

# The Future for Workers, By Workers: Making the Next Normal Better for All



A dramatic workforce transformation is happening in front of our eyes. COVID-19 began as a health crisis and is playing out as an economic crisis and a social crisis. Work literally left the building and whole industries are disrupting at speeds never seen before.

Workforce demand is shifting too. Increased demand for cyber security experts, data analysts, software and app developers and new roles like contact tracers, distance monitors and temperature checkers are emerging as fast as others decline in aviation, hospitality and entertainment.



And work is being categorized in new ways – essential and non-essential – many celebrated in our communities: the delivery drivers, grocery workers and healthcare heroes who remained on the job throughout.

In these unpredictable times, one thing is certain – this crisis should be a catalyst for a new future of work, that is more flexible, more diverse and more wellbeing-oriented than we could ever have imagined. Let's take this opportunity to **go back to the future of work** and create more opportunities for the many not the few.

To find out how this crisis is accelerating What Workers Want, ManpowerGroup asked more than 8,000 people in 8 countries about the future for workers. Listen up, the workers have spoken.

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# 01 COVID-19: Global Impact At Work



Keeping their job is a top priority for workers everywhere



After health concerns, workers are most worried about returning to an old way of working, losing the flexibility they have gained

8 IN 10

Want to better balance work and family in future

43%

Workers believe this marks the end of the office 9-5. Most prefer 2-3 days a week in the workplace

A small proportion of the population will be infected by COVID-19, almost all (93%) will be impacted



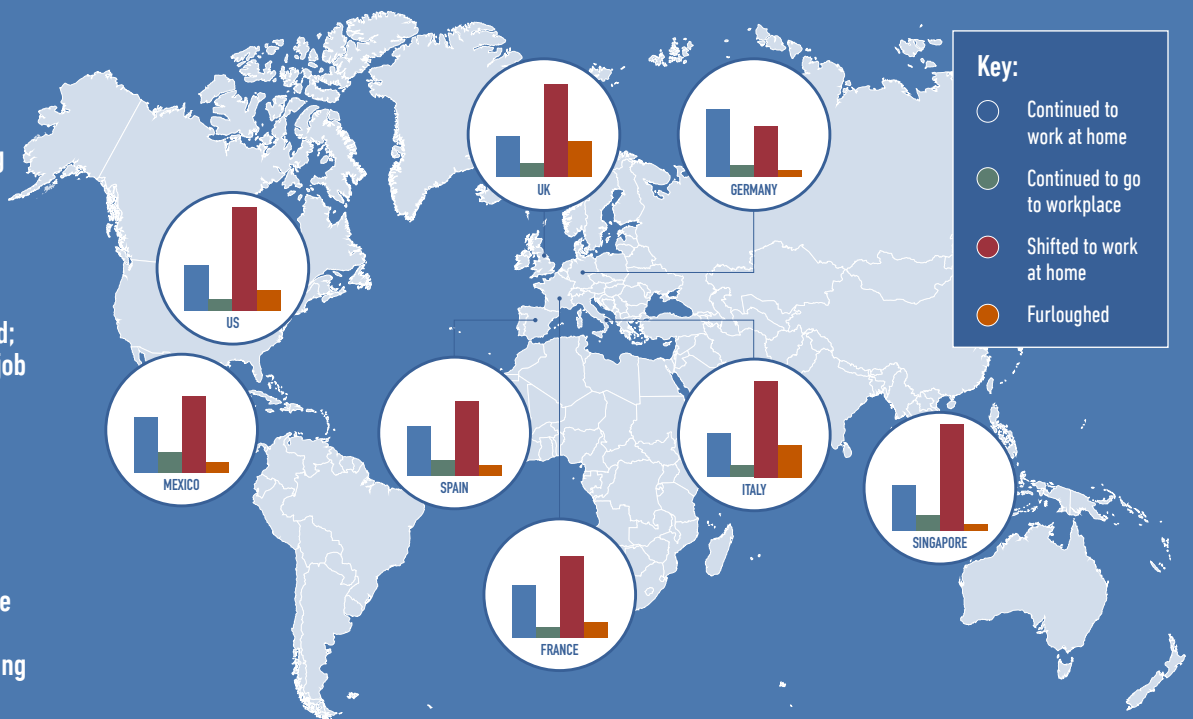
Germany - most resilient? 18% say no impact on working life vs 7% globally



UK, Italy - highest proportion furloughed; swift introduction of job retention programs



