



---

THE ADECCO GROUP  
FOUNDATION

# Future of Work post-COVID

Bridging divides for shared prosperity



# Introduction

The economic recovery from the COVID-19 crisis is projected to be long and uneven and it will accelerate many ongoing transformations. The consequences of the crisis are most felt in labour markets: unemployment rates have soared and are disproportionately affecting women and younger populations. The pandemic also added to a sense of precarity especially among workers with basic skills. Coupled with the accelerated speed of automation and digitalisation, the crisis increases inequality and accelerates the skills mismatch, threatening workforce preparedness and economic recovery. Business leaders, governments and workers should aim to better understand each others' needs as far as they relate to the labour market to be able to jointly develop inclusive policies and innovative human-centred solutions to empower smooth workforce transformation towards a post-pandemic economy.

## Key Findings:

1. Business leaders and workers think differently about the future of work: business leaders are more optimistic than workers.
2. Those most concerned about the future of work post-COVID are mid-career, entry-level and female workers.
3. Diverging expectations can lead to underinvestment in the right skills: youth and women are most at risk of being left out.
4. By addressing worker's health and job security concerns, business leaders can ensure that workers remain engaged at a critical time for businesses.
5. By better understanding female workers' expectations, businesses can cement their commitment to an inclusive workforce.

# Understanding workforce is key for recovery

The COVID-19 crisis is accelerating the transformation of economies, sectors, and businesses. At the industry level, sectors such as aviation or tourism are shrinking, while others, such as the digital economy or healthcare, are booming. Companies transform their strategies, digitise, automate, and explore the potential of human-machine collaboration. Workers, however, see an uncertain future with jobs disappearing and new ones requiring very different skill sets.

These differing dynamics carry the risk of increasing societal polarisation and missed opportunities. The recent [COVID Economic Recovery Index](#) has shown that how countries or companies equip their workforce with the skills needed for the new economy will be one of the key determining factors in how successfully they will weather the crisis and recover.

Complex transformations require all stakeholders to be on board and aligned towards economic recovery. Taken together, these developments underscore the need to examine gaps in perceptions and attitudes about the future of work, and identify opportunities to bridge divides so that governments, businesses, and workers can face the future with positive prospects.

To shed light on the different dynamics and perceptions, we surveyed workers, and business leaders and experts (referred to as “business leaders” throughout the report) from the US, France, Spain, and Belgium. Respondents were represented across the administrative services; transportation and storage; industrials; food, beverage, and tobacco; and automotive sectors. This report explores the survey findings in depth, while integrating secondary research and insights from the Adecco Group/BCG F.U.S.E Digital 2020 event for a comprehensive research programme. By exploring views from both business leaders and workers, this study builds on our previous research envisioning the world of work post-COVID: [The Inclusion Imperative](#), which explored the perspectives of experts in building a more inclusive workplace, and [Resetting Normal](#), which surveyed office workers on the parameters for a new era of work.

The findings allow the exploration of perceptions and divides in more detail and inform on how to bridge them. We start by exploring the differences in levels of optimism about the future of work between business leaders and workers and delve into the perceived priorities for the post-COVID economy in more detail.

# Business leaders are more optimistic about the future of work than the workforce

COVID-19 has accelerated digital transformation and added further impetus for automation, giving business leaders good reason to look forward to a future of tech-driven growth. But workers see the future differently; they were already wary of automation's impact on jobs, and the pandemic has only exacerbated their concerns. These disparate sentiments are evident in the survey, with 43% of business leaders expecting a better world of work after the crisis, compared with 35% of workers. Optimism ran even higher among business leaders polled at the [Adecco Group/BCG FU.SE Digital 2020](#) event, with 74% hopeful for the future—over twice as much as workers surveyed.

As decision-makers, business leaders will be shaping the new normal, but workers will emerge from the pandemic at a low point in confidence about their jobs. Furloughs, layoffs, and reductions in hours and pay have become the norm during the crisis, resulting in a loss of working hours equivalent to [400m jobs](#) worldwide in just the second quarter of 2020. The US unemployment rate [neared 15%](#) in April 2020—a level unseen since the Great Depression. Also, as discussed in our recent [The Inclusion Imperative](#) report, people on lower incomes are more likely to work on temporary contracts and lack access to social protections, deepening financial instability. Diverging expectations between leaders and workers carry the risk of polarisation at the societal level and the misalignment of incentives for upgrading skills needed for future economies.



Table 1

Looking to the post-COVID future, how do you expect the world of work to be?

	Better than before	Same as before	Worse than before
Business Leaders	45%	22%	33%
Workers	36%	23%	41%

# Mid-career, entry-level and female workers are the most pessimistic about the world of work after COVID-19

A closer look at the survey data reveals varying levels of optimism among different demographics of workers—with those in the middle and early stages of their careers reporting bleaker outlooks, and women holding less positive views than men.



**Figure 1**

**Expectations for the future of work among male and female workers**

Looking to the post-COVID future, how do you expect the world of work to be?

