

HP WORKFORCE EVOLUTION

Survey Findings

October 2020



METHODOLOGY



15-minute online survey
designed and conducted by
Edelman Dxl



The survey was fielded July
24, 2020 through
August 5, 2020



1,000 office workers from
each of the following
markets:

-  United States
-  United Kingdom
-  Spain
-  Germany
-  France
-  Italy

How we defined office workers:



Works full time, part time, or
reduced hours due to COVID-19



Identifies as primarily a desk-
based or office-based worker

KEY FINDINGS

- Despite the hardships office workers are facing during these times, employees believe they can use this disruption to better their ways of working
- Employers have scratched the surface of supporting employees in the new ways of working, but they are not prepared to provide everything employees need
- Employees are therefore taking their future of work into their own hands
 - They have identified continuous learning and upskilling as key to their success, and aren't waiting around for employers to get it
 - Office workers are also willing to make significant personal investment to ensure their home office keeps up with the changing ways of working
- Despite the empowerment they feel, there are areas they still need help navigating – specifically a lack of digital readiness
- Nailing down the future of work: employers need to keep in mind that flexible working hours and remote working are here to stay in order to support the future workforce

**DESPITE THE HARDSHIPS OFFICE WORKERS ARE
FACING DURING THESE CURRENT TIMES,
EMPLOYEES BELIEVE WE CAN USE THIS
DISRUPTION TO BETTER OUR WAYS OF WORKING**

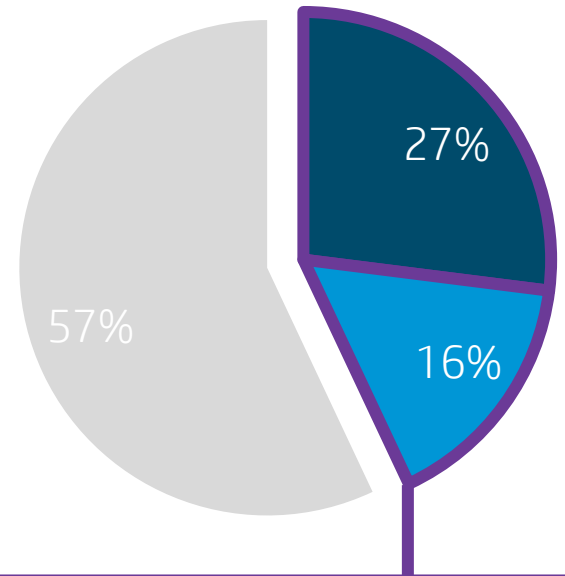
AMID OTHER CHANGES AND STRESS THE PANDEMIC HAS BROUGHT ON, ALMOST HALF OF OFFICE WORKERS HAVE HAD TO COPE WITH REDUCED WORKING HOURS, WITH YOUNGER GENERATIONS HIT THE HARDEST



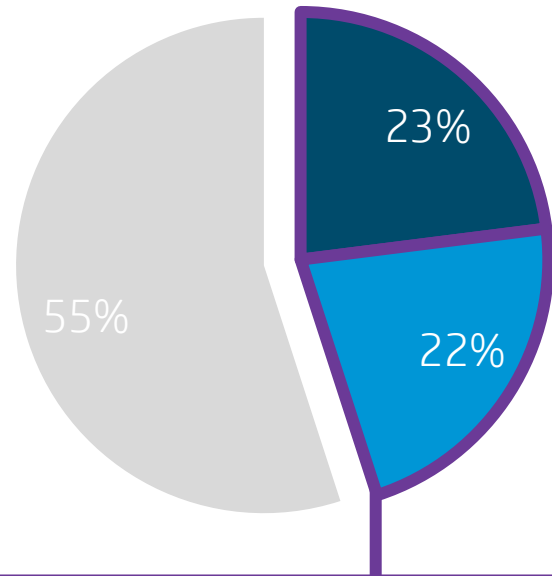
In the **US**, 43% of office workers had their hours reduced, and 27% are still working this way



In **Europe**, 45% of office workers had their hours reduced, and 23% are still working this way



- I had my hours cut due to the COVID-19 pandemic and currently work less hours than I did prior to COVID-19
- I had my hours cut due to the COVID-19 pandemic and had to work less hours than I did prior to COVID-19, but have resumed working full-time now
- I never had my hours cut or reduced due to the COVID-19 pandemic



	Gen Z	Millennials	Gen X	Boomers
■	35%	31%	25%	22%
■	34%	20%	11%	8%

Younger generations have been most impacted by reduced hours

	Gen Z	Millennials	Gen X	Boomers
■	34%	25%	20%	17%
■	30%	27%	21%	15%

Q3a. Which of the following best describes your current working hours? // Base sizes: US office workers = 1000, US Gen Z = 145, US Millennials = 250, US Gen X = 275, US Boomers = 330, European office workers = 5000, European Gen Z = 554, European Millennials = 638, European Gen X = 1733, European Boomers = 1167



FOR 1 IN 3 OFFICE WORKERS, JOB SECURITY IS A REAL WORRY

1 in 3

Are **MORE concerned about job security** now than they were before the pandemic

(37% US, 35% Europe)

Government positions in Europe are slightly less concerned than others – as only 1 in 4 say that they are more concerned about their job security

Say that **fear of losing their job is MORE of a motivator** to perform well at their job

(32% US, 32% Europe)

Q5. We'd like you to think about the changing ways of working due to the COVID-19 pandemic, and the impact it had on how you generally feel at work.

Q17: Now thinking about your motivations to perform well at your job, have the below become more or less of a motivator for you since your ways of working changed due to the COVID-19 pandemic?

Base sizes: US office workers whose ways of working changed = 803, European office workers whose ways of working changed = 4156



AND THIS WORRY IS SEEPING INTO THEIR WORKDAY

OFFICE WORKERS
FEEL *MORE...*

DISTRACTED DURING THEIR WORKDAY (32% US, 25% Europe)

EASILY STRESSED OUT AT WORK (26% US, 22% Europe)

HAVE TROUBLE STEPPING AWAY FROM THEIR WORK (25% US, 21% Europe)



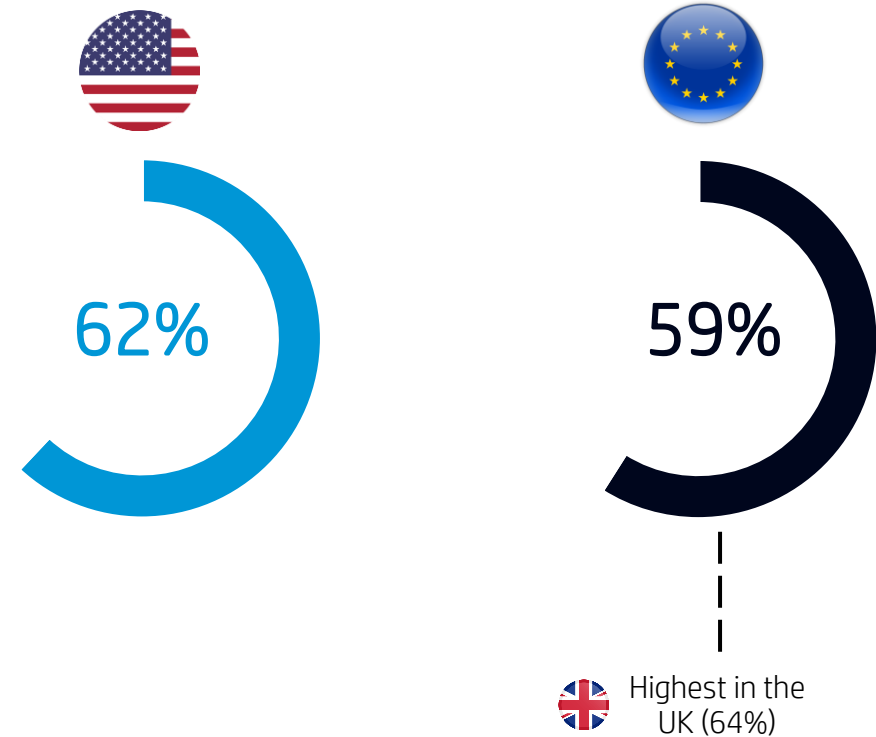
German office workers are the least impacted by these worries, only 18% are more easily stressed out at work, and 17% have more trouble stepping way from their work

**BUT OFFICE WORKERS
ARE READY TO USE THIS
DISRUPTION TO THEIR
ADVANTAGE...**

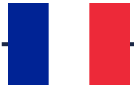
**...BELIEVING IT CAN AND
WILL BE LEVERAGED TO
BETTER OUR WAYS OF
WORKING**

Q19: Next, we'd like to talk to you about the skills and trainings you need to both perform your job and grow in your career. Thinking about how your ways of working have changed due to the COVID-19 pandemic, how much do you agree or disagree with the following statements about the impact that has had on your skills and training? // Base sizes: US office workers with changed working situations N=803, Europe office workers with changed working situations=4156, UK office workers with changed working situations = 878

This new way of working due to the COVID-19 pandemic allows us to change our work environments for the better
(% agree)



HOW DOES THIS COMPARE ACROSS MARKETS?



Notable differences:

- 25% of office workers in France feel more stressed out now than before, the highest of any European market



Notable differences:

- Germany is the least impacted by cut hours, only 36% reported any hours getting cut, the lowest in any market
- Only 24% of German office workers are more motivated by fear of losing their job to perform well (compared to 32%)



Notable differences:

- No notable differences



Notable differences:

- Spain is more impacted by reduced working hours, 49% of Spanish office workers had their hours cut
- Spain is the most concerned with job security, 51% are *more* concerned about their job security
- Spain struggled the most with the transition back to the office, at 49% (compared to 39% overall)



Notable differences:

- The UK was less impacted by cut hours with 42% reporting any hours cut
- 1 in 3 (32%) office workers in the UK feel more distracted now than before, compared to 25% overall

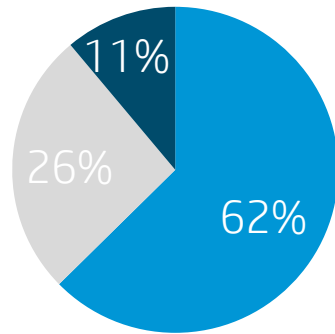
**EMPLOYERS HAVE SCRATCHED THE
SURFACE OF SUPPORTING EMPLOYEES
IN THE NEW WAYS OF WORKING, BUT
THEY ARE NOT PREPARED TO PROVIDE
EVERYTHING EMPLOYEES NEED**

MANY OFFICE WORKERS SAY THEY FEEL SUPPORTED BY THEIR COMPANY IN THIS NEW WORKING SITUATION, BUT IN REALITY, MOST HAVE NOT RECEIVED ANY RESOURCES FROM THEM

How supported by your employer do you feel in your current work situation?

