

BACK TO WORK

SURVEY REPORT

*How Covid-19 is Affecting
the Return to the Workplace*

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EXECUTIVE SUMMARY

These are some of the key observations that we've made from the survey.





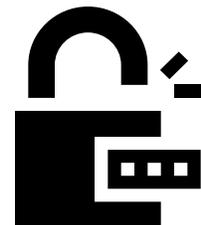
Although organizations have been affected at different times and in varying magnitudes by COVID-19, there is little to choose between the way that organizations have reacted to the challenges presented. Working from home has been universally accepted.

Despite widely reported data outlining the devastating effects on organizations, **most of our respondents felt that they had adjusted well to the pandemic's challenges.** Indeed, the majority reported they were well 'above average' when dealing and recovering from the challenges.



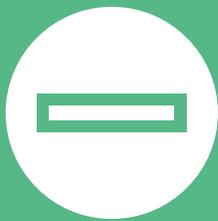
When implementing working from home solutions, **significant challenges facing organizations were dealing with employees' personal and emotional issues.** Almost 44.3% of our sample reported that this was a challenge. 4.7% of these were major challenges.

Although security and data protection issues were the least troublesome of the working from home issues, **the fact that more than 20% of organizations did have troubles could be of concern.** These challenges tend to be more 'showstopper' in their nature.



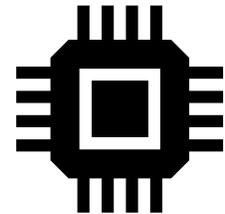
One of the big losers in this pandemic workwise are freelance workers. This is perhaps unsurprising given the economic problems caused by the pandemic. Around 17% of organizations confirmed they will be decreasing the use of freelances. 28% will not be using freelance services at all.

Around 72% of organizations said they would probably or definitely turn to technology to protect themselves further from future pandemics. This statistic is borne out by a recent Fortune 500 survey. In this, 75% of CEOs in the Fortune top 500 said that it would accelerate the crisis would affect the pace of technological transformation. Only 19% said it would have no significant effect. (Fortune 500 CEO Survey, June 2020)



Our survey revealed that just **25% of respondents believed that the pandemic would have a negative effect on their organization.** This may be a surprisingly low figure, but it is not dissimilar to an ongoing Mercer Global Survey where only 15% of organizations had implemented a staff reduction program.

Interest in robotics and AI remains lower than some other issues we have examined, but it has increased since our previous survey into the new world of work in February 2020. Then, only 14% of respondents felt that AI and automation were critically important to them during 2020. **Now, 35% of respondents are keen to extend their use of AI.**



Our last survey, conducted in February, revealed a significant disconnect between the way non-HR C-suite executives viewed the future of work compared to their HR and learning colleagues. The advent of COVID-19 has helped to realign their views, especially when it comes to the use of technology. But today 69.8% of HR staff and 70.2% of C-suite and believe that increasing technology use would help protect against future pandemics.

REFERENCES FROM OTHER SURVEYS

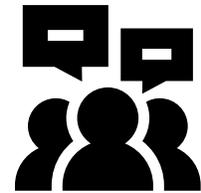
The following facts and figures have been drawn from other surveys recently conducted into the effects of COVID-19





When asked how the crisis would affect the pace of technological transformation, **75% of CEOs in the Fortune top 500 said that it would accelerate it.** 19% said it would have no significant effect. This was remarkably similar to the results in this survey where around 72% of organizations said they would probably or definitely turn to technology to protect themselves further from future pandemics. (Fortune 500 CEO Survey, June 2020)

In January 2021, **when asked, how do you expect your company's total employment to compare to what it was in January 2020, 53.6% said slightly less.** 19% say significantly less and, surprisingly, 10.7% said more and 3,6% said significantly more. (Fortune 500 CEO Survey, June 2020)



One of the big losers in this pandemic workwise are freelance workers. This is perhaps unsurprising given the economic problems caused by the pandemic. Around 17% of organizations confirmed they will be decreasing the use of freelances. 28% will not be using freelance services at all.

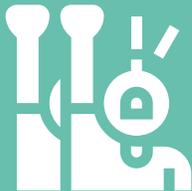
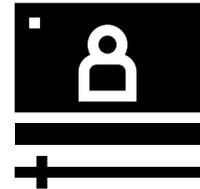
Companies are embracing new ways of working, with 52% reporting that they plan to make remote work a permanent option for roles that allow, and 52% saying they plan to improve the remote working experience. This is broadly consistent with this survey where 75% of organizations were planning to increase their use of homeworking. (All Territories PwC Workforce Pulse Survey, June 2020)





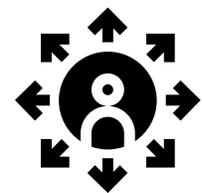
For employees, safety protocols have quickly become expected. 58% of workers aged 45-54 and 54% of workers aged 65 and older say implementing new workplace safety measures would make them feel more comfortable being on-site. Only 40% of those aged 18-34 felt the same. (All Territories PwC Workforce Pulse Survey, June 2020)

94% of UK L&D professionals' organizations have had to change their L&D strategy in response to the COVID-19. Two out of three reported having to make significant changes. (Fosway, June 2020)



An ongoing study asked organizations if they were considering a reduction-in-force (termination of employment) due to the pandemic. Around 65% of respondents have confirmed that they are not considering this. A further 20% are considering it while around 15% have already implemented such a program. These results are relatively consistent with this survey, where around 25% of respondents suggested that the pandemic would have a negative effect on their organization. (Mercer Global Survey, July 2020)

A similarly optimistic statement was selected by around 63% of participants confirming that their company “... has the right HR structure and roles to support the business and our workforce as they adapt to new ways of working.” More than 50% of people agreed that their company was “...maximizing the effectiveness and adoption of our current HR technology. (Mercer Global Survey, July 2020)

