%	43%	45%	44%	47%	44%	44%	37%	45%
Placed a freeze on new hires / contractors	28%	39%	17%	30%	26%	10%	34%	29%	36%
Placed some staff on furlough / temporary suspension of working commitments	22%	17%	26%	18%	26%	10%	21%	34%	23%
Asked staff to take pay cuts	10%	18%	5%	8%	7%	6%	12%	10%	17%
Laid off staff / made redundancies	10%	20%	5%	7%	4%	5%	11%	12%	17%
Asked employees to use holiday as extended sick leave	15%	21%	18%	7%	32%	10%	13%	9%	12%
Delayed promotions / pay rises	20%	31%	15%	17%	19%	6%	23%	24%	25%
Stopped / delayed paying suppliers	7%	7%	5%	6%	8%	4%	10%	7%	8%
Changed the products / services they provide	15%	17%	17%	15%	10%	10%	17%	14%	16%
Cut back on production	19%	14%	22%	19%	28%	16%	17%	16%	19%
Extended paid sick leave	10%	11%	16%	6%	9%	6%	8%	11%	18%

Q9. Has your company taken any of the following specific measures in response to the pandemic, that you are aware of? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Those in Japan and Spain were more likely to be working longer weeks during the pandemic, with fewer hours expected in the USA

% Who work short, medium or long hours during the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
NET Short working hours = Less than 28 hours	17%	16%	21%	14%	19%	10%	13%	19%	22%
NET Medium working hours = 28-42 hours	64%	67%	64%	70%	59%	66%	62%	67%	60%
NET Long working hours = 43 or more hours	19%	16%	15%	16%	22%	24%	25%	14%	18%

Q10. How many hours would you say you have been working during the pandemic in an average week? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Those in Germany and France had greater flexibility to set their own working schedules, whereas those in Italy had to follow the company's schedule

% Who agree with the following statements about their working life during the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
My working schedule was completely set by the company	24%	25%	16%	14%	35%	25%	26%	24%	28%
I had some flexibility to adjust my own working schedule	54%	59%	51%	63%	52%	49%	53%	53%	54%
My working schedule was completely set by me	22%	16%	33%	23%	13%	26%	21%	22%	18%

Q11: During the pandemic period, which of the following statements best describes your weekly working time and schedule? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

However those in Japan were more likely to say it had been a difficult experience

% of managers who say the following have been difficult to deal with during the pandemic (NET Difficult)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Encouraging a good working culture	15%	14%	15%	18%	12%	26%	16%	13%	9%
Keeping aware of how your staff are feeling	16%	16%	15%	17%	13%	30%	18%	15%	10%
Providing effective advice to staff on remote working	12%	11%	12%	15%	10%	24%	13%	10%	7%
Ensuring staff have the right equipment / platforms for remote working	13%	12%	13%	16%	12%	18%	14%	12%	8%
Providing effective advice to staff on their mental wellbeing	16%	13%	16%	19%	13%	30%	20%	13%	11%
Supporting and guiding the team to focus on achieving the business goals	13%	12%	13%	14%	12%	25%	15%	9%	9%
Providing feedback to staff	12%	9%	11%	15%	10%	22%	15%	9%	7%
Supporting the career development of my staff	19%	20%	19%	23%	17%	30%	17%	19%	14%

Q12. Thinking this time about how you have found the experience of managing other people during the pandemic, how easy or difficult have you found the following? (NET Difficulty) Base: C-Suite / Exec management (n=4,244), Australia (n=568), France (n=558), Germany (n=489), Italy (n=401), Japan (n=389), Spain (n=627), UK (n=646) and USA (n=566)

Placing trust in staff, strong skills in remote communication, and supporting the flexible needs of staff are seen as key requirements from management

% Who think it is important that their managers do the following after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Placing trust in staff to get the job done	79%	85%	75%	79%	79%	59%	82%	85%	88%
Strong skills in communicating with staff remotely	76%	83%	68%	74%	77%	60%	78%	81%	84%
Supporting my flexible / remote working needs	75%	83%	69%	73%	76%	60%	81%	79%	82%
A leadership style focussed on collaboration, problem solving and adaptability	74%	81%	64%	77%	77%	55%	79%	78%	82%
Effective organisation and coordination of team members across different locations	74%	81%	66%	72%	75%	56%	79%	79%	82%
A leadership style focussed on empathy and a supportive attitude	74%	83%	63%	76%	74%	55%	76%	81%	82%

Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Empathy and nurturing morale are valued relatively highly in Australia, Germany and the UK

% Who think it is important that their managers do the following after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Promoting and nurturing strong team morale and culture	73%	83%	68%	76%	74%	49%	75%	80%	82%
Providing guidance and advice on effective remote working	71%	78%	66%	68%	71%	54%	78%	77%	78%
Finding effective ways to collaborate on new ideas / creativity across locations	71%	80%	63%	68%	73%	53%	76%	77%	80%
Keeping staff engaged with company values and culture	69%	77%	66%	64%	70%	45%	76%	76%	79%
Flexing around my childcare needs*	67%	70%	62%	64%	71%	53%	73%	72%	71%

*This statement was only shown to respondents who have children

Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Ensuring staff have the right equipment / platforms for remote working in future rated as a key obligation of employers for the future

% Who think it is important that their company do the following after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Ensuring staff have the right equipment / platforms for remote working	78%	83%	76%	79%	80%	57%	83%	80%	85%
Implementing more flexibility in how and where staff can work	77%	82%	71%	77%	79%	64%	80%	79%	83%
Implementing strict cleaning and hygiene policies at work	76%	83%	74%	66%	77%	54%	83%	83%	86%
Investing in technology to facilitate better digital ways of working	75%	79%	69%	73%	78%	59%	79%	78%	82%
Adapting office spaces to enable social distancing	73%	79%	70%	63%	78%	56%	78%	81%	82%
Improving IT support for staff working remotely	73%	78%	67%	65%	76%	58%	79%	79%	80%

Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

7 in 10 say its important for employers to provide clarity on how the company will deal with similar crises in future

% Who think it is important that their company do the following after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Providing clarity on how the company will deal with similar crises in future	72%	77%	64%	71%	72%	60%	74%	75%	81%
Implementing financial support policies for future crises (e.g. enhanced sick pay, job protection, income protection, etc.)	68%	70%	58%	59%	72%	55%	73%	71%	81%
Providing regular updates on company performance and plans	67%	73%	51%	64%	66%	53%	70%	74%	82%
Updating the focus areas of company training	61%	66%	54%	53%	69%	42%	70%	66%	70%
Providing quality health insurance	59%	50%	58%	40%	69%	48%	61%	59%	86%

Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Those in Japan and USA feel they are going to work long hours after the pandemic, whereas those in France and Spain are more likely to work regular hours

% Who think they will work short, medium or long hours after the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
NET Short working hours = Less than 28 hours	5%	7%	3%	5%	9%	2%	3%	8%	5%
NET Medium working hours = 28-42 hours	76%	79%	84%	78%	76%	56%	83%	79%	70%
NET Long working hours = 43 or more hours	19%	14%	13%	16%	15%	42%	14%	14%	25%

Q15. How many hours do you think you will end up working in an average week after the pandemic? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

The expectation of where employees will work after the pandemic is consistent across all markets

% of working week employees expect to spend in the following environments after the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
From your company's office(s)	69%	70%	69%	71%	67%	73%	69%	66%	70%
From a client's office(s)	2%	2%	2%	2%	2%	3%	2%	2%	2%
From your own home	27%	26%	27%	25%	29%	22%	27%	31%	26%
From someone else's home (e.g. family member / friend / colleague)	0%	0%	1%	1%	0%	0%	0%	0%	1%
From a communal venue (e.g. café, public space, etc.)	1%	1%	1%	1%	0%	1%	1%	1%	1%
Other (e.g. shop, factory, etc.)	1%	0%	1%	1%	0%	1%	1%	1%	1%

Q16. After the pandemic, what proportion of your time do you expect to spend working in the following locations? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Similarly, employees across all markets have a similar view in terms of where they would like to spend their working week

% of working week employees want to spend in the following environments after the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
From your company's office(s)	51%	51%	54%	52%	50%	51%	48%	48%	52%
From a client's office(s)	2%	2%	2%	2%	2%	3%	2%	2%	2%
From your own home	45%	46%	42%	44%	46%	43%	48%	49%	44%
From someone else's home (e.g. family member / friend / colleague)	0%	0%	0%	1%	1%	0%	0%	0%	1%
From a communal venue (e.g. café, public space, etc.)	1%	1%	1%	1%	1%	2%	1%	1%	1%
Other (e.g. shop, factory, etc.)	1%	0%	1%	1%	0%	1%	0%	0%	1%
NET Remote environment	49%	49%	46%	48%	50%	49%	52%	52%	48%

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: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Looking to the future after the pandemic, which of the following best describes how you expect the world of work to be overall?

