

A modern office lounge with large windows, wooden slat walls, and hanging plants. Two women are sitting on a red leather sofa, looking at a laptop. A man is sitting on a high stool, working on a laptop. The space is well-lit with warm, ambient lighting.

Work Reimagined Employee Survey 2021

Key findings

December 2021

The EY logo, consisting of the letters 'EY' in a bold, white, sans-serif font, with a yellow diagonal line element to the right.

EY

Building a better
working world

Contents

A man with dark hair and a light beard is sitting on a brown leather couch. He is wearing a white t-shirt and light blue pants. He is holding a tablet in his left hand and looking at it. A laptop is open on his lap. The background shows a patterned curtain and a wooden floor.

Survey context and demographics

Executive summary

Job satisfaction and productivity

Need for flexibility in the new normal

Remote work preferences and profiles

New normal on safety, travel and office

Additional analysis

- ▶ Attributes of remote work preferences
 - ▶ “Office optimal”
 - ▶ Travel preferences
 - ▶ Caregivers
-

Framing of 2021 Work Reimagined Employee Survey and objectives

As the world comes to grips with the **extended impact of COVID-19**, businesses and teams are having to continue to adjust and react quickly. With vaccinations started, the thinking is shifting gears from temporary health and safety to longer-term ways to reimagine work.



Employers are evaluating new strategies based on prior study findings to adapt to **new and more flexible ways of working**. New strategies encompass approaches to hiring, policies on where and how work gets done, and workplace and technology changes (see examples of public announcements).



Employees in some markets are moving at record levels in anticipation of opportunities for flexibility, choosing to work new **schedules and in new locations on a temporary basis** to spend time with family, learn new things or explore new places. Key word searches have increased significantly for remote work*.

*Google Trends 2018-2021, as of March 2021.

This research builds on our previous Physical Return and Work Reimagined Study in **June/July 2020**, when we surveyed **3,600+** employees and **700+** employers.

EY market research has been conducted to understand **what will enhance the employee experience** of the future and how that varies for different types of employees in different locations.

Outcomes of research and decisions companies can make with the data

1



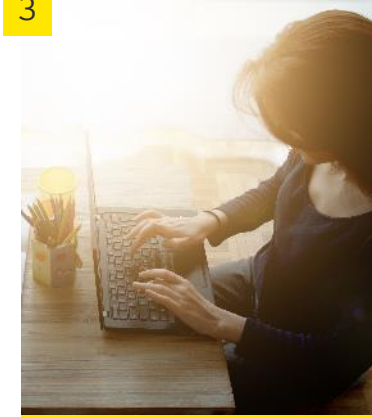
How will remote work transition from a **short-term fix to a permanent component** that drives performance while embracing employee preference?

2



What employee engagement and retention **risks are companies facing** across different work arrangements?

3



Which attributes are **key drivers** of employee remote work preferences (e.g., location, job type, demographics)?

4



What are the **company levers that can be tailored** to enhance employee experience?

- ▶ Investments in on-site amenities?
- ▶ Technology and upskilling?
- ▶ Work-from-anywhere and talent and reward approaches?

5



What **criteria are companies using to balance employee work location preferences** with business operating goals?

- ▶ Remote first
- ▶ Hybrid/remote – equal
- ▶ On-site with flexibility
- ▶ Other work schedule changes
- ▶ Total reward program/policy changes

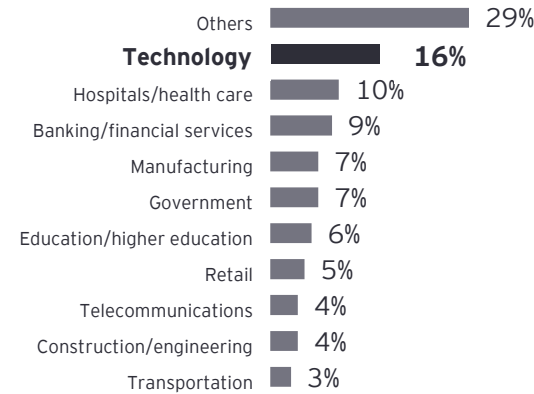
Work Reimagined Employee Survey – survey demographics

For Internal use

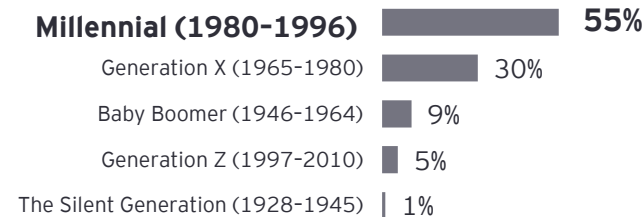
16,264 respondents across
16 countries

Country	Number of respondents
United States	8,067
Canada	1,028
Japan	1,009
United Kingdom	1,004
Germany	1,002
Australia and NZ	1,001
France	544
India	509
Brazil	371
Mexico	334
Colombia	331
Philippines	312
Singapore	251
Indonesia	251
Malaysia	250

23 industries represented, with
most coming from **Technology (16%)**



Millennials represent more than
half of all respondents



Data now accessible in
Power BI dashboard



[Link here](#) – mine the data!

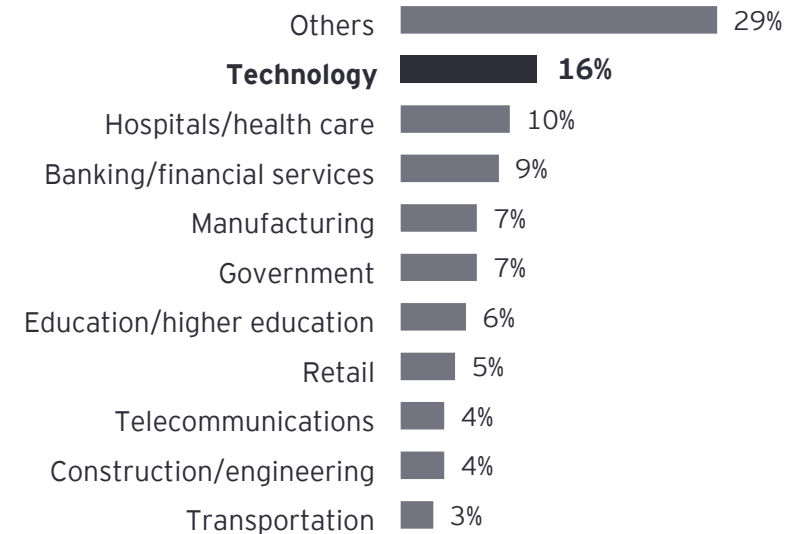
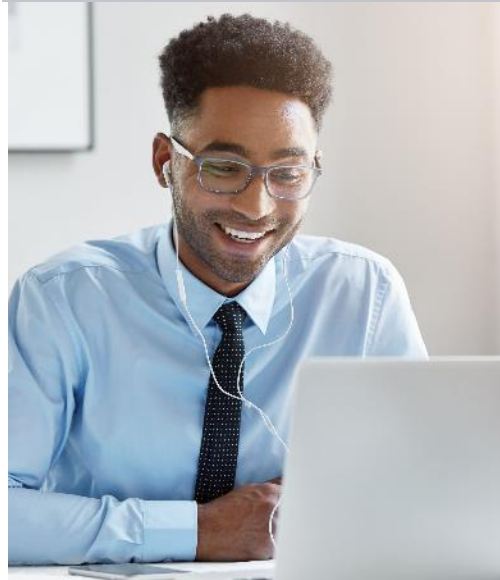
Work Reimagined Employee Survey – survey demographics

For External use

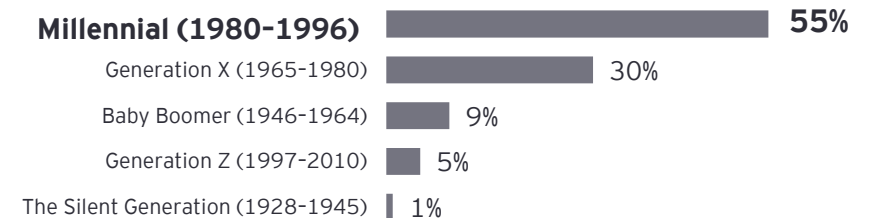
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23 industries represented, with most coming from **Technology (16%)**

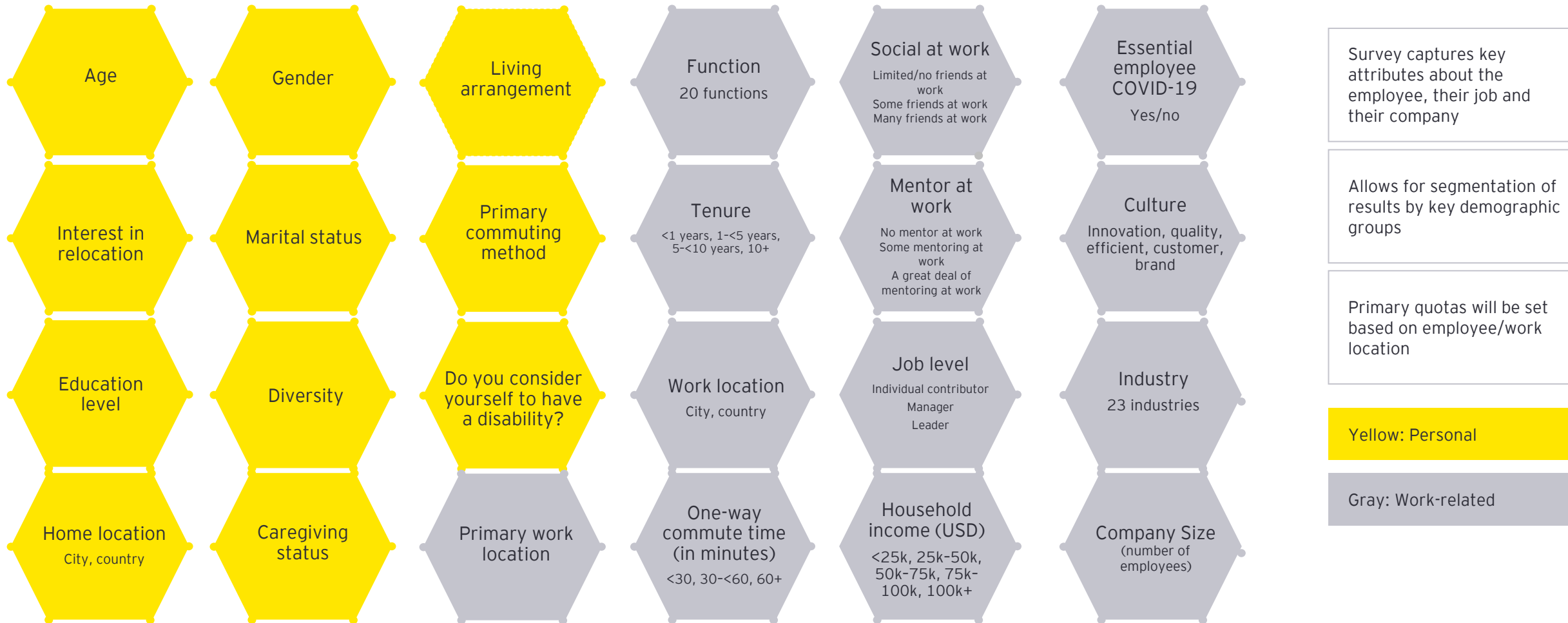


Millennials represent more than half of all respondents



24 demographic categories allow for the data to be segmented in various ways

Demographic categories that are captured within the new Work Reimagined Employee Survey



Executive summary

Employees think they and their employers have responded well so far and will stay for 12 months



In spite of the challenges posed by the pandemic, employees remain positive about their work

- ▶ **76%** of employees rate their job satisfaction at 7 or above on a scale of 1 to 10
- ▶ **A majority (60%)** rate their job satisfaction at 8+
- ▶ **93%** of survey respondents are likely to “Stay” with their current organization for at least the following 12 months

Employees are broadly positive about the impact of remote working

- ▶ **48%** of employees believe their company culture has changed and gotten better since the beginning of the pandemic (with a net +17% positive score)
- ▶ **67%** agree that the productivity for their job can be accurately measured by their company irrespective of where they work

