Resetting Normal: Defining the New Era of Work
Study Background and Objectives

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

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

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

• How attitudes have changed and the implications for companies to successfully adapt in this period of transition, a year after the pandemic changed the way we work forever.

• Uncover new perspectives and insight on what the future world of work can and should look like
Fieldwork was conducted between 13th May & 4th June 2021 in local languages. **14,800 respondents across 25 countries** answered a 15-minute online survey.
The trend is confirmed. Work is universally hybrid. But what are the consequences for businesses?

Flexibility is the new expected standard and workers are calling for a shorter work week.

Wellbeing and people’s overall mental health is an issue spanning age and gender.

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

The is no great resignation on the horizon but there are warning signs for companies as people re-evaluate what work means to them.
Executive Summary:

1. HYBRID WORKING - THE GOOD, THE BAD AND THE UGLY

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

2. SHORTER AND FLEXIBLE - THE NEW WEEK IN DEMAND

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

3
BURNOUT MIGHT BE THE NEXT WORKER PANDEMIC

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

4
LEADERS MUST RECONNECT THE DISCONNECT

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

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

The trend is confirmed. But what are the consequences for businesses?
Hybrid Working: The Good, The Bad and The Ugly: Summary

• Globally, workers want a hybrid working model where more than half of their time spent working is remote (53%). Parents and younger generations want more office time

• 8 in 10 believe that increased flexibility around hybrid working will benefit both employers and employees. This belief is shared among leaders

• Majority believe hybrid working models will boost equal opportunities: with remote work creating more opportunities for parents, people with disabilities and people from diverse backgrounds.

• Workers want the complementary benefits of work/life balance and focus provided by remote alongside the office as a nice environment to collaborate and connect

• Emotions of excitement to reconnect with colleagues in the office coexist with anxiety about the return for some

• Workers want to go back to the office but on their own terms. 7 in 10 say working remotely more than before will be important to them, however tension exists between the ‘ideal’ hybrid that people want vs. what they expect companies will impose

• Agency and adaptation: workers have adapted, obstacles of trust and practicality are being overcome, and 7 in 10 (71%) now have a setup at home that allows effective remote work
Workers want to spend at least 53% of their work time remotely
The next normal continues to be universally hybrid: over half of workers want to work remotely 50% of their time

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

<table>
<thead>
<tr>
<th>Location</th>
<th>% Wanting to work remotely after the pandemic</th>
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<tbody>
<tr>
<td>Office</td>
<td>47%</td>
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<tr>
<td>Remote location(s)</td>
<td>53%</td>
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</table>

Those with kids want to be in the office more (51%) than those who do not have kids (42%)

Younger people want more office time:
- 56% Gen Z
- 48% Millennials
- 46% Gen X
- 44% Boomers

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

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

- People with disabilities: 75%
- Working parents: 73%
- People from diverse backgrounds: 69%
Workers remain enthusiastic about people-focused office environments, conducive to work, leisure and collaboration

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

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

Manager, Hospitality

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

Manager, Tech / Telecoms

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

Non-manager, Financial

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

Non-manager, Construction

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

The Adecco Group
Workers and leaders believe hybrid and flexible working benefits both them and the companies they work for.

8 in 10

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

82%

Leaders

80%

Managers

77%

Non-managers

8 in 10

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

83%

Leaders

79%

Managers

75%

Non-managers

Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,377)

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

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

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

Manager, Engineering

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

Non-manager, Tech / Telecoms

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

Non-manager, Government

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

Non-manager, Engineering

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

Manager, Energy

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

Manager, Financial services
Workers have been successful in creating their own set up for effective remote work

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

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800), Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
7 in 10 (71%) say working remotely more than they did before the pandemic will be important to them in future
Tension exists between the ‘ideal’ hybrid model that people want versus what they expect

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

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

- Remote location/s: 53% What I want, 47% What I expect
- Office: 61% What I want, 39% What I expect
Non-management have a greater desire for remote work than leaders and managers

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

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

57%
Say they can’t wait to start seeing more of my colleagues in person again

12%
Say they feel / have felt a lot of anxiety about returning to the office

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

<table>
<thead>
<tr>
<th>Generation</th>
<th>Say they can’t wait</th>
<th>Say they feel anxiety</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generation Z</td>
<td>63%</td>
<td>46%</td>
</tr>
<tr>
<td>Millennials</td>
<td>60%</td>
<td>45%</td>
</tr>
<tr>
<td>Generation X</td>
<td>55%</td>
<td>40%</td>
</tr>
<tr>
<td>Baby boomers</td>
<td>56%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Women tend to feel anxiety about returning more than men

Women: 46%  Men: 38%

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

- Mental wellbeing has worsened: Women: 34%  Men: 29%
- Physical wellbeing has worsened: Women: 30%  Men: 26%

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Managers</th>
<th>Non-managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Want to see colleagues in person</td>
<td>68%</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>Feel / have felt anxiety about going back to the office</td>
<td>41%</td>
<td>61%</td>
<td>42%</td>
</tr>
</tbody>
</table>
Anxiety about returning to the office is highest in Australia while people in the EEMENA region are most excited to see colleagues again.

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

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
Those who are anxious about a return to the office are more likely to have social, wellbeing and practical related concerns and priorities

Among those who are anxious about returning to the office:

- 33% say their mental wellbeing got worse during the last 12 months
- 29% say their physical wellbeing got worse
- 77% rate a redesigned office for people to work safely and effectively as important
- 68% rate ability to manage caring for others around work as important
- 25% say their relationships with colleagues got worse
- 69% want to work remotely more than they did before the pandemic

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

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

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

Those who are anxious about a return to the office ....

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

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

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

Workers maintained the flexibility gained during 2020, but they want more. Questions over the length of the working week must be addressed as the future stays flexible.
Flexibility key for the next normal; over two-thirds of workers have maintained flexibility and control over their working schedule and (75%) think it’s important to retain flexibility going forward.

Productivity has survived the shift to hybrid as people become better time managers and work/life balancers. 82% say productivity has stayed the same or improved during the last 12 months.

7 in 10 (72%) call for employers to revisit the length of the working week and hours people are expected to work with over half (57%) believing the job can be done in under 40 hours.

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

Companies and leaders are yet to adapt to the demand for outcome instead of hours-based approaches. Only 36% of non-managers feel their managers are assessing their performance based on results instead of hours worked.
People have become more trusted to do their job and able to balance work and personal life, scores are marginally higher than 2020 results

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

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better, NET Worse) Base: All respondents (14,800), Australia (1,000), Canada (1,000), France (1,000), Japan (1,000)
Workers don't want to lose autonomy. 3 in 4 (75%) think it's important to retain flexibility over their own schedule in the next normal
Two thirds of workers have maintained some flexibility and control over their working schedule

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

![Bar chart showing the distribution of workers' working schedules by country and region.](chart.png)

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

The Adecco Group
Across geographies, retaining the benefits of flexibility at work is highly sought after after the pandemic.

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

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

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

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

Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353), Mothers with children at home (3,829), Fathers with children at home (4,299), Have an adult reliant on care (159), No dependents (3,434).
82% of workers say their productivity has stayed the same or improved in the last 12 months
Productivity has survived the shift to hybrid work with 82% feeling as productive or more than before

<table>
<thead>
<tr>
<th>% NET Better</th>
<th>Global</th>
<th>Australia</th>
<th>China</th>
<th>LatAm</th>
<th>EMEENA</th>
<th>USA</th>
<th>Switzerland</th>
<th>UK</th>
<th>Nordics</th>
<th>Italy</th>
<th>Spain</th>
<th>Germany</th>
<th>Bel / Ned</th>
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<tr>
<td>% NET Better</td>
<td>40%</td>
<td>61%</td>
<td>57%</td>
<td>52%</td>
<td>44%</td>
<td>44%</td>
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<td>37%</td>
<td>36%</td>
<td>35%</td>
<td>33%</td>
<td>32%</td>
<td>15%</td>
</tr>
<tr>
<td>% Same</td>
<td>42%</td>
<td>29%</td>
<td>35%</td>
<td>28%</td>
<td>31%</td>
<td>41%</td>
<td>38%</td>
<td>44%</td>
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<td>46%</td>
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<td>49%</td>
<td>45%</td>
<td>53%</td>
<td>55%</td>
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<tr>
<td>% NET Worse</td>
<td>18%</td>
<td>9%</td>
<td>8%</td>
<td>20%</td>
<td>25%</td>
<td>15%</td>
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<td>17%</td>
<td>16%</td>
<td>23%</td>
<td>15%</td>
<td>31%</td>
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* Caution: Figures may not add to 100% due to rounding

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better, NET Worse) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
Hours worked have increased 14% since last year with 63% of workers working over 40 hours per week. But 6 out of 10 (57%) say they would be able to do their work in less than 40 hours.
Workers perceive an opportunity to reverse a growing trend in long working hours, with 6 out of 10 able to do their work in less than 40 hours.

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

Q37. Now that new ways of working are becoming established, how many hours do you think you actually need to spend to get your job done on an average week? Base: All respondents (14,800)
Disconnect between hours worked vs. hours deemed necessary is clear across geographies

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

Q10. How many hours would you say you have been working during the last 12 months in an average week?
Q37. Now that new ways of working are becoming established, how many hours do you think you actually need to spend to get your job done on an average week? Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
Calls for a shift from hours-based to outcome-based working has strengthened

8 in 10 (79%) leaders agree

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

Manager, Engineering

83% 81% 60% 57%

Most likely to agree

Least likely to agree

72%
Say employers should revisit the length of the working week and the hours that employees are expected to work

73%
Say employee contracts should focus more on meeting the needs of the role and less on number of hours worked

8 in 10 (81%) leaders agree

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

Manager, Government

84% 84% 67% 53%

Most likely to agree

Least likely to agree

Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800), Australia (1,000), LatAm (1,000), China (1,000), France (1,000), Japan (1,000), Nordics (1,000)
Only 36% of non-managers say leaders are assessing them on outputs & results

73% Say employee contracts should focus more on meeting the needs of the role and less on number of hours worked

52% Say their manager did not meet their expectations for assessing performance on outcomes / results instead of hours worked

Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800), Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)
Almost half of leaders have not found it easy to support and guide the team to focus on achieving business goals, and assessing their performance based on outcomes.