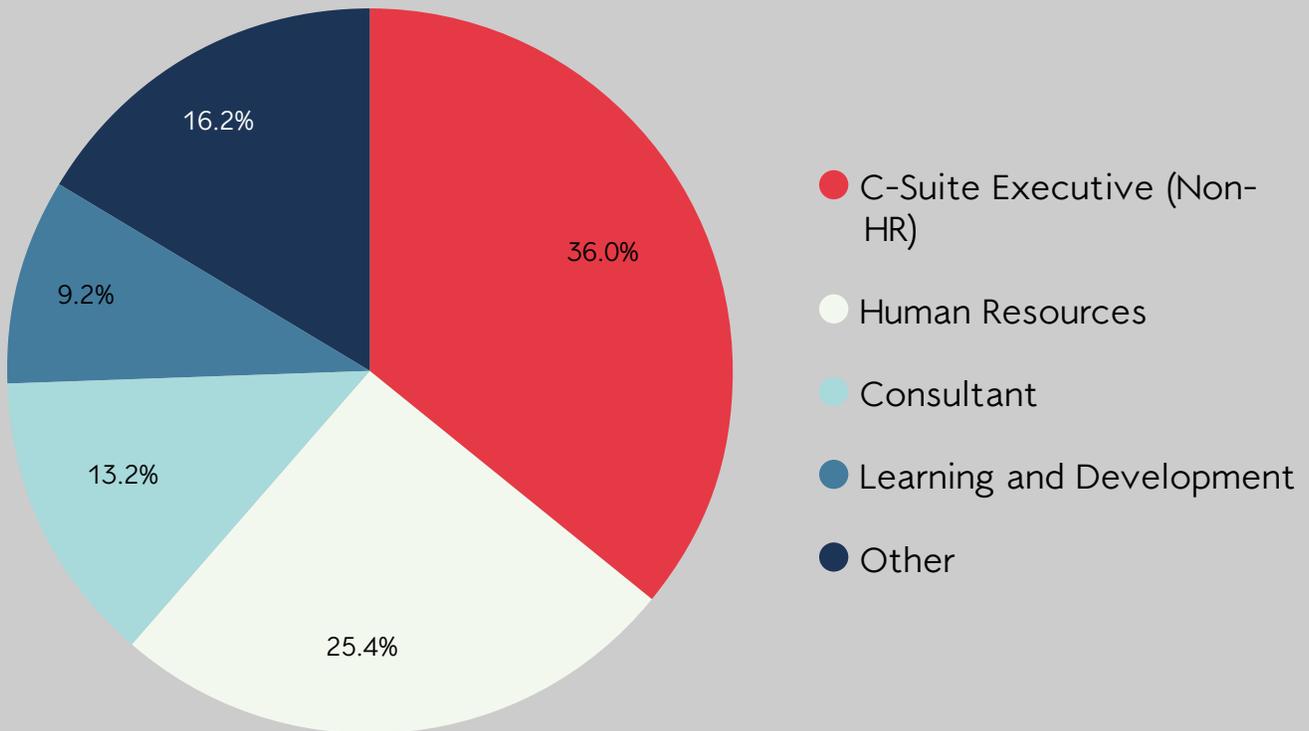


A background image showing a group of business professionals in a meeting, looking at and pointing to various charts and documents on a table. The image is overlaid with a semi-transparent teal filter. The text is centered in white, bold, uppercase letters.

SURVEY RESPONSES AND QUESTIONS



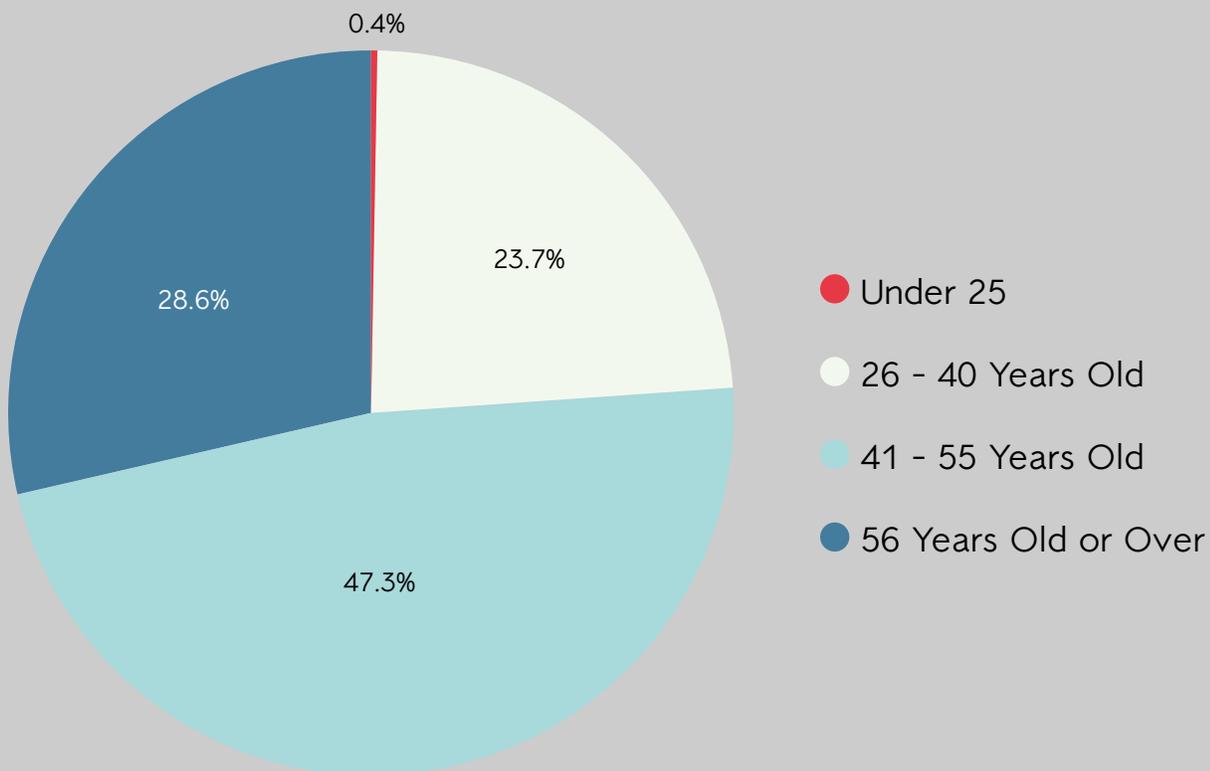
1. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR CURRENT ROLE?



Asking our respondents to describe their current role gives us an initial understanding of our target audience. We were pleased to get a statistically significant number of people replying from each of our target roles. This enables us to have a higher degree of confidence when analyzing data when segregated by type of respondent.

Of the respondents that fell outside our typical role profile, they included VP of Assessment, VP of Products, Business Development leaders, general management, sales and marketing positions. No other role was statistically significant.