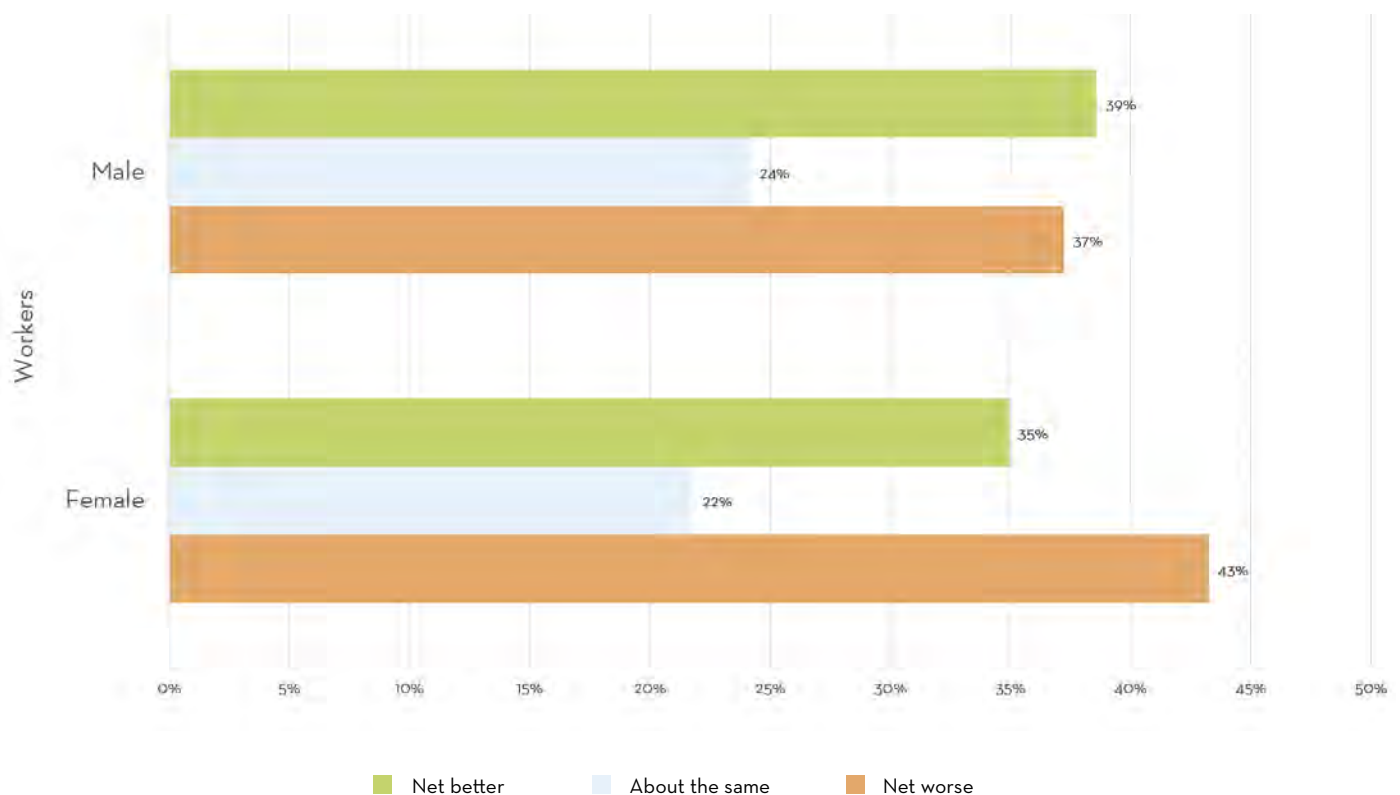
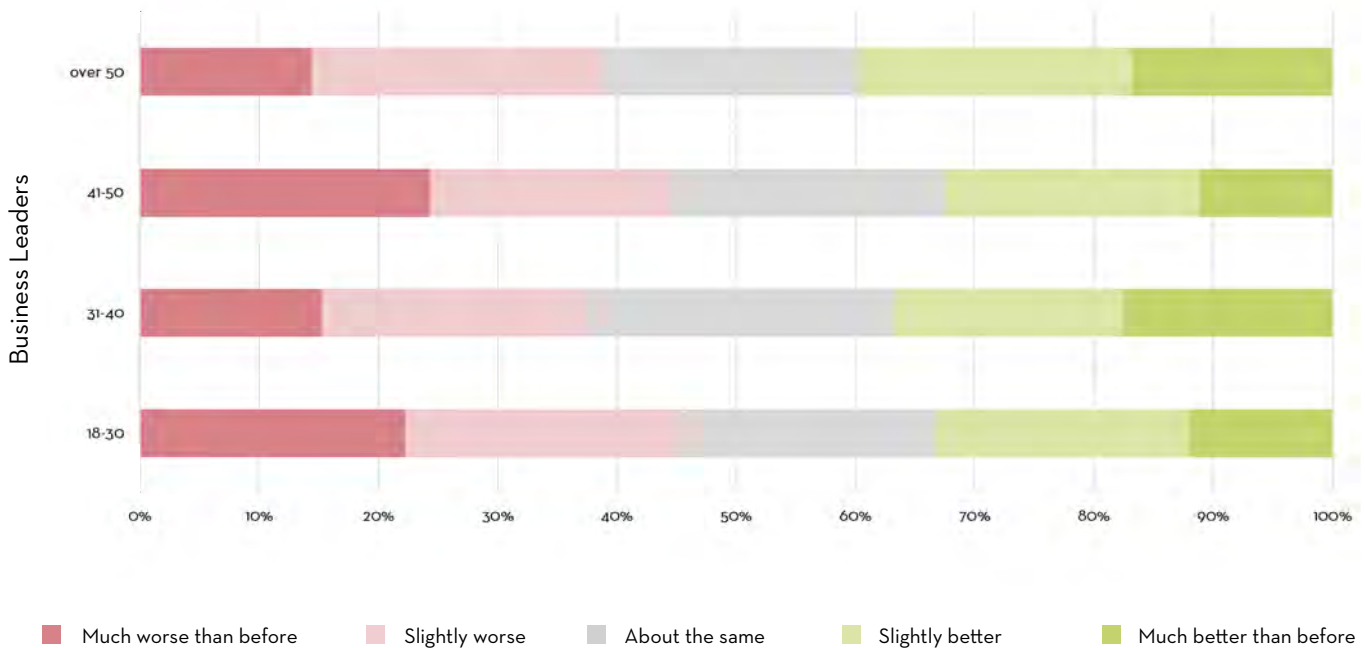




Figure 2

## Expectations for the future of work by age group among business leaders by age group



Workers aged 41-50, members of Generation X, are the most pessimistic of all age groups. Now in the middle stage of their careers, they are beginning to bear the brunt of ageism, which the average UK worker first experiences at [41](#), and as early as 29 in the tech sector. A recent study found that Generation X workers are [less likely](#) than other generations to get multiple promotions in a span of five years, as Baby Boomers remain in the workforce longer, and millennials get more established in their careers. The greater opportunities for advancement for these generations aligns with the higher levels of optimism in our survey for respondents aged 31-40 and over 50.

Meanwhile, Generation X workers get promoted 20-30% more slowly than millennials, reflecting how a focus on millennials as the first digital native generation often overlooks the digital capabilities of Generation X. These perceptions of a generational digital divide may become more pronounced as digital transformation becomes increasingly urgent in the post-COVID era.