Say "My employer has not provided me with ANY resources to assist me with the transition to the new ways of working due to the COVID-19 pandemic"

US

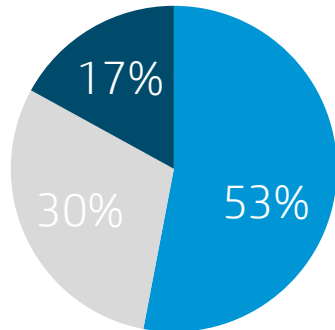


In the US, **parents** feel the most supported (68% of parents vs. 55% of non-parents feel supported by their employer in their current work situation)

US

1 in 5
(20%)

EUROPE



EUROPE

1 in 4
(24%)

■ Supported
 ■ Neutral
 ■ Unsupported

Q6: Now, please now think about your current work situation. Using the scales below, please let us know how you feel. Q26: Have you received any of the following resources, guidance, or information from your employer to assist with the transition to your new ways of working due to the COVID-19 pandemic? // Base sizes: US office workers with changed working situations N=803, European office workers with changed working situations N= 4156, US parents with changed working situations N=435, US non-parents with changed working situations N=366



WHEN UNPACKED FURTHER, EMPLOYER SUPPORT ACROSS KEY EMPLOYEE NEEDS IS LACKING

SKILLS

2 in 3

agree that it's more important now than ever to be **learning new skills** to **remain competitive in their industry**
(65% US, 62% EU)

But **2 in 5** also agree that they feel their company has **deprioritized training** in this new way of working due to COVID-19
(41% US, 38% EU)

SUPPLIES

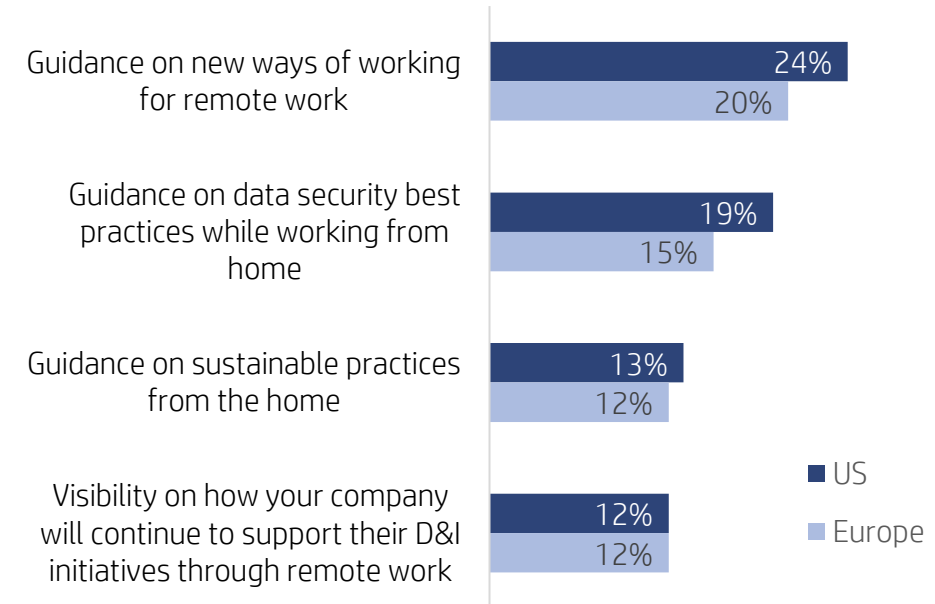
Over half

have access to **all of the supplies they need** to adequately perform their job
(59% US, 53% EU)

But **2 in 3 US office workers**, and **1 in 2 in Europe** have had to **purchase supplies with their own money**
(62% US, 49% EU)

WAYS OF WORKING

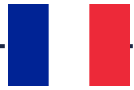
Less than 25% have received guidance from their employers on working remotely
(showing % who received each resource)



Q7: We are now going to ask you some questions about the office supplies or materials that you use while working. In your current work situation, do you feel you have access to all the office supplies, equipment, tools, and technology that you need to adequately perform your day to day job? / Q10: Thinking specifically about office supplies, equipment, tools, or technology you purchased due to remote working conditions of the COVID-19 pandemic, how much of your own money do you estimate to have spent on these items? / Q19: Next, we'd like to talk to you about the skills and trainings you need to both perform your job and grow in your career. Thinking about how your ways of working have changed due to the COVID-19 pandemic, how much do you agree or disagree with the following statements about the impact that has had on your skills and training? / Q26: Have you received any of the following resources, guidance, or information from your employer to assist with the transition to your new ways of working due to the COVID-19 pandemic? // Base sizes: US N=1000, EU N=5000, US office workers with changed working situations N=803, European office workers with changed working situations N= 4156



HOW DOES THIS COMPARE ACROSS MARKETS?



Notable differences:

- French office workers felt the least supported by their employer at 43% (compared to 53% across European markets)



Notable differences:

- In Germany, 62% of office workers have access to all the supplies they need for their job, compared to 53% overall
- Germany had the lowest amount of office workers who felt their employers deprioritized training during this time (33%, compared to 38% overall)



Notable differences:

- No notable differences



Notable differences:

- 71% of Spanish office workers feel it is important to be learning new skills to remain competitive in my industry



Notable differences:

- No notable differences

EMPLOYEES ARE TAKING THEIR FUTURE OF
WORK INTO THEIR OWN HANDS

THEY HAVE IDENTIFIED CONTINUOUS
LEARNING AND UPSKILLING AS KEY TO
THEIR SUCCESS

*AND AREN'T WAITING AROUND FOR
EMPLOYERS TO GET IT*

THE EVOLUTION OF THE WORKFORCE CATALYZED BY COVID-19 HAS HIGHLIGHTED THE NEED FOR OFFICE WORKERS TO CONSTANTLY KEEP LEARNING NEW SKILLS

6 IN 10

agree that

“The way my work has changed due to the COVID-19 pandemic has **emphasized the need for lifelong learning** now more than ever before”

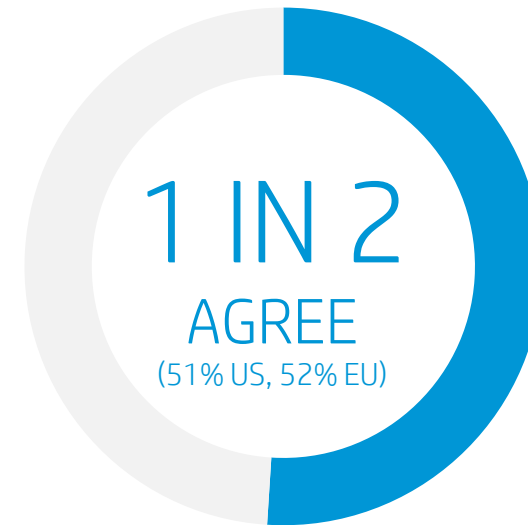
(61% US, 59% Europe)



Office workers in **Spain** agree the most with this new emphasis on lifelong learning (67%)

WHILE MOST OFFICE WORKERS FEEL THIS NEW WAY OF WORKING HAS ENABLED THEM TO HONE THEIR TECHNICAL SKILLS, 1 IN 2 AGREE THEY NEED A NEW SKILLSET TO CONTINUE PERFORMING WELL AT THEIR JOB

6 in 10 office workers agree
“This new way of working due to the COVID-19 pandemic has allowed me to hone my technical skills”
(60% United States, 56% Europe)



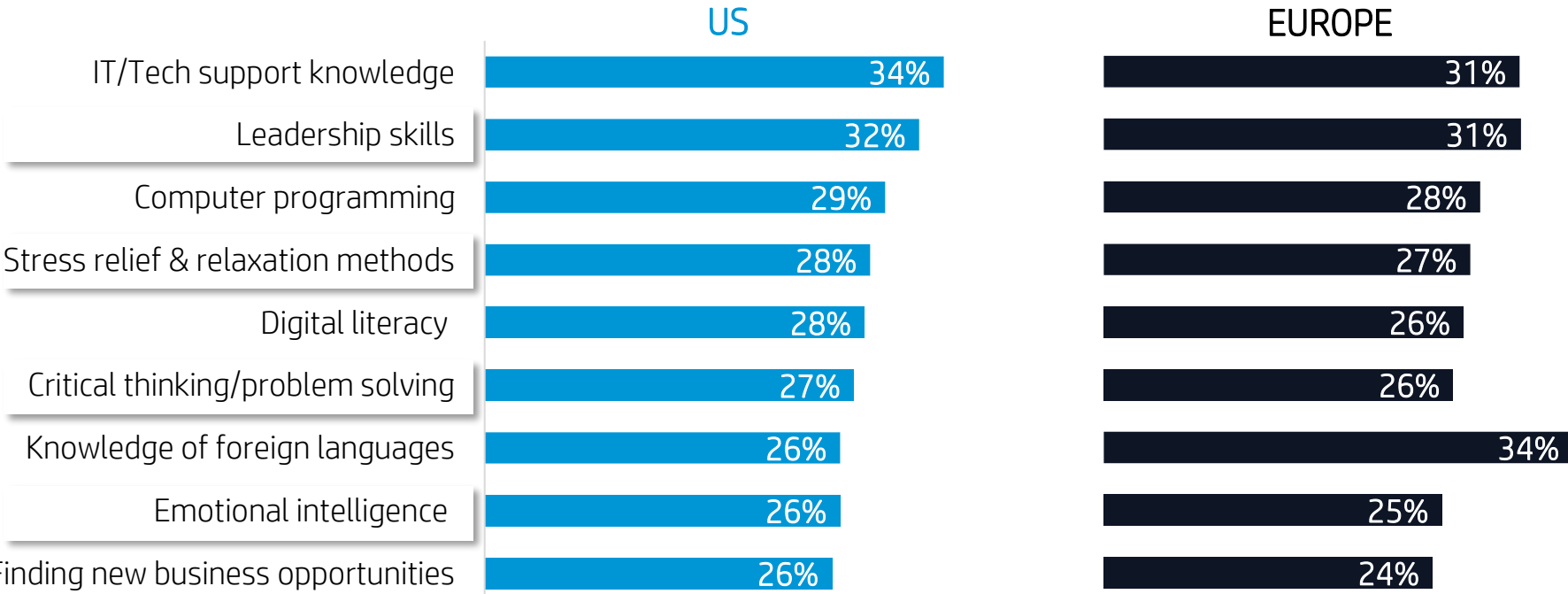
“I feel like this new way of working due to the COVID-19 pandemic requires a new skillset for me to perform well in my job”

Q19: Next, we'd like to talk to you about the skills and trainings you need to both perform your job and grow in your career. Thinking about how your ways of working have changed due to the COVID-19 pandemic, how much do you agree or disagree with the following statements about the impact that has had on your skills and training? // Base sizes: US office workers with changed working situations N=803, Europe office workers with changed working situations=4156