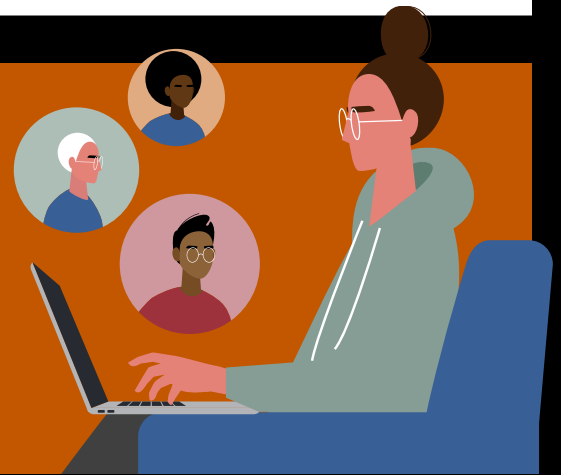
Mexico, U.S. - most likely to work at home or self-isolate; most anxious about returning



Governments were universal in their unprecedented speed to provide aid early in the pandemic. But approaches have varied. Some provided unemployment payments to individuals direct (U.S.), others wage replacement / job retention / subsidized furlough programs to employers (Europe and Singapore). As these schemes expire and governments cease, pause or reallocate support by impacted sector the economic impact will become more evident.

# 02 Celebrate or Commiserate – Returning to the Workplace

As lockdowns lift and restrictions ease, workers want to feel reassured that health, safety and wellbeing comes first when returning to the workplace. Trust and transparency have never been more important and the best employers know they need data and insight to instill confidence. Pulse surveys, feedback channels, consultation and communication are critical.



## POSITIVE

RELIEVED,  
HAPPY,  
EXCITED

### GEN-Z



Most positive, more space, keen to catch up with colleagues, more appetite to learn and network to move up and earn more.

### BOOMERS



Keen to return, prefer to collaborate in-person, value space between work and home.

### GEN-X



Most likely to feel relieved, least likely to be nervous or concerned about health. Keen to get back to the office to collaborate and concentrate.

### BRAVO



Italy, one of the countries first impacted feel most confident yet least keen on losing their newly found autonomy and freedom.

## NEGATIVE

CONCERNED,  
NERVOUS,  
SAD

### MILLENNIALS



Least positive generation, especially parents. Seek most reassurance that sick workers told to stay home, most eager to avoid the commute, least willing to lose flexibility they have gained.

### LAST OUT, LAST IN



Mexico, Spain and U.S. most nervous, least relieved about returning to work.

### POLITICKING



In the UK & U.S. where response has been most politicized and fractured, people are most reluctant to return.

### BIG DEAL?



Large companies need to do most persuading to bring people back. These workers are most concerned about exposure to greater risk, most likely to feel positive about return.

# 03 Acceleration of Inequity – More Haves, Even More Have Nots

Workers are united in what they want for the future – to keep their job, stay healthy, learn and keep developing skills, and to not go back to the old way of working. Yet look closer and an even greater bifurcation within the workforce looks likely. Those with in-demand skills can call the salary shots, work remotely, avoid the commute and stay safe at home. Those with declining skills are required to commute to work onsite, and subject to even greater exposure.

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|--|---|
| <h2 style="margin: 0;">THE HAVES</h2> <p style="margin: 0;">Includes workers in cyber security, business transformation, accountancy, sales</p>  | <h2 style="margin: 0;">THE HAVE NOTS</h2> <p style="margin: 0;">Includes workers in hospitality, entertainment, retail and grocery stores</p>   |
| <ul style="list-style-type: none"> <li> Most likely to see wage increases even in downturns</li> <li> More employment security, with skills in demand even when unemployment rises</li> <li> View the office as somewhere to socialize, collaborate and take a break from home</li> <li> Can skip the commute and increased risk that public transport brings</li> <li> Greater flexibility over how and when they work, blending home and work in a way that works for them</li> </ul> | <ul style="list-style-type: none"> <li> More likely to experience unemployment, greater risk of furlough</li> <li> More impacted by reduced hours and reduced pay</li> <li> Less likely to be able to work from home – less flexibility and work life balance, more childcare challenges</li> <li> More relieved/ more need to return to the workplace</li> <li> More likely to have to commute, more cost, more risk, less me-time</li> <li> More stress of exposure to the virus, greater concerns of risk of infecting family</li> </ul> |

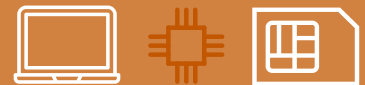
White Collar Privilege = Work-Life Privilege?