The youngest cohort surveyed—aged 18-30 and consisting of Generation Z and younger millennials—is also pessimistic. This group faces the highest risk of job losses from COVID-19 lockdowns and automation and is struggling to gain a foothold on the career ladder. Indeed, prior to the crisis, opportunity for career growth topped the list of aims for a first professional job, cited by 36% of Gen Z and millennials in the [Adecco Group's "Way to Work" survey](#). Since the start of the pandemic, however, [one in six](#) young people stopped working, prompting the ILO to warn of a "lockdown generation" whose job prospects and earning potential in the future are impaired by disruptions in employment and education today. Entry-level jobs, especially in food services and customer sales, are vulnerable to both COVID-related shutdowns and automation, disproportionately affecting younger workers. A recent [study by the Y20](#), the youth arm of the G20, finds that young people are pessimistic about future of work.



Female workers are less optimistic than their male counterparts about the future of work, highlighting gender divisions in paid and unpaid work. Our survey shows that jobs in human resources (HR), sales and customer service are the most likely to be digitalised, with administrative services facing the most risk from automation overall. Women are more susceptible to automation displacement as they are overrepresented in many of these occupations, accounting for **the majority** of clerical support workers in developed countries and **73% of HR workers in the US**. They also disproportionately work in sectors hardest hit by COVID-related shutdowns, such as accommodation and food services.

Overall, women experience COVID-related job losses **disproportionately**. ILO attributes much of this disparity to societal barriers faced by female workers, such as shouldering the bulk of unpaid work at home. Indeed, care responsibilities during the pandemic forced women out of the workforce altogether, making re-entry harder in the future and limiting earnings. A recent Center for American Progress study reported US millennial mothers were **nearly three times** more likely than fathers to stop work in April-July 2020 because of lack of childcare and school closures. Women workers also face age discrimination younger, starting at **40**, compared with 45 for men.

## There is a disconnect between workers and business leaders on post-COVID priorities in the near term, with business leaders overlooking workers' needs for security

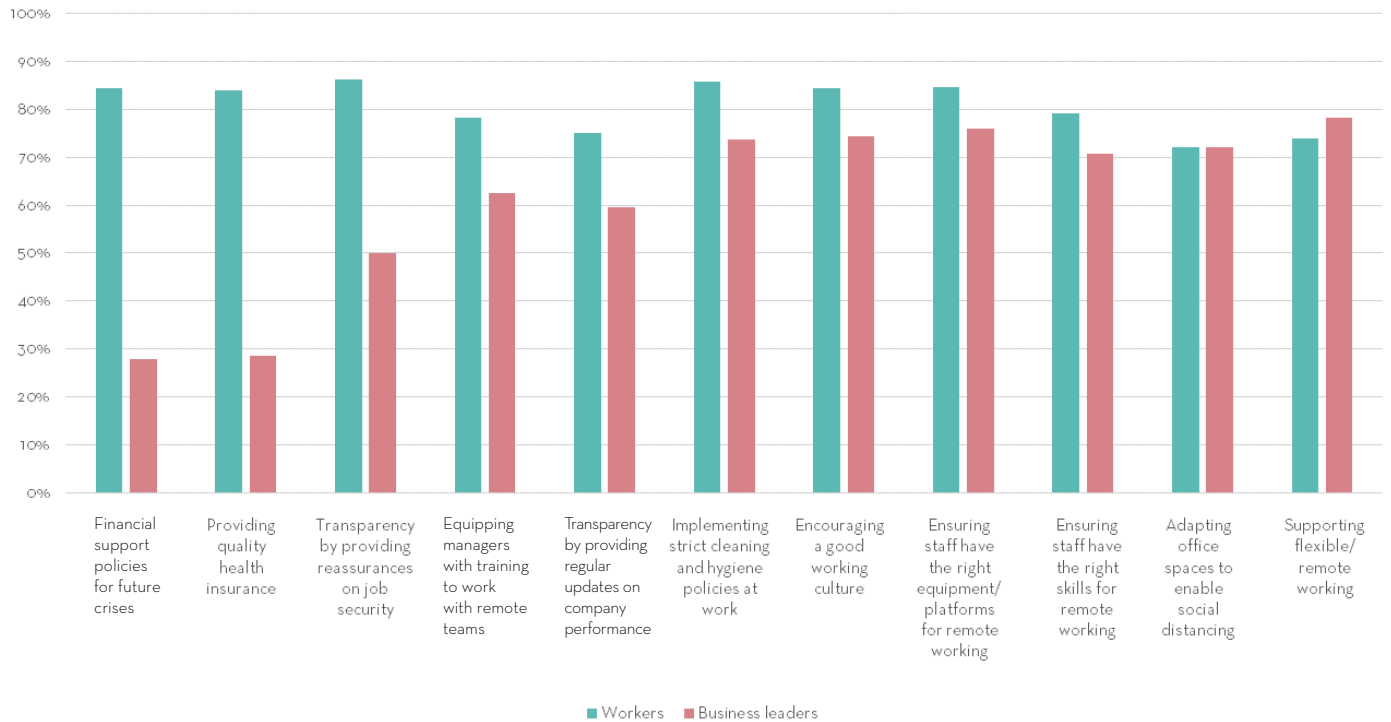
Workers say companies should prioritise workers' needs by offering greater transparency on job security, implementing strict cleaning and hygiene policies, as well as ensuring workers have the right equipment for remote work and financial support for future crises. The top priorities of business leaders focus more on sustaining operations, such as supporting remote work, including ensuring workers have the right equipment, followed by encouraging a good work culture and sanitising the workplace. Sanitation is expectedly high on both lists, especially given the high rates of infection continuing in the US and the resurgence of the virus in parts of Europe. But the largest gaps in priorities deal with other aspects of employee welfare and security—at over 50 percentage points for ensuring financial support and quality healthcare, and over 30 percentage points for providing reassurance on jobs.



Figure 3

### Business priorities post-COVID as perceived by workers and business leaders

% who think that their company should prioritize the following after the pandemic



There is mixed evidence on whether workers are satisfied working from home. There can be an improved work/life balance saving time on commuting, and flexible remote work schedules can benefit working parents. But remote work can also lead to isolation, longer hours and—if managers are distrustful—feeling pressure to constantly be available to stay employed.