But they demand permanent flexibility going forward, want company investments and are prepared to quit if they don't get it



- ▶ **9 out of 10** employees want flexibility in where and when they work
- ▶ On average, employees expect to work between **two and three days** remotely after the pandemic
- ▶ **One-third** of employees want their employers to offer shorter working weeks
- ▶ Tech is key to support hybrid with **64%** wanting better tech in the office and **48%** wanting home office “hardware” investments
- ▶ A majority (**54%**) of employees are likely to quit if they aren't offered the flexibility they want, with Millennials two times as likely as Baby Boomers to quit

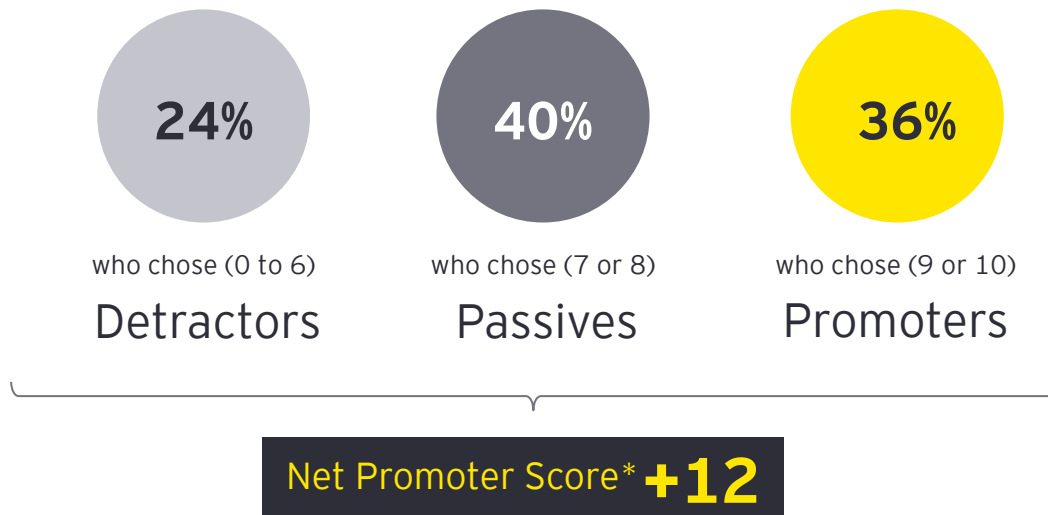
Some things have changed permanently, but other pre-pandemic behaviors and preferences will remain



- ▶ Health and safety is a new normal with **61%** wanting their company to require the vaccine (subject to exceptions)
- ▶ Nearly **two-thirds of employees** want to continue business travel post-pandemic (this was 49% in the past survey)
- ▶ **A fifth** of employees would still expect to work fully (five or more days) in the office post-pandemic
- ▶ Employees will continue to consider **trade-offs** between rewards and office features; **Work location and stipends** have highest employee preference and **office desk policy** is the lowest

In spite of the challenges posed by the pandemic, employees remain positive about their work and will stay for 12 months

On a scale of 1 to 10 (1 is not at all satisfied, 10 is extremely satisfied), how would you rate your job satisfaction?



* Score is calculated by subtracting promoters' % and detractors' %

- ▶ The Net Promoter Score signifies that, overall, respondents are satisfied with their jobs
- ▶ **76%** of employees rate their job satisfaction at 7 or above on a scale of 1 to 10; **60%** of employees rate their job satisfaction at 8+

How likely are you to stay with your current organization for at least the next **12 months**?

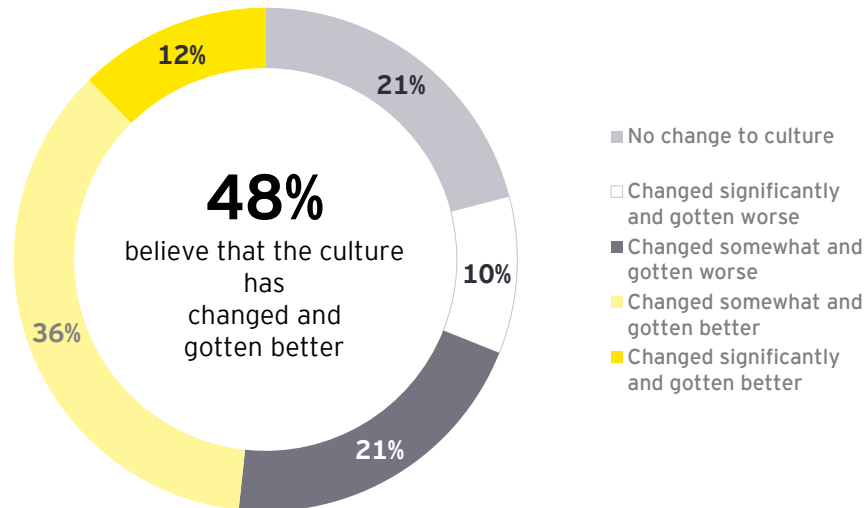


93%

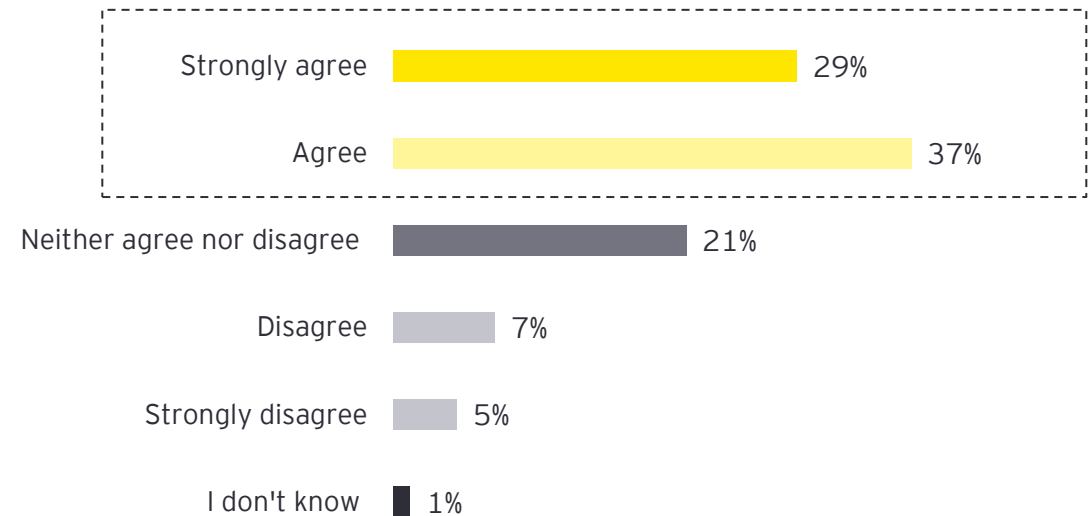
are likely or very likely to stay with their organization for the next 12 months

A majority of employees believe that the company culture has changed for the good and that their productivity can be measured irrespective of their work location

To what extent do you believe your company culture has changed since the beginning of the pandemic?



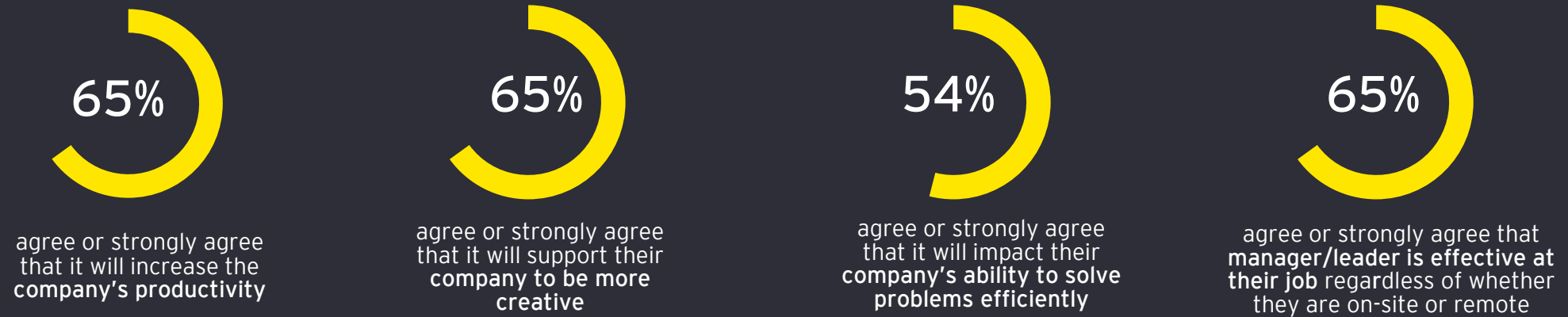
The productivity for my job can be accurately measured by my company regardless of where I work



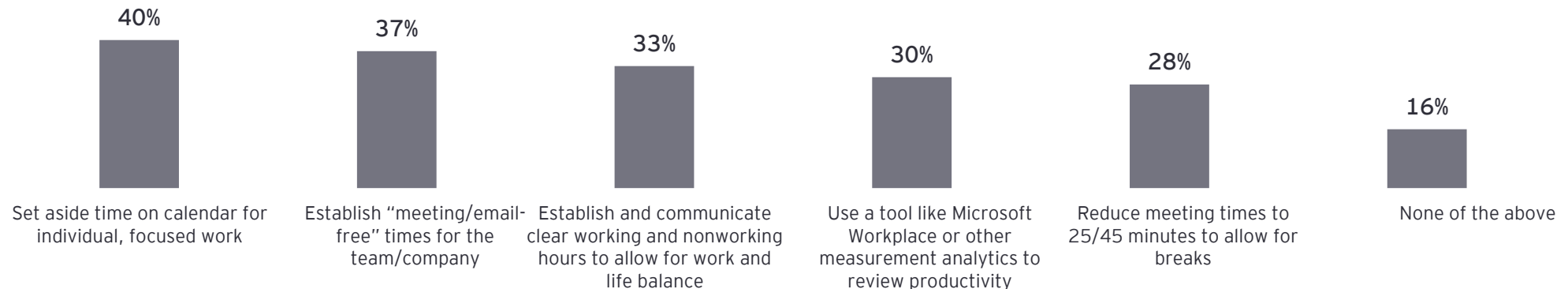
- ▶ **48%** of respondents believe that their company **culture has changed and gotten better** since the beginning of the pandemic, and another **two-thirds (66%)** agree that the productivity for their job can be accurately measured by their company irrespective of where they work.
- ▶ However, there are differences across countries. Here are some notable examples where employees have been less positive:
 - ▶ Only **29%** of respondents in **France** believe that company culture has changed and gotten better since the beginning of the pandemic, and **45%** agree that the productivity for their job can be accurately measured by their company irrespective of where they work.
 - ▶ **36%** of respondents in **Germany** believe that company culture has changed and gotten better since the beginning of the pandemic, and **47%** agree that the productivity for their job can be accurately measured by their company irrespective of where they work.
 - ▶ **33%** of respondents in **Japan** believe that company culture has changed and gotten better since the beginning of the pandemic, and only **29%** agree that the productivity for their job can be accurately measured by their company irrespective of where they work.