Q2. Thinking this time about how you have found the experience of managing other people during the last 12 months, how easy or difficult have you found the following? (NET Not Easy) Base: All managers (8,405)

- Onboarding new staff to the team / business: 55%
- Supporting and guiding the team to focus on achieving the business goals: 45%
- Assessing performance of my staff based on outcomes / results instead of hours worked: 44%
Workers have had polarised experiences over changes at work. Companies must embrace that “One size will not fit all” when addressing employee individual needs. Flexibility will be key.
Views on the future of working life are split with just under half of workers happier following changes at work

49%

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

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800) [Detailed country bases in appendix]
Polarised experience is evident across aspects of work spanning wellbeing, career, relationships and company engagement

<table>
<thead>
<tr>
<th>Aspect</th>
<th>NET Better</th>
<th>NET Worse</th>
</tr>
</thead>
<tbody>
<tr>
<td>My physical well-being</td>
<td>35%</td>
<td>28%</td>
</tr>
<tr>
<td>My mental well-being</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Job motivation</td>
<td>31%</td>
<td>26%</td>
</tr>
<tr>
<td>Effective communication between colleagues</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Sense of team culture and morale</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>My sense of job security</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>My workload</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Relationship with my colleagues</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Prospects for progression / promotion</td>
<td>24%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q6. Thinking about the following aspects of your own working life, which do you feel have got better / got worse during the last 12 months (NET Better / NET Worse) Base: All respondents (14,800)
Just under half of workers are happy with the new working normal

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

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171), Creative / Design (233), Digital / IT workers (7,440), Offline retail (2,075), Education (1,236), Hospitality (165)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Leaders Agree</th>
<th>Managers Agree</th>
<th>Non-managers Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative / Design</td>
<td>60%</td>
<td>57%</td>
<td>55%</td>
</tr>
<tr>
<td>Offline retail</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital / IT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>41%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hospitality</td>
<td></td>
<td></td>
<td>38%</td>
</tr>
</tbody>
</table>

Highest scoring sectors

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

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

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better) Base: Leaders (1,427), Managers (6,978), Non-managers (6,171)
Parents, on the other hand, feel more trusted to do their job and able to manage their time, and they are noticeably happier with the changes than those with no dependants.

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

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

- My digital / remote working skills: 66% (Have children), 60% (No children)
- Ability to care for others: 53% (Have children), 56% (No children)
- Work / life balance: 53% (Have children), 46% (No children)
- My time management: 51% (Have children), 42% (No children)
- How much I am trusted to get the job done: 45% (Have children), 32% (No children)

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

- Mothers: 55%
- Fathers: 51%

Global average: 49%

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

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

• **People want to work smarter, not longer.** Maintaining flexibility and autonomy over their own schedules is key for workers going forward. Companies must build a culture of trust and re-invent planning and collaboration for a new era of flexible work.

• Measuring employee performance based on their activity and time spent online is outdated and inadequate in the next normal. Companies need to provide support and guidance on how managers can assess performance on outcomes and results instead of hours worked.

• With only 36% of non-managers being measured based on their results, performance management appear as a clear opportunity for improvement for leaders and companies. Using technology and creating resources such as clear and personalised score cards, ongoing analysis, feedback processes, and collaborative and adapted actions will be key to link the success of teams and individuals to the company success.

• Therefore, calls for companies to revisit hour-based contracts and to focus instead on outcomes and results continue to be strong and leaders share the vision. Automation of repetitive tasks via technologies such as AI and machine learning will play an important role in this shift.

• It will also be important for companies to create a hybrid model that encourages and fosters a better normal for all individuals, acknowledging that “one size does not fit all”. Listening to employee feedback and striking the right balance will be key to successful hybrid working.
BURNOUT MIGHT BE THE NEXT WORKER PANDEMIC

Wellbeing is an issue spanning age and gender. And half of leaders struggle to see the signs.
Wellbeing comes to the fore as a key challenge for companies and leaders going forward. It’s an issue spanning geographies, age and gender.

63% of workers have worked more than 40 hours per week in the last 12 months. With working hours increasing by 14% since 2020, 3 in 10 also say their mental and physical health has declined in the last 12 months.

Burnout has been a significant cause for concern across the workforce for almost 4 in 10 workers. And it’s been felt most among younger generations. More than half of young leaders (54%) have suffered from burnout, the same group who shoulder significant responsibility for future progress.

Leaders are not equipped to support employees: More than half of all managers find it hard to identify when staff may be struggling with mental wellbeing (53%) or overwork and burnout (51%).

7 in 10 (71%) say having the right support for mental wellbeing at work will be important to them in future and nearly three-quarters (74%) expect their company to increase focus on wellbeing of staff.
A third say their mental health has got worse, rising to around half in Poland and Canada.

32%

Say their mental wellbeing got worse in the last 12 months.

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Worse) Base: All respondents (14,800) [Detailed country bases in appendix]
1 in 3 say their mental and physical health has declined

3 in 10
(32%) say their mental health has got worse in the last 12 months

3 in 10
(28%) say their physical health has got worse in the last 12 months

Q3. Thinking about your working life as it is now [before the pandemic], how far would you agree or disagree with the following? (NET Agree)
Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Worse) Base: All respondents (14,800), Core 8 2020 (8,000), Core 8 2021 (6,000)
Mental wellbeing is an issue spanning age and gender

**32%**

Say their mental wellbeing has worsened over the last 12 months

<table>
<thead>
<tr>
<th>Age/Gender Group</th>
<th>% Who say their mental wellbeing has worsened over the last 12 months (NET Worse)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Women</td>
<td>34%</td>
</tr>
<tr>
<td>Men</td>
<td>29%</td>
</tr>
<tr>
<td>Generation Z</td>
<td>32%</td>
</tr>
<tr>
<td>Millennials</td>
<td>30%</td>
</tr>
<tr>
<td>Generation X</td>
<td>32%</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>34%</td>
</tr>
</tbody>
</table>

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

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

Non-manager, Tech / Telecoms

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

Non-manager, Tech / Telecoms
67% of non-managers say leaders don't meet their expectations for checking on their mental wellbeing
Better support for mental wellbeing is key and managers need guidance and support to deliver this

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

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

53% of all managers say they have not found it easy to identify when staff may be struggling with mental wellbeing

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

Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? (NET Haven’t met expectations) Base: Non-managers (6,171)
63% have worked more than 40 hours in the last 12 months (14% more than in 2020)
Working long hours is common, and on the increase

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

<table>
<thead>
<tr>
<th>Region</th>
<th>% 2021</th>
<th>% 2020</th>
<th>Increase vs. 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>63%</td>
<td>57%</td>
<td>+16</td>
</tr>
<tr>
<td>Japan</td>
<td>86%</td>
<td>77%</td>
<td>+16</td>
</tr>
<tr>
<td>China</td>
<td>82%</td>
<td>67%</td>
<td>+15</td>
</tr>
<tr>
<td>Spain</td>
<td>74%</td>
<td>59%</td>
<td>+15</td>
</tr>
<tr>
<td>LatAm</td>
<td>70%</td>
<td>55%</td>
<td>+15</td>
</tr>
<tr>
<td>Switzerland</td>
<td>70%</td>
<td>55%</td>
<td>+15</td>
</tr>
<tr>
<td>USA</td>
<td>66%</td>
<td>51%</td>
<td>+15</td>
</tr>
<tr>
<td>Italy</td>
<td>65%</td>
<td>47%</td>
<td>+18</td>
</tr>
<tr>
<td>EMEENA</td>
<td>62%</td>
<td>47%</td>
<td>+15</td>
</tr>
<tr>
<td>Nordics</td>
<td>60%</td>
<td>45%</td>
<td>+15</td>
</tr>
<tr>
<td>Germany</td>
<td>60%</td>
<td>45%</td>
<td>+15</td>
</tr>
<tr>
<td>Canada</td>
<td>59%</td>
<td>44%</td>
<td>+15</td>
</tr>
<tr>
<td>UK</td>
<td>50%</td>
<td>35%</td>
<td>+14</td>
</tr>
<tr>
<td>France</td>
<td>47%</td>
<td>32%</td>
<td>+15</td>
</tr>
<tr>
<td>Bel / Ned</td>
<td>46%</td>
<td>31%</td>
<td>+15</td>
</tr>
<tr>
<td>Australia</td>
<td>46%</td>
<td>31%</td>
<td>+5</td>
</tr>
</tbody>
</table>

Q10. How many hours would you say you have been working during the last 12 months in an average week? Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
Burnout has been a significant issue over the last year, felt most among younger generations. Managers need help in spotting the signs.

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

<table>
<thead>
<tr>
<th>Generation</th>
<th>% Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generation Z</td>
<td>45%</td>
</tr>
<tr>
<td>Millennials</td>
<td>42%</td>
</tr>
<tr>
<td>Generation X</td>
<td>35%</td>
</tr>
<tr>
<td>Baby boomers</td>
<td>27%</td>
</tr>
</tbody>
</table>
Those from Australia, EMEENA and Italy most likely to admit to suffering burnout

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

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

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

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

<table>
<thead>
<tr>
<th>Generation Z &amp; Millennials</th>
<th>Generation X &amp; Baby boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Who say they have suffered from working too hard / burnout during the last 12 months (NET Agree)</td>
<td>% Who say they have suffered from working too hard / burnout during the last 12 months (NET Agree)</td>
</tr>
<tr>
<td>Young leaders</td>
<td>Older leaders</td>
</tr>
<tr>
<td>54%</td>
<td>45%</td>
</tr>
<tr>
<td>Young managers</td>
<td>Older managers</td>
</tr>
<tr>
<td>42%</td>
<td>36%</td>
</tr>
<tr>
<td>Young non-managers</td>
<td>Older non-managers</td>
</tr>
<tr>
<td>39%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? Base: Generation Z & Millennials (7,288), Generation X & Baby boomers (7,512), Young leaders (871), Young managers (3,499), Young non-managers (2,813), Older leaders (556), Older managers (3,479), Older non-managers (3,358)
51% of managers did not find it easy to identify when staff may be struggling with overwork / burnout.
Over half of managers have not found it easy to manage others on issues of burnout and mental wellbeing, especially in Japan and France.

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

Q12. Thinking this time about how you have found the experience of managing other people during the last 12 months, how easy or difficult have you found the following? (NET Not easy) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
There is a vast disconnect between how burnt out people feel and expectations of this being addressed in the future, especially in Italy and Spain.