2. INTO WHICH OF THESE AGE GROUPS DO YOU FALL

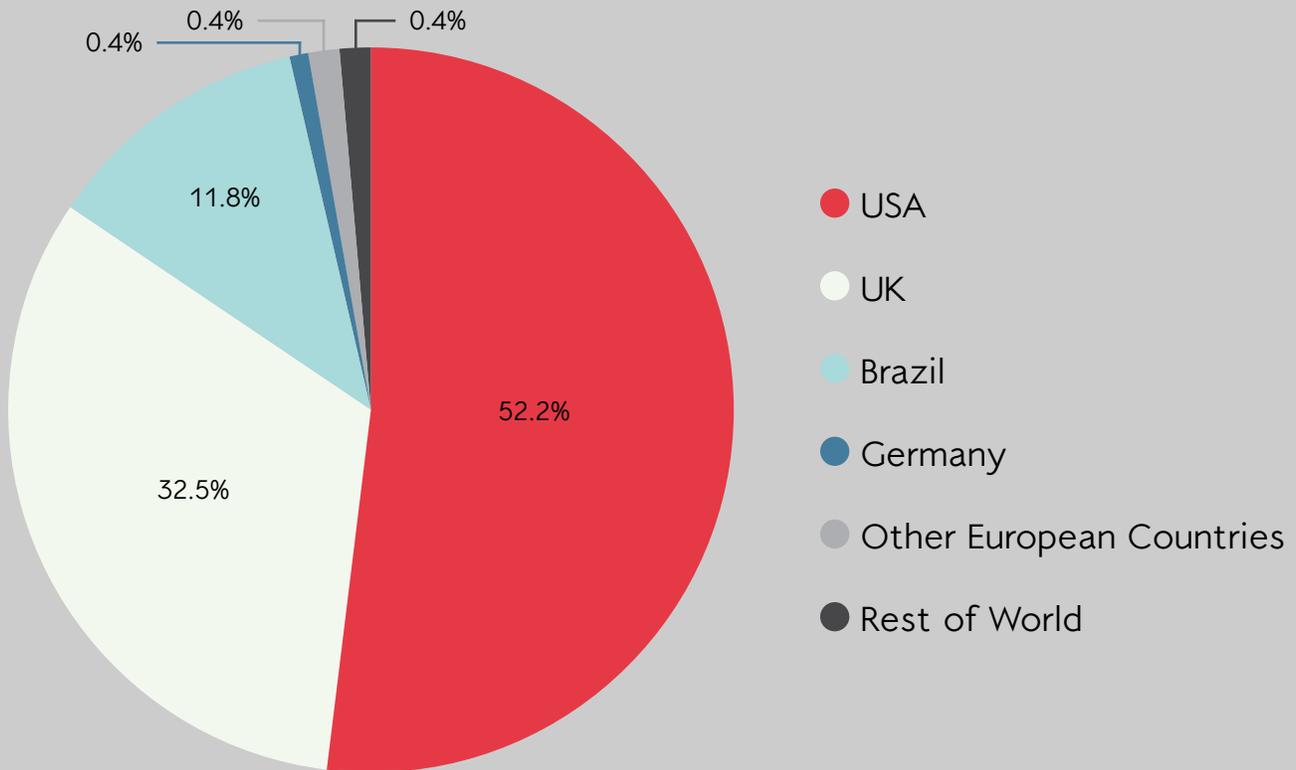


In previous surveys, we neglected to ask the age group of our respondents. However, this time we felt that, given the discussions around the reactions of different generations to COVID-19 and for specific issues such as working from home, this was now relevant. In dividing the respondents into four groups, we aimed to reflect the common generational groups. That is:

- Baby Boomers, typically defined as being born between 1946 and 1964
- Generation X, defined as being anyone born between 1965 and 1980 and...
- Millennials, (or Generation Y) born between 1981 in 2000

We also included a category for Generation Z - for anyone born after the year 2000, although we received no responses from anyone from that generation.