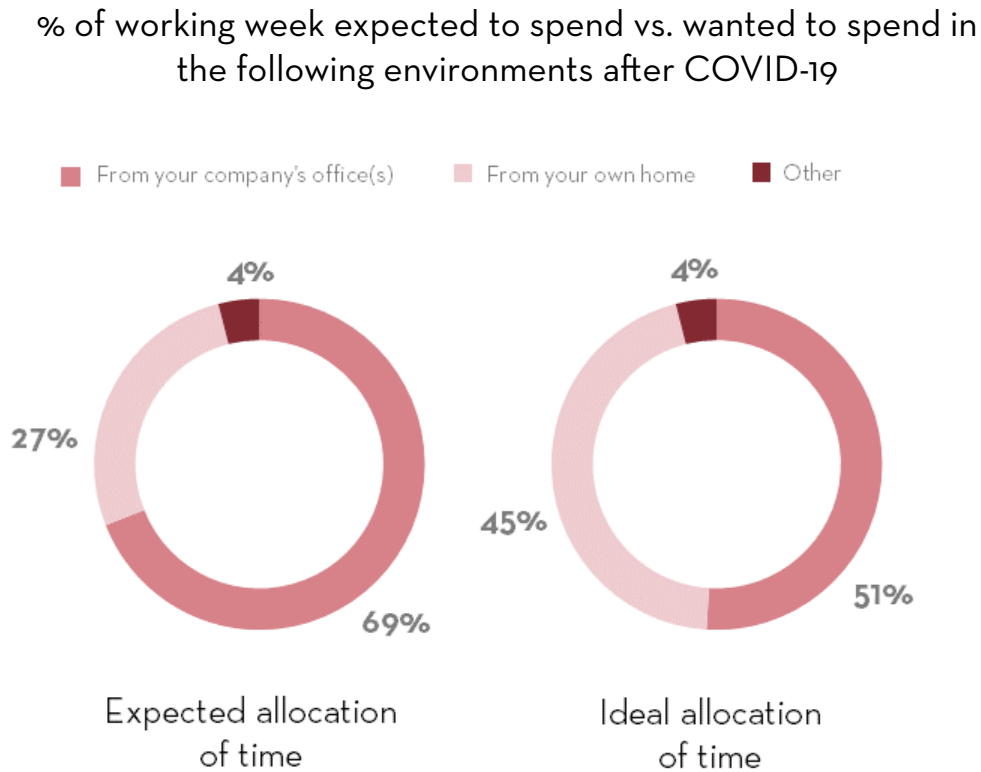
There is a need to align expectations about hybrid arrangements in the future. Workers seem to prefer many aspects of home-based work. Our recent study on the post-lockdown economy ([Resetting Normal](#)) found that workers are keen to retain increased individual autonomy at work in the future with three quarters (75%) saying it is important to maintain flexibility in their working schedules. That survey found that workers' ideal home-office time split differs from what they expect to be given, with more office-based time anticipated (see chart).





## Figure 4

### Remote working expectations from office workers



The pandemic highlighted a strong need for empathy as one of the core soft skills for leaders. While workers generally credit business leaders for having done a good job in business-related communications, exchange regarding workers' personal situations (e.g. checking in on mental wellbeing) is assessed less favourably. Only 2 in 5 people (40%) in the Resetting Normal study said that their managers had exceeded their expectations in checking on their mental wellbeing during the lockdown. More than half of managers (54%) said it was not easy to provide effective advice on mental wellbeing to their people, highlighting a lack of adequate soft skills training in the past and an important area for improvement for the future.

These findings were supported by attendees in design-thinking workshops at the Adecco Group/BCG FU.SE Digital 2020 event, who highlighted that employees need to know what is coming and what is expected of them to be empowered to prepare for the future. This is particularly important with respect to the deployment of new technologies, which may seem threatening, but can at the same time enhance workers' jobs and forge new career paths, if workers understand how they can adapt. Engaging workers in regular discussions about the future of work can help shift perspectives from worrying about job losses to being able to take charge of their own future and envisioning career growth as the economy transforms.

Younger workers have voiced the need for business leaders to understand their experiences which set them apart from the rest of the workforce. Firstly, Millennials and Gen Z have both experienced transformative events and career-stunting crises like 9/11, the Great Recession and the ongoing COVID-19 pandemic. These events have helped cultivate a strong will for social change within this demographic. By aligning their values accordingly, companies can respond to this need, promote diversity, and build inclusive work environments in ways that deliver meaningful impact. Moreover, as our [recent study](#) recognises, working remotely has limited young peoples' networking and mentorship opportunities. Initiatives like affinity groups, job rotations and formal mentor programmes can help fill these gaps, strengthen emotional intelligence, and build a more cohesive company culture. Engaging young people in designing training programmes and reverse mentoring can further integrate them as stakeholders in an organisation's future.

The needs are again different for women. Along with broader skills development and inclusion programmes, women face challenges in adapting from at-risk roles, as well as in balancing work and home life. Workers surveyed in administrative and support services are predominantly female and are chiefly concerned with ensuring they have the right equipment and skills for remote work. Modelling successful virtual interaction can help, especially - [as we point out in one of our previous studies](#) - by focusing on clarity and providing everyone equal air time for better inclusivity. Moreover, while care duties have always disproportionately fallen on women, the pandemic has deepened gender divisions. Additional paid leave can alleviate these pressures, as can sponsored memberships to childcare referral services. Collecting gender-based data on hiring, promotions and job losses is critical for tracking trends and informing further practices and policies.

## Business leaders and workers are generally aligned in their expectations for long-term changes in the workplace after COVID-19, with some key differences

Workers expect an increased focus on health and safety, greater work flexibility, more remote work, and skills development to be the most durable changes after the pandemic. Business leaders share these views more widely but place the sharpest focus on increased remote work. They are also more likely to point to a broader range of priorities, although development of well-being and skills—including cultivating leadership—are lesser aims. Workers emphasise income support policies over the long term more strongly than business leaders, reiterating the gap seen between both groups' short-term priorities.