To maintain their productivity and a work and life balance, employees have started to adopt new approaches and set boundaries

With the new mix of on-site and remote work



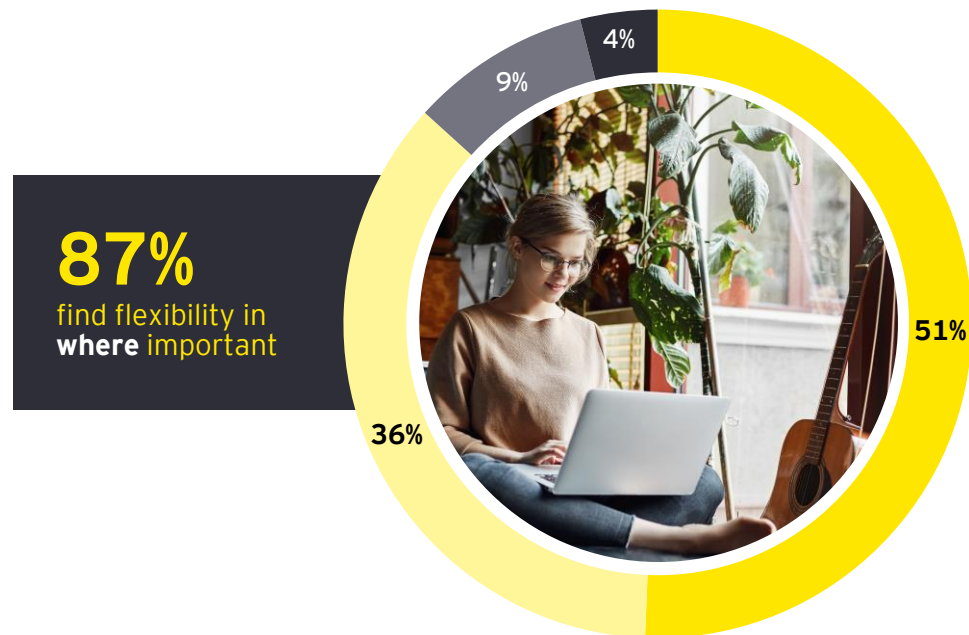
What have you or others in your organization done to be more productive with a new mix of on-site and remote teams?
(top three choices)



Percentages do not sum to 100%, as each respondent could choose up to three of the options above.

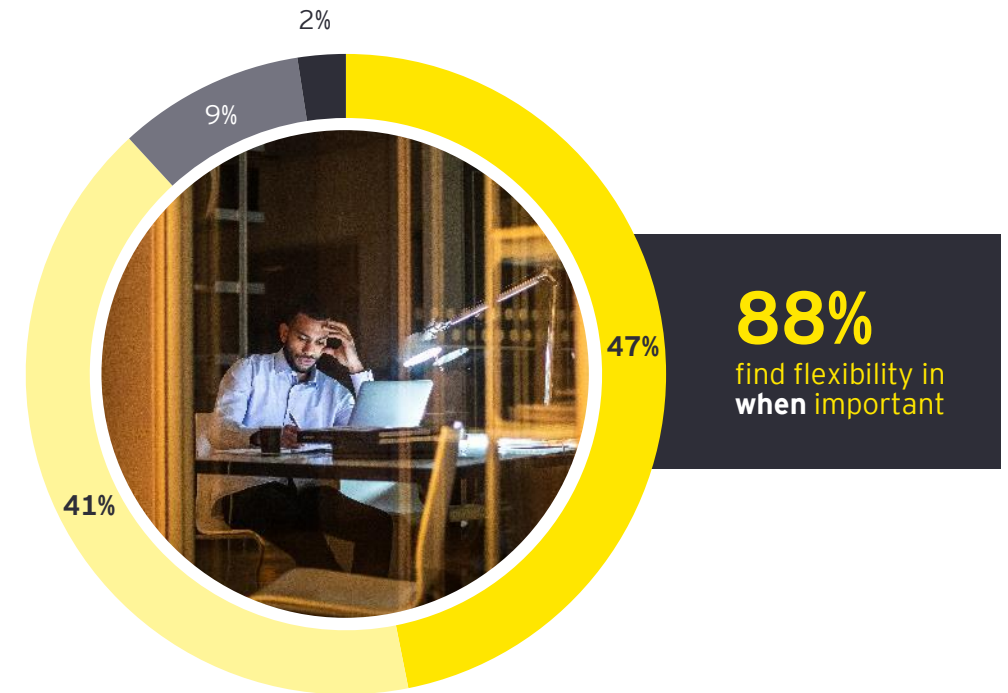
9 out of 10 employees want flexibility in where and when they work ...

How important is it to you to have flexibility in **where you work** (vs. your job having a fixed work location)?



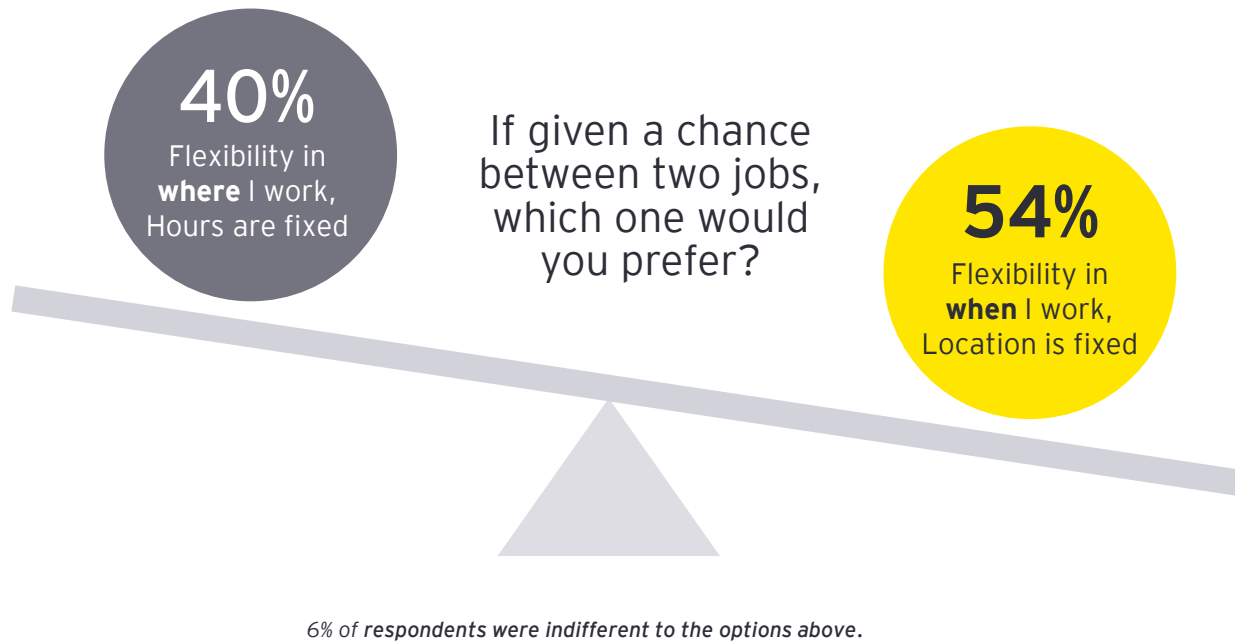
■ Extremely important ■ Medium importance
■ Low level of importance ■ Not important to me

How important is it to you to have flexibility in **when you work** (vs. your job having fixed hours)?



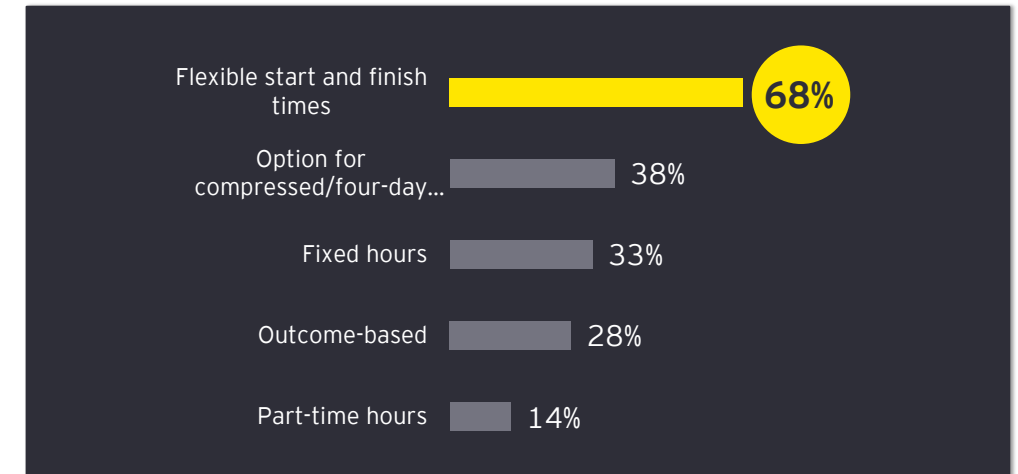
■ Extremely important ■ Medium importance
■ Low level of importance ■ Not important to me

... and if given a choice between flexibility in work location and work time, employees prefer flexibility in *when* they work



- ▶ When given a choice between where and when to work, **1.4x** more respondents chose to have flexibility in when they have to work
- ▶ However, **60%** of people who currently are working 100% at home would prefer the first option as compared with the second (34%)

What choices would you want your employer to provide related to when you have to work? (top three choices)



Percentages do not sum to 100%, as each respondent could choose up to three of the options above. The analysis doesn't include respondents who chose "Other option for when I work" and "none of the above"

- ▶ **Two-thirds** of employees would want their employers to provide them with flexible start and finish times
- ▶ Another **one-third** of employees want their employers to offer shorter working weeks

54% of employees say they are likely to quit if they are not offered the flexibility they want

- ▶ **A majority (54%) of employees are prepared to quit** if they aren't offered the flexibility they want; but this headline finding hides some significant variation among groups of employees
- ▶ Regression analysis (key drivers analysis) finds that some demographic factors are much stronger predictors of an employee's likelihood to quit than others

Most likely predictor: **Leave**



Most significant factor

- 1 Manager/leader
- 2 <10 years of tenure
- 3 Tech role
- 4 Caregiver
- 5 Finance role

Most likely predictor: **Stay**



Most significant factor

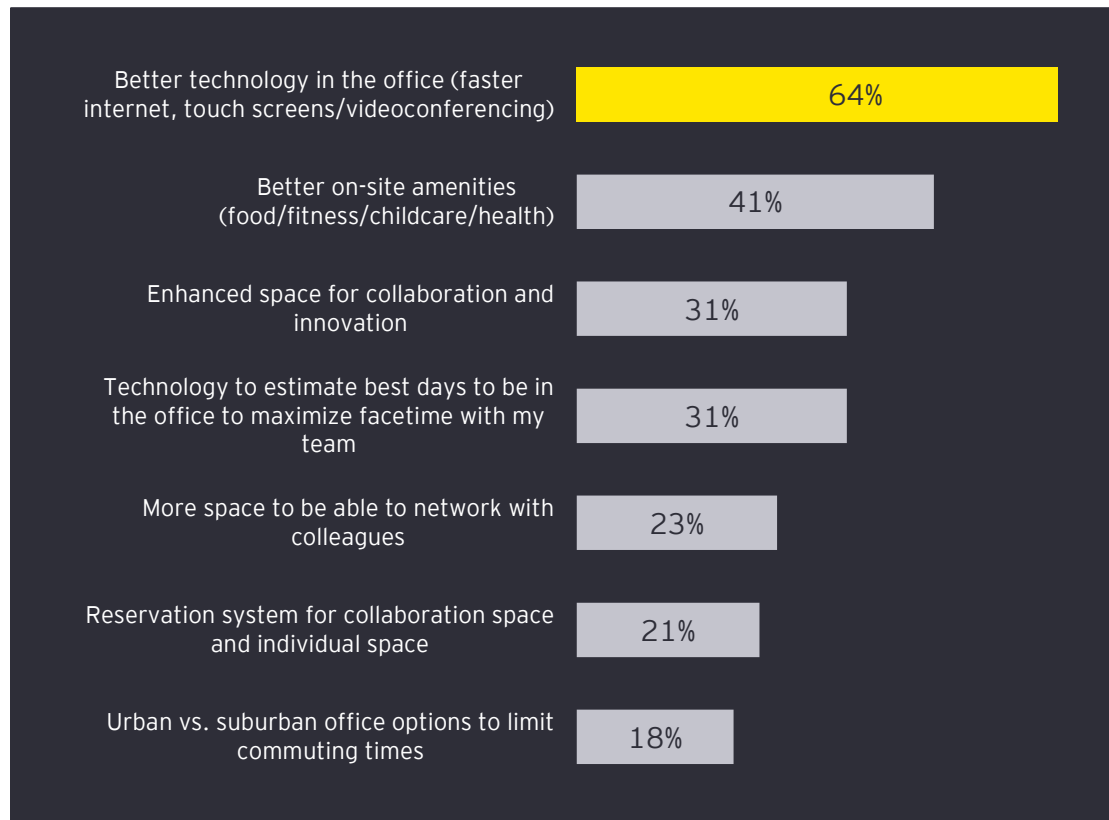
- 1 Baby Boomer
- 2 10+ years of tenure
- 3 Gen X
- 4 Education role
- 5 Government role

For a given outcome, this analysis finds the combination of factors that do the best job of explaining that outcome. The result is the **relative importance** of each factor in explaining the variation in the outcome. The outcome here is "Likelihood to quit if your preference for when and where you work is not accommodated by your employer," and the demographic variables analyzed are gender, ethnicity, generation, household income, job tenure (years), job level, caregiver status (Y/N) and marital status.