IT and Financial Services workers more likely to expect better work-life after crisis, versus those in Manufacturing or Retail

48% vs. 40%

Full-time workers expect improved work-life balance versus part-time workers



IT workers are the only sector who do not rank “just keeping their job” as top priority

# 04 The Great Skills Shift: How COVID-19 is Reshaping In-Demand Skills

The biggest workforce shift and reallocation of skills since World War II began in March. Skills that were en vogue in 2019 might now be out of fashion; and the shift is swift – even those skills most in demand in the early phase of the crisis are different to demand emerging now and expected in future.

Business Transformation, Health and wellbeing, Logistics and E-commerce

General Sales & Marketing, Hospitality & Leisure, Office Admin & Maintenance, Retail IRL (In Real Life)

This crisis is accelerating the demand for technical and human skills that we have been tracking and predicting for some time.

Acute skills shortages are exacerbating in tech – demand for cyber security, software development and data analysts continue unabated.

And there is rising demand too for human or power skills – in times of rapid transformation and uncertainty these so-called soft skills are more important than ever in workers and in leaders.



ManpowerGroup Survey of In Demand Soft Skills Dec 2019. In priority order of employer demand.

THE NEED FOR A SKILLS REVOLUTION IS HERE IN FULL FORCE.

# 05 Essential Workers. Essential Skills. Essential Pay?

The undervalued key workers have emerged as the essential heroes – serving us in hospitals, grocery stores, factories, delivery centers and delivering essential and non-essential goods the world over. The rise of voice and social media attention has led to a new category of workers, many better recognized, more widely celebrated and increasingly more supported.



## Emergency Responder to Long-Term Hero?

**76%** of all workers think essential workers should be paid more during the crisis

**1/4** say this should continue post-crisis

↑\$ DURING

↑\$ AFTER



## ITALY & US

Workers in Italy and U.S. least likely to think essential workers should continue to be paid more after the crisis (16% and 18% respectively), compared to 33% in Germany and the UK.



## DIVIDED

Governments and employers are putting their hands in their pockets – France and UK have committed to long term pay increases for essential workers in healthcare, teaching and law enforcement. Elsewhere policy makers, politicians, trade unions and individuals are calling for greater equity – between perm and temp workers, remote or onsite, non-essential and essential. For all workers, reassurance that health is priority will be most important for some time to come.

## 01 Equality Maker or Breaker? How the Crisis Impacts Women

Men's health might be more impacted by the crisis<sup>1</sup>, while women will be impacted longer term by the economic and social crisis.

World Economic Forum. Covid-19 Infects More Men than Women, June 2020



### Home Work Doesn't Always Work for Women

*"It's tempting to think that flexible work options will be a universal big equalizer for women. Not always. Men are more likely to want to use the office for networking, women for collaborating and getting work done. Working from home could accelerate underlying inequality by further reducing opportunities for face-to-face networking.*

*We also risk the rise of a new form of "presenteeism." In most cases some people will be physically co-located while others work remotely. What happens when some team members are in the office or traveling for work while others are WFH? Instead of making assumptions on productivity and performance, collect and analyze data. Look at the effects of remote working by level. Does it provide the same career benefits to the entry-level, mid-career, and executive roles? Take active steps to challenge any embedded assumptions about the gender-normative roles of mothers and fathers so that those norms do not drive the way managers and colleagues perceive remote working by men and women and what they expect of them. And most important, learn to evaluate output, rewarding people for what they actually contribute rather than for the show they put on"*

Tomas Chamorro-Premuzic, ManpowerGroup Chief Talent Scientist - [Harvard Business Review](#)

### Women are Over Represented in Sectors Most Impacted by COVID-19<sup>2</sup>



International Labor Organization (ILO). COVID-19 and the World of Work, April 2020

#### Accommodation and Food Services



#### Administration and Business Services



#### Arts / Entertainment – Clerical Roles



# 02 Parent Trap or Care(r) Free



More than 30%<sup>3</sup> of workers now have to be teachers, employees, parents and/or caregivers all while working longer days. With timing for school reopenings shifting, being able to balance work and home remains more important than ever. Brookings Institute. Working Parents are Key to Recovery. July 2020

## Working Parents. What Matters Most: At the Workplace. At Home. In Future.



### WORKPLACE:



Being able to separate work from home



Socializing and collaborating with colleagues



Less distraction, more comfortable working space



### HOME:



Avoiding the commute



Spending more time with family



Getting work done at times that suit



### IN FUTURE:



Opportunity to learn and develop career



Employment security



More remote work options to better blend work and home

#### ITALY

Older population has been badly impacted, people are more concerned about managing their caring responsibilities than their employer taking steps to keep them healthy.