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Suffered Burnout</th>
<th>Think their company will provide coaching on preventing burnout</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>53%</td>
<td>-30</td>
</tr>
<tr>
<td>EMEENA</td>
<td>50%</td>
<td>-20</td>
</tr>
<tr>
<td>Italy</td>
<td>49%</td>
<td>-39</td>
</tr>
<tr>
<td>China</td>
<td>41%</td>
<td>-12</td>
</tr>
<tr>
<td>LatAm</td>
<td>40%</td>
<td>-15</td>
</tr>
<tr>
<td>Canada</td>
<td>40%</td>
<td>-22</td>
</tr>
<tr>
<td>Spain</td>
<td>39%</td>
<td>-25</td>
</tr>
<tr>
<td>USA</td>
<td>38%</td>
<td>-19</td>
</tr>
<tr>
<td>UK</td>
<td>37%</td>
<td>-24</td>
</tr>
<tr>
<td>Nordics</td>
<td>34%</td>
<td>-21</td>
</tr>
<tr>
<td>Switzerland</td>
<td>34%</td>
<td>-17</td>
</tr>
<tr>
<td>France</td>
<td>34%</td>
<td>-17</td>
</tr>
<tr>
<td>Bel / Ned</td>
<td>30%</td>
<td>-10</td>
</tr>
<tr>
<td>Germany</td>
<td>27%</td>
<td>-16</td>
</tr>
<tr>
<td>Japan</td>
<td>20%</td>
<td>-16</td>
</tr>
</tbody>
</table>

*Caution: Differences may look wrong due to rounding issues*

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree)
Q36. Which of the following do you think your company will actually do in response to the changes in working life over the last 12 months? Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
There is more room for improvement in supporting employee physical and mental wellbeing across sectors

<table>
<thead>
<tr>
<th>% Who said their physical wellbeing has improved during the last 12 months (NET Better) [Top and bottom 5]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative arts and design</td>
</tr>
<tr>
<td>Online retail</td>
</tr>
<tr>
<td>Construction</td>
</tr>
<tr>
<td>Digital / IT</td>
</tr>
<tr>
<td>Media / Journalism</td>
</tr>
<tr>
<td>Charity and voluntary work</td>
</tr>
<tr>
<td>Automotive and mobility</td>
</tr>
<tr>
<td>Hospitality</td>
</tr>
<tr>
<td>Science, pharmaceuticals and biotechnology</td>
</tr>
<tr>
<td>Education</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Who said their mental wellbeing has improved during the last 12 months (NET Better) [Top and bottom 5]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative arts and design</td>
</tr>
<tr>
<td>Online retail</td>
</tr>
<tr>
<td>Digital / IT</td>
</tr>
<tr>
<td>Offline retail</td>
</tr>
<tr>
<td>Construction</td>
</tr>
<tr>
<td>Agriculture</td>
</tr>
<tr>
<td>Automotive and mobility</td>
</tr>
<tr>
<td>Science, pharmaceuticals and biotechnology</td>
</tr>
<tr>
<td>Education</td>
</tr>
<tr>
<td>Charity and voluntary work</td>
</tr>
</tbody>
</table>

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better) Base: All respondents (14,800) [Detailed sector bases in appendix]
The Latam region takes the strongest view on focusing on staff wellbeing after the pandemic

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

Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
Disparity between what has got worse for non-managers compared to leaders is vast, especially in communicating with colleagues and impact on mental wellbeing.

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

- Effective communication between colleagues: Leaders 30%, Managers 26%, Non-managers 37%
- My mental wellbeing: Leaders 33%, Managers 24%, Non-managers 35%
- My physical wellbeing: Leaders 15%, Managers 15%, Non-managers 16%
- Job motivation: Leaders 24%, Managers 24%, Non-managers 30%
- Sense of team culture and morale: Leaders 29%, Managers 29%, Non-managers 29%
- Relationship with my colleagues: Leaders 29%, Managers 23%, Non-managers 14%
- My workload: Leaders 26%, Managers 18%, Non-managers 26%
- Ability to collaborate on new ideas and creativity: Leaders 27%, Managers 23%, Non-managers 20%
- Work / life balance: Leaders 23%, Managers 22%, Non-managers 16%
- Prospects for progression / promotion: Leaders 11%, Managers 18%, Non-managers 19%

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

- **Companies must re-evaluate how they can better support and provide wellbeing resources** to their employees within the new hybrid working model. **Building pro-wellbeing working environments, cultures and skillsets from top to bottom** will be key in the next normal.

- With the majority of managers saying they have not found it easy to identify when staff may be struggling with mental wellbeing, overwork or burnout, and almost 4 in 10 workers suffering with overwork or burnout it’s increasingly urgent for companies to set up processes, resources and tools to foster openness and listen to employee needs, as well as helping workers develop resilience to prevent it.

- Moreover, 67% of non-managers say their leaders don’t meet their expectations for checking on their mental wellbeing. **Leadership development, coaching and resources for managers on how to deal with and respond to these situations is key.**

- The usage of cognitive technologies for employee wellbeing can provide increased visibility into burn-out warning indicators and generate awareness amongst individuals and leaders to address the issue.
LEADERS MUST RECONNECT THE DISCONNECT

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

- There is a **big disconnect between management views of their own performance and the opinion of their employees**
- **Relationships, motivation and sense of team / company culture have regressed.** With perspectives of leaders and non-management at odds, the disconnect poses a major threat to company cohesion
- **Only a third of non-managers feel they are getting due recognition within the business,** and only half of all workers say their managers met or exceeded expectations for encouraging a good working culture (48%) or helping support their work/life balance (50%)
- **Nearly half (46%) of managers say they have NOT found the overall experience of managing other people easy over the past 12 months,** struggling especially with onboarding, identifying when staff may be struggling and supporting their career development (48%)
- **Disconnect is also clear between leader and non-manager perceptions of the company talent strategy and development** with most leaders feeling the company has a strategy, but less than half of non-managers believe it
Satisfaction with senior leadership is polarised with only 43% satisfied at non-management level

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

- Leaders: 80%
- Managers: 62%
- Non-managers: 43%

Say they are satisfied with their company’s senior leadership
Satisfaction with senior leadership tends to be lowest in Western Europe and Japan

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

Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
Satisfaction with senior leadership tends to be lowest in Western Europe and Japan

53%
Say they are satisfied with the senior leadership of their company

Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800) [Detailed country bases in appendix]
Motivation has regressed across the workforce and tends to be lowest in Western Europe and Japan

% Who say they are motivated (NET Agree)

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

Q3. Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Agree) Base: Core 8 2021 (8,000), Core 8 Leaders (670), Core 8 Managers (3,677), Core 8 Non-managers (3,545)
Staff / manager relationships have deteriorated with less than half feeling the relationship is strong among non-managers

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

- Leaders (Core 8): 77% (NET Agree) down 8 points from 2020
- Managers (Core 8): 62% (NET Agree) down 12 points from 2020
- Non-managers (Core 8): 45% (NET Agree) down 17 points from 2020

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

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

<table>
<thead>
<tr>
<th>Region</th>
<th>% (NET Agree)</th>
<th>Change vs. 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>61%</td>
<td>-6</td>
</tr>
<tr>
<td>USA</td>
<td>77%</td>
<td>-3</td>
</tr>
<tr>
<td>Australia</td>
<td>77%</td>
<td>-3</td>
</tr>
<tr>
<td>China</td>
<td>77%</td>
<td>-6</td>
</tr>
<tr>
<td>LatAm</td>
<td>75%</td>
<td>-12</td>
</tr>
<tr>
<td>EMEENA</td>
<td>69%</td>
<td>-15</td>
</tr>
<tr>
<td>Belgium / Netherlands</td>
<td>69%</td>
<td>-15</td>
</tr>
<tr>
<td>Nordic</td>
<td>69%</td>
<td>-16</td>
</tr>
<tr>
<td>Spain</td>
<td>64%</td>
<td>-12</td>
</tr>
<tr>
<td>UK</td>
<td>60%</td>
<td>-15</td>
</tr>
<tr>
<td>Canada</td>
<td>56%</td>
<td>-21</td>
</tr>
<tr>
<td>France</td>
<td>53%</td>
<td>-19</td>
</tr>
<tr>
<td>Switzerland</td>
<td>51%</td>
<td>-18</td>
</tr>
<tr>
<td>Italy</td>
<td>46%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>21%</td>
<td></td>
</tr>
</tbody>
</table>

8-market benchmark vs. 2020

The Adecco Group
77% of managers say they are satisfied with their own performance while only 57% of non-managers are satisfied with the performance of their manager.
There is a disconnect between management views of their own performance and the opinion of their employees

<table>
<thead>
<tr>
<th>Category</th>
<th>Leaders</th>
<th>Managers</th>
<th>Non-managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfaction</td>
<td>88%</td>
<td>74%</td>
<td>57%</td>
</tr>
</tbody>
</table>

Q31. How satisfied would you say you currently feel about the following? (NET Satisfied)
Q32. Thinking specifically about your own opinion on how you perform as a manager, how satisfied do you currently feel with yourself? (NET Satisfied) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)

Global average 63%
74% say it is important for managers to promote and nurture strong team morale and culture.