FOR MANY OFFICE WORKERS, THIS MEANS A FOCUS ON NEW SKILLS THAT WOULD NOT ONLY MAKE THEM A BETTER EMPLOYEE, BUT A BETTER CONTRIBUTOR IN TERMS OF THEIR SOFT SKILLS

Top skills office workers are interested in learning more about



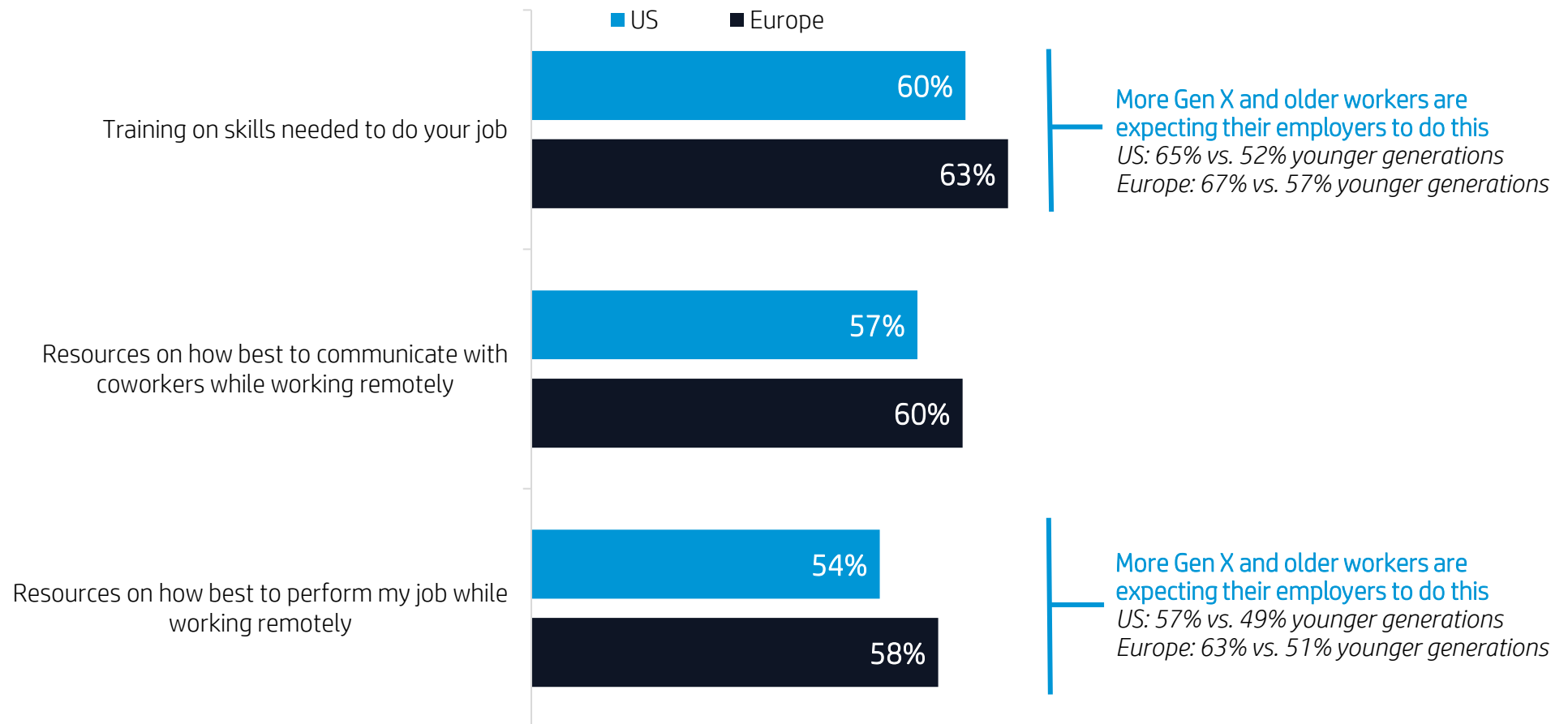

Spain and Italy
 are the most interested
 in learning more about
 all of these skills than
 any other markets

Q23: Which of the following skills would you be interested in learning more about to further your career? // Base sizes: US office workers N = 1000, European office workers N=5000, Spain office workers = 1000, Italy office workers = 1000



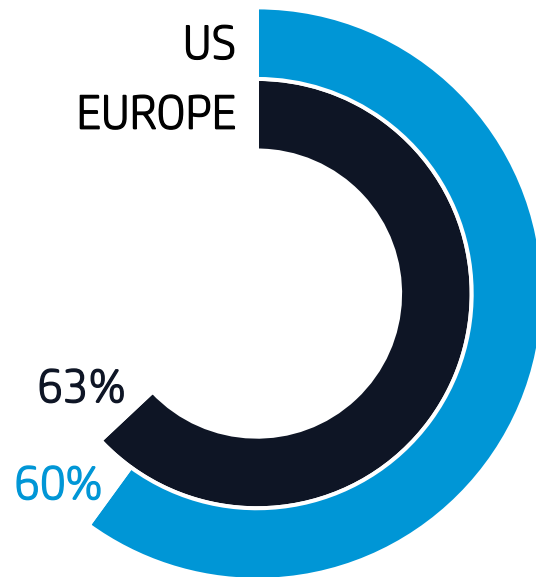
EMPLOYEES EXPECT THEIR EMPLOYERS TO PROVIDE THEM WITH TRAINING AND RESOURCES TO LEARN AND PERFORM THESE SKILLS

% who feel their employer/company should provide them with these resources



BUT CURRENT EFFORTS ARE NOT MEETING EMPLOYEE NEEDS - MANY DO NOT FEEL SUPPORTED BY THEIR EMPLOYERS IN THEIR EFFORTS TO UPSKILL

% feel training on skills needed to do their job should be provided by employer



Yet, there is a major discrepancy in meeting these employee expectation and needs

- 1 in 5** Have not received any training or guidance from their employers to assist with the transition to the new way of working (US 20%, Europe 24%)
- 2 in 5** Feel their employer has **deprioritized training** because of COVID-19 (US 41%, Europe 38%)
- More than 1 in 3** Don't feel their company has provided them with the **right resources to learn new skills** necessary in the new way of working (US 37%, Europe 34%)
(Especially among US younger employees; 40% of US Gen Z, 45% US Millennials)

THAT DOESN'T MEAN OFFICE WORKERS ARE WAITING AROUND, THEY FEEL EMPOWERED TO TRAIN THEMSELVES UP

Over half of office workers are currently learning at least one new skill
(63% United States, 57% Europe)

US workers are busy learning... (showing top skills currently learning)

- Leadership skills
- IT/Tech support knowledge
- Stress relief & relaxation methods
- Critical thinking/problem solving
- Time management
- Digital literacy
- Managing a team
- Managing client relationships
- Self-motivation
- Emotional intelligence

EU workers are busy learning... (showing top skills currently learning)

- Knowledge of foreign languages
- IT/Tech support knowledge
- Managing a team
- Digital literacy
- Time management
- Leadership skills
- Computer programming
- Organization
- Critical thinking/problem solving
- Managing client relationships

OFFICE WORKERS ARE ACTIVELY SEEKING TRAINING THEMSELVES TO STAY RELEVANT AND DESIRABLE EMPLOYEES

Employees are seeking out online courses to...

Because...



Learn a **brand-new skill**

US: 42%
EU: 40%



Developing digital skills helps them be more **desirable employees**

US: 55%
EU: 51%

Those who wish to learn skills are currently learning them already
Digital skills: US 51%, Europe 43%
Soft skills: US 60%, Europe 52%
Hard skills: US 49%, Europe 43%



Keep up with **industry needs**

US: 40%
EU: 39%



Focusing on 'essential' skills helps them **stay relevant**

US: 57%
EU: 51%

Especially younger employees who are newer to the workforce:
US Millennials and younger: 55%
US Gen Z and older: 31%



THIS PROACTIVENESS DOESN'T END THERE - EMPLOYEES ARE EMPOWERED BY THE SKILLS THEY'VE TAUGHT THEMSELVES TO BRANCH OUT AND START THEIR OWN BUSINESS



New skills as a result of their new way of working are also a factor in deciding to try something new

Over
1 in 3

Say they would **consider starting their own business** in the future as a result of learning new skills during this new way of working
(37% US, 35% Europe)

PAIRED WITH THE FACT THAT JOB SECURITY IS NO LONGER A HUGE STAYING FACTOR, OFFICE WORKERS ARE CONSIDERING OTHER CAREER OPTIONS

Changing perceptions of job security have empowered employees to try something new



2 in 5

Say they are more motivated to pursue their passion as a career because the pandemic has changed how they feel about job security

(43% US, especially those in financial services – 53%, 43% Europe)

1 in 3 say they that because the pandemic has decreased their sense of job security, they have a **new interest in starting their own business**

(36% US, 36% Europe)