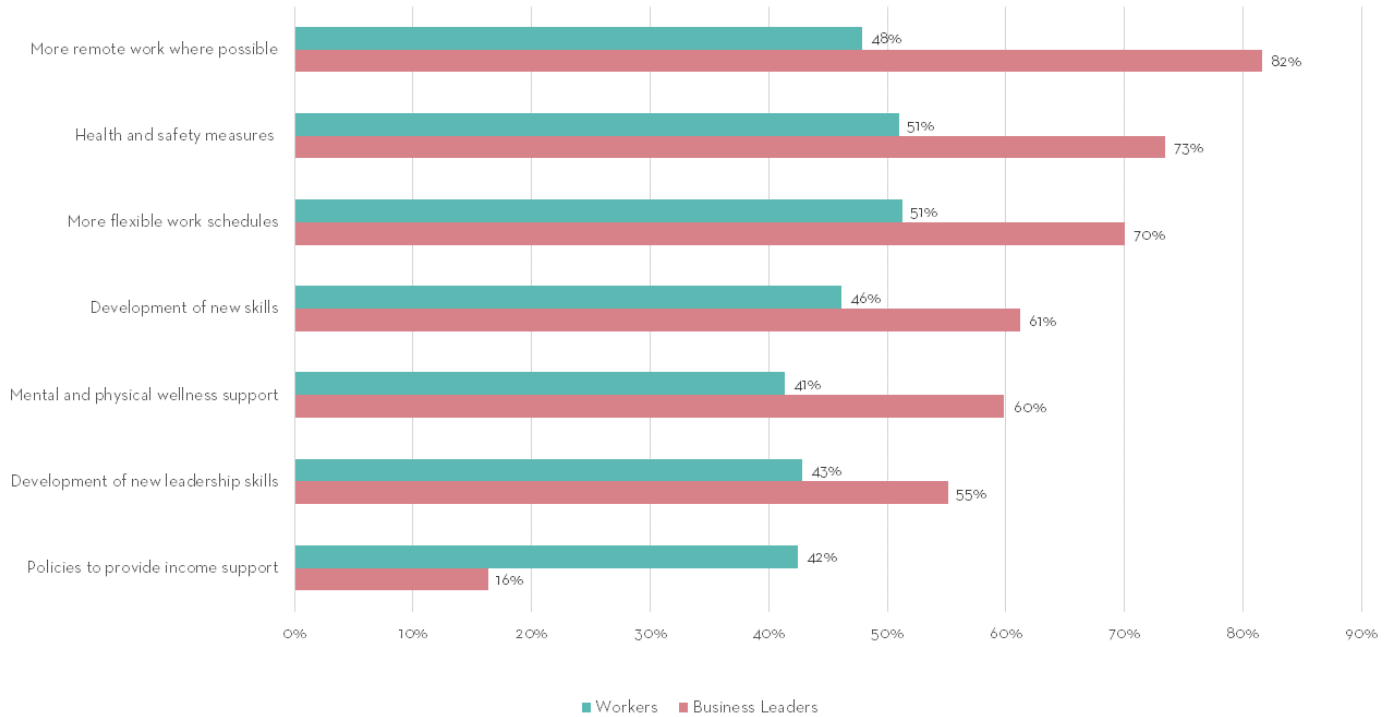




Figure 5

## Expectations for the durable changes in the workplace among workers and business leaders

### Expected durable changes in the workplace

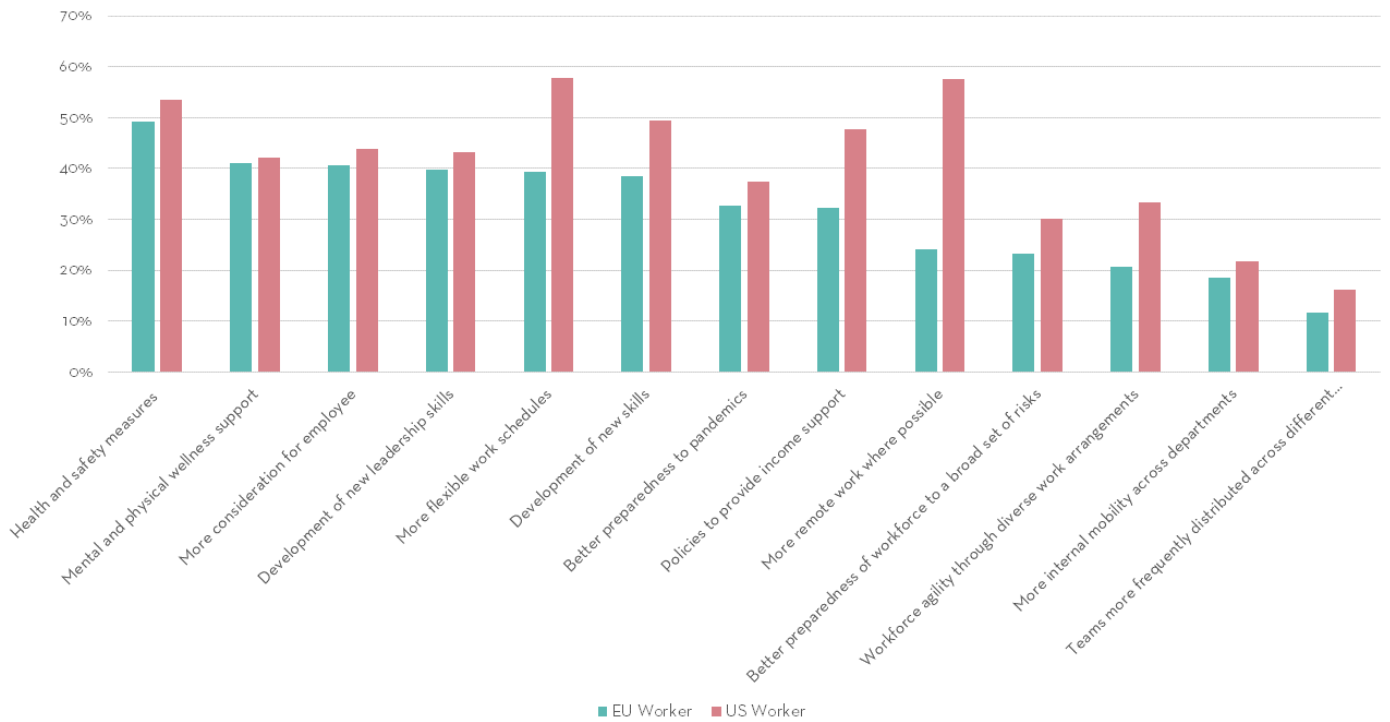


Notable variations also appear when segmenting the survey data by demographics. In terms of geography, US respondents generally weigh various priorities equally. European respondents are more likely to emphasise remote and flexible work arrangements, along with increased health and safety measures. The latter may reflect a wariness over the resurgence of the virus in several countries, especially [Spain](#).