But only 37% of non-managers say their manager is encouraging a good working culture.
Managers are falling short on promoting a good working culture

Half

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Managers</th>
<th>Non-managers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>73%</td>
<td>53%</td>
<td>37%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>69%</td>
</tr>
<tr>
<td>China</td>
<td>69%</td>
</tr>
<tr>
<td>USA</td>
<td>64%</td>
</tr>
<tr>
<td>Italy</td>
<td>37%</td>
</tr>
<tr>
<td>France</td>
<td>32%</td>
</tr>
<tr>
<td>Japan</td>
<td>19%</td>
</tr>
</tbody>
</table>

¾ (74%) say it is important for managers to promote and nurture strong team morale and culture

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

Less than half

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

71% Leaders
31% Managers
33% Non-managers

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

70% China
65% Australia
60% USA
60% LatAm
36% Italy
30% France
14% Japan

Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? (NET Met or exceeded expectations) Base: All respondents (14,800), Australia (1,000), China (1,000), USA (1,000), LatAm (1,000), Italy (1,000), France (1,000), Japan (1,000), Leaders (1,427), Managers (6,978), Non-managers (6,171)
Less than half feel that their manager is helping support their work/life balance among the non-management tier

Half

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

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

<table>
<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Managers</th>
<th>Non-managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>71%</td>
<td>34%</td>
<td>42%</td>
</tr>
<tr>
<td>China</td>
<td>68%</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>USA</td>
<td>64%</td>
<td>39%</td>
<td>25%</td>
</tr>
<tr>
<td>Italy</td>
<td>39%</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>France</td>
<td>64%</td>
<td>39%</td>
<td>25%</td>
</tr>
<tr>
<td>Japan</td>
<td>64%</td>
<td>33%</td>
<td>25%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Area</th>
<th>Leaders</th>
<th>Managers</th>
<th>Non-managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placing trust in me to get the job done</td>
<td>74%</td>
<td>64%</td>
<td>53%</td>
</tr>
<tr>
<td>Adapting to the challenges of the pandemic</td>
<td>73%</td>
<td>61%</td>
<td>51%</td>
</tr>
<tr>
<td>Supporting your working arrangements</td>
<td>73%</td>
<td>56%</td>
<td>43%</td>
</tr>
<tr>
<td>Assessing performance on outcomes / results instead of hours</td>
<td>71%</td>
<td>53%</td>
<td>36%</td>
</tr>
<tr>
<td>Organising resources of budget, staff and technology</td>
<td>71%</td>
<td>51%</td>
<td>32%</td>
</tr>
<tr>
<td>Providing regular guidance and check-ins</td>
<td>70%</td>
<td>50%</td>
<td>34%</td>
</tr>
<tr>
<td>Checking on your mental wellbeing</td>
<td>69%</td>
<td>47%</td>
<td>33%</td>
</tr>
<tr>
<td>Encouraging time &amp; resources for training, upskilling &amp; reskilling</td>
<td>69%</td>
<td>48%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Q8. Thinking about how your manager / employer has performed in the following areas in the last 12 months, to what extent, if at all, have they met your expectations? Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171)
Just 37% of non-managers believe their company is effectively investing in developing their skills.
Importance of skills and career development may be a belief among leadership, but it is not a reality felt throughout the business

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

- **My company has a clear strategy to train employees in the new digital skills that the company will need in future**
  - Leaders: 80%
  - Managers: 64%
  - Non-managers: 46%

- **My company is investing effectively in developing my skills**
  - Leaders: 78%
  - Managers: 56%
  - Non-managers: 37%

- **My company regularly assesses my skills and helps me devise a development plan**
  - Leaders: 78%
  - Managers: 57%
  - Non-managers: 38%

Q7. Thinking about how well-equipped you currently are for work, how far would you agree or disagree with the following? (NET Agree)
Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: Leaders (1,427), Managers (6,978), Non-managers (6,171)
Since companies are not taking steps to upskill them, 60% of workers are taking it upon themselves to do new courses and qualifications.

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

- **Leaders**: 72%
- **Managers**: 64%
- **Non-managers**: 52%

Say they have already taken / are taking / are considering taking a new course / qualification / other professional development.
China and Australia perform better on skills and development

**58%**
Say their company has a clear strategy to train employees in the new digital skills that the company will need in future

**50%**
Say their company is investing effectively in developing their skills

**51%**
Say their company regularly assesses their skills and helps them devise a development plan

---

Q7. Thinking about how well-equipped you currently are for work, how far would you agree or disagree with the following? (NET Agree)
Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: All respondents (14,800), Australia (1,000), China (1,000), France (1,000), Japan (1,000).

Top scoring countries
- China: 82%
- Australia: 74%
- France: 71%
- Japan: 73%

Bottom scoring countries
- Canada: 46%
- China: 38%
- France: 40%
- Japan: 25%
Only 34% of non-managers are satisfied with career prospects at their company.
People need to see and feel opportunity - less than half are satisfied with career prospects at their company

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

- Leaders: 78%
- Managers: 54%
- Non-managers: 34%

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

48%

Say they are satisfied with the career prospects at their company

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

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

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

Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
Nearly half (46%) of managers have NOT found the overall experience of managing other people easy over the past 12 months.
Leaders recognise difficulties managing in areas like onboarding staff, supporting the team’s wellbeing and keep them engaged with the business goals

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

- Onboarding new staff to the team/business: 33%
- Identifying when staff may be struggling with mental wellbeing: 33%
- Identifying when staff may be struggling with overwork/burnout: 31%
- Supporting staff who may be struggling with the pressures of work: 48%
- Supporting the career development of my staff: 48%
- Being supportive of employees with needs related to childcare/other dependents: 43%
- Supporting and guiding the team to focus on achieving the business goals: 43%
- Assessing performance of my staff based on outcomes/results instead of hours worked: 41%

% Of managers who have NOT found the following easy over the past 12 months

- Trust & agency: 35%
- Culture & engagement: 35%
- Wellbeing: 33%
- Career & security: 43%
There is wide disparity between perceived importance of leadership training and those that are actually doing it

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

- 78% Leadership coaching is important
- 68% Done / doing a course in leadership skills
- 31% Leaders
- 22% Managers

Q14. Thinking about what you expect from your company after the pandemic, how important will the following be? (NET Important)
Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? Base: Leaders (1,427), Managers (6,978)
Leaders Must Reconnect the Disconnect: Key Takeaways

• With workers’ motivation, relationships, feeling of recognition and sense of team and culture deteriorating, leaders hold the key to re-connecting people to the company purpose, helping them feel like they belong and providing them with development and career opportunities that can motivate them.

• However, they are struggling to see the issues. Companies must support the new breed of leaders who will be best placed to address major threats to company cohesion.

• Equipping leaders with upskilling, coaching, resources and technology that will help them to better listen to and manage their teams, increase and nurture motivation, and a strong team morale and culture is a priority for businesses in the new hybrid working model.
THE GREAT RE-EVALUATION
No great resignation on the horizon but there are warning signs for companies as workers re-evaluate what work means to them
The Great Re-Evaluation: Summary

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

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Total: 62%</th>
<th>Considering</th>
<th>Done / doing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking a new course / qualification / other professional development</td>
<td>20%</td>
<td>10%</td>
<td>30%</td>
</tr>
<tr>
<td>Moving to a job with more flexible working options</td>
<td>42%</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>Changing careers</td>
<td>38%</td>
<td>8%</td>
<td>27%</td>
</tr>
<tr>
<td>Reducing the number of days a week that I work</td>
<td>37%</td>
<td>10%</td>
<td>27%</td>
</tr>
<tr>
<td>Leaving the workforce altogether</td>
<td>26%</td>
<td>6%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Younger generations most likely to be reassessing

Generation Z: 74% consider, 51% are doing, 47% have done
Millennials: 68% consider, 47% are doing, 43% have done
Generation X: 54% consider, 35% are doing, 33% have done
Baby boomers: 37% consider, 23% are doing, 24% have done

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET: Already done / doing / considering) Base: All respondents (14,800), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353)
In Australia and EEMENA over half are looking at career changes, likewise in the Media / Journalism and Hospitality sectors.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Most likely</th>
<th>Global average</th>
<th>Least likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>36%</td>
<td>56%</td>
<td>32%</td>
</tr>
<tr>
<td>EEMENA</td>
<td>51%</td>
<td>54%</td>
<td>31%</td>
</tr>
<tr>
<td>Italy</td>
<td>43%</td>
<td>43%</td>
<td>28%</td>
</tr>
<tr>
<td>USA</td>
<td>32%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>China</td>
<td>31%</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Japan</td>
<td>28%</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>Media / Journalism</td>
<td>56%</td>
<td>56%</td>
<td>36%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>52%</td>
<td>52%</td>
<td>33%</td>
</tr>
<tr>
<td>Online Retail</td>
<td>48%</td>
<td>48%</td>
<td>32%</td>
</tr>
<tr>
<td>Charity and voluntary work</td>
<td>38%</td>
<td>43%</td>
<td>33%</td>
</tr>
<tr>
<td>Engineering &amp; manufacturing</td>
<td>36%</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Education</td>
<td>48%</td>
<td>48%</td>
<td>32%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Women (%)</th>
<th>Men (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking a new course / qualification / other professional development</td>
<td>60</td>
<td>39</td>
</tr>
<tr>
<td>Moving to a job with more flexible working options</td>
<td>39</td>
<td>41</td>
</tr>
<tr>
<td>Changing careers</td>
<td>37</td>
<td>38</td>
</tr>
<tr>
<td>Reducing the number of days a week that I work</td>
<td>34</td>
<td>37</td>
</tr>
<tr>
<td>Leaving the workforce altogether</td>
<td>24</td>
<td>28</td>
</tr>
</tbody>
</table>

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: Women (7,324), Men (7,442)
Up and reskilling one of the most relevant areas for workers re-evaluation

62% of workers have done or are considering new courses, qualifications or career development.

66% workers believe they need to train and gain new skills to stay employable in the years ahead.

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

The Adecco Group
1 in 4 have done or are considering moving to another country or region temporarily in the next normal – especially Gen Zs and leaders
While changes in working life are triggering relocations, adapting the home is more common than making a major move

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

- **Buying new things / products to make remote working easier**: Total: 66%
  - Generation Z: 34%
  - Millennials: 32%
  - Generation X: 26%
  - Baby Boomers: 7%
  - Leaders: 31%
  - Managers: 26%
  - Non managers: 18%

- **Changes to the home to make remote working easier**: Total: 57%
  - Generation Z: 31%
  - Millennials: 26%
  - Generation X: 20%
  - Baby Boomers: 7%
  - Leaders: 20%
  - Managers: 19%
  - Non managers: 19%

- **Moving to a different part of the country long-term**: Total: 27%
  - Generation Z: 7%
  - Millennials: 6%
  - Generation X: 6%
  - Baby Boomers: 6%
  - Leaders: 7%
  - Managers: 6%
  - Non managers: 6%

- **Temporary move to a different part of the country**: Total: 26%
  - Generation Z: 6%
  - Millennials: 6%
  - Generation X: 6%
  - Baby Boomers: 6%
  - Leaders: 6%
  - Managers: 6%
  - Non managers: 6%

- **Moving to a different country long-term**: Total: 26%
  - Generation Z: 7%
  - Millennials: 6%
  - Generation X: 6%
  - Baby Boomers: 6%
  - Leaders: 7%
  - Managers: 6%
  - Non managers: 6%

- **Temporary move to a different country**: Total: 24%
  - Generation Z: 6%
  - Millennials: 6%
  - Generation X: 6%
  - Baby Boomers: 6%
  - Leaders: 6%
  - Managers: 6%
  - Non managers: 6%