% Who think the world of work will be better or worse in the future

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Much worse than before	9%	4%	12%	4%	17%	4%	20%	6%	4%
Slightly worse	23%	18%	24%	21%	29%	16%	32%	23%	22%
About the same	38%	30%	42%	50%	33%	56%	28%	32%	31%
Slightly better	25%	39%	19%	23%	18%	22%	17%	31%	30%
Much better than before	6%	10%	3%	3%	3%	2%	4%	8%	13%
NET Worse	32%	22%	36%	25%	46%	20%	52%	29%	27%
NET Better	30%	49%	22%	26%	21%	24%	21%	39%	43%

Q18. Looking to the future after the pandemic, which of the following best describes how you expect the world of work to be overall? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Technology that facilitates remote working considered a top priority across all countries

% Who agree with the following statements about the future world of work after the pandemic (NET Agree)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Technology that facilitates more effective remote working will be increasingly important	81%	87%	80%	82%	82%	68%	83%	83%	85%
Employees will benefit from having increased flexibility around office and remote working	75%	85%	69%	79%	73%	58%	71%	81%	82%
A mix of office-based and remote working will be the best way forward in my profession	74%	82%	73%	74%	76%	59%	77%	77%	76%
Business will generally benefit from allowing increased flexibility around office and remote working	73%	85%	70%	77%	60%	55%	76%	79%	80%
Employee contracts should focus more on meeting the needs of the role and less on number of hours worked	69%	78%	66%	65%	71%	48%	75%	74%	75%
Employers should revisit the length of the working week and the hours that employees are expected to work	67%	73%	51%	70%	71%	57%	72%	68%	73%

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 (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Over a third expect hours to be excessively high post pandemic with concerns highest in Italy, Spain and the USA

% Who agree with the following statements about the future world of work after the pandemic (NET Agree)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
My company is well-equipped to deal with similar crises to the pandemic in future	63%	78%	57%	68%	61%	44%	63%	65%	70%
The pandemic has demonstrated that set-hours contracts are no longer relevant to modern ways of working	62%	74%	60%	61%	63%	47%	60%	68%	68%
Increased flexibility in working patterns will make jobs in my profession accessible to more people compared to before the pandemic	62%	71%	53%	64%	58%	45%	64%	72%	72%
Team collaboration will suffer if remote working becomes the norm	51%	52%	55%	53%	52%	36%	56%	51%	51%
I expect my working hours to be excessively high after the pandemic	37%	37%	39%	28%	40%	33%	44%	35%	44%

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 (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Being able to maintain a good work/life balance after the pandemic is most important to workers in all countries

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

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Being able to maintain a good work / life balance	80%	86%	81%	81%	81%	60%	84%	85%	87%
Feeling trusted to get the job done	78%	86%	77%	81%	80%	48%	84%	82%	86%
Feeling confident that my job is secure	78%	86%	76%	80%	82%	45%	82%	82%	87%
Retaining / having flexibility over my working hours / schedule	75%	80%	76%	73%	79%	55%	81%	76%	79%
Having the right opportunities to maintain my physical health / fitness	73%	78%	69%	70%	79%	52%	80%	77%	81%
Maintaining a good relationship with my manager	72%	80%	74%	73%	72%	46%	77%	75%	83%

Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

7 in 10 say that having the right support for their mental wellbeing is important to their future work life with Spain, Italy and the US most open about this

% Who think the following training, resources and support will be important to their working life after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Feeling I have the right support available for my mental wellbeing	70%	75%	69%	66%	75%	46%	79%	73%	79%
Feeling that my career development is still given enough attention	67%	72%	68%	59%	74%	37%	77%	72%	75%
Working remotely more than I did before the pandemic	66%	71%	61%	64%	67%	54%	68%	71%	71%
Being able to socialise remotely with colleagues (e.g. via company intranet, team chats, activities, etc.)	63%	65%	64%	73%	63%	44%	68%	60%	66%
Having the opportunity to still see my colleagues face-to-face	63%	67%	63%	64%	62%	45%	66%	65%	70%

Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Digital / remote working skills is seen as the top priority across all countries in terms of training needs after the pandemic

% Who think the following training, resources and support will be important to their working life after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Support / training related to digital / remote working skills	69%	73%	62%	65%	72%	53%	79%	72%	78%
Support / training on company platforms / systems	65%	71%	55%	57%	72%	47%	72%	70%	77%
Training on managing staff in remote working environments	65%	71%	59%	50%	68%	49%	78%	70%	75%
Training / resources on soft skills (e.g. teamwork, people skills, problem solving, etc.)	63%	69%	55%	58%	65%	48%	73%	67%	71%
Access to resources / support on mental health	60%	70%	45%	52%	61%	48%	67%	68%	69%

Q21. Thinking about types of training, resources and support that a company may provide, how important will the following be after the pandemic? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Overall, managers in Australia and the USA felt it was easier to deal with certain work aspects as a result of the pandemic

% Who think the following training, resources and support will be important to their working life after the pandemic (NET Important)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Training / resources to improve my knowledge of clients / the industry I work in	58%	68%	46%	48%	63%	40%	72%	63%	68%
Support / training on time management	58%	64%	47%	46%	63%	46%	74%	60%	67%
Access to resources / classes on physical wellbeing / fitness	58%	63%	49%	50%	59%	46%	64%	62%	67%
Skills / training on creative thinking	55%	61%	43%	46%	59%	42%	66%	58%	67%

Q21. Thinking about types of training, resources and support that a company may provide, how important will the following be after the pandemic? (NET Important) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Workers in Australia and UK place more importance on their employer than other countries, while Spain and Australia look to the government more than others

% Who say the following institutions are responsible for ensuring a better working world after the pandemic (NET Responsible)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Your country's government	73%	80%	57%	69%	77%	73%	79%	78%	71%
International governmental organisations (e.g. G7, G20, the UN)	53%	54%	41%	41%	53%	56%	64%	59%	53%
Non-governmental organisations (e.g. World Economic Forum)	48%	51%	39%	37%	47%	39%	61%	52%	57%
Your employer	80%	85%	69%	82%	78%	74%	81%	86%	84%
Independent companies offering financial support	53%	51%	46%	41%	53%	49%	63%	55%	62%
Independent companies offering medical insurance	52%	51%	50%	37%	56%	51%	53%	49%	65%
Companies advising business on good working practice	60%	67%	50%	55%	58%	48%	70%	67%	69%
Yourself	72%	80%	69%	72%	74%	53%	71%	76%	83%
Unions / Organisations representing employee rights	63%	62%	55%	64%	64%	56%	72%	69%	64%

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 (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

US workers are generally the most trusting of institutions as well as themselves, while the French and Germans tend to place less trust in institutions

% Who say they trust the following institutions to support them during any future crises (NET Trust)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Your country's government	42%	63%	34%	54%	43%	23%	35%	42%	44%
International governmental organisations (e.g. G7, G20, the UN)	34%	42%	27%	28%	34%	20%	38%	41%	44%
Non-governmental organisations (e.g. World Economic Forum)	34%	42%	31%	29%	31%	19%	36%	40%	47%
Your employer	61%	70%	54%	66%	59%	39%	60%	68%	73%
Independent companies offering financial support	34%	36%	31%	30%	32%	22%	39%	35%	47%
Independent companies offering medical insurance	35%	35%	34%	29%	37%	27%	37%	35%	47%
Companies advising business on good working practice	40%	46%	35%	36%	38%	23%	44%	45%	53%
Yourself	76%	85%	75%	77%	80%	35%	81%	84%	89%
Unions / Organisations representing employee rights	43%	48%	39%	46%	39%	25%	41%	51%	52%

Q23. How much do you trust the following to support you during any future crises such as the coronavirus pandemic? (NET Trust) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Healthcare and cleaning services have received the most significant increase in positive perceptions compared to other industries