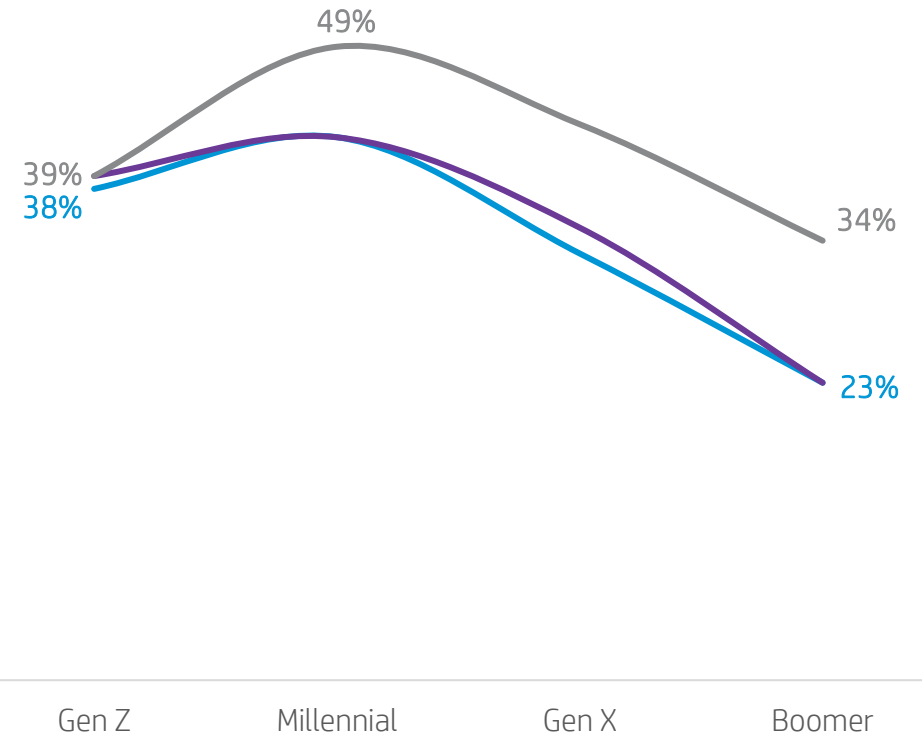
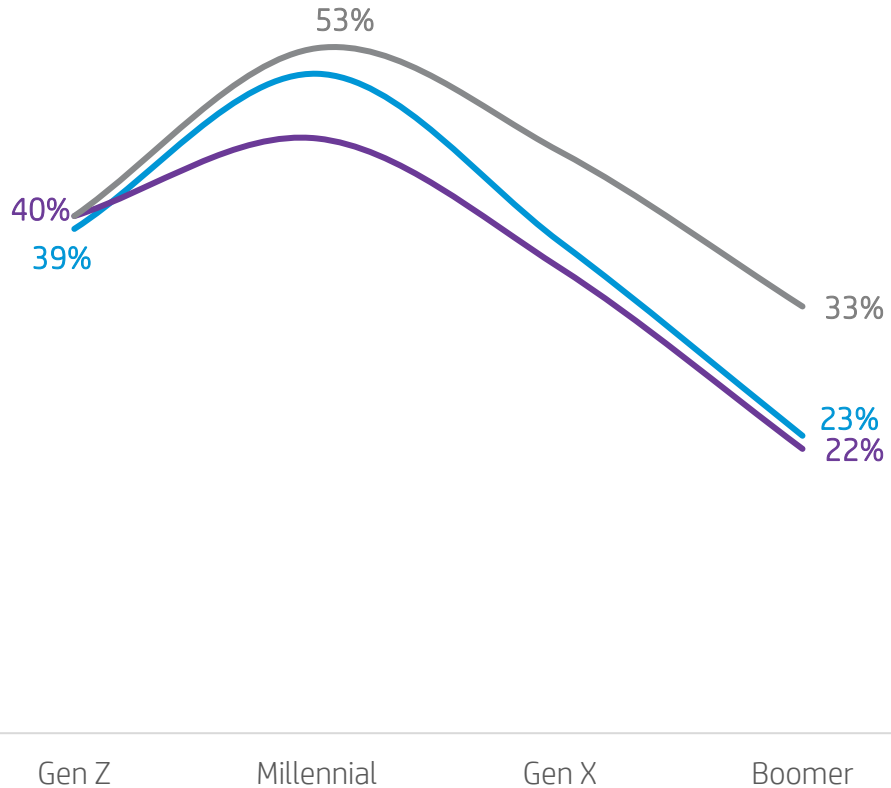
MILLENNIALS ARE THE MOST MOTIVATED TO PURSUE THEIR PASSIONS OR START THEIR OWN BUSINESS



Because the COVID-19 pandemic has decreased my sense of job security, I have a new interest in starting my own business

I am more motivated to pursue my passion as a career because the impact of the COVID-19 pandemic has changed how I feel about job security

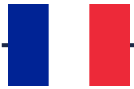
I would consider starting my own business in the future as a result of learning new skills during this new way of working



Q29: And finally, we'd like to ask you some of your thoughts on the future. How much do you agree or disagree with the following statements? // Base sizes: US office workers whose ways of working changed N = 803, US Gen Z = 132, US Millennials = 244, US Gen X = 194, US Boomer = 233, European office workers whose ways of working changed N=4156, Europe Gen Z = 500, Europe Millennial = 1492, Europe Gen X = 1326, Europe Boomer = 838



HOW DOES THIS COMPARE ACROSS MARKETS?



Notable differences:

- French office workers feel the lowest need for a new skillset to perform well at their job in this new way of working – 45% compared to 52% across all European office workers
- France is the least interested in learning new IT or critical thinking skills, at 23% for each



Notable differences:

- In Germany, office workers are the least interested in learning more about digital literacy to further their career, at 23%



Notable differences:

- 31% of Italian office workers are interested in learning more about emotional intelligence, the highest of any market
- 1 in 2 Italians (50%) are more interested in starting their own business now due to decreased job security, compared to 36% of Europe



Notable differences:

- 67% of office workers in Spain agree that the new ways of working emphasize the need for lifelong learning more now than ever before, the highest of any market
- 64% were also able to hone their technical skills during the COVID-19 pandemic, the highest of any market



Notable differences:

- In the UK, 70% believe that companies are responsible for providing employees with the trainings that they need, the highest of all markets

**OFFICE WORKERS ARE WILLING TO MAKE
SIGNIFICANT PERSONAL INVESTMENT TO
ENSURE THEIR HOME OFFICE KEEPS UP
WITH THE CHANGING WAYS OF WORKING**

THE MAJORITY AGREE THAT COVID-19 HAS HIGHLIGHTED THE KEY ROLE TECHNOLOGY PLAYS IN THE ABILITY FOR OFFICE WORKERS TO SUCCESSFULLY DO THEIR JOBS



2 IN 3

Agree that
“Changes in my working situation due
to the COVID-19 pandemic made me
realize that **technology is necessary
for me to do my job**”
(70% US, 68% Europe)

Q12: Now we'd like to talk about the impact access to certain supplies, equipment, tools, and technology has had on your ability to do your job. How much do you agree or disagree with the following statements about your working situation before and after your ways of working changed due to the COVID-19 pandemic?
Base sizes: US office workers whose ways of working changed = 803, European office workers whose ways of working changed = 4156



THE MAJORITY OF OFFICE WORKERS HAD TO ACQUIRE NEW OR UPGRADED HOME OFFICE SUPPLIES—SECURITY SOFTWARE IS THE HIGHEST PRIORITY ACROSS THE BOARD; MILLENNIALS AND GEN Z ARE MOST AFFECTED

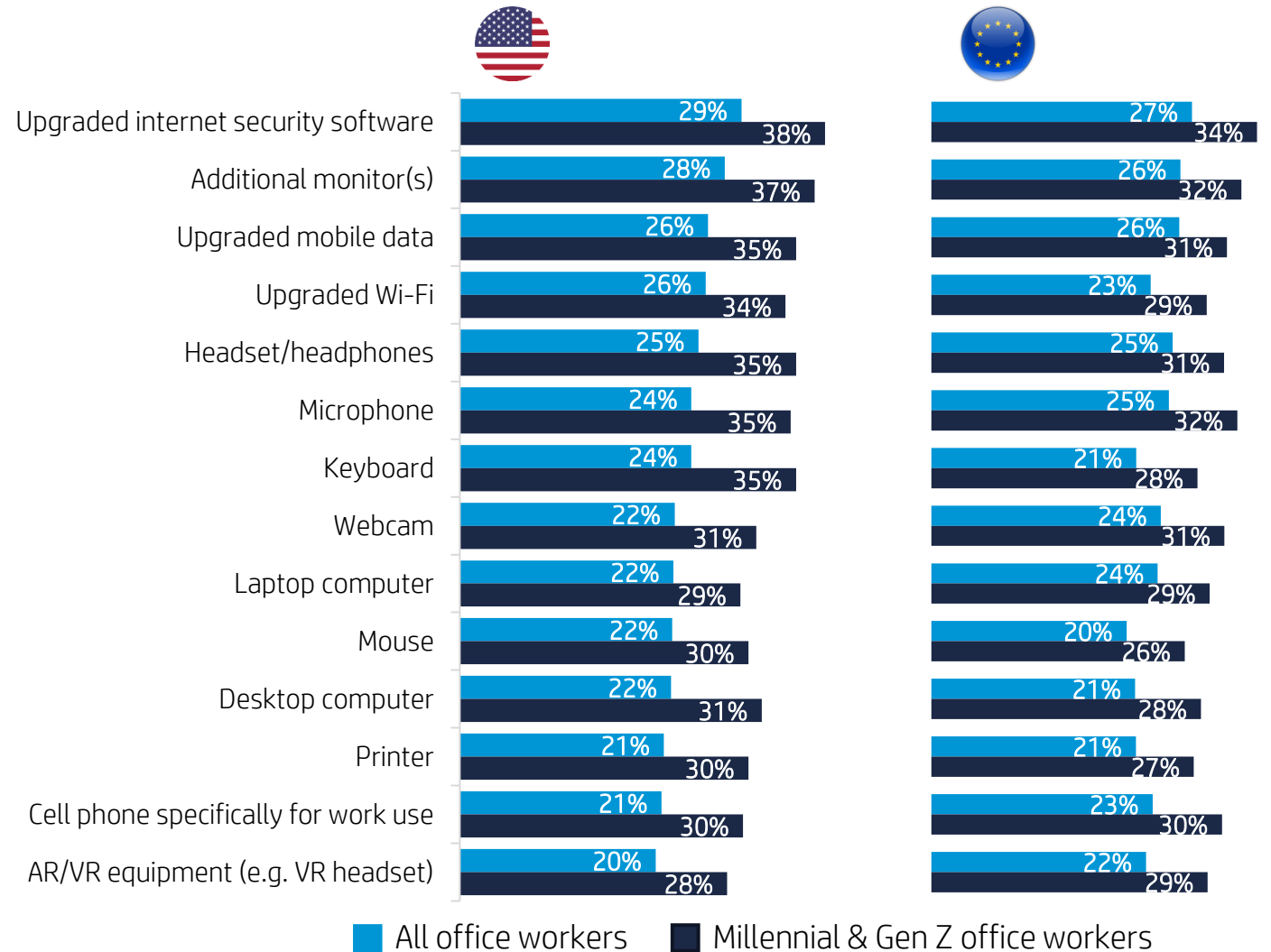
2 in 3

office workers had to purchase or upgrade home office supplies
(65% US, 64% EU)

For 1 in 3

“Knowing that my company provides access to the latest technologies I need to do my job”

is now more of a motivator for them when deciding whether to work for a company
(30% US, 32% EU)



Q8: Thinking about remote working and looking at the below office supplies, equipment, tools, and technology, which of the below apply to you? [NET M2B “I had this before, but upgraded” and “I did not have this before but acquired it”] / Q17: Now thinking about your motivations to perform well at your job, have the below become more or less of a motivator for you since your ways of working changed due to the COVID-19 pandemic? // Base sizes: US office workers whose ways of working changed N = 803, European office workers whose ways of working changed N=4156



HAVING THE TOOLS TO SUCCEED IS A PRIORITY FOR OFFICE WORKERS AS THEY ARE WILLING TO MAKE SIGNIFICANT PERSONAL INVESTMENTS



2 in 3

office workers in the US had to purchase home office supplies using their own money (62%)

On average they spent **\$642** on new supplies, **\$778** among Millennials and Gen Z office workers



1 in 2

office workers in Europe had to purchase home office supplies using their own money (49%)

On average they spent **506€** on new supplies, **577€** among Millennials and Gen Z office workers

Top purchased items with own funds: (showing top 5 most purchased by themselves in US and EU)

United States

- 1 Office chair (46%)
- 2 Non-standing desk (40%)
- 3 Upgraded wi-fi (40%)
- 4 Printer (38%)
- 5 Standing desk (37%)

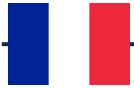
Europe

- 1 Upgraded wi-fi (37%)
- 2 Printer (33%)
- 3 Office chair (33%)
- 4 Non-standing desk (32%)
- 5 Headphones or headset (32%)

Q9: You said you already acquired or plan to acquire the below office supplies, equipment, tools, or technology due to remote working conditions of the COVID-19 pandemic. Which of the below did / will you purchase yourself and which of the below was / will be provided by your employer? Q10: Thinking specifically about office supplies, equipment, tools, or technology you purchased due to remote working conditions of the COVID-19 pandemic, how much of your own money do you estimate to have spent on these items? // Base sizes: US office workers with changed working situations N=803, Europe office workers with changed working situations=4156, US office workers who bought supplies = 497, European office workers who bought supplies = 2036, US Millennials who bought office supplies = 171, US Gen Z who bought office supplies = 101, Europe Millennials who bought office supplies = 838, Europe Gen Z who bought office supplies = 317



HOW DOES THIS COMPARE ACROSS MARKETS?