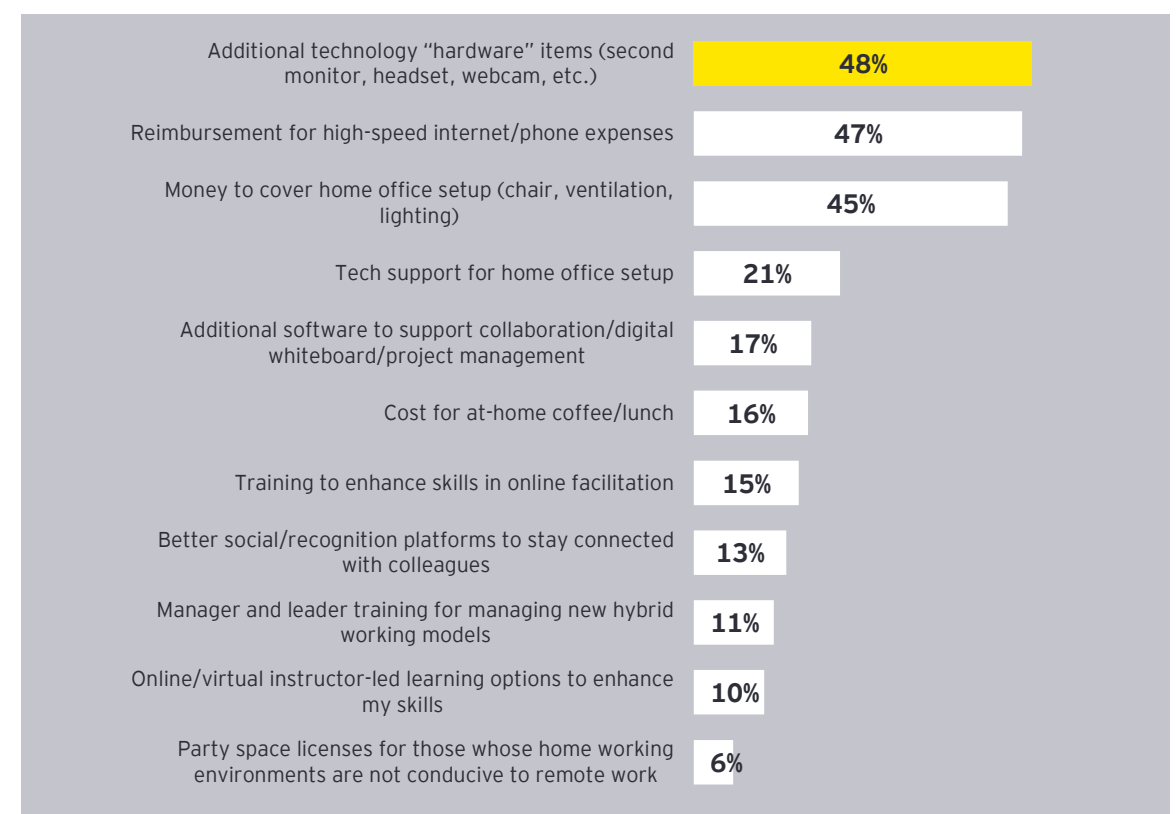
Employees who prefer a hybrid work model want company investments in at-home and on-site technology to remain productive

The questions below were asked of the respondents **who would prefer to work in some form of a hybrid model** when there are no longer any pandemic restrictions to work (n=4,314)

What would you like to see your company spend money on to make you most productive when in the office? (top three choices)



What would you like to see your company spend money on to make you most productive when working remotely? (top three choices)



Percentages do not sum to 100%, as each respondent could choose up to three of the options above.

EY Employee Remote Work Preference Index (RPI)

New! Index score to assess, **quantify** and compare the degree of flexibility desired by employees and their preferred return to work model

Based on a consistent set of answers to three questions regarding remote work

38%
Remote Work
Preference
Undecided



62%
Remote Work
Preference
Decided

Work
model/preference

Flex:
where
to work

Flex:
when to
work

62% (n~10k)
had clear and consistent work model preferences

38%
did not show clear and consistent preferences for
these questions

Aggregation of responses created a "Remote Work
Preference" score

Created score of 1-3 where

1 = "Old normal"

3 = "New normal"

For the **62%**
of employees who have a defined Remote Work
Preference, the average index score is **2.7**

Scale/score

1

The "old normal"

2

Hybrid

3

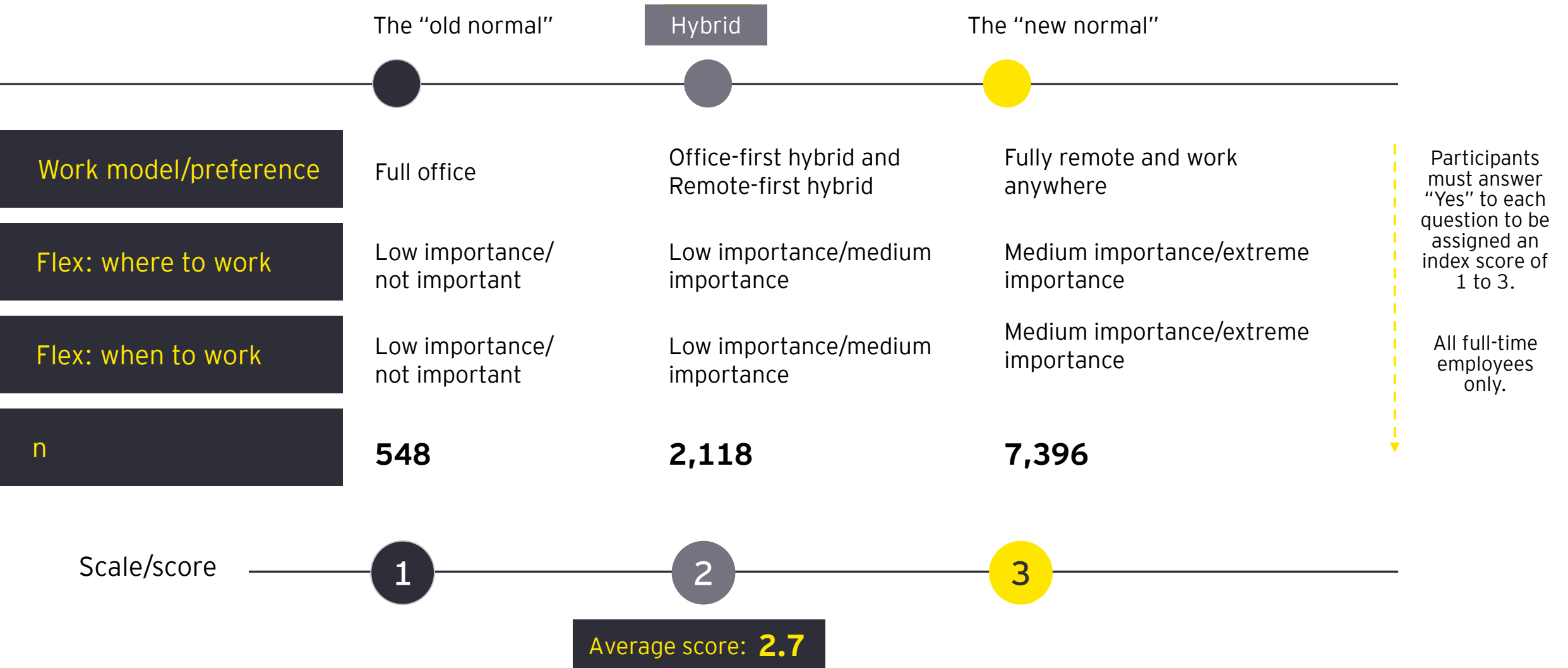
The "new normal"

Average score: **2.7**

Index details

62% of respondents grouped

Index score to assess, quantify and compare the degree of flexibility desired by employees and their remote work preferences



Profiles from the Employee Remote Work Preference Index

62% of the survey respondents could be categorized under three discrete profiles: the Office Optimal, the Hybrid Hopeful and the Remote Ready. The remaining 38% of the survey population falls in the Undecided category

←----- Consistent preferences within the profiles -----→

	Office Optimal (Falling in the first category)	Hybrid Hopeful (Falling in the second category)	Remote Ready (Falling in the third category)	Undecideds (Outliers/falling in no category)
Employer loyalty	Unlikely to quit (87%) their jobs if flexibility not accommodated by the employer	Unlikely to quit (67%) their jobs if flexibility not accommodated by the employer	Likely to quit (67%) their jobs if flexibility not accommodated by the employer	Unlikely to quit (52%) their jobs if flexibility not accommodated by the employer
Effective productivity measurement	Believe that productivity cannot be measured (39%) by employer if they work from anywhere	Believe that productivity can be measured (57%) by the employer regardless of where they work	Believe that productivity can be measured (74%) by the employer regardless of where they work	Believe that productivity CAN be measured (64%) by the employer regardless of where they work
Business travel	Would like limited/no travel (72%) after the pandemic	Would like moderate to extensive travel (61%) after the pandemic	Would like moderate to extensive travel (65%) after the pandemic	Would like Moderate to extensive travel (59%) post the pandemic
Company's creativity	Disagree (44%) that a new mix of on-site and remote work will support their company to be more creative	Agree (62%) that a new mix of on-site and remote work will support their company to be more creative	Agree (72%) that a new mix of on-site and remote work will support their company to be more creative	Agree (62%) that a new mix of onsite and remote work will support their company to be more creative
Remote days	Expect to work 0 to 1 day per week (90%) from home when the world returns to normal	Expect to work 2 to 3 days per week (52%) from home when the world returns to normal	Expect to work more than 4 days per week (41%) from home when the world returns to normal	Expect to work 0 to 1 day per week (45%) from home when the world returns to normal
Company's culture	Believe that there is no change to the company culture (40%) since the beginning of the pandemic	Believe that the company culture has changed and gotten better (45%) since the beginning of the pandemic	Believe that the company culture has changed and gotten better (51%) since the beginning of the pandemic	Believe that the company culture has changed and gotten better (47%) since the beginning of the pandemic

Profiles from the Employee Remote Work Preference Index - *Option 2*

We can group **62%** of our respondents in to three distinct cohorts: **Office Optimal**, **Hybrid Hopeful** and **Remote Ready**. Each of these cohorts have distinctly different characteristics and return to work preferences, with the Remote Ready cohort being the largest and the most ready to “re-imagine ways of work”.