% Who say they have a more positive view of the following industries since the pandemic (NET More positive)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Healthcare (e.g. doctors, nurses, hospital watchmen)	70%	73%	65%	61%	67%	63%	79%	72%	76%
Cleaning services (e.g. hospital porters, industrial cleaning, office-cleaning services)	59%	65%	55%	51%	55%	48%	73%	59%	67%
Technology (e.g. A.I., new tech innovations, software development)	48%	52%	34%	35%	54%	44%	57%	45%	59%
Agriculture	43%	42%	45%	30%	40%	32%	64%	38%	52%
Engineering and manufacturing	32%	35%	26%	15%	30%	25%	46%	34%	44%
Hospitality (e.g. hotels, restaurants, events)	31%	45%	20%	25%	22%	27%	37%	29%	46%
Energy and utilities	31%	33%	29%	22%	23%	25%	42%	29%	42%
Travel and tourism (e.g. travel agencies, tour operators, hotels)	21%	29%	16%	15%	21%	13%	26%	23%	28%
Business, consulting and management	23%	26%	22%	13%	24%	13%	30%	22%	32%

Q24. Following the onset of the pandemic, have you changed your views on the value that the professionals from the following sectors contribute to society? (NET More positive) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Spain and the US are more likely to view all industries in a more positive manner post-pandemic, while France, Germany and Japan are more reserved

% Who say they have a more positive view of the following industries since the pandemic (NET More positive)

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Charity and voluntary work	45%	48%	37%	47%	44%	28%	55%	47%	58%
Home entertainment (e.g. TV, video gaming, music)	41%	44%	34%	33%	44%	33%	52%	39%	49%
Science and pharmaceuticals	50%	57%	36%	39%	45%	48%	62%	52%	60%
Transport and logistics (e.g. transportation of goods, public transport, taxi)	48%	45%	39%	42%	42%	51%	66%	51%	50%
Education (e.g. teachers, academics, professors)	45%	59%	42%	29%	41%	24%	53%	48%	62%
Online retail and delivery services (e.g. web content writers, warehouse staff)	49%	54%	31%	36%	49%	46%	58%	54%	61%
Offline retail (e.g. supermarket/shop cashiers, floor staff, warehouse staff)	54%	54%	48%	50%	46%	47%	68%	58%	60%
Media / Journalism	23%	25%	16%	20%	27%	14%	27%	19%	34%

Q24. Following the onset of the pandemic, have you changed your views on the value that the professionals from the following sectors contribute to society? (NET More positive) Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Workers in the USA and Spain are the most proud of their own industry

% Who say they are proud of the role their industry played during the pandemic

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
1 - Not proud at all	2%	1%	2%	3%	3%	5%	2%	2%	1%
2	4%	3%	3%	6%	5%	8%	3%	3%	2%
3	25%	22%	25%	28%	22%	42%	19%	23%	17%
4	35%	35%	40%	31%	40%	27%	37%	34%	34%
5 - Very proud	27%	33%	20%	17%	25%	8%	36%	32%	42%
Not applicable	7%	5%	10%	14%	5%	10%	2%	6%	3%
NET Proud	62%	69%	60%	49%	65%	36%	73%	66%	77%

Q25. Do you feel proud of the role your industry has played during the pandemic? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

Italian employees are less likely to stay in their current jobs, while French and German employees are less inclined to progress in their company

% Who have the following career plans in the next 12 months

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
I would like to stay in my current job	50%	49%	57%	63%	38%	48%	51%	46%	52%
I would like to progress in my current company / employer	30%	31%	24%	19%	38%	30%	34%	30%	32%
I would like to take a different job but in the same industry	9%	10%	8%	9%	10%	10%	7%	12%	8%
I would like to take a different job but in a different industry	11%	11%	11%	9%	13%	12%	9%	13%	8%

Q26. Thinking about your career plans in the next 12 months, which of the following statements best applies to you? Base: All respondents (n=8,000), Australia (n=1,000), France (n=1,000), Germany (n=1,000), Italy (n=1,000), Japan (n=1,000), Spain (n=1,000), UK (n=1,000) and USA (n=1,000)

There were no significant drives for people to switch jobs to different industries across all markets

% Who say they are considering moving into the following industries in the next 12 months