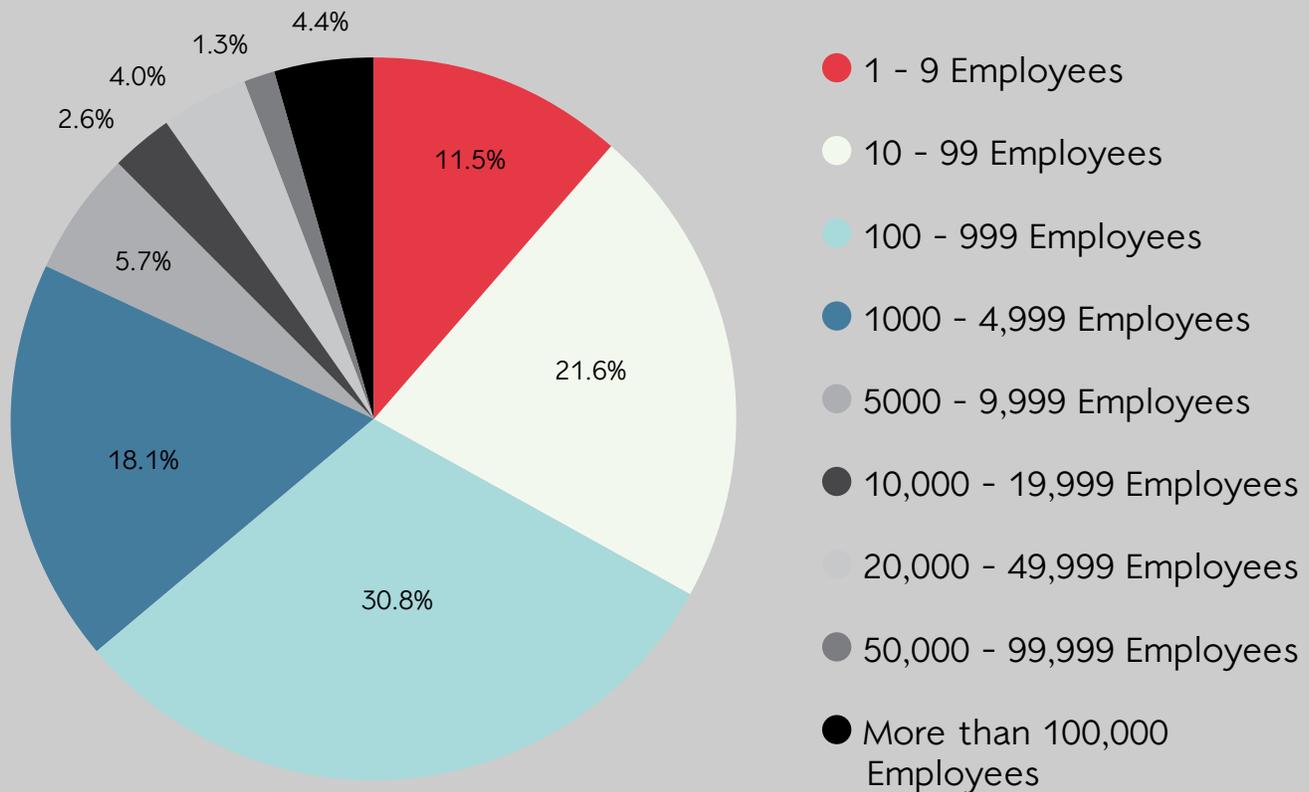
3. IN WHICH COUNTRY DO YOU WORK



The survey was open to anybody in the world. That meant we could get responders from any country. However, the study explicitly focused on people living in the USA, UK, and Brazil. As such, we were pleased to get a statistically significant sample from all of these countries. Note that:

- More than 50% of our responses came from the USA, though this was in line with expectations and objectives
- Only 3.5% of respondents came from outside of our countries of interest
- In our further analysis, we have largely ignored these responses in terms of geography, although they are included in our question response analysis.

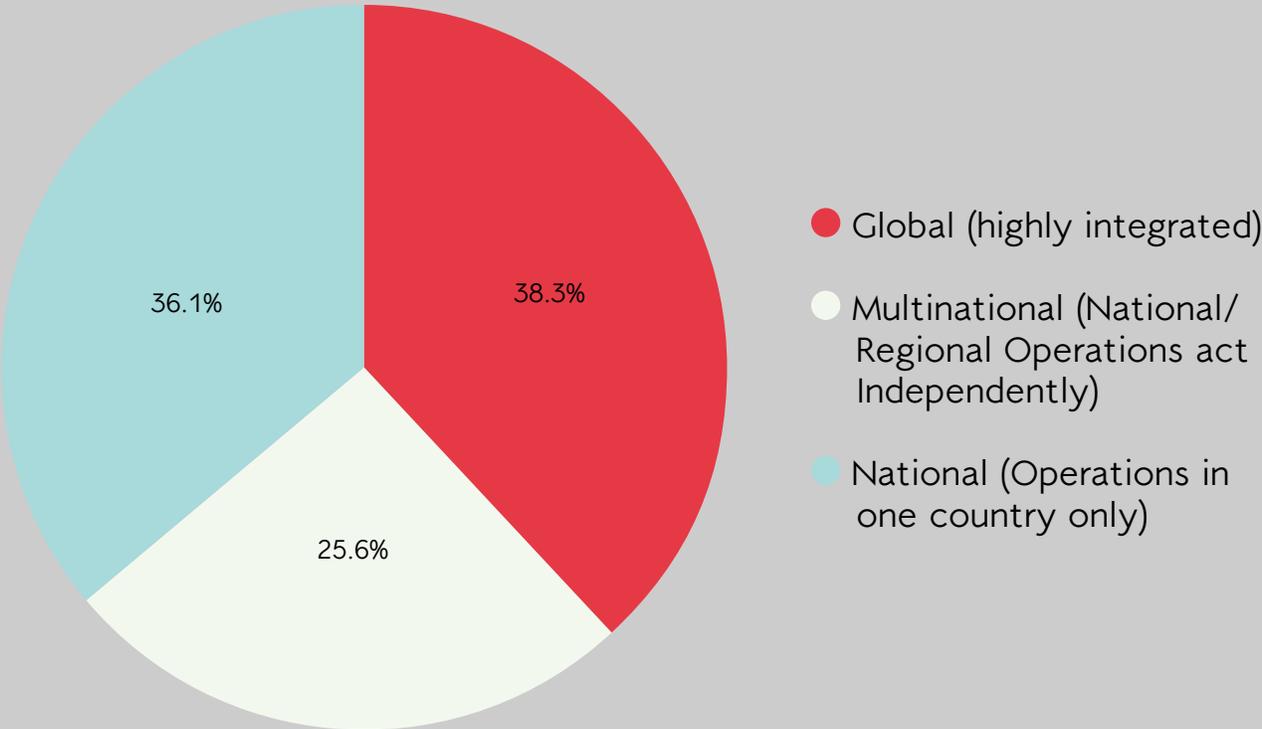
4. WHAT IS THE SIZE OF YOUR ORGANIZATION'S WORKFORCE?



Number of Employees	Per Cent
1 - 9 Employees	11.5%
10 - 99 Employees	21.6%
100 - 999 Employees	30.8%
1000 - 4,999 Employees	18.1%
5000 - 9,999 Employees	5.7%
10,000 - 19,999 Employees	2.6%
20,000 - 49,999 Employees	4.0%
50,000 - 99,999 Employees	1.3%
More than 100,000 Employees	4.4%
	100.0%