Hybrid Hopeful

33% are **likely to quit** their jobs if flexibility not accommodated by the employer

61% would like **moderate to extensive travel** after the pandemic

52% expect to work **2 to 3 days per week from home** when the world returns to normal

45% believe that the company **culture has changed and gotten better** since the beginning of the pandemic



Office Optimal

13% are **likely to quit** their jobs if flexibility not accommodated by the employer

72% would **like limited/no travel** after the pandemic

90% expect to work **0 to 1 day per week from home** when the world returns to normal

28% believe that that the company **culture has changed and gotten better** since the beginning of the pandemic



Remote Ready

67% are **likely to quit** their jobs if flexibility not accommodated by the employer

65% would like **moderate to extensive travel** after the pandemic

41% expect to work **more than 4 days per week** from home when the world returns to normal

51% believe that the company **culture has changed and gotten better** since the beginning of the pandemic

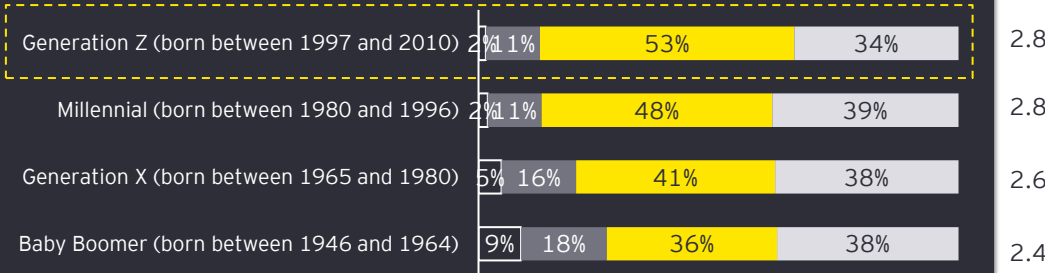
Index scores by generation, work location and sector

Remote Ready employees are more likely to be from the youngest generation – Gen Z – and to work in Technology or Finance sectors

Office Optimal Hybrid Hopeful Remote Ready Undecideds

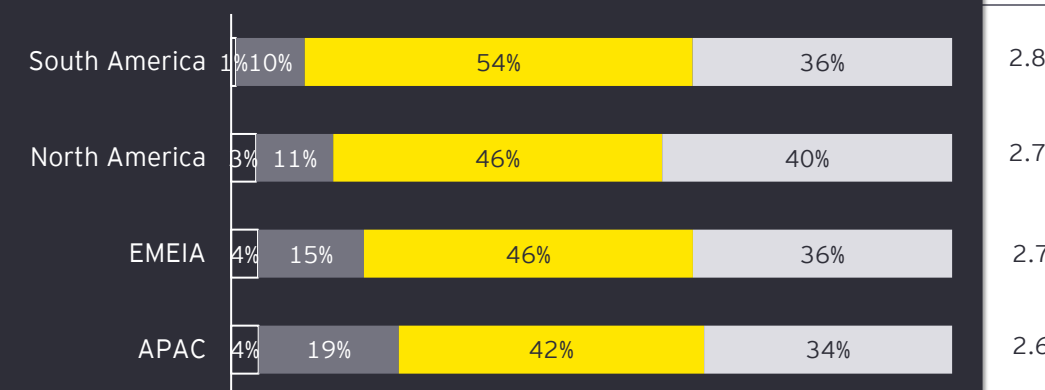
By generation

Remote Work Preference Index Score (1-3)



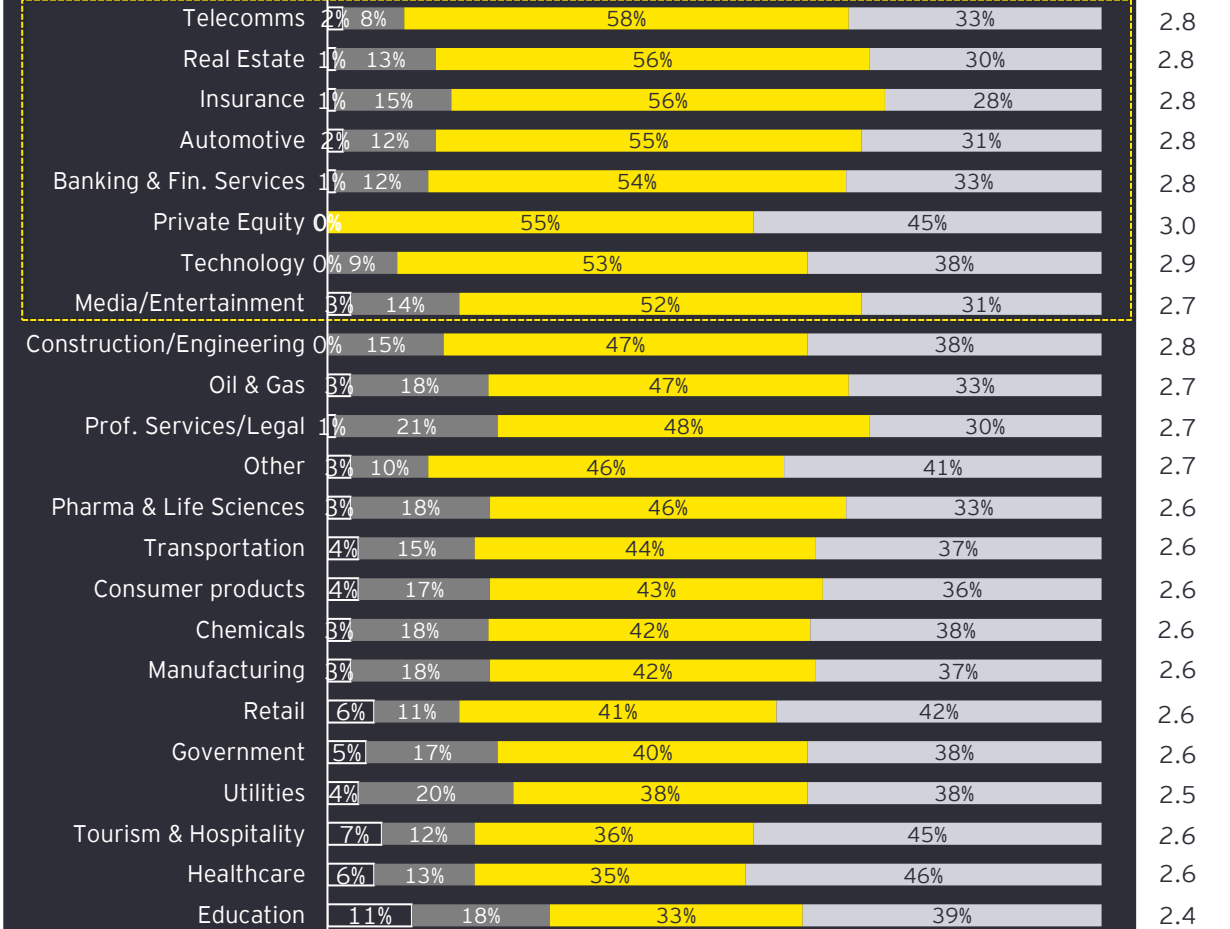
By work location

Remote Work Preference Index Score (1-3)



By sector

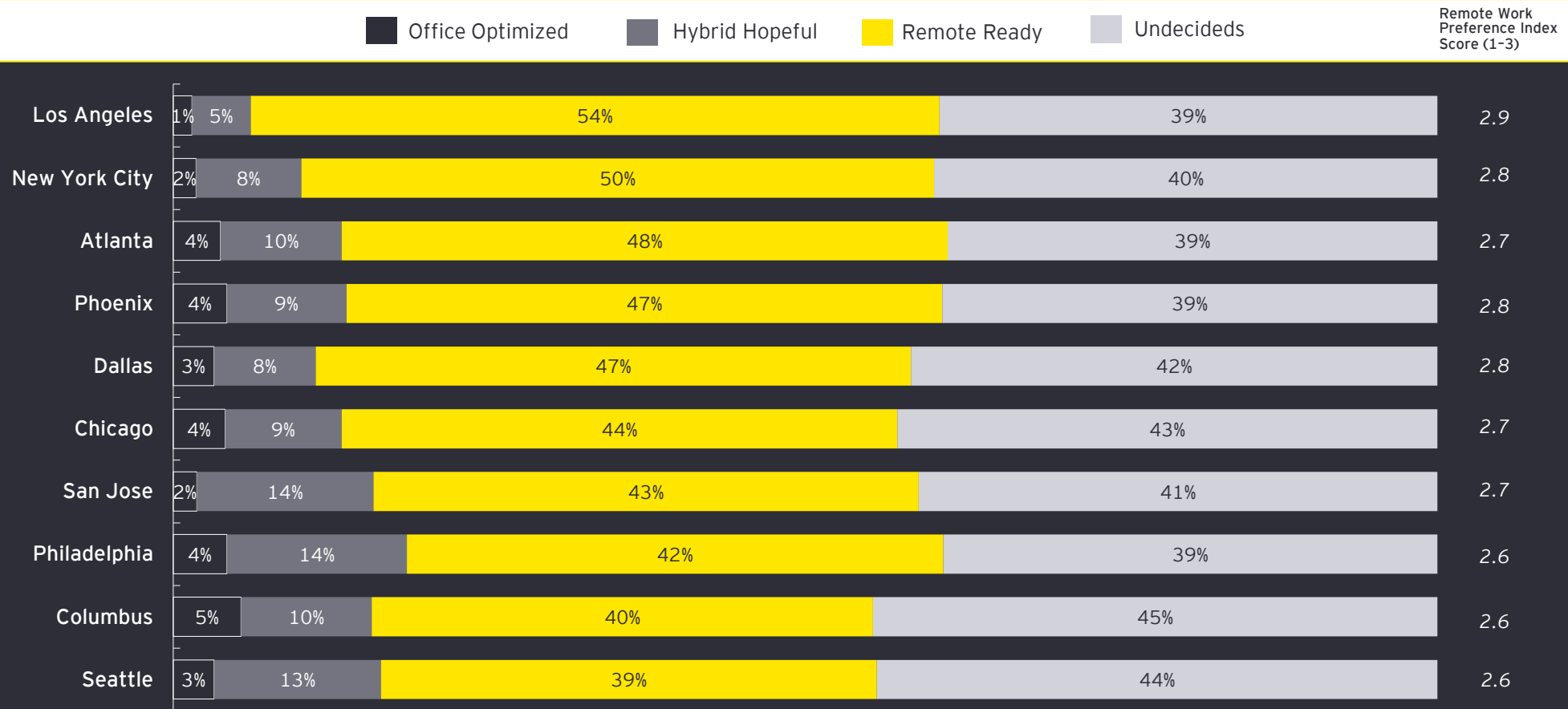
Remote Work Preference Index Score (1-3)



Totals may not sum to 100% due to rounding

Cities analysis (preview): employees in Los Angeles most likely to be Remote Ready; those in Seattle are the least likely

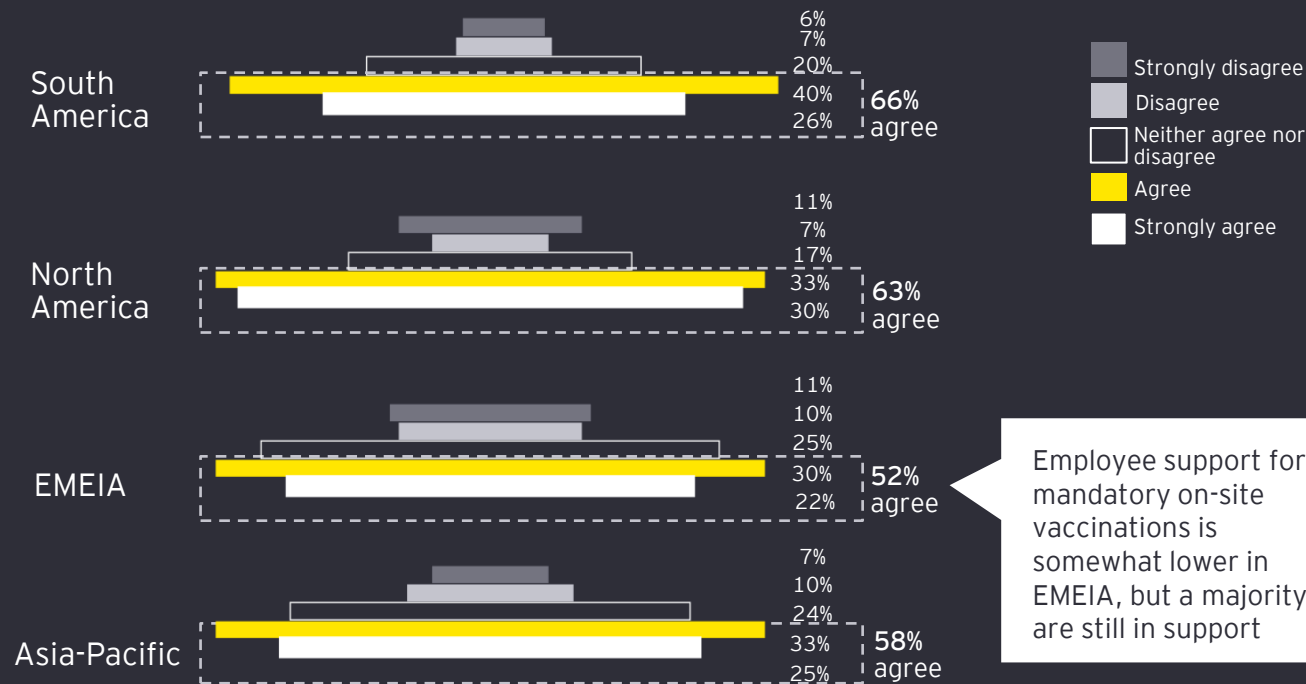
Employee remote work preference index, by US city



Percentages may not sum to 100% due to rounding.