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Healthcare (e.g. doctors, nurses, hospital watchmen)	4%	7%	3%	1%	4%	7%	3%	5%	4%
Cleaning services (e.g. hospital porters, industrial cleaning, office-cleaning services)	0%	0%	0%	0%	0%	0%	0%	1%	0%
Technology (e.g. A.I., new tech innovations, software development)	11%	13%	6%	13%	11%	13%	10%	9%	16%
Agriculture	3%	3%	2%	2%	5%	6%	4%	2%	0%
Engineering and manufacturing	7%	2%	7%	4%	10%	12%	10%	7%	5%
Hospitality (e.g. hotels, restaurants, events)	2%	2%	3%	1%	2%	1%	0%	4%	3%
Energy and utilities	4%	3%	8%	5%	3%	3%	1%	4%	4%
Travel and tourism (e.g. travel agencies, tour operators, hotels)	5%	9%	5%	8%	8%	4%	4%	3%	3%
Business, consulting and management	13%	18%	17%	17%	9%	9%	9%	14%	14%

Q27. Which industry are you considering the most in the next 12 months? Those looking for a new role in new industry (n=855), Australia (n=110), France (n=107), Germany (n=93), Italy (n=130), Japan (n=115), Spain (n=89), UK (n=132) and USA (n=79)

There were no significant drives for people to switch jobs to different industries across all markets

% Who say they are considering moving into the following industries in the next 12 months

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Charity and voluntary work	5%	5%	7%	9%	5%	4%	2%	6%	6%
Home entertainment (e.g. TV, video gaming, music)	3%	0%	2%	2%	3%	5%	2%	2%	6%
Science and pharmaceuticals	4%	3%	5%	5%	4%	4%	8%	4%	1%
Transport and logistics (e.g. transportation of goods, public transport, taxi)	3%	3%	4%	2%	3%	1%	4%	4%	3%
Education (e.g. teachers, academics, professors)	7%	5%	8%	6%	9%	6%	13%	6%	4%
Online retail and delivery services (e.g. web content writers, warehouse staff)	3%	3%	1%	4%	4%	4%	2%	5%	3%
Offline retail (e.g. supermarket / shop cashiers, floor staff, warehouse staff)	3%	1%	3%	2%	3%	3%	3%	3%	5%
Media / Journalism	3%	4%	1%	0%	3%	3%	6%	3%	4%
Other - Please specify	17%	21%	21%	17%	15%	14%	16%	17%	20%

Q27. Which industry are you considering the most in the next 12 months? Those looking for a new role in new industry (n=855), Australia (n=110), France (n=107), Germany (n=93), Italy (n=130), Japan (n=115), Spain (n=89), UK (n=132) and USA (n=79)

For employees who are planning a change in career, US employees are impacted as a result of the pandemic. German workers are likely to seek a better work-life balance

% Who say they plan to move into a new job in a different sector for the following reasons

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
The pandemic has made me reconsider my career	16%	15%	17%	16%	16%	11%	18%	17%	24%
I have developed a very positive view of this sector during the pandemic	10%	7%	11%	11%	8%	10%	10%	11%	14%
I have had a positive view of this sector for some time	22%	16%	24%	25%	27%	26%	24%	16%	16%
This feels like a more secure job area since the pandemic	11%	11%	5%	16%	13%	9%	12%	9%	14%
This has felt like a secure job area to me for some time	12%	11%	10%	18%	9%	10%	12%	11%	14%
I have been impressed by the positive impact on society it has had during the pandemic	8%	11%	7%	6%	10%	12%	2%	7%	8%
I have been impressed by the positive impact it has had on society for some time	9%	7%	2%	14%	6%	12%	7%	14%	9%
This sector seems to offer more long-term flexibility regarding working hours	11%	10%	9%	17%	11%	9%	7%	10%	16%
This sector seems to offer more long-term flexibility regarding remote working	10%	10%	6%	15%	7%	8%	13%	11%	13%

Q28. What are the main reasons attracting you to the [...] sector [selected at Q27]? Those looking for a new role in new industry (n=855), Australia (n=110), France (n=107), Germany (n=93), Italy (n=130), Japan (n=115), Spain (n=89), UK (n=132) and USA (n=79)

A change in their direction and growing new skills are cited as the top reasons to move to a different sector across most markets

% Who say they plan to move into a new job in a different sector for the following reasons