Younger generations, along with those in senior positions, are most likely to have done or be considering a move from home

**Q33.** Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? Base: All respondents (14,800), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353), Leaders (1,427), Managers (6,978), Non-managers (6,171)
EMEENA and Australians are most likely to have considered a move or actually moved to a different part of the country

<table>
<thead>
<tr>
<th>Region</th>
<th>% Who have done / doing / considering moving long-term to a different part of the country (NET Already done / doing / considering)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>27%</td>
</tr>
<tr>
<td>EMEENA</td>
<td>46%</td>
</tr>
<tr>
<td>Australia</td>
<td>41%</td>
</tr>
<tr>
<td>LatAm</td>
<td>35%</td>
</tr>
<tr>
<td>Italy</td>
<td>28%</td>
</tr>
<tr>
<td>China</td>
<td>28%</td>
</tr>
<tr>
<td>Germany</td>
<td>27%</td>
</tr>
<tr>
<td>Spain</td>
<td>26%</td>
</tr>
<tr>
<td>USA</td>
<td>25%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>25%</td>
</tr>
<tr>
<td>France</td>
<td>23%</td>
</tr>
<tr>
<td>UK</td>
<td>22%</td>
</tr>
<tr>
<td>Nordics</td>
<td>21%</td>
</tr>
<tr>
<td>Bel / Ned</td>
<td>20%</td>
</tr>
<tr>
<td>Canada</td>
<td>19%</td>
</tr>
<tr>
<td>Japan</td>
<td>14%</td>
</tr>
</tbody>
</table>

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: All respondents (14,800), Australia (1,000), France (1,000), Germany (1,000), Italy (1,000), Japan (1,000), Spain (1,000), UK (1,000), USA (1,000), Canada (1,000), China (1,000), Switzerland (800), Belgium / Netherlands (1,000), EMEENA (1,000), LatAm (1,000), Nordics (1,000)
Two thirds are confident that companies will start hiring significant numbers again within the next year (confidence highest in Australia, China and USA)

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

- Younger generations are most positive about a return to hiring opportunities.
  - Generation Z: 82%
  - Millennials: 71%
  - Generation X: 59%
  - Baby boomers: 53%

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

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

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

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

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

<table>
<thead>
<tr>
<th>Factor</th>
<th>% Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Being able to maintain a good work / life balance</td>
<td>80%</td>
</tr>
<tr>
<td>A good salary / pay scheme</td>
<td>80%</td>
</tr>
<tr>
<td>Feeling trusted to get the job done</td>
<td>79%</td>
</tr>
<tr>
<td>Feeling confident that my job is secure</td>
<td>77%</td>
</tr>
<tr>
<td>Retaining / having flexibility over my working hours / schedule</td>
<td>76%</td>
</tr>
<tr>
<td>A job with a clear sense of purpose</td>
<td>75%</td>
</tr>
<tr>
<td>Maintaining a good relationship with my manager</td>
<td>74%</td>
</tr>
<tr>
<td>Having the right opportunities to maintain my physical health / fitness</td>
<td>73%</td>
</tr>
<tr>
<td>Praise and recognition for good work</td>
<td>72%</td>
</tr>
<tr>
<td>Good learning and development opportunities</td>
<td>71%</td>
</tr>
<tr>
<td>Trust &amp; agency</td>
<td></td>
</tr>
<tr>
<td>Culture &amp; engagement</td>
<td></td>
</tr>
<tr>
<td>Wellbeing</td>
<td></td>
</tr>
<tr>
<td>Career &amp; security</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

Q20. How important will the following be to your working life after the pandemic? (NET Important) Base: Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353)
Nurturing trust in staff, flexibility, morale and emotional intelligence will be key qualities of the successful manager going forward.

<table>
<thead>
<tr>
<th>% Who believe the following skills and behaviours will be important in the role of managers after the pandemic (NET Important) [Top 8]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placing trust in staff to get the job done</td>
</tr>
<tr>
<td>Supporting my flexible / remote working needs</td>
</tr>
<tr>
<td>A leadership style focussed on empathy and a supportive attitude</td>
</tr>
<tr>
<td>Encouraging people to feel safe sharing their honest opinions and ideas</td>
</tr>
<tr>
<td>Effective organisation and coordination of team members across different locations</td>
</tr>
<tr>
<td>Promoting and nurturing strong team morale and culture</td>
</tr>
<tr>
<td>Keeping up to date with new technology relevant to business / ways of working</td>
</tr>
<tr>
<td>Demonstrating a learning / growth mentality</td>
</tr>
</tbody>
</table>

Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: All respondents (14,800)
Women show slightly higher strength of feeling on important facets of work but their priorities are similar to men

<table>
<thead>
<tr>
<th>Skills and Behaviours</th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placing trust in staff to get the job done</td>
<td>81%</td>
<td>75%</td>
</tr>
<tr>
<td>Supporting my flexible / remote working needs</td>
<td>80%</td>
<td>72%</td>
</tr>
<tr>
<td>A leadership style focussed on empathy and a supportive attitude</td>
<td>78%</td>
<td>71%</td>
</tr>
<tr>
<td>Encouraging people to feel safe sharing their honest opinions and ideas</td>
<td>78%</td>
<td>71%</td>
</tr>
<tr>
<td>Effective organisation and coordination of team members across different locations</td>
<td>77%</td>
<td>72%</td>
</tr>
<tr>
<td>Promoting and nurturing strong team morale and culture</td>
<td>77%</td>
<td>71%</td>
</tr>
<tr>
<td>Keeping up to date with new technology relevant to business / ways of working</td>
<td>76%</td>
<td>71%</td>
</tr>
<tr>
<td>Demonstrating a learning / growth mentality</td>
<td>77%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: Women (7,324), Men (7,442)
In addition to ensuring the right infrastructure is in place, companies are expected to focus on wellbeing and talent development.

<table>
<thead>
<tr>
<th>% Who expect the following from their company after the pandemic (NET Important) [Top 8]</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensuring staff have good IT infrastructure / systems</td>
<td>76%</td>
</tr>
<tr>
<td>Investing in technology to facilitate better digital ways of working</td>
<td>74%</td>
</tr>
<tr>
<td>Increasing the focus on wellbeing of staff</td>
<td>74%</td>
</tr>
<tr>
<td>Updating policies / guidance for new ways of working (e.g. flexible working, contacting outside of core hours etc.)</td>
<td>73%</td>
</tr>
<tr>
<td>Allowing staff the freedom to decide when and how they work to get the job done</td>
<td>71%</td>
</tr>
<tr>
<td>Redesigning the office space so people can work safely and effectively</td>
<td>71%</td>
</tr>
<tr>
<td>A clear talent and development strategy to train employees’ skills for future company needs</td>
<td>70%</td>
</tr>
<tr>
<td>Provide remote working specific benefits such as subsiding meals, childcare, home office equipment etc.</td>
<td>69%</td>
</tr>
</tbody>
</table>

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

NB: Full table of results in appendix
## Workers envisage a tech-enabled future where employers help them optimise their remote work environments

<table>
<thead>
<tr>
<th>Selected Verbatim Comments – ‘Try to imagine what your ideal future working environment would be like and tell us about it’</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I’d like all the right technology and support so that I could perform my function in the best possible way.”</td>
</tr>
<tr>
<td>Manager, Logistics</td>
</tr>
<tr>
<td>“I see a future where I make more efficient use of technology through chat and other software that allows me to collaborate with my team or keep in touch with the office at all times.”</td>
</tr>
<tr>
<td>Manager, Online retail</td>
</tr>
<tr>
<td>“I’d have a correct chair at home to avoid muscular-skeletal disorders.”</td>
</tr>
<tr>
<td>Non-manager, Tech / Telecoms</td>
</tr>
<tr>
<td>“I imagine my employer will make sure that I receive the equipment necessary to comply with health and safety legislation in relation to the layout of my home workplace.”</td>
</tr>
<tr>
<td>Non-manager, Tech / Telco</td>
</tr>
<tr>
<td>“I’d need to improve the equipment a little at home, because it’s been provisional during the pandemic.”</td>
</tr>
<tr>
<td>Non-manager, Government</td>
</tr>
<tr>
<td>“I would like the company to provide us with equipment and furniture to be able to work remotely.”</td>
</tr>
<tr>
<td>Non-manager, Administration</td>
</tr>
</tbody>
</table>

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

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

| % Who say the following are effective at maintaining a strong team/company culture in the new working world |
|---|---|---|---|---|
| [Top 10] | Trust & agency | Culture & engagement | Wellbeing |
| 40% A culture of trust - where people feel safe to share opinions and ideas | 40% Regular team meetings | 38% Flexibility to adapt my work schedule around other commitments | 35% Being given recognition with the wider team for good work |
| 32% Employee benefits that support my mental health | 30% Celebrating project / team /company successes together | 30% Employee benefits that support my physical health | 33% An environment where people feel they can show their true selves / personality |
| 30% | 30% | 29% Creating a strong shared vision and purpose |

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

<table>
<thead>
<tr>
<th>% Who say the following are responsible for ensuring a better working world in the future (NET Responsible)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your employer</td>
</tr>
<tr>
<td>80%</td>
</tr>
</tbody>
</table>

Some regions put as much responsibility on the individual as on the employer:
- LatAm (87% vs. 87%)
- Australia (84% vs. 85%)
- USA (81% vs. 83%)
- Nordics (75% vs. 77%)
- Italy (72% vs. 74%)

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

- **There is no turnover-tsunami on the horizon** but there are warning signs for companies with employees re-assessing their careers. The time is now for organisations to reconnect with their workforce rather than hastily turn to external hiring out of fear of a mass resignation.

- **People need to see and feel opportunity.** During the last 12 months, people have become more autonomous, agile, adaptable and proactive taking it upon themselves to get new skills. They are ready for change, and they are looking for more agency, career development, mobility opportunities or upskilling and reskilling into the next chapters.

- **Workers have a wealth of new skills,** and they are ready to action them. Companies must use the momentum to re-assess their talent and put those new skills to use. Not only will it future-proof the organisation but it can also help people re-discover themselves and reconnect with their purpose.

- With only 37% of non-managers believing their company is effectively investing in developing their skills, Assessing and upgrading employees’ tech skills can open new career paths for them, as well as provide them with a renewed sense of purpose and connection to the company.

