



Work Reimagined Employer Survey 2021

Companies redefining work with
Humans @ Center

September 2021



Overview of questions: 2021 Work Reimagined Employer Study Redefining work with Humans @ Center



How will companies evolve new ways of **working and flexibility** to balance retention, attraction and productivity needs?

1



What is the **intent of the company office** in creating an environment to support networking and collaboration?

2



Which attributes are **key drivers** of employer and workforce segment driving new ways of working (e.g., geography/ industry / company size other)?

3



How will business travel and mobility be used in the new normal environment?

- ▶ Office on-sites
- ▶ Learning and development
- ▶ Global assignments
- ▶ Key customer meetings

4



How can companies create a **connection to culture and purpose** with a mix of physical and digital experiences and avoid have and have nots?

5

Significant change is underway and employers are optimistic about it; but they also anticipate key talent risks

With challenges posed by the pandemic, employers are planning extensive changes and see silver linings

Employers are in action: 83% are already or have already planned for action (17% still waiting) when asked about where they are on the journey to post-COVID-19 “new normal”

Workplaces are changing: 84% employers expect moderate to extensive change to establish safety and another 77% say the same about workplace real estate strategy

Hybrid is growing: 79% of employers anticipate remote/hybrid work to change at least moderately; with 57% describe return-to-office philosophy as “hybrid” vs. 35% planning a more traditional “office optimal”

Leadership is critical: 82% agree leaders will model Future of Work (FoW) behaviours and 83% agree that leaders are aligned regarding the FoW approach

Flexibility is key: 8 in 10 employers agree that it is important to provide flexibility in where/when employees work and 7 in 10 agree that their company’s approach to flexibility will impact their ability to attract/retain talent

However, employers envisage risks as they embark on their workforce transformation journey

Fairness/equity is the top challenge with some jobs requiring fixed location/schedule (45%); Other key challenges include retaining talent and provide flexibility to employees (43%); culture/creativity/collaboration (40%); developing next-generation talent (39%) and establishing and measuring productivity (36%) are the top risks that employers anticipate

Emerging themes: mitigating risk and making investments



To mitigate evolving risks, employers will invest in people and their development, as well as prioritizing non-financial factors to succeed in the long-term

- ▶ **Change to learning and skills are near universal: 100%** employers are considering at least one change/enhancement in policy as part of their post-COVID-19 approach to learning and skill development
- ▶ **Long Term Value is front and center: 87%** are likely to prioritize “non-Financial factors” (i.e. society, employees or customers) when making decisions about their workplace post COVID-19
- ▶ **Business travel for employees is valued but will be redesigned:** 84% of employers have already started or plan to restart business travel in 2021 - with 48% thinking it's highly/extremely important for leadership of the future. However, 51% expect an overall decrease in post-COVID-19 business travel and many are re-evaluating their approach as a part of their new mobility strategy.



Employers plans investments in tools/technology to transition to new ways of working both in office and virtual environments

- ▶ **Onsite tech is key: 65%** are planning on making investments in better technology in the office
- ▶ **Health and safety is ongoing norm: 59%** have implemented or are considering to include health evidencing procedures to ensure workplace safety and most are looking at expanded vaccination mandates/incentives
- ▶ **Offices will be redesigned: 48%** are planning to invest in enhanced space for collaboration/networking
- ▶ **Companies are investing in virtual productivity: 50%** employers are planning to invest in software to support collaboration to enhance home office productivity
- ▶ **WFH stipends are expanding: 86%** of employers have allocated budget for annual WFH stipend; the average is \$719 per employee

Key areas of alignment and differences: Employer vs Employee perspective

Employer thinking broadly mirrors that of employees, with some notable differences



Employer View

Employee Expectation



Culture and Productivity: Employers are more positive than employees with respect to company culture and productivity

Employers believe company culture has changed and gotten better during the pandemic

72%

48%

Employee believe company culture has changed and gotten better during the pandemic

Employers agree productivity of most jobs can be accurately measured regardless of where employees work

82%

67%

Employees agree that the productivity for their job can be accurately measured by their company irrespective of where they work

Flexibility is the new normal: Employers and employees view flexibility as a key parameter in the post pandemic world

Employers agree on the need to provide flexibility in where/when employees work

~80%

~90%

Employees want flexibility in where and when they work

Employers have implemented or plan to implement condensed workweek options

56%

38%

Employees want to be offered shorter working weeks by their employers

Business Travel: There is a tension between employees' views and employers expectation with regards to business travel

Employers anticipate a moderate to significant decrease in business travel post-pandemic

51%

66%

Employees want to continue business travel post-pandemic

Companies are at different stages of planning for the “new normal” and this has an impact on their outcomes in terms of culture and productivity