Notable differences:

- No notable differences



Notable differences:

- No notable differences



Notable differences:

- Italy spent the most on office supplies for remote working, with an average spend of 633€



Notable differences:

- Spain is the most motivated by companies providing their employees with the latest technology at 42%
- Of Spanish office workers that bought a new office chair or headphones, 47% of each paid for it completely on their own, the highest of all markets



Notable differences:

- The U.K spent the least on office supplies for remote working, averaging £335

**DESPITE THE EMPOWERMENT THEY
FEEL TO TAKE THEIR FUTURE INTO
THEIR OWN HANDS THERE ARE AREAS
THEY STILL NEED HELP NAVIGATING –
SPECIFICALLY A LACK OF DIGITAL
READINESS**

OFFICE WORKERS REALLY FEEL THE LACK OF DIGITAL PREPARATION FOR THE EVOLUTION OF THE WORKFORCE



1 IN 3
AGREE

“It has been **more difficult for me to communicate with my coworkers** because **my company was not prepared for the transition to digital communication**”

(35% US, 31% Europe)

“My company struggled to transition to remote working because we **did not have sufficient ways to communicate digitally set up**”


(34% US, 31% Europe)

THIS LACK OF PREPARATION IS HAVING CLEAR CONSEQUENCES ON MORALE, QUALITY OF WORK, AND LOYALTY

MORALE

1 IN 3

agree that not being physically in the same space as their coworkers **has lowered their morale**
(35% US, 32% EU)

 Only 22% of German office workers agree that their morale is lower now, the lowest of any market

QUALITY OF WORK

1 IN 3

agree that they feel **less productive** when they are not physically in the same space as their colleagues during the day
(36% US, 31% EU)

OVER 1 IN 4

agree that not being physically in the same space as their colleagues during the day has **decreased the quality of their work**
(30% US, 25% EU)

LOYALTY

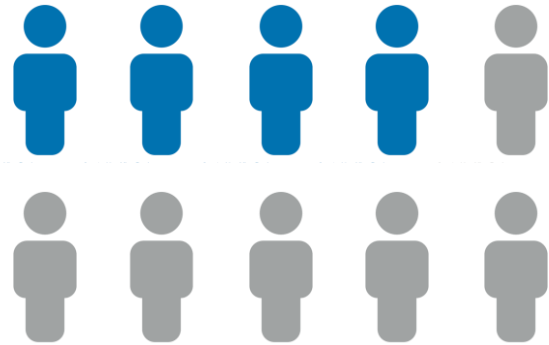
OVER 1 IN 4

agree that they feel **less loyal** to their employer when they work from home because they are disconnected from the people they work with
(29% US, 26% EU)

1 IN 3

agree that they feel **completely disconnected from their company culture** when they work from home
(36% US, 32% EU)

THIS ALSO IMPACTS EMPLOYEE GROWTH, AS OFFICE WORKERS FIND IT MORE DIFFICULT TO LEARN FROM THEIR PEERS



4 IN 10 OFFICE WORKERS
AGREE THAT ...

“Not being in the same space as my coworkers has made it much more difficult for me to learn from them”

(45% US, 40% Europe)

THIS DISCONNECT CAN BECOME A DRAIN ON OFFICE WORKERS AS OPPOSED TO A VALUABLE CONTRIBUTOR TO THEIR WAY OF WORKING

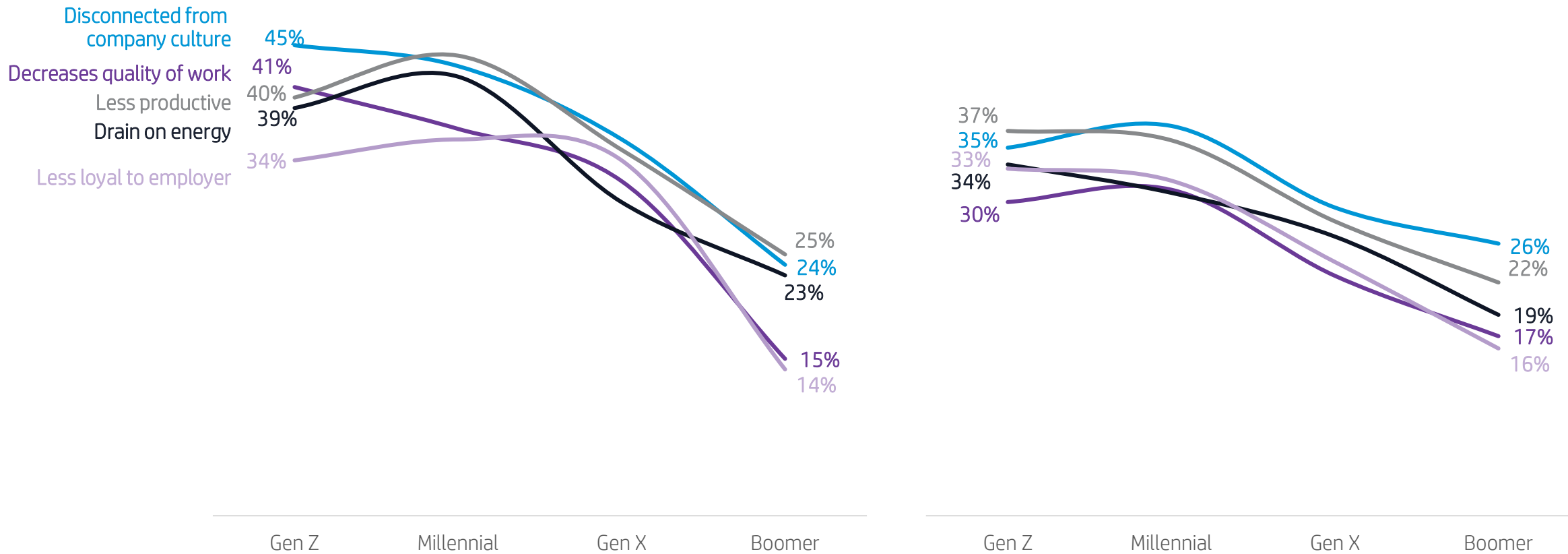
“I feel the amount of communication I have with my coworkers **distracts from my ability to do my job**”

(31% United States, 26% Europe)

“The methods of communication I am using are **more draining to me than ever before and keep me from performing my best at work**”

(33% United States, 27% Europe)

YOUNGER GENERATIONS ARE PARTICULARLY AFFECTED BY THIS GAP IN COMMUNICATIONS SUPPORT FROM THEIR EMPLOYER

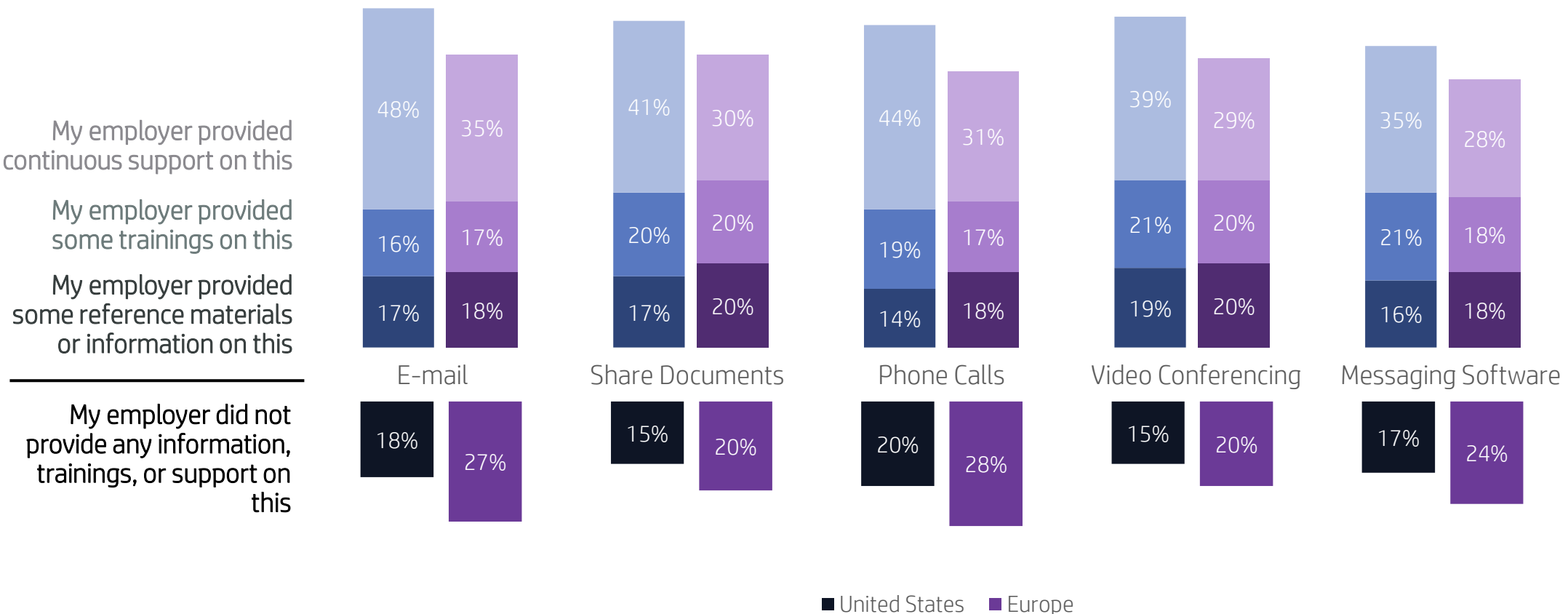


Q14: Still thinking about how you communicate within your workplace after your ways of working changed due to the COVID-19 pandemic, how much do you agree or disagree with the following statements? // Base sizes: US office workers whose ways of working changed N = 803, US Gen Z = 132, US Millennials = 244, US Gen X = 194, US Boomer = 233, European office workers whose ways of working changed N=4156, Europe Gen Z = 500, Europe Millennial = 1492, Europe Gen X = 1326, Europe Boomer = 838



EMPLOYERS ARE PROVIDING SUPPORT, BUT IT ISN'T ENOUGH; LESS THAN HALF OF EMPLOYEES ARE RECEIVING CONTINUOUS SUPPORT

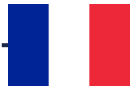
How much support have you received from your employer to better use each of the following communication platforms?