- In addition to IT and digital infrastructures, security, agency, culture, wellbeing and development are the most important to workers going forward. Companies need to prioritize them to keep workers engaged. **Nurturing stronger relationships and instilling a stronger sense of culture is key** - one that encourages healthy working styles, engagement with company goals and psychological freedom.

- Workers continue to trust companies the most to deliver a better working world. They believe individuals and governments will also play a role. 79% of workers believe Governments should do more to encourage adoption of good flexible working conditions.
6

Spotlight On: Gender

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

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

Say they are happier in their job than 12 months ago

Say their work / life balance has got better in last 12 months

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

Say they suffered from burnout in the last 12 months

Say their mental wellbeing has become worse

Say their physical wellbeing has become worse

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

Say they are satisfied with company leadership

Of managers who found overall management experience easy

Say they have a strong relationship with their manager

**Job security & development**
Half of men and women are satisfied with their career prospects but still 3 in 10 are considering career changes

Say they are satisfied with the career prospects at their company

Say they are considering changing careers

The Adecco Group
Women have more anxiety about returning to the office than men

46%  38%
Say they have anxiety about returning to the office

76%  67%
Say it is important that their manager is sensitive about anxieties they have relating to returning to the office

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

<table>
<thead>
<tr>
<th></th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expect to spend in the office</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Want to spend in the office</td>
<td>46%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Q30: Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree)
Q13: Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important)
Q16: After the pandemic, what proportion of your time do you expect to spend working in the following locations?
Q17. If you could choose for yourself, what proportion of your time would you want to spend working in the following locations in an average week after the pandemic? Base: Women (7,324), Men (7,442)
Men and women have had similar experiences in terms of motivation, workload and caring for others

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

- 33% of women and 32% of men say effective communication between colleagues has got worse.
- 28% of women and 24% of men say their workload has got worse.
- 27% of women and 25% of men say their job motivation has got worse.

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

- 8% of women and 8% of men say the level of trust placed in them to get the job done has got worse.
- 9% of women and 8% of men say their ability to care for others outside of work has got worse.
- 12% of women and 13% of men say their relationship with their manager has got worse.

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

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

- Taking a new course / qualification / other professional development: Women 60%, Men 59%
- Moving to a job with more flexible working options: Women 39%, Men 41%
- Changing careers: Women 37%, Men 38%
- Reducing the number of days a week that I work: Women 34%, Men 37%
- Leaving the workforce altogether: Women 24%, Men 28%

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: Women (7,324), Men (7,442)
Women show slightly higher strength of feeling on important facets of work but their priorities are similar to men

<table>
<thead>
<tr>
<th>% Who believe the following skills and behaviours will be important in the role of managers after the pandemic (NET Important) [Top 8]</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Placing trust in staff to get the job done</strong></td>
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<tr>
<td><strong>Supporting my flexible / remote working needs</strong></td>
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<td><strong>A leadership style focussed on empathy and a supportive attitude</strong></td>
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<td><strong>Keeping up to date with new technology relevant to business / ways of working</strong></td>
</tr>
<tr>
<td><strong>Demonstrating a learning / growth mentality</strong></td>
</tr>
</tbody>
</table>

Q13. Thinking about the role of managers after the pandemic, how important will the following skills and behaviours be? (NET Important) Base: Women (7,324), Men (7,442)
Spotlight On: Caring For Others
Providing flexibility for child / caring needs has been a challenge

45% of managers have NOT found it easy to support needs related to childcare

43% of parents say managers have not met expectations on flexing around commitments for caring for others

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

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>Mothers</th>
<th>Fathers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Say they are happier in their job than 12 months ago</td>
<td>55%</td>
<td>51%</td>
</tr>
<tr>
<td>Say their work / life balance has got better in last 12 months</td>
<td>52%</td>
<td>51%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Mothers</th>
<th>Fathers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Say they suffered from burnout in the last 12 months</td>
<td>41%</td>
<td>38%</td>
</tr>
<tr>
<td>Say their mental wellbeing has become worse</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Say they feel their physical wellbeing has become worse</td>
<td>26%</td>
<td>24%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Mothers</th>
<th>Fathers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Say they are satisfied with company leadership</td>
<td>60%</td>
<td>61%</td>
</tr>
<tr>
<td>Of managers who found overall management experience easy</td>
<td>64%</td>
<td>57%</td>
</tr>
<tr>
<td>Say they have a strong relationship with their manager</td>
<td>69%</td>
<td>63%</td>
</tr>
</tbody>
</table>

### Job security & development
Over half of parents are satisfied with their career prospects but still 3 in 10 are considering career changes

<table>
<thead>
<tr>
<th></th>
<th>Mothers</th>
<th>Fathers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Say they are satisfied with the career prospects at their company</td>
<td>57%</td>
<td>56%</td>
</tr>
<tr>
<td>Say they are considering changing careers</td>
<td>29%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Those with children are more likely to feel that aspects of their working life have improved

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

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Have children</th>
<th>No dependents</th>
</tr>
</thead>
<tbody>
<tr>
<td>My mental wellbeing</td>
<td>37%</td>
<td>25%</td>
</tr>
<tr>
<td>My physical wellbeing</td>
<td>39%</td>
<td>26%</td>
</tr>
<tr>
<td>My time management</td>
<td>51%</td>
<td>38%</td>
</tr>
<tr>
<td>Work / life balance</td>
<td>53%</td>
<td>44%</td>
</tr>
</tbody>
</table>

% Who say that aspects of their working life have got better during the last 12 months (NET Better) [Ranked by global score]
Those with no dependents are more likely to feel aspects of working life have got worse

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

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

- Sense of job security: Have children 19%, No dependents 18%
- My mental wellbeing: Have children 30%, No dependents 35%
- My workload: Have children 25%, No dependents 28%
- My physical wellbeing: Have children 25%, No dependents 33%
- Job motivation: Have children 24%, No dependents 31%
- Sense of team culture and morale: Have children 23%, No dependents 30%
- Relationship with my colleagues: Have children 23%, No dependents 29%
- Work / life balance: Have children 20%, No dependents 24%
- The impact of work on my finances (i.e. from changes in salary, travel, remote working costs): Have children 15%, No dependents 19%

Most aspects of working life are viewed more negatively by those caring for adults.
Half (49%) of those caring for adults say their own mental health got worse during the pandemic.
Parents are much more likely to have made a reduction in the number of days per week they work or are considering doing so

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

- Taking a new course / qualification / other professional development
- Moving to a job with more flexible working options
- Changing careers
- Reducing the number of days a week that I work (even if I need to reduce my salary)

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: Mothers with children at home (3,829), Fathers with children at home (4,299), Have an adult reliant on care (159), No dependents (3,434)
Those that are carers for adults and those with no dependents are more likely to have struggled with boundary setting and their mental health

<table>
<thead>
<tr>
<th></th>
<th>Have children</th>
<th>Care for adult(s)</th>
<th>No dependents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disagree that I am good at setting boundaries between my work and personal life</td>
<td>13%</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>Mothers (12%)</td>
<td>Fathers (11%)</td>
<td>Mothers (11%)</td>
<td>Fathers (10%)</td>
</tr>
<tr>
<td>Disagree that I am able to manage my mental wellbeing</td>
<td>12%</td>
<td>10%</td>
<td>25%</td>
</tr>
<tr>
<td>Mothers (11%)</td>
<td>Fathers (10%)</td>
<td>Mothers (11%)</td>
<td>Fathers (10%)</td>
</tr>
<tr>
<td>Disagree that I have a strong relationship with my colleagues</td>
<td>11%</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Mothers (7%)</td>
<td>Fathers (9%)</td>
<td>Mothers (12%)</td>
<td>Fathers (11%)</td>
</tr>
</tbody>
</table>

Q3. Thinking about your working life as it is now, how far would you agree or disagree with the following? (NET Disagree) Base: All respondents (14,800), Have children at home (8,148), Mothers with children at home (3,829), Fathers with children at home (4,299), Have an adult reliant on care (159), No dependents (3,434)
The majority feel they will be expected to spend more than half of their time at the office, but people with no caring responsibility want less hours at the office.

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

- **Want to spend in the office**
  - **Have children**: 51%
  - **Care for adult(s)**: 44%
  - **No dependents**: 42%

- **Expect to spend in the office**
  - **Have children**: 63%
  - **Care for adult(s)**: 64%
  - **No dependents**: 58%

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

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

<table>
<thead>
<tr>
<th>% Who say the following will be important to their working life after the pandemic (NET Important)</th>
<th>Mothers</th>
<th>Fathers</th>
<th>Care for Adult(s)</th>
<th>No Dependents</th>
</tr>
</thead>
<tbody>
<tr>
<td>A good salary / pay scheme</td>
<td>84%</td>
<td>78%</td>
<td>77%</td>
<td>78%</td>
</tr>
<tr>
<td>Maintaining a good relationship with my manager</td>
<td>83%</td>
<td>79%</td>
<td>78%</td>
<td>79%</td>
</tr>
<tr>
<td>Being able to maintain a good work / life balance</td>
<td>82%</td>
<td>75%</td>
<td>72%</td>
<td>68%</td>
</tr>
<tr>
<td>Feeling confident that my job is secure</td>
<td>78%</td>
<td>72%</td>
<td>63%</td>
<td>71%</td>
</tr>
<tr>
<td>Retaining / having flexibility over my working hours / schedule</td>
<td>78%</td>
<td>77%</td>
<td>63%</td>
<td>72%</td>
</tr>
<tr>
<td>Good learning and development opportunities</td>
<td>78%</td>
<td>71%</td>
<td>63%</td>
<td>72%</td>
</tr>
<tr>
<td>Feeling I have the right support available for my mental wellbeing</td>
<td>77%</td>
<td>70%</td>
<td>66%</td>
<td>70%</td>
</tr>
<tr>
<td>Feeling that my career development is still given enough attention</td>
<td>75%</td>
<td>74%</td>
<td>66%</td>
<td>74%</td>
</tr>
<tr>
<td>Working remotely more than I did before the pandemic</td>
<td>70%</td>
<td>70%</td>
<td>66%</td>
<td>66%</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

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

S3: How old are you? S11: Which of the following best describes your position or level within your company or organisation? All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171), Generation Z & Millennials (7,288), Generation X & Baby boomers (7,512)
Workers in tech want more office time than other workers, but share the vision of a universal hybrid and flexible working model with workers in other sectors

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

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

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

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

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

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

% Who agree with the following (NET Agree)

<table>
<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Non-Management</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Digital</td>
<td>Other Sector</td>
</tr>
<tr>
<td>I am happier in my job following the changes to working life</td>
<td>55%</td>
<td>42%</td>
</tr>
<tr>
<td></td>
<td>79%</td>
<td>73%</td>
</tr>
<tr>
<td>I have all the necessary office equipment / hardware for remote working</td>
<td>76%</td>
<td>67%</td>
</tr>
<tr>
<td></td>
<td>82%</td>
<td>80%</td>
</tr>
</tbody>
</table>

% Who feel satisfied with the following (NET Satisfied)

<table>
<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Non-Management</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Digital</td>
<td>Other Sector</td>
</tr>
<tr>
<td>The career prospects at my company</td>
<td>59%</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>67%</td>
<td>50%</td>
</tr>
</tbody>
</table>

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

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree)
Q7: Thinking about how well-equipped you currently are for work, how far would you agree or disagree with the following? (NET Agree) Q31. How satisfied would you say you currently feel about the following? (NET Satisfied)

Base: All respondents (14,800) Digital / IT workers (7,440), Other sectors (7,360), Leaders Digital / IT (1,173), Leaders Other sectors (254), Non-management Digital / IT (2,044), Non-management Other sector (4,127)
Although non-management are often less positive than leaders, people in tech feel consistently more improvement in many aspects of their working life than workers in other sectors.