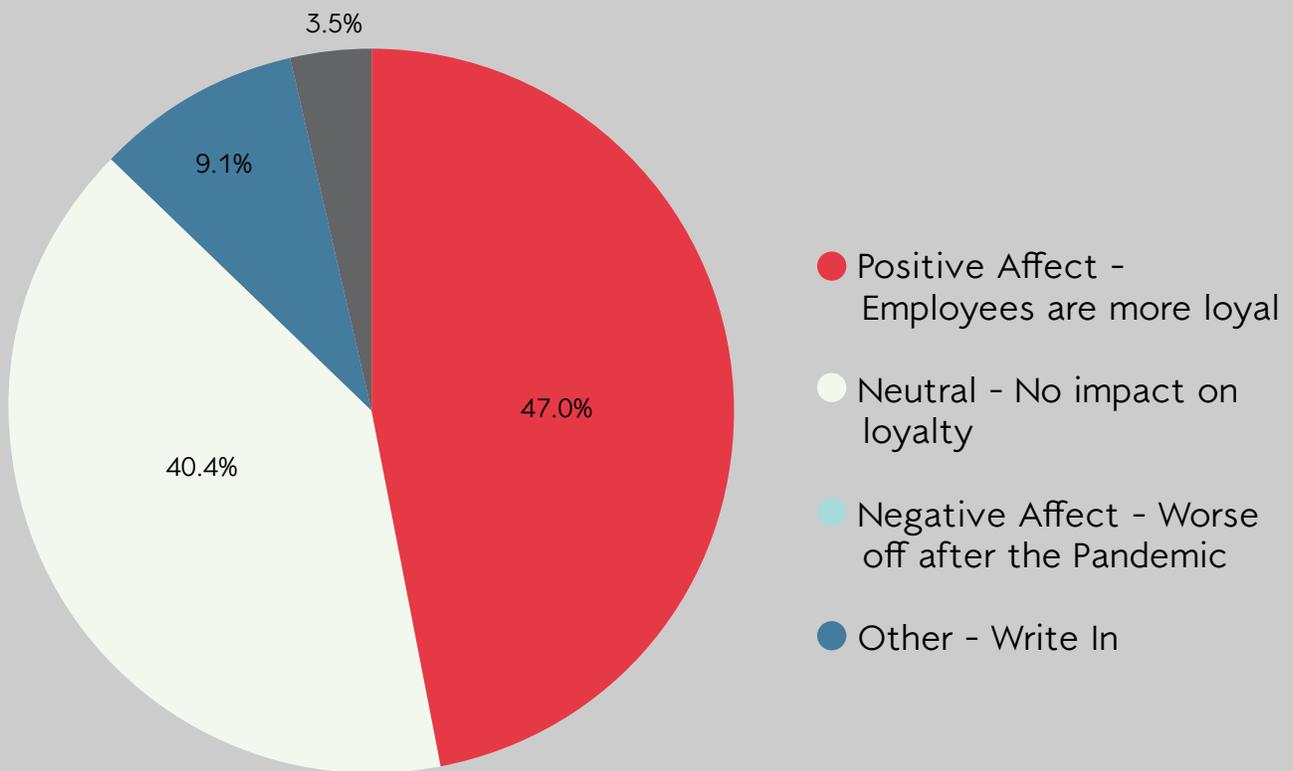
We were keen to understand if there is any difference in the size of organizations in terms of their reactions to COVID-19. Above is the full breakdown of the organizations that responded. Note that we have gained a useful set of responses across the board. Typically though, in the further analysis, we have only broken them down in 'small' (below 1000 employees) or large (above 1000 employees)

5. PLEASE DESCRIBE YOUR ORGANIZATION'S GEOGRAPHIC STRUCTURE



To add weight to the previous question, we asked respondents about the nature of their organizations. By dividing into three categories, global multinational or national, we can build an added dimension to our results. Again, we gained a statistically useful response for each of these sectors.

6. HOW HAS THE PANDEMIC AFFECTED EMPLOYEE LOYALTY DURING MANDATORY CLOSURES?



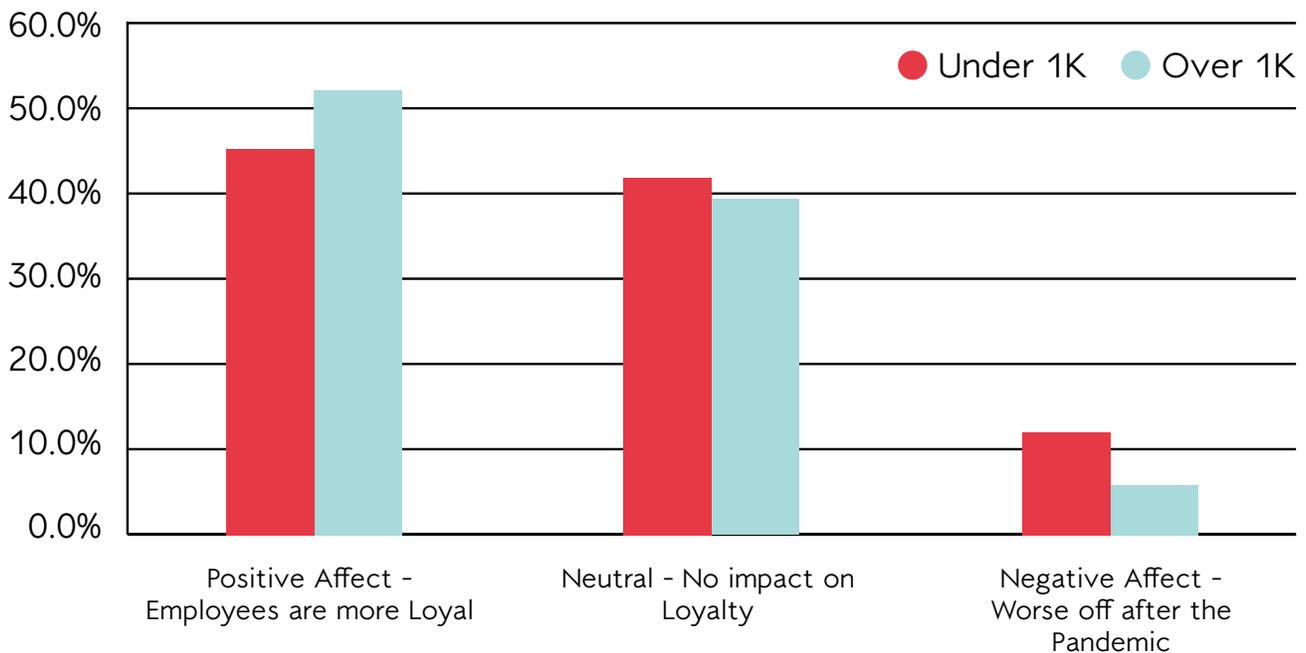
When it comes to employee loyalty, our target audience of HR and C-suite executives believe that the pandemic has made employees more loyal. Results indicate that:

- 47% of those surveyed believe that employee loyalty would increase because of the pandemic
- More than 40% of the rest thought it would not have any impact

- Only 9.3% perceived a potential negative impact

Other researchers and experts agree that the pandemic will cause high unemployment in the countries we surveyed. Given this scenario, it is probably unsurprising that employees would be perceived as being more loyal now as options and opportunities elsewhere are now limited. Another interpretation could be that organizations have been able to demonstrate a real degree of care during this period and their employees have appreciated this.