Figure 6

## Expectations for the durable changes in the workplace among US and EU workers



Looking across gender lines, female workers (55%) would like to see more remote work as a durable change as opposed to male workers (39%) but female business leaders see this as less of a priority compared to men (77% vs 88%). Female workers most emphasise income support over the long term, reflecting their higher risk of job loss from automation and the COVID-19 crisis. They also value measures to improve well-being and health, greater consideration from employers, flexible and remote work arrangements, and skills development.

**Table 2****Top 5 priorities for female and male workers**

	<b>Female workers</b>	<b>Male workers</b>
<b>1</b>	More flexible work schedules	Health and safety measures
<b>2</b>	More remote work where possible	More flexible work schedules
<b>3</b>	Health and safety measures	Development of new skills
<b>4</b>	Development of new skills	Development of new leadership skills
<b>5</b>	Policies to provide income support	More consideration for employee

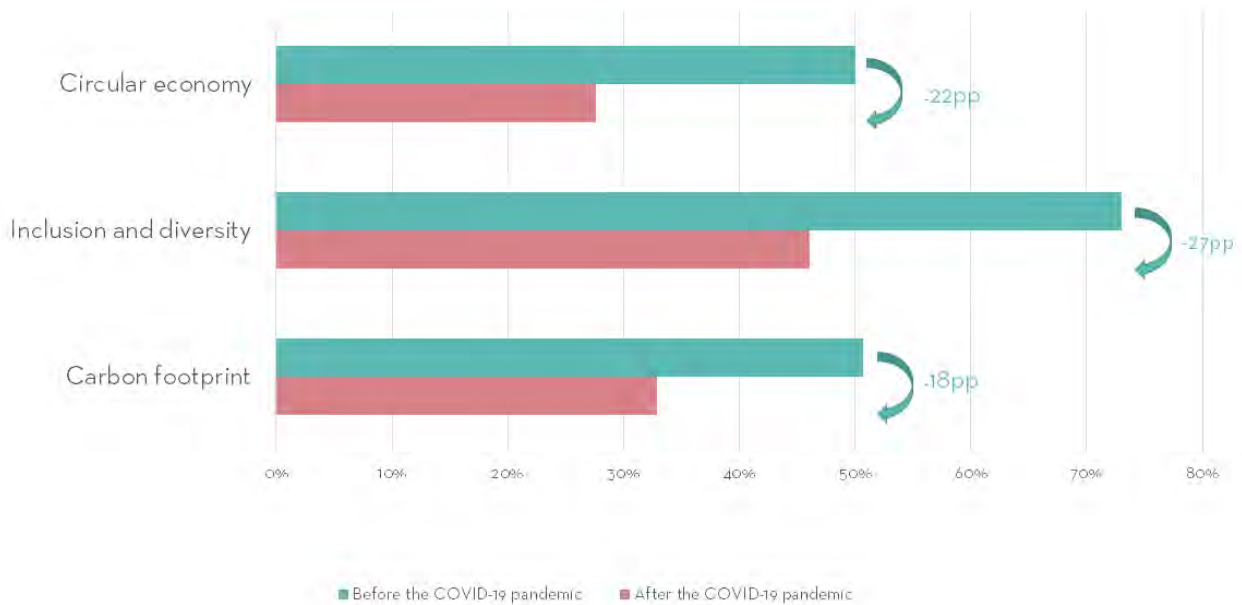
Age differences also matter. When asked about their top priorities, respondents aged 18-30 most want greater consideration from employers, or the right to have their voices heard. Mostly consisting of Gen Z and millennials, various studies have noted that this cohort values meaningful work and social responsibility. In a recent panel with young leaders at the [Adecco Group/BCG FU.SE Digital 2020](#) event, all panellists agreed they would take a 10% pay cut for a more diverse work environment. Our survey shows, however, that business leaders' commitment to these aims is waning relative to priorities that support digital transformation. A sharper focus would better align with the values of younger workers.





Figure 7

## Business transformation plans before and after pandemic



Delving further into variations in priorities by age, respondents over 50 most want greater flexibility in their work schedules. A [recent study](#) found that older workers would delay retirement for more flexible work schedules and shorter commutes. Younger workers also value flexibility but view it more as a requirement rather than a post-COVID ideal, with [one in three](#) Gen Z workers reporting they would not tolerate an inflexible work schedule. This shows that these two demographics see great value in flexible work schedules which they wish to maintain as we emerge from the pandemic.

Our survey reveals that respondents over 40 are more likely than younger workers to emphasise skills development. The workforce is getting older, with [two in three](#) US workers ages 40-65 planning on continuing to work after 66. But they face misguided biases that older workers are resistant to change and new technologies, underscoring the factors that erode optimism among mid-career workers in our study. Contrary to these perceptions, our recent [study](#) showed workers aged 45 and older are more interested in developing skills than following a structured career path. Companies that undergo workforce transformation programmes should keep the particular needs of the different demographics in mind.

# Business leaders and workers approach skills priorities differently, signalling a mismatch between the skills needed in the future and those being developed now

High-end technical skills in data analytics and data science are most prized by business leaders, but certain soft skills are also key. Workers underestimate the value of these attributes, and overestimate the value of hard skills like selecting, installing, and maintaining technologies. While the switch to remote work has emphasised the need for hard skills, our findings show that in the medium to longer term, technology deployment calls for more soft skills, such as communication, critical thinking, or creativity and originality.

One reason for this is that remote working is available to only a small part of the workforce. Moreover, technical skills are more likely to be automated, so that in the future, companies will shift towards more soft skills. It is also reasonable to expect that technology deployment will require workers to be more critical and inquisitive about the limitations and benefits of each technology and more creative in using it. Lastly, uncertainty about the future is driving the need for soft skills, which are more transferable across different types of work.