Most employees agree that their company should require vaccination of all workers in order to return safely to work

I think my company should require vaccination of all employees (subject to health exemption or local legal rules) so that we can safely return to work

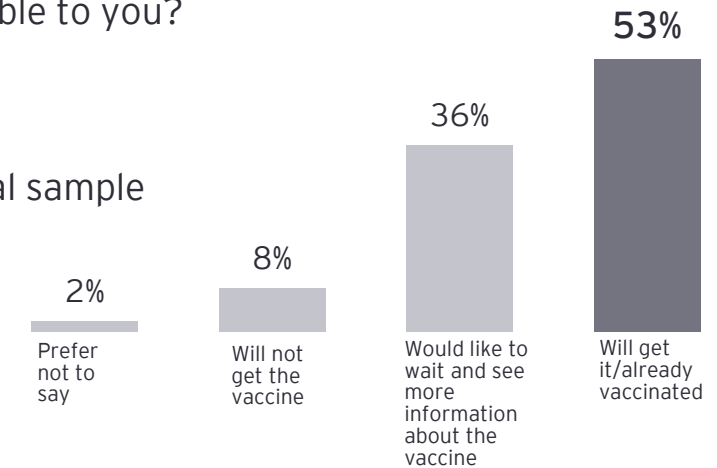


Employee support for mandatory on-site vaccinations is somewhat lower in EMEIA, but a majority are still in support

Note: Percentages will not sum to 100% due to the exclusion of respondents who answered "I don't know"

Will you get the COVID-19 vaccine when it becomes available to you?

Global sample



- ▶ Despite broad overall employee support for required vaccinations, there is a high degree of variance across countries and sectors:
- ▶ **84%** of respondents across India agree that the company should require vaccination, while just **28%** from France agree with it
- ▶ **76%** of respondents across the Technology sector agree that the company should require vaccination, while just 43% from the Insurance sector agree with it

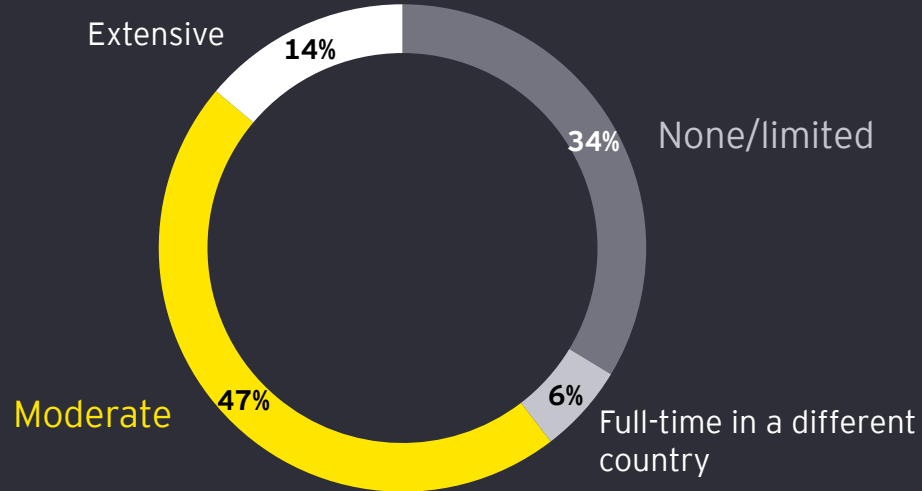
South America includes Brazil, Colombia and Mexico; North America includes Canada and US; EMEIA includes UK, Germany, France and India; and Asia-Pacific includes Australia, Indonesia, Japan, Malaysia, New Zealand, Philippines and Singapore

The pandemic brought global business travel to a grinding halt, but employees now want to travel for business, with certain preferences

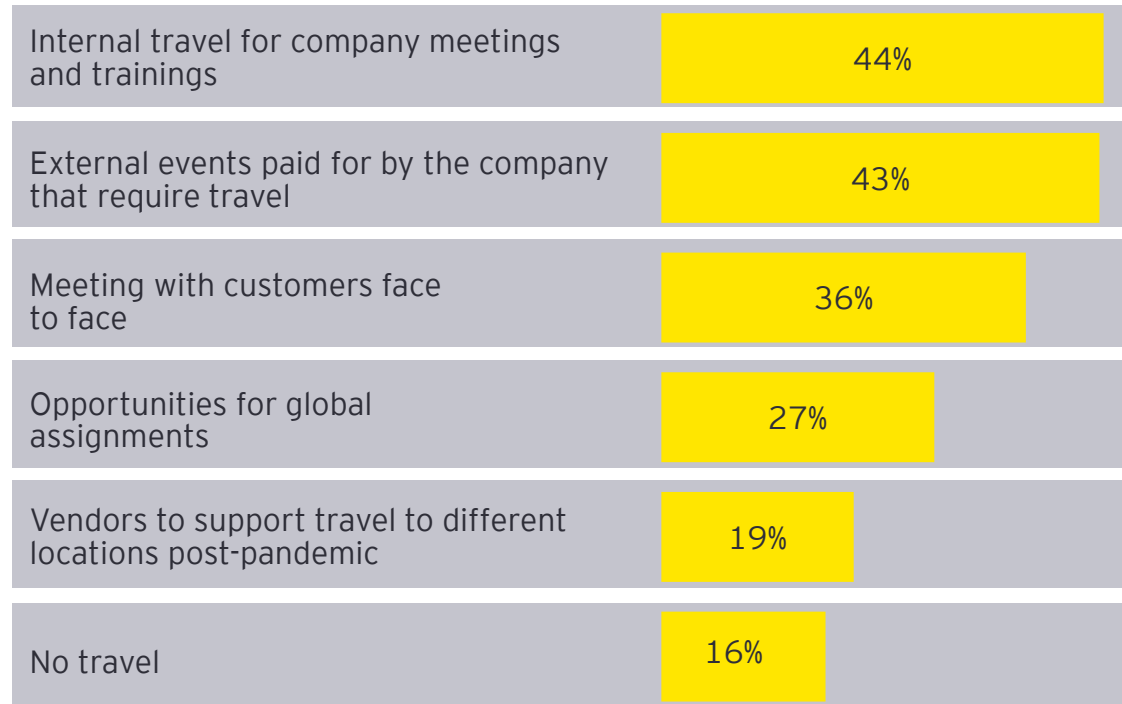
Nearly **two-thirds of employees want to continue** business travel post-pandemic, to at least some degree

Employees want to travel most for **internal company meetings or to external events**

How much business travel would you like to do after COVID-19?



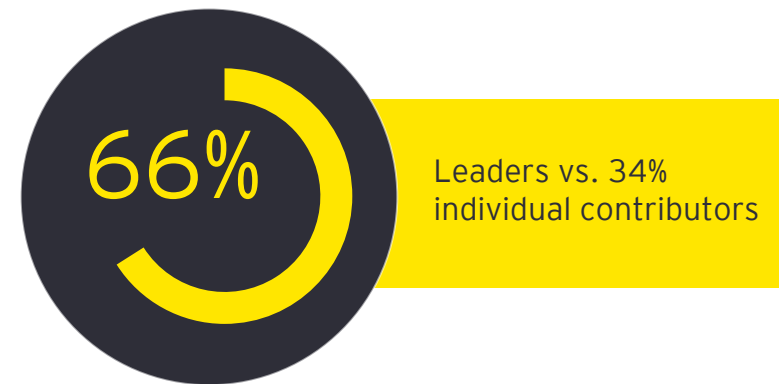
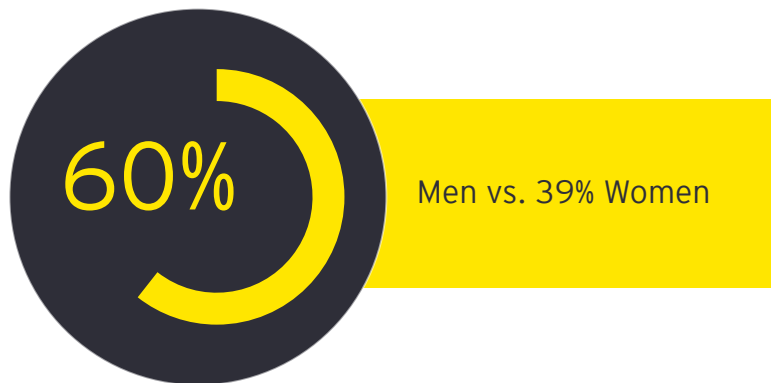
Where would you like to see your employer continue to allow business travel and associated processes? (multi-select)



Percentages do not sum to 100%, as each respondent could choose any or all of the options above.

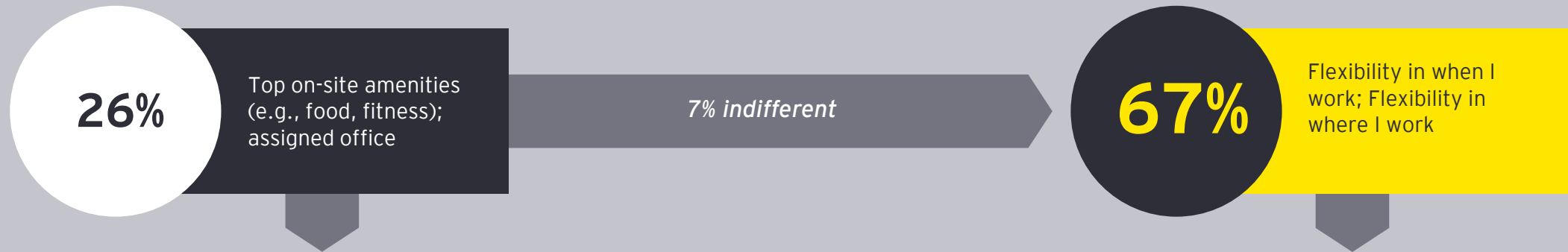
Employees in leadership roles and those who retain a high level of job satisfaction are among the most willing to travel

Notable characteristics of employees who show a high willingness to travel moderately to extensively post-COVID-19



When asked to choose between flexibility and top on-site amenities, employees generally choose flexibility

Trade-off question: If given a choice between top onsite amenities (e.g., food, fitness); assigned office vs. flexibility in *when* I work; flexibility in *where* I work



Out of the 26% of respondents who chose top on-site amenities; assigned office

- ▶ **More likely** to be already working on-site (56% as compared with overall 46% whose primary work location is 100% at work site)
- ▶ **68%** were “essential employees” during COVID-19 and needed to work on-site
- ▶ **More likely** to expect to work from the office post-pandemic (46% as compared with overall 34% who want to work zero or one day from home when the world returns to normal)

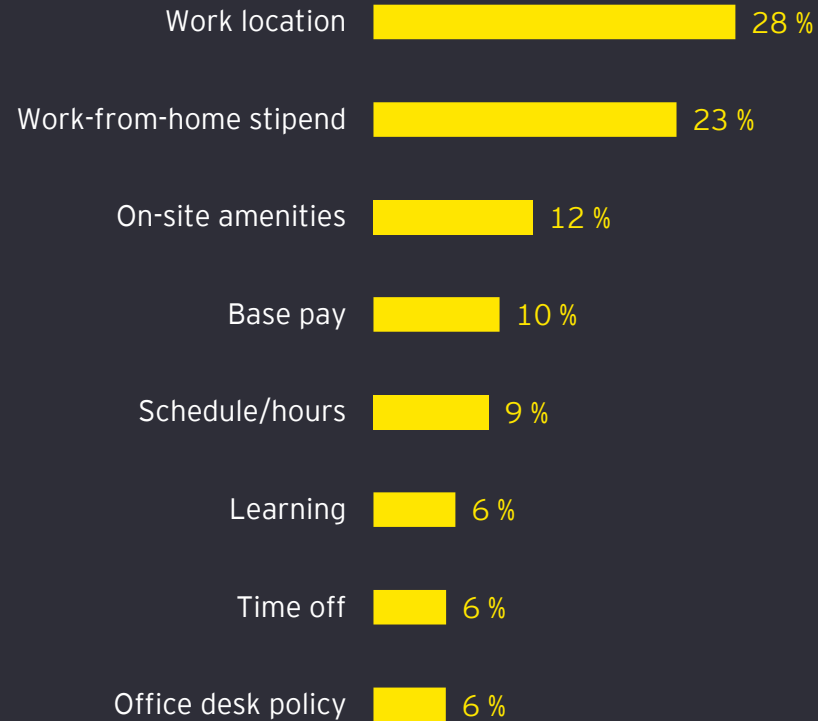
Out of the 67% of respondents who chose flexibility in *where* and *when* they work

- ▶ **52%** think their company culture has changed and gotten better
- ▶ **63%** have indicated a medium to high level of interest in relocating
- ▶ **More likely*** to value “Great meeting/ collaboration space” as an important office attribute

**These responses are applicable to respondents who chose hybrid working as their preferred future work model.*

Results of conjoint study highlight trade-offs on preference

Relative importance of preferences



Key findings

- ▶ Work location and work-from-home stipends are the biggest “hot buttons” with the strongest preferences found here
- ▶ Less sensitivity to having allocated spaces or time-off policies
- ▶ Consistency of preference in global findings (81% consistency in the relative preference)

* The sample size for the conjoint study was 11,232. Numbers are subject to revision.