Q13: How much support have you received from your employer to better use each of the following communication platforms? Base sizes: US office workers =1000 , European office workers N=5000



HOW DOES THIS COMPARE ACROSS MARKETS?



Notable differences:

- 31% of French office workers feel less loyal to their employer when they work from home compared to 26% of Europe overall
- They were also the highest of all markets to not receive any support from their employer in using any communication platforms



Notable differences:

- Only 26% also feel less productive from not being around their coworkers anymore



Notable differences:

- 33% of Italians agree that not being in the same space as their coworkers has made it more difficult to learn from them, compared to 40% of Europe overall



Notable differences:

- Spain struggled the most with the lack of digital preparation, 35% felt their company was not prepared for the transition to digital communication, and 37% felt their company struggled to transition to remote working due to insufficient methods of digital communication set up



Notable differences:

- UK office workers struggled the least with the transition to digital communication – only 24% said their company struggled due to not having sufficient ways of communicating digitally set up
- However, they are the most drained by the communication methods they use now, at 32% vs. 27% overall

**NAILING DOWN THE FUTURE OF WORK:
WHAT EMPLOYERS NEED TO KEEP IN MIND
WHEN SUPPORTING THE FUTURE
WORKFORCE**

PERSONAL NEEDS OVERALL INCREASE IN IMPORTANCE WHEN OFFICE WORKERS DISCUSS THEIR EXPECTATIONS OF THEIR EMPLOYER

Almost all office workers find it **important** that their company takes an active interest in the well-being of its employees (97% US, 96% EU)



But, nearly **4 in 10** state that their company taking an active interest the well-being of its employees is **more important** to them after COVID-19 (39% US, 35% EU)

A large majority of office workers find it **important** that their company is actively involved in supporting the community in which it operates (93% US, 93% EU) And that the company's mission and purpose align with their own values (94% US, 94% EU)



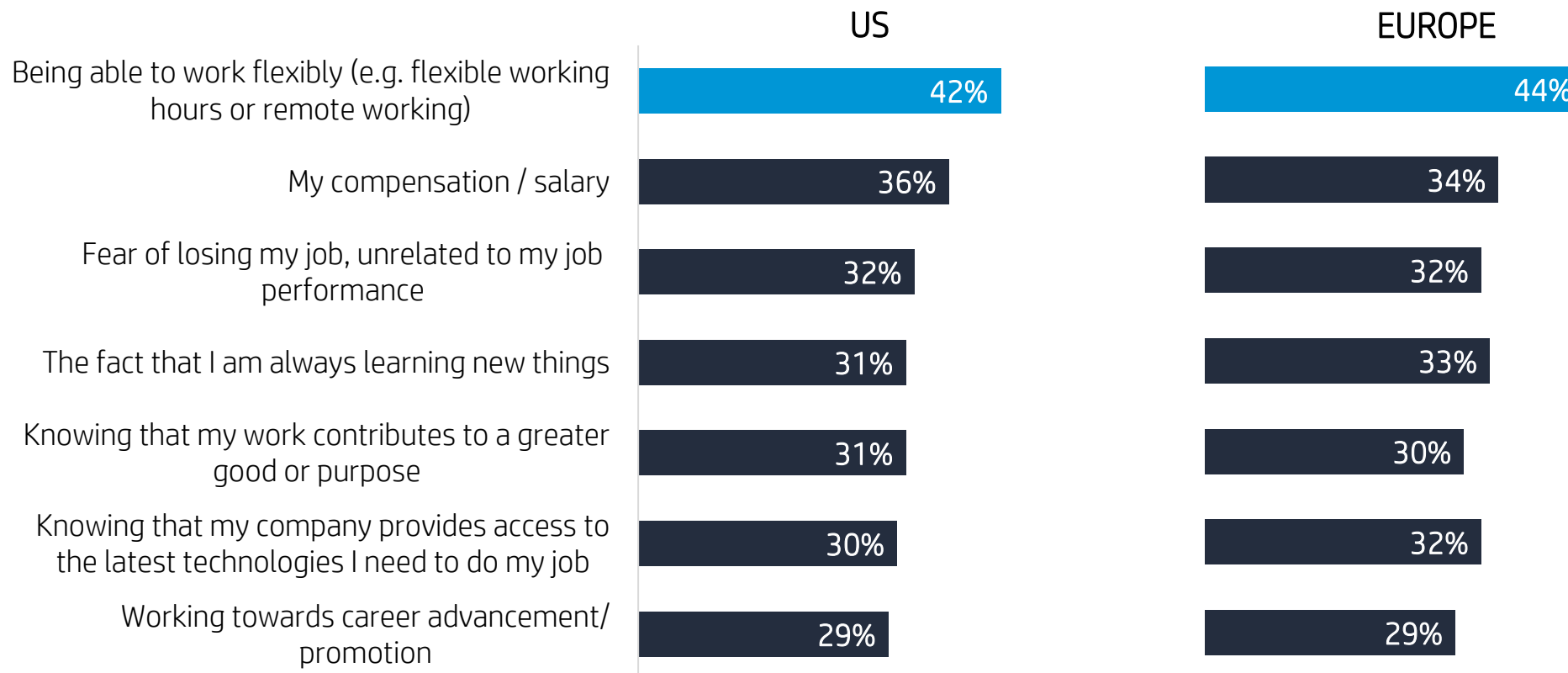
However, **3 in 10** say that knowing that their work contributes to a greater good or purpose is a **greater motivator** to perform well at their job after COVID-19 (31% US, 30% EU)

 *This is particularly high for office workers in Spain (38%)*



THE ABILITY TO WORK FLEXIBLY IS EMPLOYEES' TOP DEMAND FOR THEIR FUTURE, SURPASSING EVEN PAY

% have become MORE of a motivator to perform well due to the COVID-19 pandemic



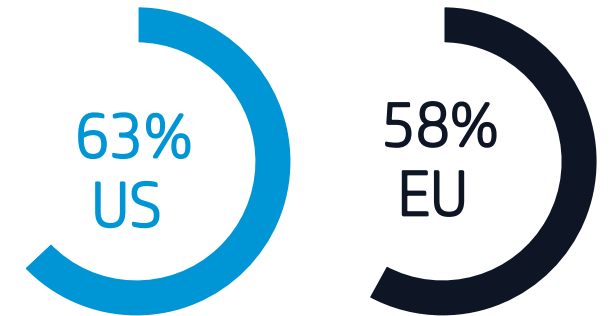
THE SUCCESS OF REMOTE WORKING FOR COMPANY PERFORMANCE IS NO LONGER DENIABLE, AND MANY OFFICE WORKERS NOW EXPECT THIS TO BECOME THE NORM GOING FORWARD


59%
agree that

“I feel remote working has always been the future, the COVID-19 pandemic was simply a catalyst”

(59% in both United States and Europe)

If I am given the option I will continue to work remotely even after the COVID-19 pandemic
(% who agree)



 53% of Italian office workers would continue to work remotely even after the pandemic, the lowest of any market

HOWEVER, IN-PERSON EXPERIENCES PLAY A CRITICAL ROLE FOR MANY IN DRIVING CAREER GROWTH

2 in 5

Agree that not being in the same space as my coworkers has made it **more difficult for me to learn from them**

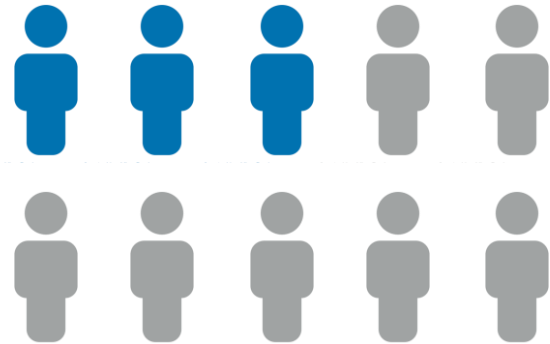
(40% US, 45% Europe)

1 in 4

Agree that they **need collaborative working sessions with colleagues** to produce their best work

(25% US, 21% Europe)

LOSING THE IN-PERSON CONNECTION CAN LEAD TO LOW PRODUCTIVITY, MORALE, AND LOYALTY



3 IN 10 OFFICE
WORKERS
AGREE THAT ...

“I feel **less productive** when I am not physically in the same space as my colleagues during the day” (36% US, 31% EU)

“Not being physically in the same space as my coworkers has **lowered my morale**” (35% US, 32% EU)

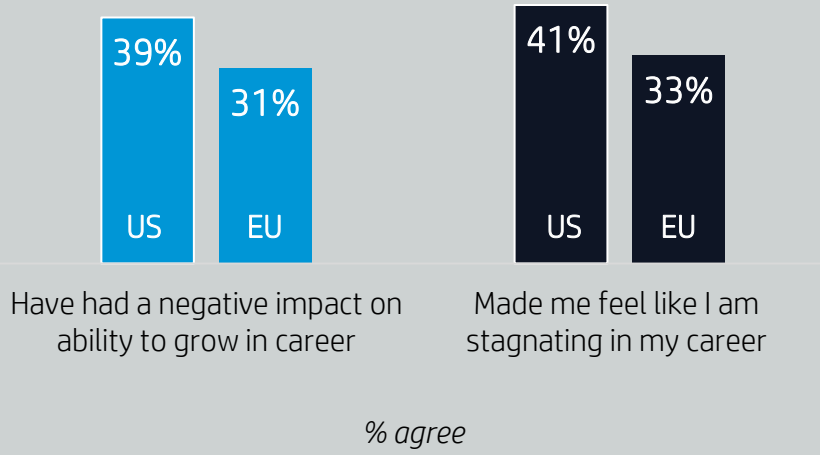
“Not being physically in the same space as my colleagues during the day has **decreased the quality of my work**” (30% US, 25% EU)

“I **feel less loyal to my employer** when I work from home because I am **disconnected from the people I work for/with**” (29% US, 26% EU)


MANY DON'T WANT AN ALL REMOTE FUTURE, AND ARE WORRIED ABOUT THE IMPACT THAT THE PANDEMIC WILL HAVE ON THEIR CAREER GROWTH



For at least 1 in 3, current conditions...