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
I will become a more valued member of society if I work in this sector	11%	18%	7%	10%	10%	10%	9%	14%	11%
I think the pay / salary in this sector is set to improve going forwards	12%	10%	13%	18%	5%	13%	15%	14%	10%
I think the pay / salary in this sector is aligned to what I am looking for	13%	12%	9%	13%	15%	11%	15%	11%	19%
The skills I would learn in this sector would have more long-term value	16%	25%	13%	17%	15%	18%	10%	18%	11%
I am looking for a better work / life balance	25%	25%	29%	15%	25%	23%	27%	27%	32%
I want a change / new direction	40%	46%	34%	47%	36%	27%	48%	38%	46%
I want to learn new skills	29%	35%	26%	33%	25%	35%	20%	30%	28%
I think this sector provides safe working conditions	11%	6%	14%	23%	11%	8%	17%	8%	5%
Other - please specify	5%	3%	4%	5%	5%	2%	8%	8%	5%

Q28. What are the main reasons attracting you to the [...] sector [selected at Q27]? Those looking for a new role in new industry (n=855), Australia (n=110), France (n=107), Germany (n=93), Italy (n=130), Japan (n=115), Spain (n=89), UK (n=132) and USA (n=79)

Australian and Spanish employees felt the most impact from the pandemic, leading to a change in career.

% Who say they plan to move into a new job in the same sector for the following reasons

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
The pandemic has made me reconsider my career	19%	27%	19%	20%	10%	10%	24%	20%	23%
I have developed a very positive view of other companies in my industry during the pandemic	7%	9%	2%	6%	7%	5%	7%	10%	9%
I have had a positive view of other companies in my industry for some time	16%	15%	11%	21%	12%	13%	24%	14%	18%
Other companies in my industry feel more secure since the pandemic	10%	11%	6%	8%	8%	8%	15%	8%	15%
Other companies in my industry have felt more secure to me for some time	14%	14%	9%	18%	10%	18%	18%	12%	14%
I've been impressed by the positive impact on society other companies in my industry have had during the pandemic	8%	8%	2%	7%	7%	8%	10%	9%	10%
I have been impressed by the positive impact other companies in my industry have had on society for some time	8%	7%	6%	4%	5%	12%	10%	10%	6%
Other companies in my industry seem to offer more long-term flexibility regarding working hours	13%	12%	7%	12%	16%	13%	22%	10%	18%

Q29. What are the main reasons attracting you to a different job in the same industry? Base: Those looking for a new role in same industry (n=729), Australia (n=95), France (n=81), Germany (n=89), Italy (n=102), Japan (n=98), Spain (n=68), UK (n=118) and USA (n=78)

A change in their direction and growing new skills are cited as the top reasons to reconsider their jobs across most markets

% Who say they plan to move into a new job in the same sector for the following reasons

	Total	Australia	France	Germany	Italy	Japan	Spain	UK	USA
Other companies in my industry seem to offer more long-term flexibility regarding remote working	15%	16%	11%	15%	13%	19%	19%	14%	12%
I will become a more valued member of society if I work in other companies in my industry	11%	13%	6%	7%	10%	14%	10%	10%	15%
I think the pay / salary in other companies in my industry is set to improve going forwards	20%	31%	11%	16%	11%	13%	35%	19%	26%
I think the pay / salary in other companies in my industry is aligned to what I'm looking for	25%	31%	20%	27%	21%	13%	41%	23%	29%
The skills I would learn in other companies in my industry would have more long-term value	19%	23%	25%	9%	18%	15%	22%	19%	24%
I am looking for a better work / life balance	31%	26%	25%	25%	37%	31%	32%	36%	38%
I want a change / new direction	36%	46%	37%	34%	36%	26%	37%	36%	33%
I want to learn new skills	34%	40%	42%	29%	32%	34%	35%	30%	29%
I think other companies in my industry provides safe working conditions	13%	14%	14%	15%	14%	13%	22%	6%	10%
Other - please specify	5%	5%	11%	10%	2%	1%	1%	5%	3%

Q29. What are the main reasons attracting you to a different job in the same industry? Base: Those looking for a new role in same industry (n=729), Australia (n=95), France (n=81), Germany (n=89), Italy (n=102), Japan (n=98), Spain (n=68), UK (n=118) and USA (n=78)