#### US

While schools remain closed, childcare out of service and cases still rising, working parents especially with younger children are more worried about balancing kids and work than getting sick on their commute.

#### FRANCE

Most schools have been open since May, childcare is widely available - balancing work and parental responsibilities ranks low in the list of workers concerns.

#### UK

Parents have delivered an average of 3 hours daily education for children during lockdown. Working in a way that accommodates childcare matters more than networking, being able to better manage workload or access to more efficient technology.

## WELLBEING

Companies and HR are turning into wellbeing experts, balance advocates and education advisers. Now is the time to rethink the way people work, are recognized and rewarded with parents front and center, particularly for women who still do the majority of caring and household activities in many households.





# 03 Free Spirits or Compliant Culture – How Workers Feel about Testing and Tracing

As second surges, repeat lockdowns and reintroduction of restrictions occur – trust matters. People are more likely to share their data with their employer if they trust that they will act on the information available and make the right decision about their health and safety. Guidance, Reassurance, Communication comes first. People want to know that unwell workers will stay at home, strict hygiene policies are enforced and communication is clear. Trust is the new currency and health & wellbeing the new priority, before any kind of return.



## TESTING

UK, Singapore and Mexico most willing to comply with testing, tracking and tracing; most likely to take second wave of the virus as seriously



## TRACKING

France and Spain most resistant to share tracking data or travel plans with employers; France least concerned about a second wave



## MONITORING

U.S. and Germany aren't keen on being told what to do – most uneasy about being monitored and traced; least likely to take the second lockdown as seriously



## TRUSTING

Italy and France least trusting of employers to make the right decision about health and wellbeing

## THE WORKERS HAVE SPOKEN

Those who trust their employers are twice as likely to feel positive about returning to the workplace than those who don't (44% vs. 23%). Easier said than done, more than 1 in 3 workers don't trust their employer to make the right decision about their health.

# 5 Ways to Make the Next Normal Better for All



Now is our opportunity to re-shape a future that is closer to what we know workers have wanted all along -more flexible, more virtual, more trusting and allowing people to better blend work and home while allowing organizations to tap talent that can work from wherever.

## 01 Ask Why. Why Return

Tasks we thought could never be done remotely have transformed overnight – closing the books, payroll, customer service and even information security – so now is a good time to be asking why return in order to be planful and fair. What do managers need to lead remotely? How can workers be more productive at home? Help managers understand individuals’ needs to avoid assumptions and prevent unconscious biases in playing out.

## 02 Skills are Evolving- Prepare for that Reality

The skills employers need in the future will be different to the past. Encourage all of the workforce to reskill and engage in continuous learning, not just those who would have upskilled anyway. Encourage remote learning and support workers to reclaim their commute with curated learning opportunities aligned to the skills your business needs.

## 03 Flexibility and Balance for the Many not the Few

Offering employees the opportunity to work remote isn’t the only way to enable people to work flexibly and balance work and home. For roles that need to be done in the workplace offer staggered start and finish times, more flexible scheduling, and understand the priorities people have to balance in order to get their work done.

## 04 Physical and Emotional Wellbeing = New Health and Safety

Feelings of isolation, stress, fear and anxiety will be a COVID-19 legacy, and so too will be our reflections on the value of health, wellbeing, family and community. Prioritize emotional wellbeing with the same importance as physical and organizational measures like temperature taking and social distancing, to ensure people are confident, healthy and productive.

## 05 Build Resilience - In People and the Organization

Companies need to build trust, listen to people, and respond to their needs and help workers prioritize and recharge. The initial adrenalin of workers needs to shift to resilience for the long term and employers must lead this charge. When stress is on the rise and the number one concern on the minds of many workers is losing their jobs, strong remote leadership, transparent frequent communication, and a culture that is fit for the hybrid work /home workplace and accessible wellbeing support is key.

**ABOUT THE RESEARCH:** ManpowerGroup commissioned research to understand attitudes towards work from workers. Reputation Leaders conducted a quantitative global study in June 2020 of more than 8,000 employees (including furloughed) workers aged 18 and over balanced by age, gender and region in 8 countries, France, Germany, Italy, Mexico, Singapore, Spain, UK and US.