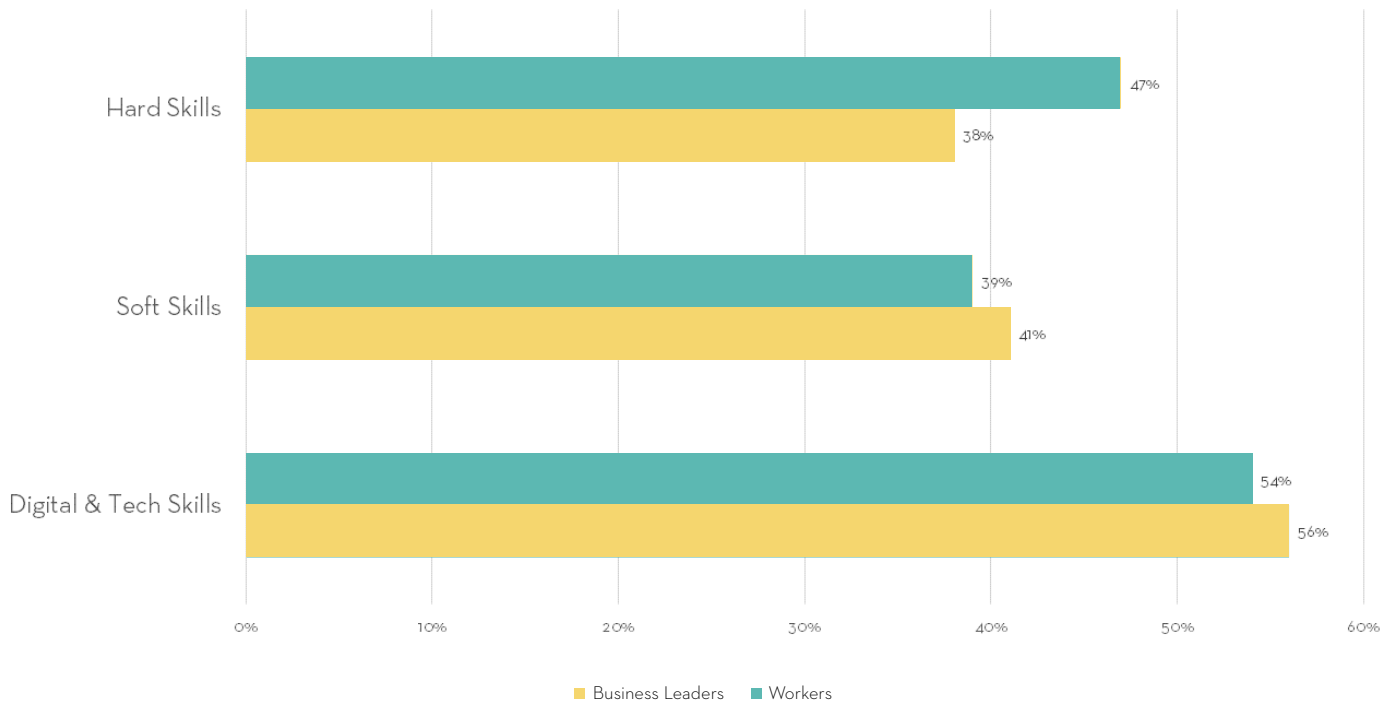
When it comes to business leaders, crisis-related soft skills like resilience and emotional intelligence are the most critical to them. While workers also highly value resilience, the soft skills they prioritise the most are oriented toward tasks, such as coordination and time management, and attention to detail.





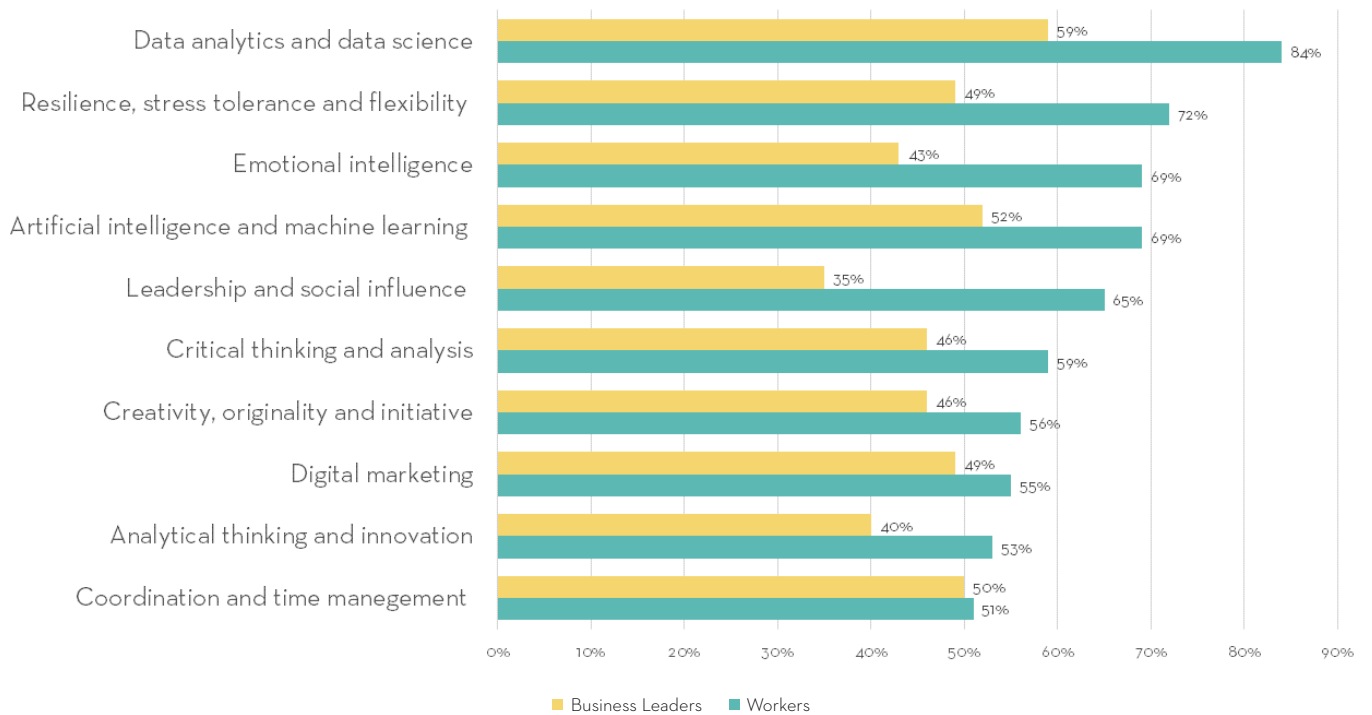
**Figure 8**

### The importance of skills as perceived by workers and business leaders



**Figure 9**

### Top ten skills for the post-COVID economy



Business leaders in the EU and the US are largely aligned on the soft skills that are most critical to the future, but greater geographic variation appears among workers. EU workers are more likely than those in the US to include the higher-order soft skills of resilience and creativity among their top priorities for development, behind quality control and safety awareness, and alongside personnel management. US workers value problem solving highly, but place more emphasis on coordination and time management, and attention to detail.