Additional analyses: Key demographic characteristics of the three major index profiles

Attributes such as generation, job role and caregiving responsibilities influence employee choices

Office Optimal

(Falling in the first category)



Are most likely to be women **(52%)** vs. Hybrid Hopeful **(45%)** and Remote Ready (43%)



1.4x more likely to belong to Gen X (born 1965-80) **(43%)** vs. 30% overall



68% do not have caregiving responsibilities vs. 51% overall



70% are individual contributors (job level) vs. 44% overall



1.7x more likely to have a customer facing organization culture **(41%)** vs. 24% overall

Hybrid Hopeful

(Falling in the second category)



Are fairly evenly split between men **(54%)** and women **(45%)**



Are evenly split between older and younger generations, with **49%** born before 1980 and **51%** born after 1980



60% do not have caregiving responsibilities vs. **51%** overall



Are evenly split between being either managers/leaders **(48%)** and individual contributors **(52%)**



Are evenly split between being "essential" **(50%)** and "nonessential" **(50%)** employees during COVID-19

Remote Ready

(Falling in the third category)



One-third are most likely to work in Banking & Financial Services or Technology vs. 25% overall



61% have at least a 30-min commute to the office (16% at least 1 hour) vs. **55%** overall



52% are most likely to have caregiving responsibilities vs. **40%** Hybrid Hopeful and 32% Office Optimal



71% are interested in relocating vs. **61%** overall

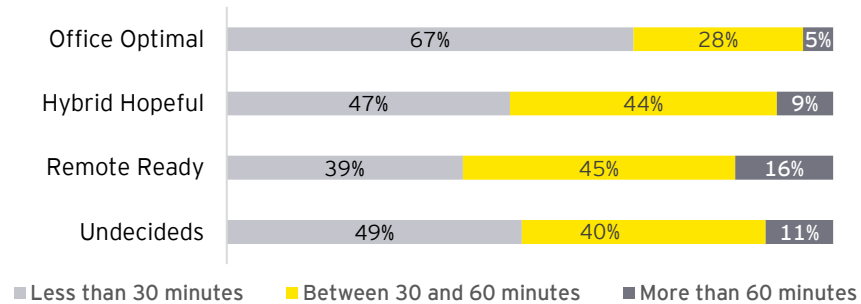


54% are most likely to describe their organizational culture as focused on Quality & Innovation vs. 44% Hybrid Hopeful and **34%** Office Optimal

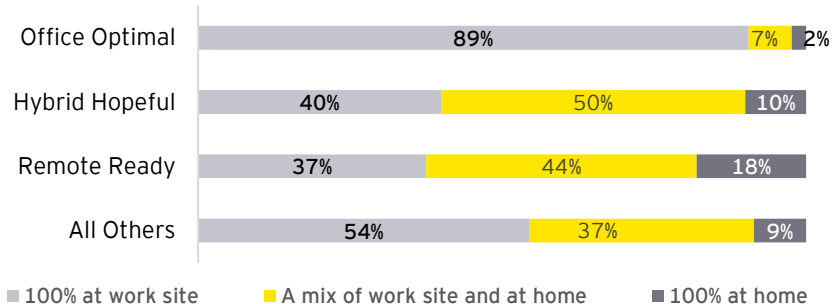
Additional analysis: Office attributes play a key role in the choices made

Nearly 9 in 10 Office Optimal are already working full-time from the office, and half of them have been working with their current employer for more than a decade. Their future preferences can therefore be seen as a reflection of their current working environment.

Current commute time (one-way)



Primary work location



10+ years

<10 years

Tenure at
the
current
company

50%

Office Optimal

70%

Remote Ready

58%

Hybrid Hopeful

Two-thirds of the Office Optimal cohort say their current commute time to office is less than 30 minutes, and **78%** use their personal vehicle to reach the office.

89% of Office Optimal say that their primary work location is full-time at their work site, and a majority (50%) of them have been with their organization for more than 10+ years, indicating their loyalty to their employer.

Most of the Remote Ready and Hybrid Hopeful cohort is currently working in a more flexible operating environment and wants to retain this flexibility after the pandemic.

Currently, 37% of the Remote Ready cohort are working entirely from the office. In the future they would want transition to a fully remote model and are not ready to trade their demand for flexibility. **67%** of this cohort is likely to quit if this flexibility is not accommodated by their employer.

Additional analysis: Employees expect to work remotely an average of 2.4 days per week going forward

When the world returns to “normal,” how many days per week, on average, do you expect to work from home?

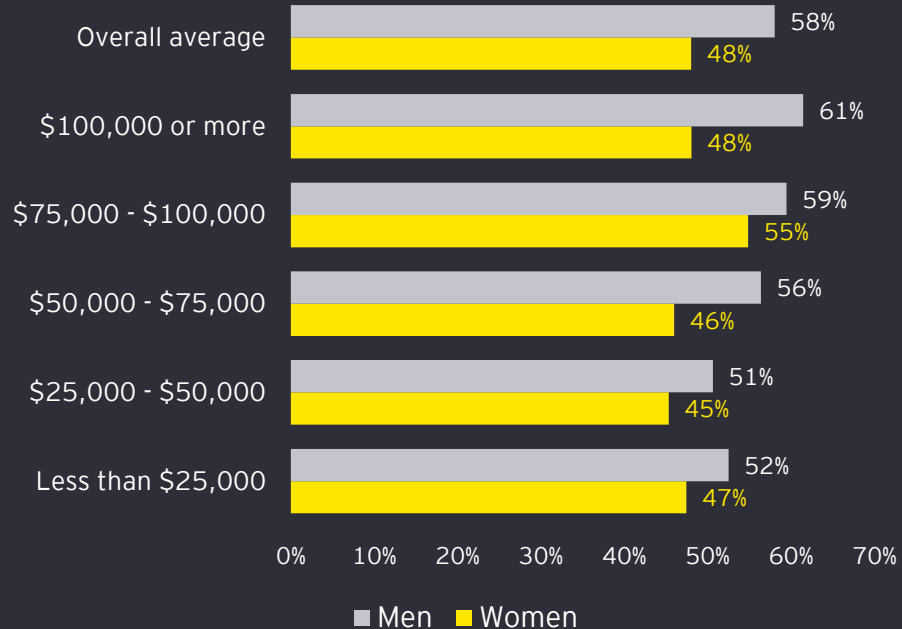
AREA	Expected remote working days			Avg. remote working days
	0 to 1	2 to 3	4 to 5	
Global	34%	38%	28%	2.4
Americas	34%	36%	30%	2.4
Asia-Pacific	33%	41%	26%	2.4
EMEIA	36%	39%	25%	2.3
SECTOR				
Insurance	22%	38%	40%	2.9
Telecommunications	22%	39%	39%	2.8
Technology	19%	44%	36%	2.9
Banking/Financial Services	19%	45%	35%	2.8
Professional Services/Legal	23%	46%	32%	2.7
Private Equity	21%	55%	24%	2.6
Construction/Engineering	27%	47%	26%	2.5
Automotive	29%	45%	26%	2.4
Real Estate	30%	44%	26%	2.4
Utilities	30%	44%	25%	2.4
Oil & Gas	30%	45%	25%	2.4
Chemicals	31%	46%	24%	2.4
Pharmaceutical/Life Sciences	35%	38%	26%	2.3
Media/Entertainment	32%	46%	23%	2.3
Manufacturing	36%	40%	24%	2.3
Government	42%	37%	21%	2.1
Consumer products	42%	41%	17%	2.0
Retail	50%	27%	23%	2.0
Transportation	49%	28%	23%	2.0
Tourism/Hospitality	52%	27%	21%	1.9
Education/Higher Education	52%	27%	21%	1.9
Hospitals/Healthcare	53%	26%	20%	1.8

- ▶ Across Areas and the sectors, there **actually isn't much variance** in preferred number of days employees expect to work remotely
- ▶ On average, employees **expect to work between 2 and 3 days** a week remotely (2.4)
- ▶ **One-fifth (22%) of employees** would prefer to work full-time at the office in the future when there are no longer any pandemic restrictions to work

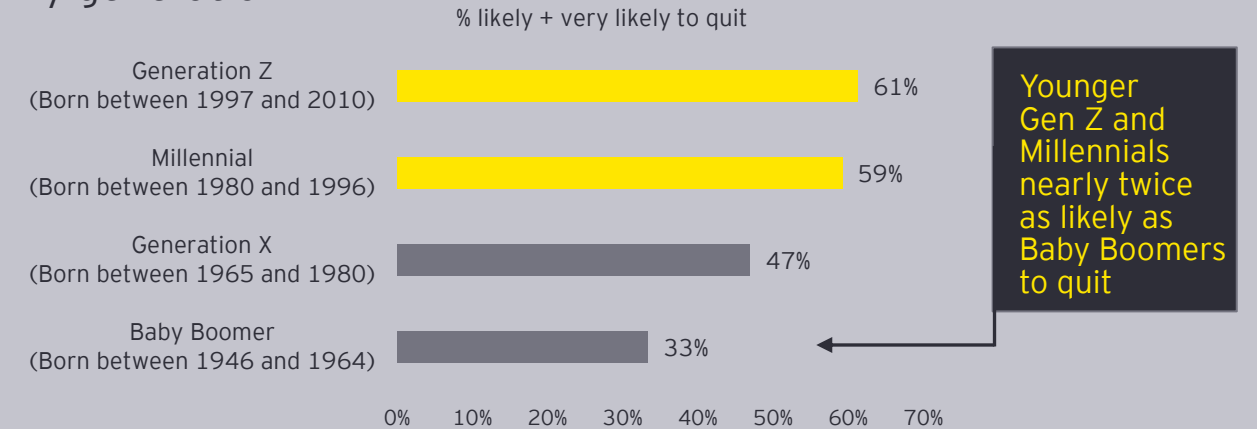
Additional analysis: Likelihood to quit by gender and income, generation, and caregiving responsibilities

By gender and income

Men are more likely to say they are prepared to quit without desired flexibility. This is strongest for male employees with the highest household incomes.