Stage of Action	Unique Characteristics	Culture Outcome	Productivity Outcome
Waiting “On the couch: still watching and waiting”	<ul style="list-style-type: none"> ▶ Much more likely to be an “essential business” (90% vs 72% avg.) ▶ Much more likely to say the business has experienced a “high impact” from COVID-19 (62% vs 39%) ▶ Much more likely to want a full post-COVID-19 return to office/worksites (68% vs 35%) 	73% agree it’s changed & gotten better	70% agree it’s changed & gotten better
Planning Now “Stretching to go for a walk: starting to plan for action” + “In the driver’s seat: planning for action and have a plan”	<ul style="list-style-type: none"> ▶ Least likely to be planning to implement condensed work week options (45% vs 56%) ▶ Least likely to think that mobility is significantly important for global workforce planning & talent management (35% vs 49%) ▶ Most likely to be planning for a conditional hybrid return to work (66% vs 57%) 	65% agree it’s changed & gotten better	60% agree it’s changed & gotten better
Actioned Already “Communicated action plan with staff” + “Built the next Rocketship/ already taken market leading action”	<ul style="list-style-type: none"> ▶ Much more likely to have evaluated and implemented policies on employee relocation (33% vs 26%) ▶ Most likely to consider post-COVID-19 approaches to workforce technology (45% vs 38%) ▶ Most likely to consider post-COVID-19 approaches to learning and skill development (42% vs 37%) 	80% agree it’s changed & gotten better	76% agree it’s changed & gotten better

Position on the “new normal” continuum

A majority of employers are planning a hybrid return to work model for their workforce

Return-to-office philosophy

35%: Office Optimal

Everyone must return to office (return to pre-COVID-19 levels and policy)

57%: Hybrid Hopeful

To follow a conditional hybrid plan and a flexible hybrid plan

7%: Remote Ready

Hire and work from anywhere (100% remote work; eliminating geographical constraints)



Office Optimal

Almost equally split (~33%) between the three stages (no action, planning now and already actioned) with respect to their future approach to “new normal”

48% have already started company-sponsored travel for client/internal events for selected markets

Most likely (70%) have already implemented or plan to implement condensed work week options providing schedule flexibility if location flexibility is not an option

A majority (58%) believe that “establishing fairness/equity of the new approaches to working with some jobs requiring fixed location/schedule” is the risk they are most concerned about



Hybrid Hopeful

The largest proportion (49%) are in the “planning now” stage with respect to their future approach to “new normal”

61% plan to start company sponsored travel in H22021

48% have already implemented or plan to implement condensed work week options

The largest proportion (41%) believe that “maintaining culture /creativity /collaboration” and “ability to retain talent and provide flexibility to employees” are the risks they are most concerned about



Remote Ready

The largest proportion (51%) are in the “already actioned” stage with respect to their future approach to “new normal”

42% plan to start company sponsored travel in H22021

53% have already implemented or plan to implement condensed work week options

The largest proportion (42%) believe that “developing next-generation talent” is the risk they are most concerned about

Approach to new normal

Business travel plans

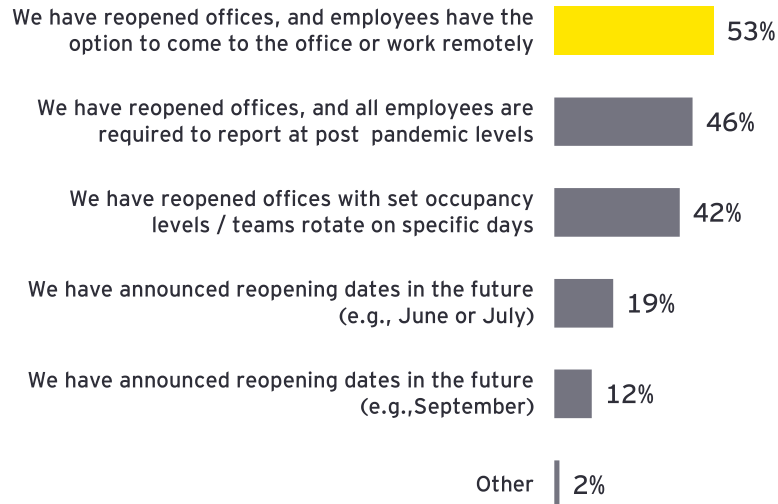
Option for condensed work week

Most anticipated risk

Leader and employee perspectives need to be aligned on new ways of working

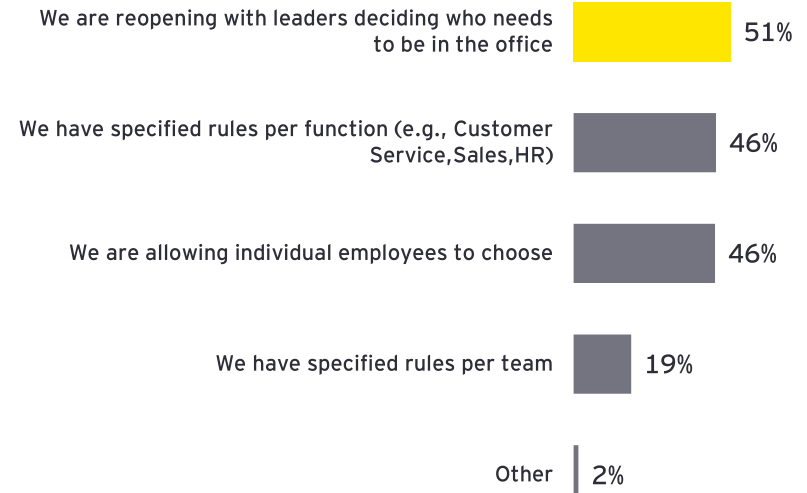
Currently, a **majority of employers offer employees the option** to come to office or work remotely

For those employees not part of an "essential" group, where are you at with reopening of offices?