And half are hoping that office work will become the norm again
(54% US, 51% EU agree)

 In the UK, only 46% want to return back to office work the way it was before

Q19: Next, we'd like to talk to you about the skills and trainings you need to both perform your job and grow in your career. Thinking about how your ways of working have changed due to the COVID-19 pandemic, how much do you agree or disagree with the following statements about the impact that has had on your skills and training? Q29: And finally, we'd like to ask you some of your thoughts on the future. How much do you agree or disagree with the following statements? // Base sizes: US office workers whose ways of working changed N=803, US Parents with small children N= 114, European office workers whose ways of working changed N= 4156, UK office workers whose working situation changed N = 878



BUT SOME WHO HAVE ALREADY RETURNED TO THE OFFICE ARE STRUGGLING AND DID NOT FEEL PREPARED FOR THE EVOLUTION OF THE WORKPLACE SINCE THE ONSET OF COVID-19



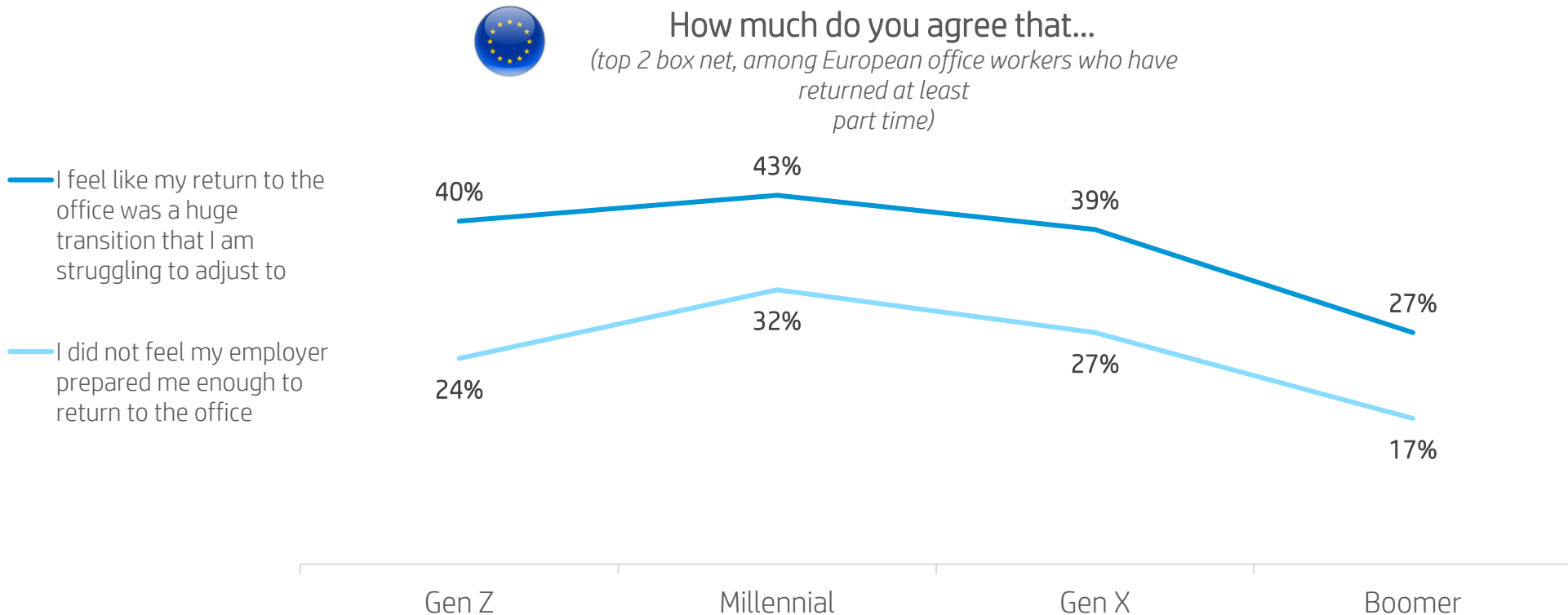
“I feel like my return to the office was a **huge transition** that I am **struggling to adjust to**”

1 IN 4
ALSO AGREE

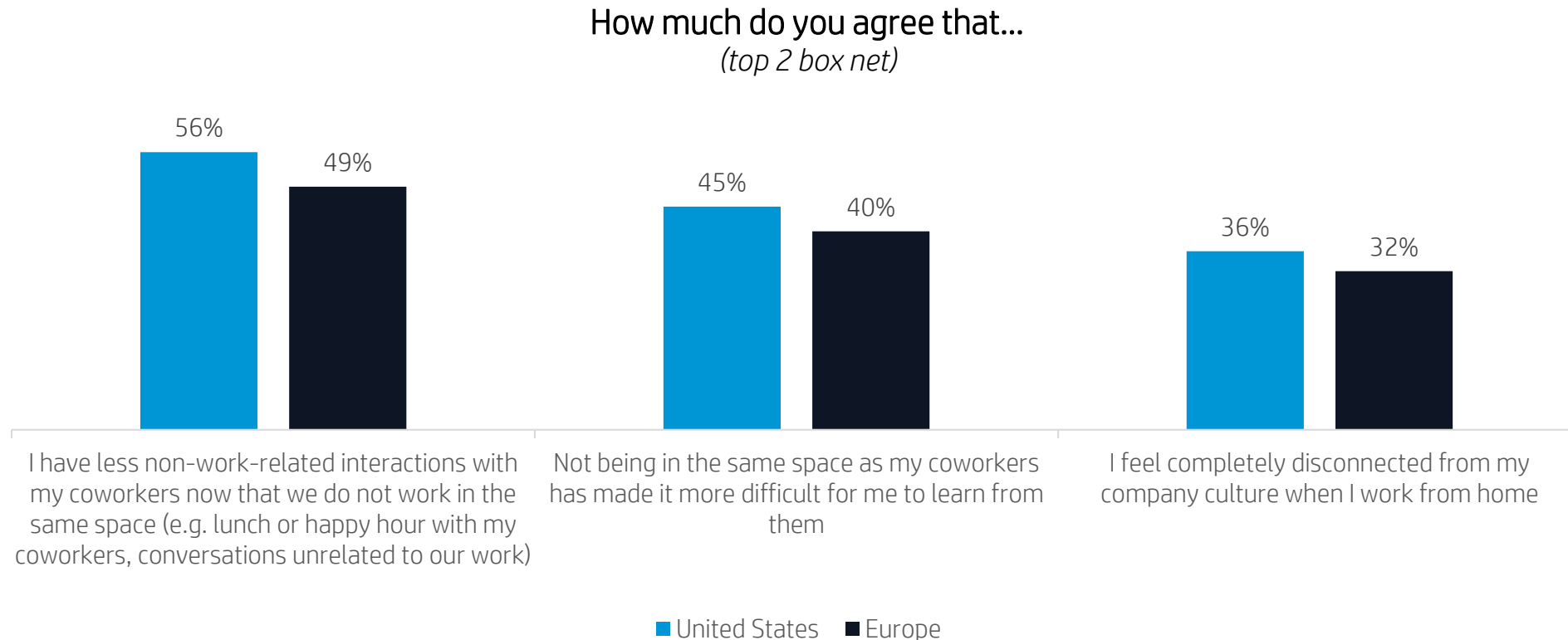
(31% US, 26% EU who have returned at least part time)

“I did not feel my employer prepared me **enough** to return to the office”

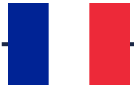
IN EUROPE ESPECIALLY, YOUNGER GENERATIONS ARE STRUGGLING THE MOST WITH THEIR RETURN TO THE OFFICE



CREATING AN ENVIRONMENT WHERE EMPLOYEES CAN LEARN FROM AND STAY CONNECTED TO THEIR COWORKERS WILL BE CRUCIAL IN THIS NEW WAY OF WORKING



HOW DOES THIS COMPARE ACROSS MARKETS?



Notable differences:

- French office workers feel the least pessimistic about their career growth – only 28% agree the new way of working has a negative impact on their ability to grow their career



Notable differences:

- In Germany, office worker morale suffered the least from remote working, with only 22% agreeing that not being physically in the same space as their coworkers has lowered their morale



Notable differences:

- 53% of Italian office workers would continue to work remotely even after the pandemic, the lowest of any market



Notable differences:

- Spain is the most motivated now by flexible working, with 47% indicating that they are more motivated to perform well at their job by flexible working options
- 38% are also more motivated to perform well at their job by knowing their work contributes to a greater good or purpose
- 49% agree that they feel like their return to the office was a huge transition that they are struggling to adjust to



Notable differences:

- UK felt the strongest against returning to the office – only 46% want to return, and 60% want to stay remote

MARKET FINDINGS

THE SPAIN STORY

Spain was hit hardest by some of the stressors from with the pandemic, specifically **concerns about job security**.

- **49% agree** that they feel like their return to the office was a **huge transition that they are struggling to adjust to** (vs 39% of European office workers)
- **51% of Spanish office workers** say they are **more concerned about job security** than they were before the pandemic (vs 35% of European office workers)
- **34% are more motivated** by fear of losing their job if their work doesn't meet expectations (vs 28% of European office workers)
- **40% are more motivated by losing their job** unrelated to job performance (vs 32% of European office workers)

Spain also struggled with preparing for the new ways of communicating

- **35% feel their company was not prepared** for the transition to digital communication (vs 31% of European office workers)
- **37% feel their company struggled to transition** to remote working due to insufficient methods of digital communication set up (vs. 31% of European office workers)

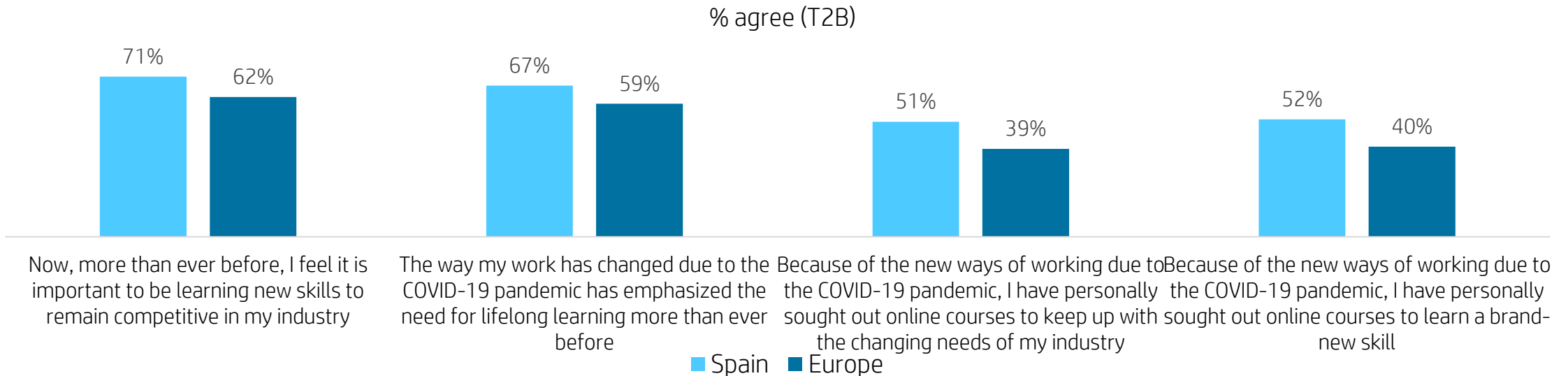
Despite the hardships, Spanish office workers are flourishing in the new ways of working.