<table>
<thead>
<tr>
<th>% Who say that aspects of their working life has improved during the last 12 months (NET Better) [Based on Top 10 for Digital / IT workers]</th>
<th>Leaders</th>
<th>Non-Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital / IT</td>
<td>Other sector</td>
<td>Digital</td>
</tr>
<tr>
<td>My professional learning, development and skills</td>
<td>46%</td>
<td>25%</td>
</tr>
<tr>
<td>Ability to collaborate on new ideas and creativity</td>
<td>44%</td>
<td>21%</td>
</tr>
<tr>
<td>Pride in my company</td>
<td>41%</td>
<td>21%</td>
</tr>
<tr>
<td>Understanding of company culture and strategy</td>
<td>40%</td>
<td>18%</td>
</tr>
<tr>
<td>Job motivation</td>
<td>40%</td>
<td>21%</td>
</tr>
<tr>
<td>Relationship with my manager</td>
<td>39%</td>
<td>19%</td>
</tr>
<tr>
<td>Sense of team culture and morale</td>
<td>38%</td>
<td>18%</td>
</tr>
<tr>
<td>My sense of job security</td>
<td>37%</td>
<td>16%</td>
</tr>
<tr>
<td>Prospects for progression / promotion</td>
<td>35%</td>
<td>13%</td>
</tr>
<tr>
<td>Relationship with my colleagues</td>
<td>35%</td>
<td>15%</td>
</tr>
</tbody>
</table>

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

Q6. Thinking about the following aspects of your own working life, which do you feel have got better during the last 12 months, and which have stayed the same or got worse? (NET Better) Base: All respondents (14,800) Digital / IT workers (7,440), Other sectors (7,360), Leaders Digital / IT (1,173), Leaders Other sectors (254), Non-management Digital / IT (2,044), Non-management Other sector (4,127)
Tech workers are far more proactive and ready for change in all elements of their career and development compared to those in other fields

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

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

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

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering) Base: All respondents (14,800), Digital / IT workers (7,440), Non-digital / IT workers (7,360)
Employees from technology sectors are more likely to have skills, assessments and development plans than in other sectors. But less than half of non-managers in the same sector say the company regularly assesses their skills.

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

63% 39%

Digital / IT Other sector

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

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

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

Q7. Thinking about how well-equipped you currently are for work, how far would you agree or disagree with the following? (NET Agree) Base: Digital / IT workers (7,440), Non-digital / IT workers (7,360)
Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: Digital / IT workers (7,440), Non-digital / IT workers (7,360)
The technology sector is making progress on digital transformation but others have a distance to go

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

72%  48%

Digital / IT  Other sectors

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

71%  70%  69%

Technology / Telecoms  Offline Retail  Construction

Highest scoring sectors

51%  49%  47%

Charity and voluntary work  Agriculture  Education

Lowest scoring sectors

Q19. How far would you agree or disagree with the following statements about the future of work after the pandemic? (NET Agree) Base: Digital / IT workers (7,440), Non-digital / IT workers (7,360), Technology / Telecoms (2,418), Offline retail (354), Construction (548), Charity and voluntary work (131), Agriculture (77), Education (1,236)
Further Insights
The majority of workers across almost all countries have been satisfied with their jobs overall over the last 12 months.
Two thirds are satisfied with their job overall and satisfied with the company they work for

<table>
<thead>
<tr>
<th>Leaders</th>
<th>Managers</th>
<th>Non-managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>83%</td>
<td>72%</td>
<td>60%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Generation Z</th>
<th>Millennials</th>
<th>Generation X</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>71%</td>
<td>70%</td>
<td>65%</td>
<td>61%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Males</th>
<th>Females</th>
<th>Parents</th>
<th>Non-parents</th>
</tr>
</thead>
<tbody>
<tr>
<td>67%</td>
<td>67%</td>
<td>72%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Q31. How satisfied would you say you currently feel about the following? (NET Satisfied) Base: All respondents (14,800), Leaders (1,427), Managers (6,978), Non-managers (6,171), Women (7,324), Men (7,442), Have children at home (8,148), No children (5,595), Generation Z (380), Millennials (6,908), Generation X (6,159), Baby boomers (1,353),
Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following (NET Agree)

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

Q30. Thinking about how the last 12 months may have affected your attitudes towards work, how far would you agree or disagree with the following? (NET Agree) Base: All respondents (14,800) [Detailed country bases in appendix]
### Australian, American and Chinese workers are generally more satisfied with all aspects of working life than workers in other countries

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

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

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

4 in 10 (40%) Believe workers lack technical digital skills (average % NOT skilled for all digital skills)

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

- Machine learning and AI: 45%
- Coding and programming skills: 44%
- Agile project management techniques: 43%
- Software development / engineering: 41%
- Data science / big data: 40%
- Digital user experience and design: 40%
- Digital marketing: 40%
- Cybersecurity: 40%
- Cloud computing: 39%
- Product management: 29%

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

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

Over 1 in 4 (27%)
Believe workers lack personal soft skills
(average % NOT skilled for all personal soft skills)

Nearly a third (31%)
Believe workers lack interpersonal soft skills
(average % NOT skilled for all interpersonal soft skills)

<table>
<thead>
<tr>
<th>Soft skill type</th>
<th>% Who believe workers are NOT skilled (NET Not skilled)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mental health management</td>
<td>34%</td>
</tr>
<tr>
<td>Emotional intelligence</td>
<td>33%</td>
</tr>
<tr>
<td>Leadership skills</td>
<td>32%</td>
</tr>
<tr>
<td>Nurturing company culture across locations</td>
<td>31%</td>
</tr>
<tr>
<td>Persuasion skills</td>
<td>31%</td>
</tr>
<tr>
<td>Resilience / working under pressure</td>
<td>27%</td>
</tr>
<tr>
<td>Adapting to business change</td>
<td>26%</td>
</tr>
<tr>
<td>Building strong relationships / collaborating remotely</td>
<td>26%</td>
</tr>
<tr>
<td>Using initiative</td>
<td>25%</td>
</tr>
<tr>
<td>Learning / growth mentality</td>
<td>25%</td>
</tr>
<tr>
<td>Effective time management</td>
<td>25%</td>
</tr>
</tbody>
</table>

Q33. Have you done or considered doing any of the following in response to the changes in working life over the last 12 months? (NET Already done / doing / considering)
Q35. Thinking about the qualities people may need for long-term success at work, how skilled do you think people generally are in the following areas? (NET Not Skilled) Base: All respondents (14,800)
56% have done / are considering training on soft skills in response to the changes in working life over the last 12 months
The biggest disparity in skills gaps are within digital skills, particularly for those working in home entertainment and charity sectors.

### Personal soft skills gap by sector (NET Not skilled) [Top and bottom 5]

- Media / Journalism: 37%
- Automotive and mobility: 34%
- Charity and voluntary work: 32%
- Travel and tourism: 31%
- Science, pharmaceuticals and biotechnology: 29%
- Technology / telecoms: 24%
- Healthcare: 24%
- Creative arts and design: 24%
- Offline retail: 23%
- Construction: 22%

### Interpersonal soft skills gap by sector (NET Not skilled) [Top and bottom 5]

- Media / Journalism: 40%
- Automotive and mobility: 38%
- Travel and tourism: 35%
- Science, pharmaceuticals and biotechnology: 35%
- Charity and voluntary work: 33%
- Business, consulting and management: 27%
- Healthcare: 27%
- Creative arts and design: 26%
- Construction: 25%
- Offline retail: 23%

### Digital skills gap by sector (NET Not skilled) [Top and bottom 5]

- Charity and voluntary work: 54%
- Education: 48%
- Travel and tourism: 48%
- Automotive and mobility: 46%
- Media / Journalism: 45%
- Creative arts and design: 34%
- Online retail: 33%
- Construction: 31%
- Offline retail: 31%
- Technology / telecoms: 31%

Q35. Thinking about the qualities people may need for long-term success at work, how skilled do you think people generally are in the following areas? (NET Not skilled) Base: All respondents (14,800) [Detailed sector bases in appendix]
10 Country Spotlights
Australia: Happier in their job than all other countries but will still consider if they can find something better elsewhere

**Overall**

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

- **70%** Are happier in their job than 12 months ago (vs. 49% globally)
- **71%** Say their work / life balance has got better in last 12 months (vs. 50% globally)

**Wellbeing**

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

- **53%** Suffered from burnout in the last 12 months (vs. 38% globally)
- **14%** Feel their mental wellbeing has become worse (vs. 32% globally)
- **14%** Feel their physical wellbeing has become worse (vs. 28% globally)

**Culture & engagement**

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

- **74%** Are satisfied with senior leadership (vs. 53% globally)
- **73%** Of managers found the overall management experience easy (vs. 54% globally)
- **65%** Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

**Job security & development**

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

- **70%** Are satisfied with career prospects at their company (vs. 48% globally)
- **39%** Are considering a career change (vs. 30% globally)

Top Skills Gaps:

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

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

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

- 39% Are happier in their job than 12 months ago (vs. 49% globally)
- 36% Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

- 34% suffered from burnout in the last 12 months (vs. 38% globally)
- 37% feel their mental wellbeing has become worse (vs. 32% globally)
- 35% feel their physical wellbeing has become worse (vs. 28% globally)

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

- 40% Are satisfied with senior leadership (vs. 53% globally)
- 36% Of managers found the overall management experience easy (vs. 54% globally)
- 24% Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

Job security & development
Only a third are satisfied with their career prospects, over a quarter are considering a career change

- 35% Are satisfied with career prospects at their company (vs. 48% globally)
- 28% Are considering a career change (vs. 30% globally)

Top Skills Gaps: (Ranked by NET Unskilled)
1. Machine Learning / AI (51%)
2. Cloud computing (48%)
3. Coding & Programming (47%)

Non-managers
33%
Germany: Low levels of happiness and satisfaction with leaders compared to the global average

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

- **42%**
  - Are happier in their job than 12 months ago (vs. 49% globally)

- **47%**
  - Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

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

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

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

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

- **48%**
  - Are satisfied with senior leadership (vs. 53% globally)

- **45%**
  - Of managers found the overall management experience easy (vs. 54% globally)

- **29%**
  - Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

**Job security & development**
As less than half are satisfied with career prospects at their company, over a quarter are considering a career change

- **44%**
  - Are satisfied with career prospects at their company (vs. 48% globally)

- **28%**
  - Are considering a career change (vs. 30% globally)

**Top Skills Gaps**
(Ranked by NET Unskilled)

1. Agile project management techniques (47%)
2. Machine Learning / AI (47%)
3. Software development / engineering (45%)
Italy: Relatively high levels of burnout and below average satisfaction with senior leadership and with career prospects

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

44%
Are happier in their job than 12 months ago (vs. 49% globally)

44%
Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

39%
Are satisfied with senior leadership (vs. 53% globally)

55%
Of managers found the overall management experience easy (vs. 54% globally)

27%
Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

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

Job security & development
Few are satisfied with their career prospects leading to people thinking of changing careers

35%
Are satisfied with career prospects at their company (vs. 48% globally)

37%
Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)
1. Machine Learning / AI (42%)
2. Agile project management techniques (41%)
3. Data science / big data (40%)

The Adecco Group
Japan: Lowest levels of happiness and leadership / career satisfaction

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

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

- **20%**
  - Are happier in their job than 12 months ago (vs. 49% globally)

- **44%**
  - Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

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

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

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

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

- **27%**
  - Are satisfied with senior leadership (vs. 53% globally)

- **23%**
  - Of managers found the overall management experience easy (vs. 54% globally)

- **13%**
  - Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

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

- **22%**
  - Are satisfied with career prospects at their company (vs. 48% globally)

- **21%**
  - Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)

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

*Note scores for Japan in online surveys in general are consistently lower than many other countries. Even more so in this research given the significantly longer working hours inherent in Japanese culture (e.g. 86% worked 40-plus hours / week in Japan vs. Global average of 63% in the last 12 months), and the personal nature of providing opinions on their career. Working these long hours has increased significantly since 2020 (from 70% to 86%) further contributing to a negative outlook in Japan.*
Spain: below average satisfaction with company leadership and nearly 2 in 5 feel mental health has got worse

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

- **50%** Are happier in their job than 12 months ago (vs. 49% globally)
- **51%** Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

- Suffered from burnout in the last 12 months (39%) (vs. 38% globally)
- Feel their mental wellbeing has become worse (37%) (vs. 32% globally)
- Feel their physical wellbeing has become worse (32%) (vs. 28% globally)

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

- **47%** Are satisfied with senior leadership (vs. 53% globally)
- **46%** Of managers found the overall management experience easy (vs. 54% globally)
- **36%** Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

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

- **42%** Are satisfied with career prospects at their company (vs. 48% globally)
- **28%** Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)
1. Coding & Programming (41%)
2. Machine Learning / AI (39%)
3. Data science / big data (37%)
UK: 6 in 10 workers feel work life balance has improved although less than half of managers have found the overall experience easy

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

- **52%**
  - Are happier in their job than 12 months ago (vs. 49% globally)

- **59%**
  - Say their work / life balance has got better in last 12 months (vs. 50% globally)

**Culture & engagement**
Around half are satisfied with senior leadership but less than half of managers have found things easy.

- **51%**
  - Are satisfied with senior leadership (vs. 53% globally)

- **47%**
  - Of managers found the overall management experience easy (vs. 54% globally)

- **41%**
  - Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

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

- Suffered from burnout in the last 12 months (37%) (vs. 38% globally)
- Feel their mental wellbeing has become worse (35%) (vs. 32% globally)
- Feel their physical wellbeing has become worse (26%) (vs. 28% globally)

**Job security & development**
Only 2 in 5 are satisfied with their career prospects, and a third are considering a change.

- **42%**
  - Are satisfied with career prospects at their company (vs. 48% globally)

- **32%**
  - Are considering a career change (vs. 30% globally)

**Top Skills Gaps**
(Ranked by NET Unskilled)
1. Machine Learning / AI (56%)
2. Coding & Programming (55%)
3. Software development / engineering (53%)
USA: Satisfaction with leaders and career prospects stronger than most countries

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

- 58% Are happier in their job than 12 months ago (vs. 49% globally)
- 57% Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

- Suffered from burnout in the last 12 months (38%) (vs. 38% globally)
- Feel their mental wellbeing has become worse (27%) (vs. 32% globally)
- Feel their physical wellbeing has become worse (18%) (vs. 28% globally)

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

- 71% Are satisfied with senior leadership (vs. 53% globally)
- 67% Of managers found the overall management experience easy (vs. 54% globally)
- 53% Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

Job security & development
Although two thirds are satisfied with career prospects at their company, over are considering a career change

- 65% Are satisfied with career prospects at their company (vs. 48% globally)
- 26% Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)
1. Machine Learning / AI (43%)
2. Coding & Programming (40%)
3. Digital user experience and design (UX) (40%)

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

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

- 46% Are happier in their job than 12 months ago (vs. 49% globally)
- 45% Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

- Suffered from burnout in the last 12 months (40%) (vs. 38% globally)
- Feel their mental wellbeing has become worse (45%) (vs. 32% globally)
- Feel their physical wellbeing has become worse (37%) (vs. 28% globally)

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

- 48% Are satisfied with senior leadership (vs. 53% globally)
- 46% Of managers found the overall management experience easy (vs. 54% globally)
- 43% Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

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

- 40% Are satisfied with career prospects at their company (vs. 48% globally)
- 30% Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)

1. Machine Learning / AI (63%)
2. Digital user experience and design (61%)
3. Coding & Programming (59%)
China: Workers take a positive perspective on working life despite 2 in 5 suffering overwork / burnout

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

- **67%** Are happier in their job than 12 months ago (vs. 49% globally)
- **61%** Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

- Suffered from burnout in the last 12 months (41%) (vs. 38% globally)
- Feel their mental wellbeing has become worse (7%) (vs. 32% globally)
- Feel their physical wellbeing has become worse (6%) (vs. 28% globally)

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

- **73%** Are satisfied with senior leadership (vs. 53% globally)
- **72%** Of managers found the overall management experience easy (vs. 54% globally)
- **60%** Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

Job security & development
Satisfaction with career prospects is high, less than a quarter considering a career change

- **74%** Are satisfied with career prospects at their company (vs. 48% globally)
- **22%** Are considering a career change (vs. 30% globally)

Top Skills Gaps:
(Ranked by NET Unskilled)
1. Coding & Programming (31%)
2. Software development / engineering (30%)
3. Cloud computing (28%)
**Switzerland: Polarised experiences evident with half happier than 12 months ago and 1 in 3 having burnout / wellbeing issues**

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

![Image](https://via.placeholder.com/150)

- **48%** Are happier in their job than 12 months ago (vs. 49% globally)
- **51%** Say their work / life balance has got better in last 12 months (vs. 50% globally)

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

![Image](https://via.placeholder.com/150)

- Suffered from burnout in the last 12 months (34%) (vs. 38% globally)
- Feel their mental wellbeing has become worse (30%) (vs. 32% globally)
- Feel their physical wellbeing has become worse (32%) (vs. 28% globally)

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

- **51%** Are satisfied with senior leadership (vs. 53% globally)
- **43%** Of managers found the overall management experience easy (vs. 54% globally)
- **36%** Of non-managers say their manager has met or exceeded expectations in encouraging a good working culture (vs. 37% globally)

**Job security & development**
Less than half are satisfied with their career prospects with 1 in 3 considering a career change

- **43%** Are satisfied with career prospects at their company (vs. 48% globally)
- **31%** Are considering a career change (vs. 30% globally)

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**Top Skills Gaps**
(Ranked by NET Unskilled)

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

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

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

39%
Say they are happier in their job than 12 months ago (vs. 49% globally)

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

34%
Say their mental wellbeing has become worse (vs. 32% globally)

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

54%
Say they are satisfied with senior leadership (vs. 53% globally)

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

47%
Say they are satisfied with career prospects at their company (vs. 48% globally)
Office workers in LatAm generally taking a more positive outlook although mental wellbeing has declined for around 2 in 5

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

- 57% say they are happier in their job than 12 months ago (vs. 49% globally)

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

- 63% say they are satisfied with senior leadership (vs. 53% globally)

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

- 38% say their mental wellbeing has become worse (vs. 32% globally)

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

- 60% say they are satisfied with career prospects at their company (vs. 48% globally)

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

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

- **47%**
  Say they are happier in their job than 12 months ago (vs. 49% globally)

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

- **51%**
  Say they are satisfied with senior leadership (vs. 53% globally)

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

- **33%**
  Say their mental wellbeing has become worse (vs. 32% globally)

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

- **41%**
  Say they are satisfied with career prospects at their company (vs. 48% globally)
EMEENA: Positive perspectives in Romania and Turkey contrast with negative perceptions among Greek office workers

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

56%
Say they are happier in their job than 12 months ago (vs. 49% globally)

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

38%
Say their mental wellbeing has become worse (vs. 32% globally)

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

64%
Say they are satisfied with senior leadership (vs. 53% globally)

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

59%
Say they are satisfied with career prospects at their company (vs. 48% globally)

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

The Adecco Group
Methodology: Detailed Bases

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<thead>
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<td>Automotive and mobility</td>
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Making the Future Work For Everyone