Loyalty: Small Organizations vs. Large Organizations



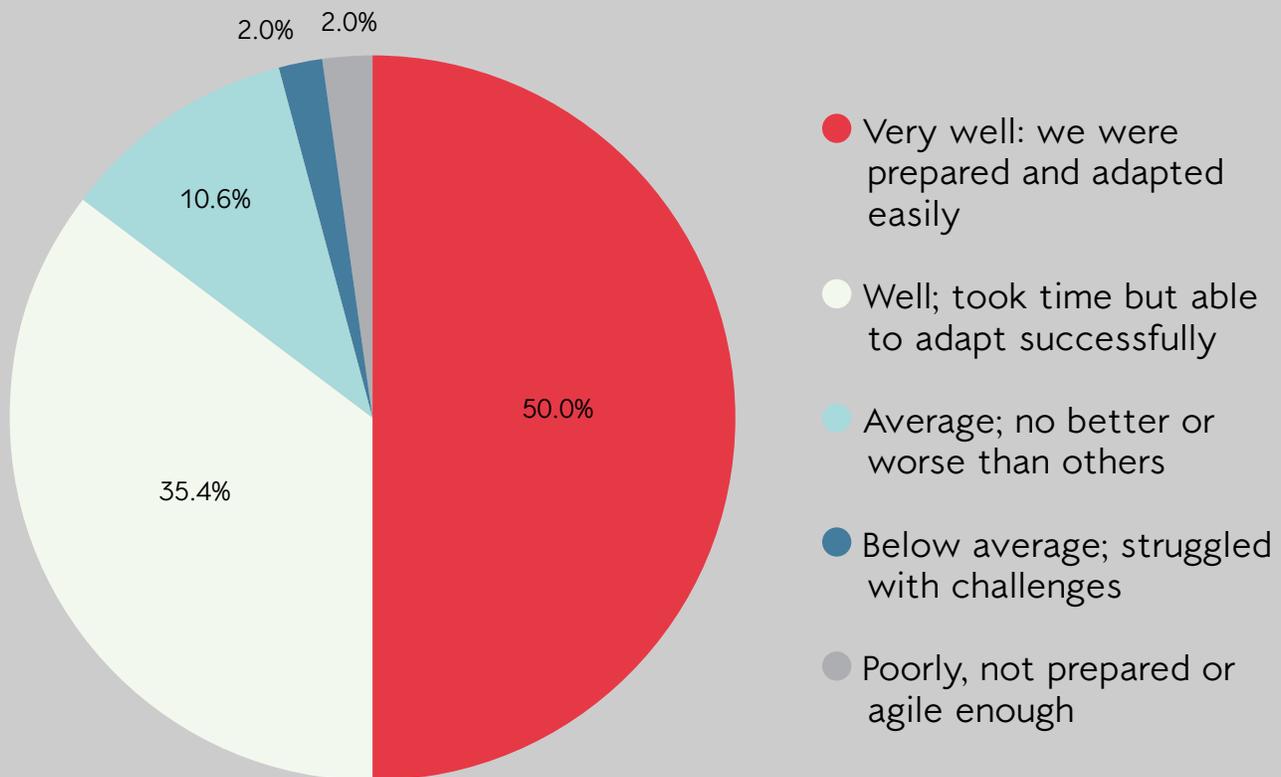
We also assessed how loyalty, affected by the pandemic, varied with the size of organizations and across different countries. The most notable differential was when assessing organizations with less or greater 1000 employees:

- 51.3% of employees in larger organizations were perceived as being more loyal
- 44.3 % of employees in smaller organizations were perceived as more loyal, some 7% less.

It could be concluded that larger organizations have responded more effectively than smaller ones. Note that this conclusion is also verified by the negative effect numbers; 11.5% against 5.3%.

It is also worth noting that the survey figures varied little when broken down between different countries and job roles. There were also no additional worthwhile comments to this question. The feeling of higher levels of loyalty is, therefore, both consistent and widespread.

7. HOW WELL WAS YOUR ORGANIZATION ABLE TO ADAPT?

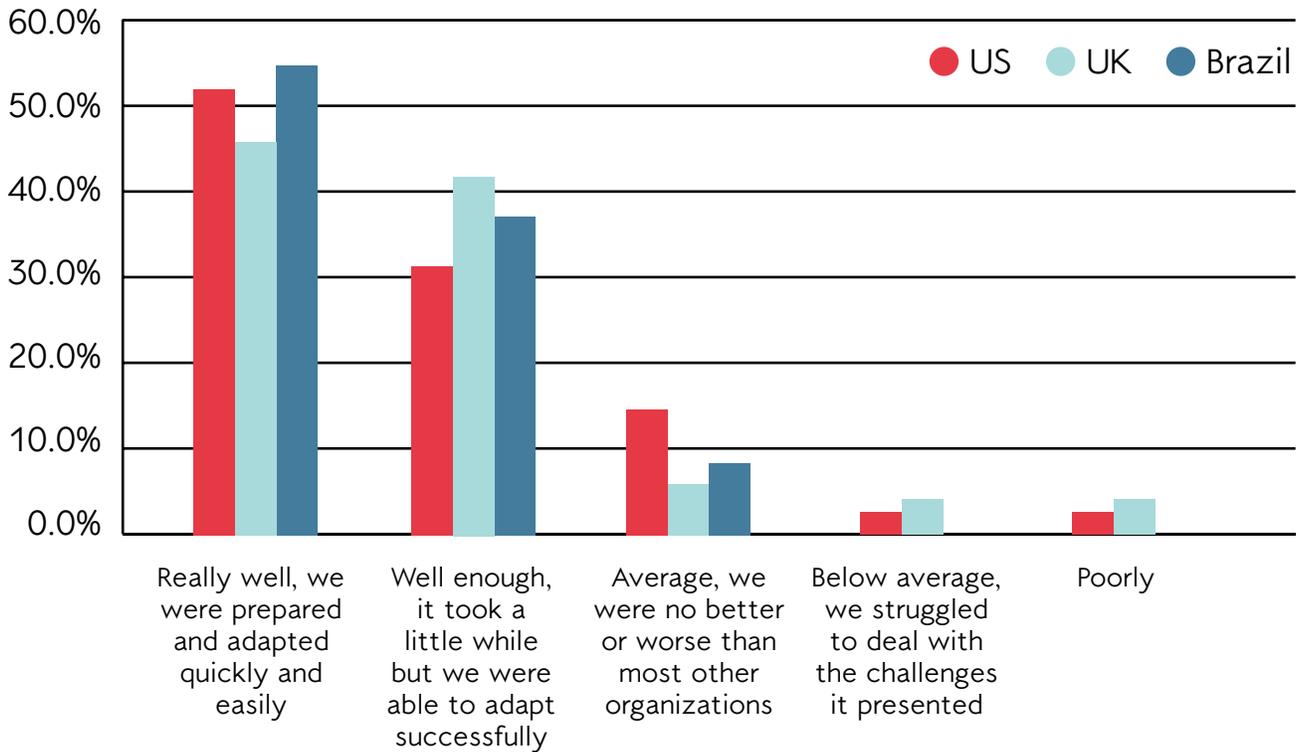


Interestingly, more than half of those surveyed claimed that their organization had adapted very well to the pandemic. More than an additional third (35.4%) said they adapted well.