- **59% of Spanish office workers** agree that they could keep working like this for the foreseeable future (vs 54% of European office workers)
- **71% feel well equipped** to perform well at their job after their ways of working changed (vs 60% in Europe)
- **64%** feel well equipped to **grow and develop** their career (vs 50% of European office workers)
- **Spain is the most motivated now by flexible working**, with 47% indicating that they are more motivated to perform well at their job by flexible working options (vs. 44% of European office workers)
- **38% are also more motivated** to perform well at their job by knowing their work contributes to a greater good or purpose (vs 30% of European office workers)
- **42% are more motivated** to perform well at their job from their company providing them with the latest technology (vs 32% of European office workers)

THE SPAIN STORY

Spanish office workers **prioritize trainings and upskilling** more so than any other market as they feel like they need to learn new skills to be successful due to the new ways of working.

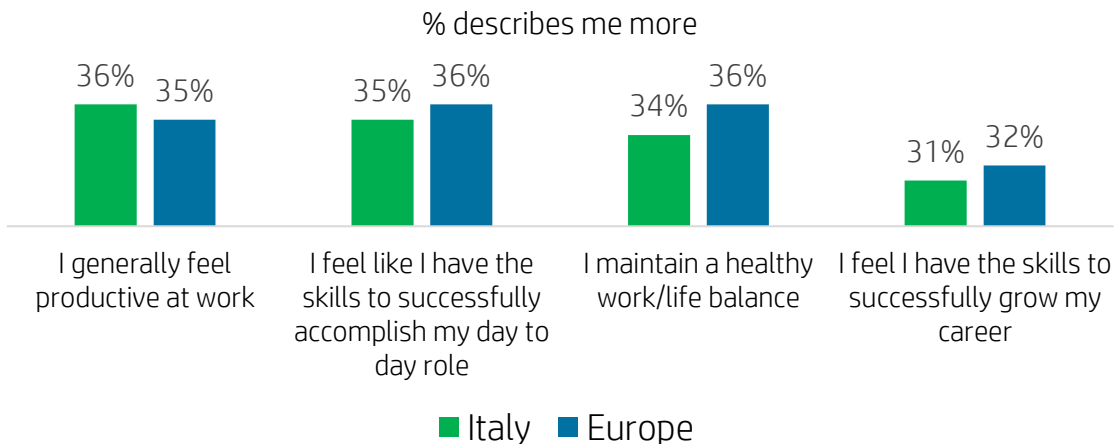
- **62% of office workers in Spain** agree that the new way of working due to the COVID-19 pandemic **requires a new skill set** for me to perform my job well *(vs 52% of European office workers)*
- **64%** were able to **hone their technical skills** during the COVID-19 pandemic *(vs 56% of European office workers)*
- They are more focused on a developing their digital skills
 - **59%** agree that they **plan on developing my digital skills** to be more desirable to employers *(vs 51% of European office workers)*



THE ITALY STORY

Similar to other European markets, Italian office workers are generally **happy with their current work situation** as they feel prepared and productive in their new working situation.

- **55% of Italian office workers** are happy with their current situation (vs 53% of European office workers)
- **53% of Italian office workers** are willing to keep working remotely even after the pandemic (vs 58% of European office workers)
- **33% agree** that not being in the same space as their coworkers makes it more difficult for them to learn (vs 40% of European office workers)



The changes in the ways of working has sparked Italian office workers' entrepreneurial spirit, showing willingness to invest in what they need to be successful.

- **50% of Italian office workers** have a **new interest in starting their own business** due to decreased job security now (vs 36% of European office workers)
- **47% are more interested in pursuing their passion** as a career now (vs 43% of European office workers)
- **Italian office workers also spend the most money on supplies**, at an average of 633€ (vs 506€ for European office workers)

70%

either upgraded or acquired electronic equipment (vs 59% in Europe)

65%

either upgraded or acquired computer equipment (vs 52% in Europe)

52%

either upgraded or acquired software (vs 42% in Europe)

50%

either upgraded or acquired office equipment (vs 38% in Europe)



THE FRANCE STORY

Office workers in France are **struggling with the change in their ways in working** more than most countries in Europe.

- **42% could keep working this way** for the foreseeable future (*vs 54% of European office workers*)
- **28% of office workers in France had their hours cut during** the pandemic, but have begun working full time since then (*vs 22% of European office workers*)
- **46% say they are happy** with their current work situation (*vs 53% of European office workers*)
- **52% in France feel well equipped** to perform well at their job (*vs 60% of European office workers*)
- **46% are happy with their current employer** (*vs 53% of European office workers*)
- **43% say they feel supported** by their current employer (*vs 53% of European office workers*)
- **31% of French office workers** feel less loyal to their employer when they work from home (*vs 26% of European office workers*)
- **25% of office workers in France feel more stressed** out now than before, the highest of any European market (*vs 22% of European office workers*).

Similar to other European countries, office workers in France are not feeling supported by their employers in the new ways of working.

- **35% of office workers in France** agree that **they do not feel like their company has provided them with the right resources** to learn the skills needed for the new ways of working (*vs 34% of European office workers*)
- However, they are less likely to go out and get it themselves: French office workers are less willing to seek trainings out themselves – only **29% have personally sought out online courses** (*vs 39% of European office workers*)
- Only **45% feel they need a new skillset** in this new way of working (*vs 52% of European office workers*)
- They are least interested in learning **IT or critical thinking skills**, at **23%** for each (*vs 31% for IT, 26% for critical thinking skills for European office workers*)
- **And French office workers feel the least pessimistic about their career growth** – only 28% agree the new way of working has a negative impact on their ability to grow their career (*vs 31% of European office workers*)



THE UK STORY

Office workers in the UK are the farthest behind in terms of transitioning back to the office but are not unhappy with continuing to work remotely.

- **33% of UK office workers** have returned to the office at least part time *(vs 59% of Europe)*
- **42% reported working cut hours at some point, with 27% still currently work reduced hours** *(vs 23% of European office workers)*
- **UK felt the strongest against returning to the office** – only 46% wanted to return, and 60% want to stay remote *(vs. 51% in Europe wanting to return to the office, 58% want to stay remote)*

Office workers in the UK felt **prepared for the shift to digital communication methods**, but they still took a toll

- **24% said their company struggled** due to not having sufficient ways of communicating digitally set up *(vs 31% of European office workers)*
- However, they are the most **drained by the communication methods** they use now, at 32% *(vs 27% of European office workers)*
- UK office workers spent the least on new supplies, at an average of £335 *(vs 506€ for European office workers)*

THE UK STORY

UK office workers still hold similar sentiments about their ways of working compared to the rest of Europe.

- **35% are more concerned** about job security (*vs 35% of European office workers*)
- **26% are more motivated to perform** because they are **afraid of losing their job** for not meeting expectations (*vs 28% of European office workers*)
- **1 in 3 (32%) office workers in the UK feel more distracted** now than before (*vs 25% of European office workers*)

Similar to other European countries, the UK finds trainings and upskilling essential to remaining competitive in the new ways of working and feel their company has deprioritized training.

- **60% feel learning new skills** is essential to stay competitive in their industry (*vs 62% of European office workers*)
- **53% feel that lifelong learning** is more important now than ever (*vs 62% of European office workers*)
- **37% agree that their company** has deprioritized training right now (*vs 38% of European office workers*)
- **70% agree** that these trainings should be provided by their employers (*vs 63% of European office workers*)

THE GERMANY STORY

German office workers are coping with the changes in their ways of working better than most European countries and are thriving in their new situation.

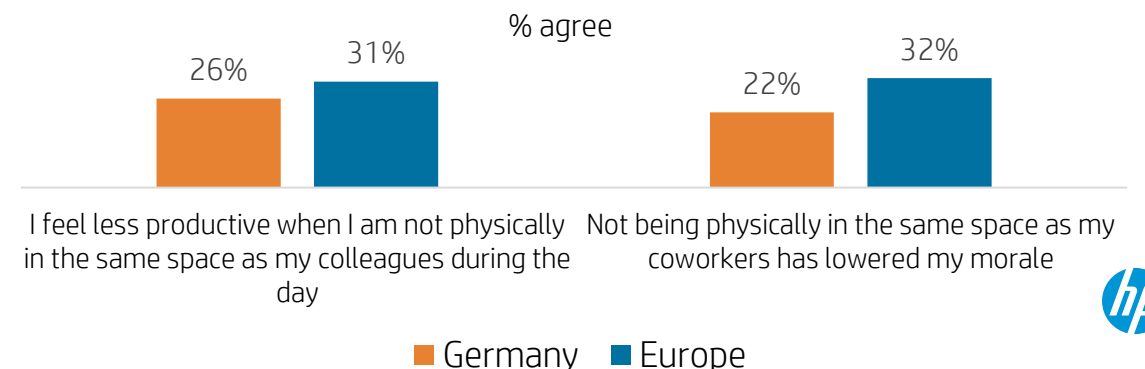
- 44% say they feel less overwhelmed (vs 31% of European office workers)
- 38% say they are less distracted (vs 27% of European office workers)
- 30% are less concerned about job security now (compared to 21% Europe)
- 24% of German office workers are more likely to perform well at their job because they are motivated by a fear of losing their job (vs 32% of European office workers)
- Only 20% are currently working reduced hours (23% of European office workers)
- Only 26% feel less productive from not being around their coworkers anymore (31% of European office workers)
- Only 22% have lower morale from not being in the same space as their coworkers (32% of European office workers)

This comfort in their current position deters German office workers from wanting to leave to pursue other ventures

- 27% agree they would want to start their own business because of decreased job security (vs 36% of European office workers)

German office workers are content in their remote working situation, feeling more supported by employers than most European markets and less affected by the lack of in-person interactions.

- 59% agree that if they were given the option they would continue to work remotely even after the COVID-19 pandemic (vs 58% of European office workers)
- Only 23% have not received any resources from their employer (vs 24% of European office workers)
- 33% of German office workers agree that their company has deprioritized trainings (vs 38% of European office workers)
- 62% of office workers have access to all the supplies they need for their job (vs 53% of European office workers)



THANK YOU

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