**Table 3**

**Soft skills for the post-COVID economy in the US and EU**

	US workers	EU workers	EU business leaders	US business leaders
Coordination and time management	1	5	7	6
Attention to detail	2	7	17	6
Reasoning, problem solving and ideation	3	8	12	5
Resilience, stress tolerance and flexibility	4	2	1	1
Critical thinking and analysis	5	6	4	3
Creativity, originality and initiative	6	4	5	10
Troubleshooting and user experience	7	13	14	21
Instruction, mentoring and teaching	8	20	15	12
Emotional intelligence	9	9	2	1
Complex problem-solving	10	9	8	4
Analytical thinking and innovation	12	12	6	12
Quality control and safety awareness	13	1	16	12
Leadership and social influence	14	18	3	6
Basic skills	15	14	20	18
Management of personnel	16	2	9	6

Business leaders and workers agree that employers should take the lead in building a better world post-COVID, but a multi-stakeholder approach is necessary for preparing workers for long-lasting prosperity in an increasingly digital economy. “We need a tripartite alliance between companies, governments and individuals to ensure that we are building the right skills for the future,” says Alain Dehaze, CEO of the Adecco Group. Indeed, successful workforce transformation requires a great degree of systemic change that can only be created if all stakeholders are involved.

Mr. Dehaze calls for employers to upskill and reskill employees, offering opportunities to rebound in the labour market more easily. The design-thinking workshops at the Adecco Group/BCG FU.SE Digital 2020 event confirm that companies should also be transparent about their skill gaps, develop methods to track their organisational progress in lifelong learning, and collaborate with workers in designing individual learning plans. Governments can partner with businesses and coordinate multiple efforts; they can also enact policies to facilitate lifelong learning and include soft skills development in early education. Equipping workers with training and resources, as well as implementing inclusive policies, empowers workers to keep their skills updated and feel invested in growing with their company rather than fear getting shut out.

## Conclusion

As economies plan for recovery, countries and employers have an unprecedented opportunity to reboot their workforce strategies. To do so successfully, we must not lose sight of the workers charged with moving the companies forward. The better workers adapt, the more strongly companies and countries will emerge from the pandemic, in terms of financial performance, but also commitment and engagement to drive social and economic recovery. To navigate the systemic transformation that is accelerating around us, multi-stakeholder action needs to be based on a shared understanding and expectations of the future.

Our findings reveal that the expectations about the post-COVID future of work are not shared across key stakeholders, notably business leaders and workers who have different expectations and levels of optimism regarding the post-COVID future of work. While business leaders are more optimistic and focus on soft skills, workers are more pessimistic and prioritize technical skills. This misalignment in expectations may slow down workforce transformation and recovery as workers may not invest sufficiently in their own upskilling if they don't expect to financially benefit from these skills in future. At the same time, business leaders may not be able to identify and respond to key needs among workers, leading to reduced engagement within the workforce.

To strengthen engagement and resilience and support workforce transformation, stakeholders should aim to better understand how expectations influence workers' and business leaders' willingness to adapt and invest in reskilling and upskilling. Companies should proactively seek to understand the needs and expectations of the workforce and prioritize them in workforce transformation plans, strengthening their purpose and culture to rebuild workers' optimism and motivation.

If unaddressed, the disconnect between workers and business leaders could hold back recovery because it could slow down company transformation and structural change, both of which will be needed to adapt to the post-COVID economy. Companies that proactively seek to understand workers' needs and prioritize inclusive workforce transformation are best positioned to re-bounce and succeed in the uncertain post-covid economic conditions.





# Research Methodology

This study is based on the Workforce Transformation survey produced by the Adecco Group Foundation. The aim of the survey was to compare the perspectives of business leaders and workers from different communities (executives, FU.SE expert community and workers).

1055 workers and 204 business leaders (108 executives and 96 experts from the FU.SE community) participated in the survey. Both respondent groups were well distributed across different industries and mainly located in the US and Europe (France, Belgium, and Spain).

The conceptual approach for the research and the survey questionnaire were developed by the Adecco Group Foundation, led by Cynthia Hansen, Head of the Adecco Group Foundation, and Liana Melchenko, Head of Thought Leadership and FU.SE, in collaboration with the Horizon Group, led by Margareta Drzeniek-Hanouz, Managing Partner, and with support by the Adecco Group customer advisory panel team. We would like to thank our expert community for the on-going input and discussions on the Future of Work:

- Brian Gallagher, President and CEO, United Way Worldwide
- Susan Athey, Professor, Economics of Technology; Director, Stanford Institute for Human-Centered Artificial Intelligence
- Richard Baldwin, Professor of International Economics, The Graduate Institute; Author “The Globotics Upheaval: Globalization, Robotics, and the Future of Work”
- Victor Bennett, Associate Professor, The Fuqua School of Business, Duke University
- Kate Bravery, Director, Future of Work, Mercer
- David Dorn, UBS Foundation Professor of Globalization and Labor Markets, University of Zurich
- Marcela Escobari, Senior Fellow, Global Economy and Development, Brookings Institution
- Dr Carl Benedikt Frey, Oxford Martin Citi Fellow, University of Oxford
- Susan Helper, Frank Tracy Carlton Professor of Economics, Case Western Reserve University
- Matissa Hollister, Assistant Professor, Organizational Behaviour, McGill University
- Patrick Hull, Strategy Director, Future of Work, CHRO office, Unilever
- Laura Liswood, Secretary General, Council of Women World Leaders
- Nazrene Mannie, Executive Director, GAN Global
- Jochen Menges, Professor, Chair of Human Resource Management and Leadership, University of Zurich
- Daniela Seabright, CHRO, Phillips
- Beatrice Weder di Mauro, Professor, President of the Center for Economic Policy Research, the Graduate Institute