Given that the pandemic has already and will continue to have an adverse effect on these organizations, this suggests that there is little that they can do about this. Those surveyed believe that they adapted well and, therefore, have done what they could to mitigate the situation.

US vs. UK vs. Brazil

Organizational adaption by Country

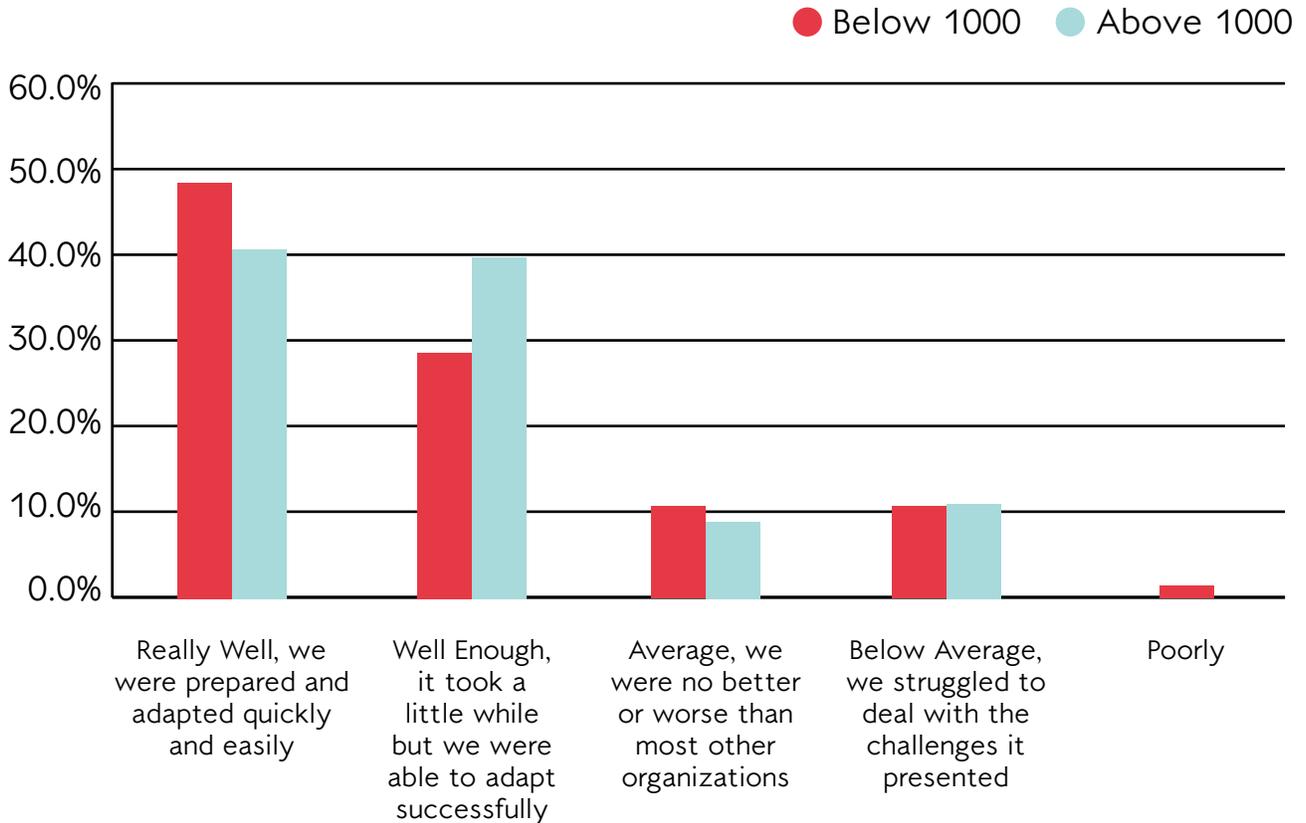


When we study the responses from an individual country's point of view, it becomes apparent that the least well prepared was the UK. More organizations in Brazil and the US received the top rating of being 'really well prepared' while perhaps, more significantly, 6.2% of organizations in the UK were rated below average or poor compared to 3.8 and zero for USA and Brazil, respectively.

Note that both the UK and the US experienced similar peak times for the virus (during April) and several weeks before this survey was conducted, so it seems unlikely that attitudes would have changed much because of this.