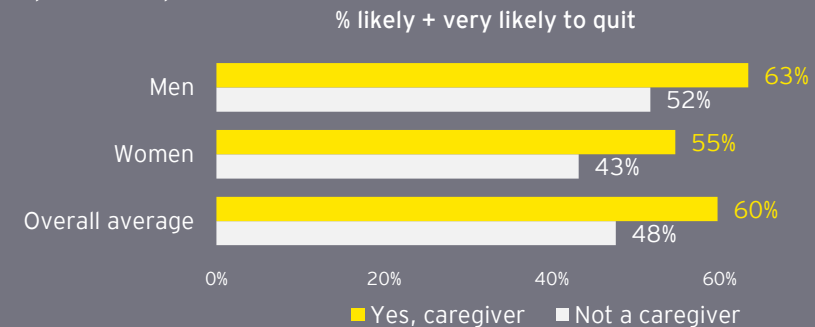


By generation



By caregiving responsibilities

For both men and women, those with caregiving responsibilities are more likely to say they are prepared to quit

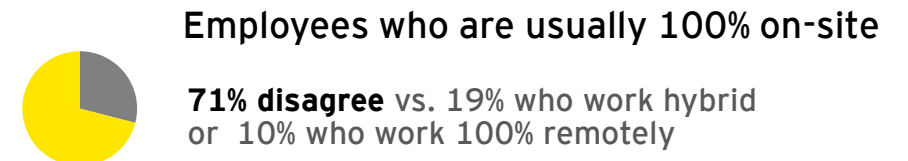
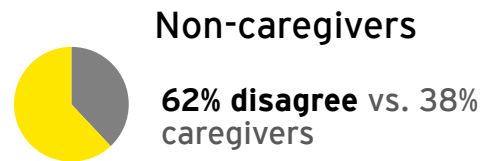
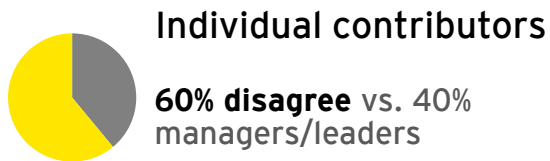


Additional analysis: Not *all* employees have a positive view about new ways of working and productivity

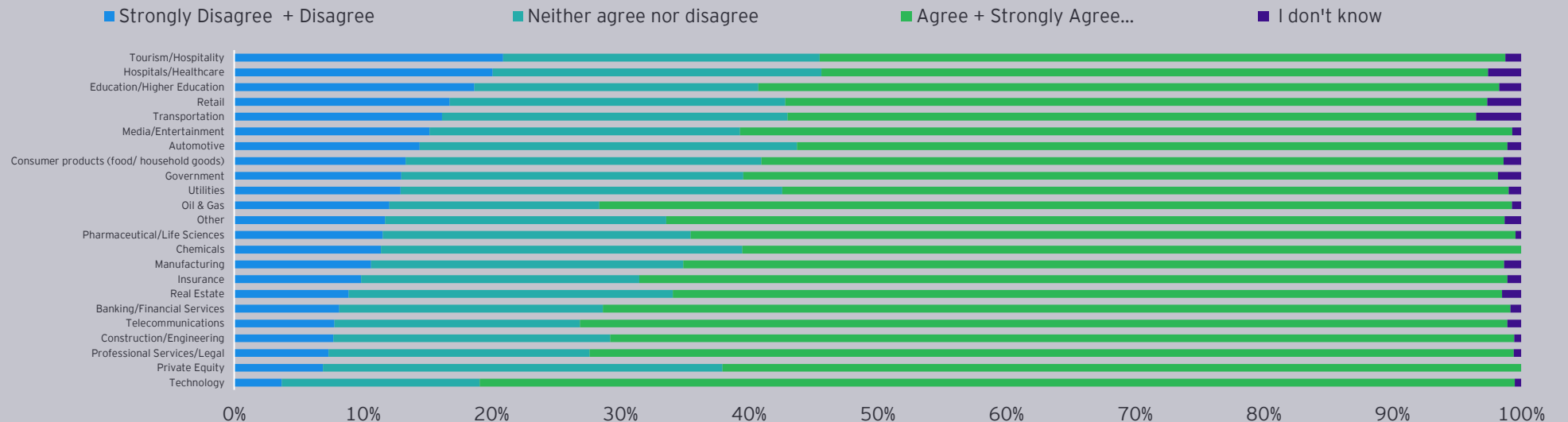
Mix of on-site and remote work on company's productivity

12% of employees disagree that a new mix of on-site and remote work will increase their company's productivity

Of the above 12% respondents, the following are least likely to have a positive view that a new mix of onsite and remote work will increase productivity:



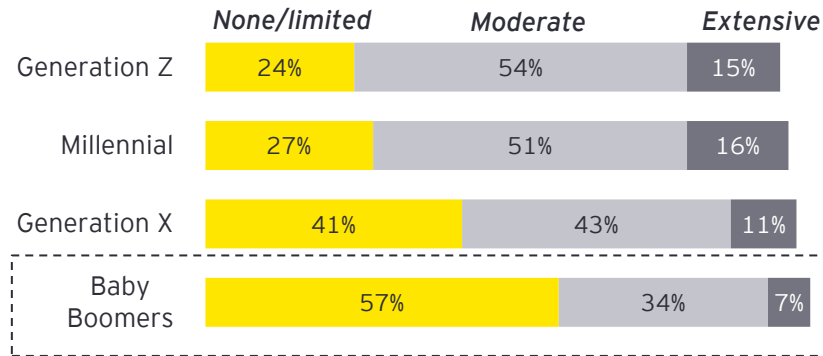
Sectors with employees least likely to be positive about productivity impact



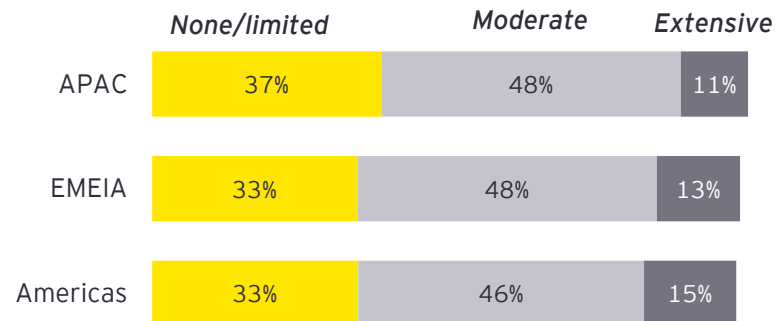
Additional analysis: Willingness to travel for business differs across a number of demographics

How much business travel would you like to do after COVID-19?

By generation

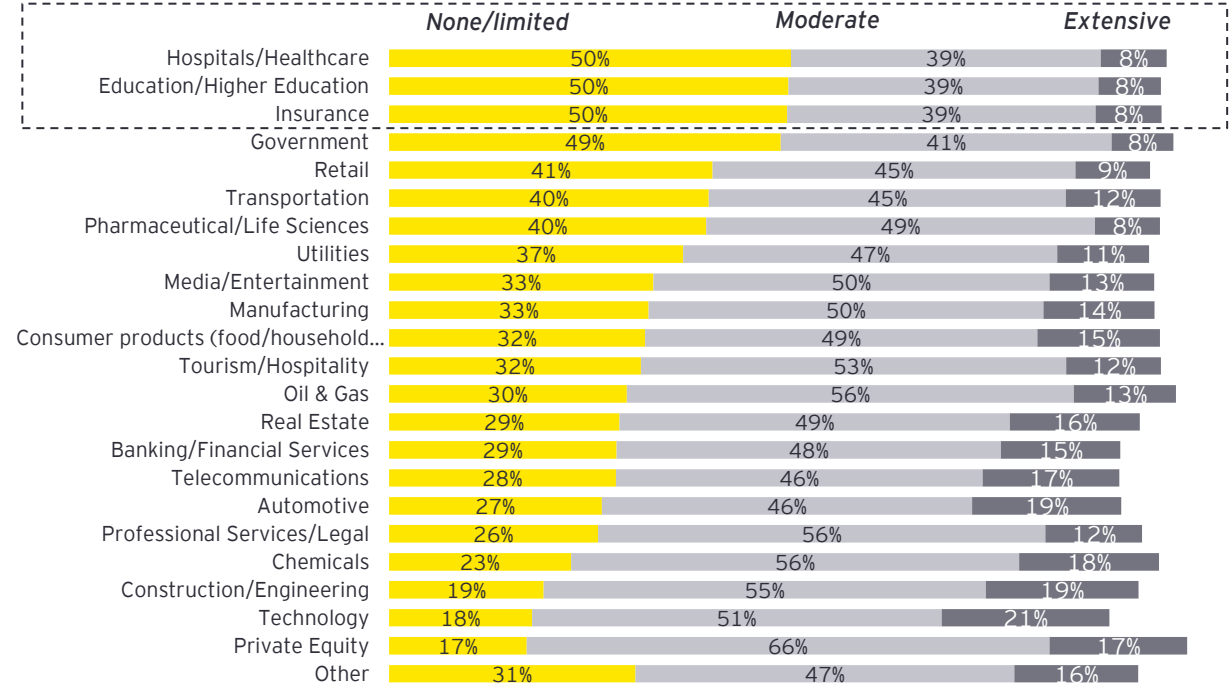


By area

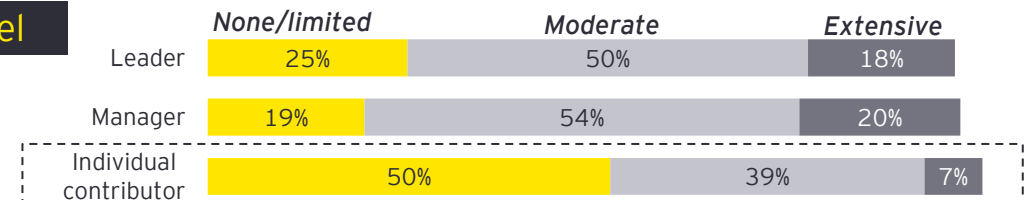


By sector

Committed to radical change in order to survive and thrive



By job level



Note: The summary excludes people who want to travel full time in a different country; therefore, the percentages do not sum to 100%.

Additional analysis: Caregivers desire flexibility, have willingness to travel and believe that productivity of their job can be measured irrespective of where they work

Job satisfaction and retention

Two-thirds (**66%**) of caregivers rated their current job satisfaction at 8 and above on a scale of 1 to 10 vs. 54% non-caregivers

95% are likely to stay with their current organization for at least next 12 months vs. 91% non-caregivers

Culture change and productivity

53% believe that the company culture has changed and got better since the beginning of the pandemic vs. 43% non-caregivers

72% believe their productivity could be accurately measured by their company irrespective of where they work vs. 61% non-caregivers

Pay and rewards

55% would prefer their pay to be adjusted to local market over time (not more than 5%-10% of current pay) and work remote from anywhere as compared with 38% who want no change to base pay and live within daily commuting distance to/from the office

Flexibility in the new normal

52% would prefer to work fully remote or work from anywhere after the pandemic vs. 50% non-caregivers

Six in 10 (**60%**) are likely to quit if preference for where and when to work is not accommodated by the employer vs. 48% non-caregivers

Business travel

Two-thirds (**67%**) would like to travel for business moderately to extensively after COVID-19 vs. 55% non-caregivers

Company productivity

71% think a new mix of on-site and remote work will increase their company's productivity vs. 59% non-caregivers



Client-specific insights are available through the client pilot program

As we generate insights for the second Work Reimagined survey, we are inviting select clients to participate in the client pilot program. This program will provide client-specific insights to facilitate impactful conversations about reimagining work.



WHO?

- ▶ The EY organization select clients
- ▶ 100 - 500 employee respondents

WHEN?

- ▶ Pilot clients can be onboarded on a rolling basis from March to June 2021
- ▶ The pilot process takes four weeks: two weeks of set up and two weeks of analysis

Contact your Area Field of Play Leader, Area Markets Leader, or Roselyn Feinsod to get started.

How **does it work?**

The pilot program is an opportunity for you to learn more about the issues your employees face around the future of work and how this compares with key geographical and industry segments.

1. Pilot clients will be provided a unique link for employees to take the survey
2. Data will be de-identified and be part of EY normative dataset

What is included and for what **cost?**

Standard (100-500 participants):

- ▶ No cost to clients for baseline offer
- ▶ Customized insights summary
- ▶ Presentation of findings

Why should I **participate?**

Pilot program participants will receive customized insights, analysis, and considerations tailored to their organizational environment and challenges. The program can help accelerate decision-making and planning for broader Work Reimagined efforts.

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