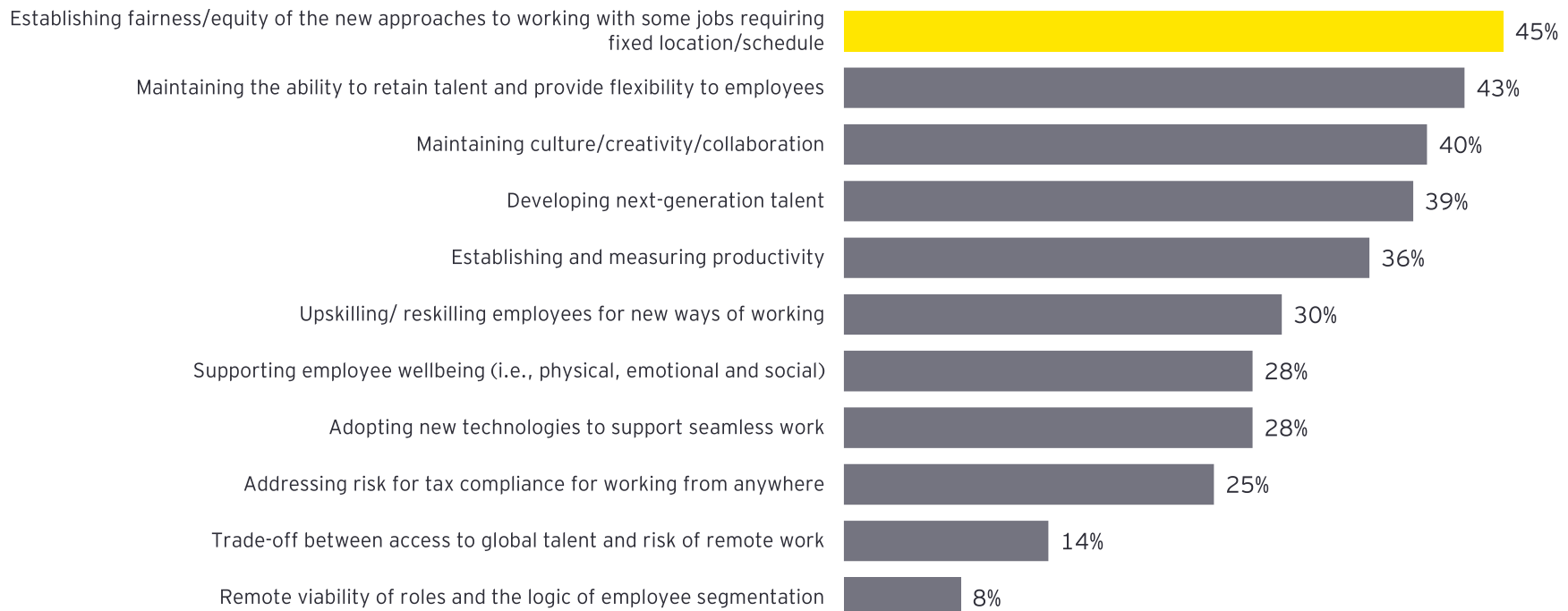
Going forward, a **majority of employers would approach reopening offices with leaders deciding** who needs to be in office

For those employees not part of an "essential" group, what approach are you taking to how you are reopening offices?



However, employers are also concerned about a number of risks and will need to take necessary actions to establish a smooth transition

Which of the following risks are you most concerned about?



EY | Building a better working world

EY exists to build a better working world, helping create long-term value for clients, people and society and build trust in the capital markets.

Enabled by data and technology, diverse EY teams in over 150 countries provide trust through assurance and help clients grow, transform and operate.

Working across assurance, consulting, law, strategy, tax and transactions, EY teams ask better questions to find new answers for the complex issues facing our world today.

EY refers to the global organization, and may refer to one or more, of the member firms of Ernst & Young Global Limited, each of which is a separate legal entity. Ernst & Young Global Limited, a UK company limited by guarantee, does not provide services to clients. Information about how EY collects and uses personal data and a description of the rights individuals have under data protection legislation are available via ey.com/privacy. EY member firms do not practice law where prohibited by local laws. For more information about our organization, please visit ey.com.

© 2021 EYGM Limited.
All Rights Reserved.

EYG No.: 007497-21GbI
ED None

This material has been prepared for general informational purposes only and is not intended to be relied upon as accounting, tax, legal or other professional advice. Please refer to your advisors for specific advice.

ey.com