Company size

Organizational adaption by Company Size



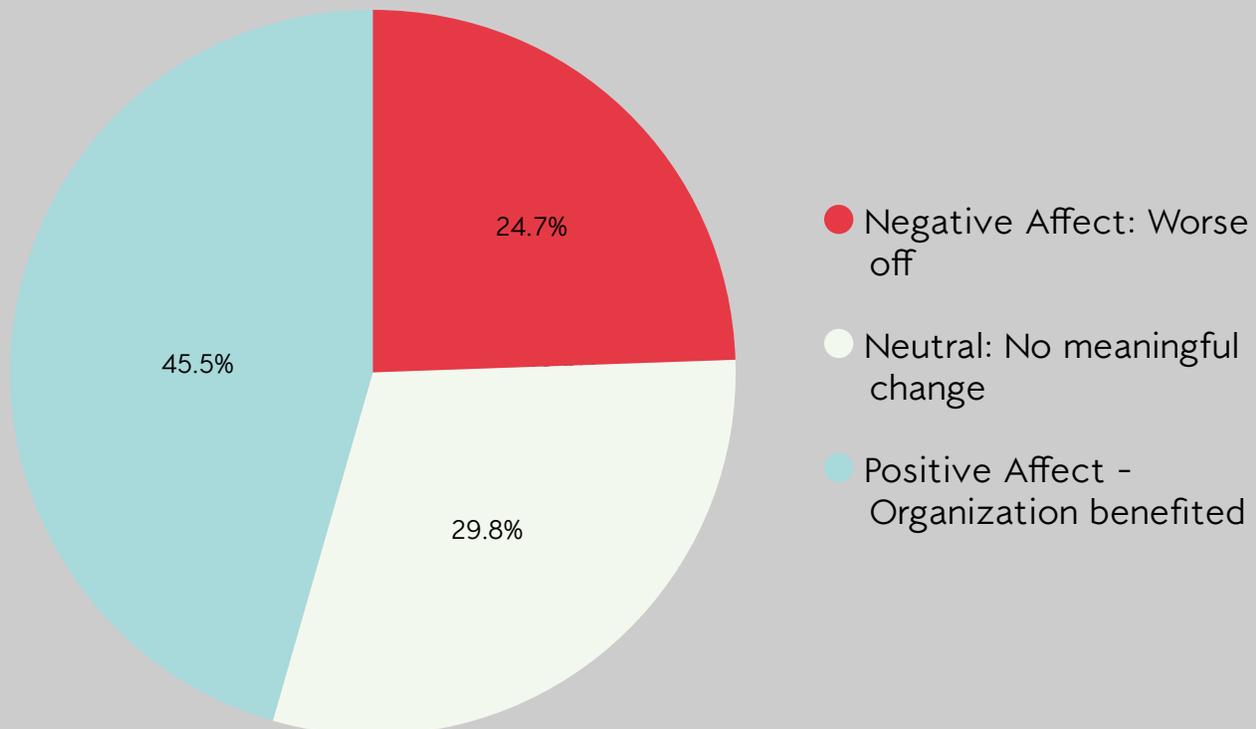
When studied by company size, the stats showed little variation. It may be argued that larger companies took longer to adapt to the virus's demands. That they were less agile is hardly surprising. But likewise, they adapted given time and, in the longer term, fared no worse or better than their smaller counterparts.

Statisticians may point out that, consistently across these results, that people identify themselves as performing 'above average' rather than 'below average.' And that, by the very definition of the term 'average', cannot be true. This must therefore, be providing an overly optimistic viewpoint. It is difficult to give objective reasoning for this view. That said, some explanation may be found by looking at the news reports in these countries. These invariably paint a 'gloomy' picture - unavoidable in the circumstances.

Our respondents may be comparing their experience with these ‘vox pop’ accounts and feeling they are in a better position. Alternatively, it may also be that they are yet to feel the pandemic’s full force because of government support.

But this optimistic attitude continues through the answers to our next questions.

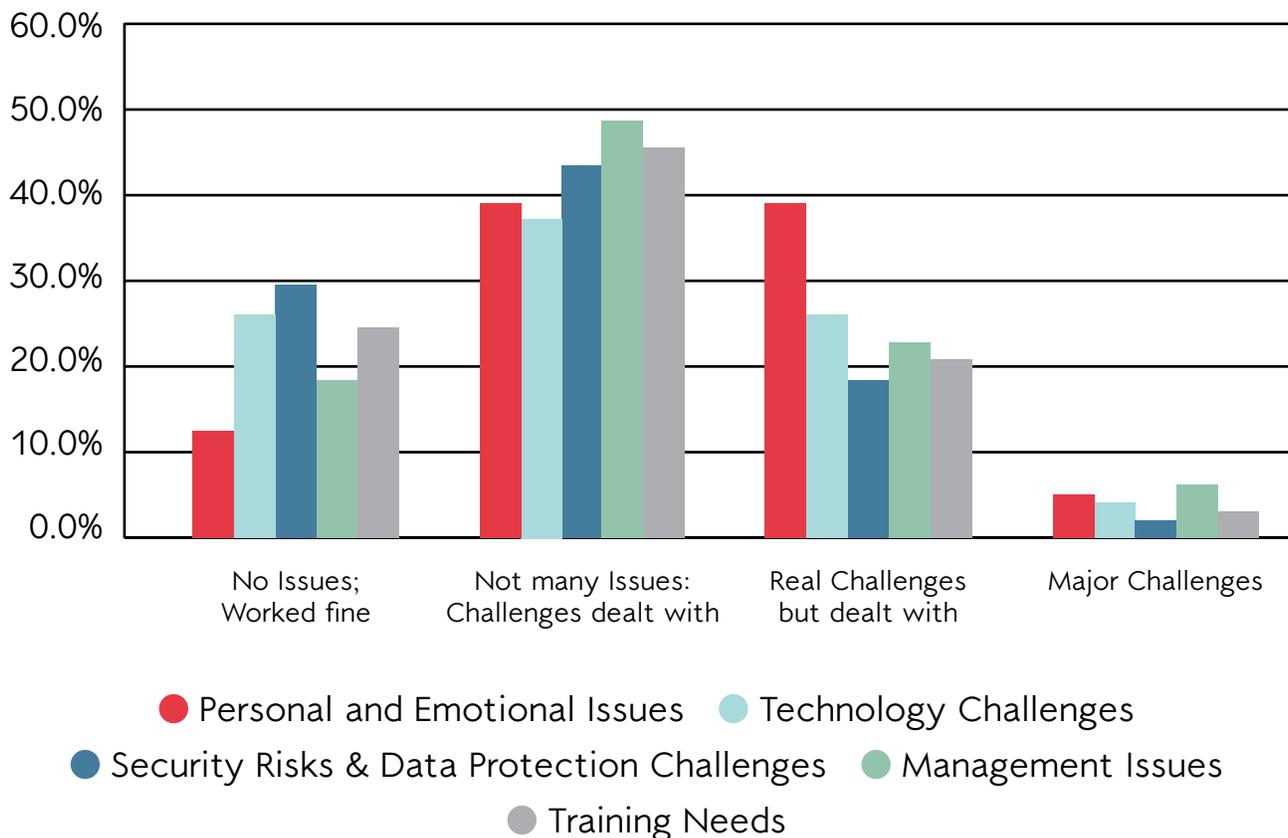
8. HOW WILL YOUR ORGANIZATION'S STRUCTURE BE AFFECTED IN SIX MONTHS?



Remarkably, less than a quarter of our respondents felt that the pandemic would adversely affect their organization's structure in the future. This flies in the face of almost all the published economic evidence and anecdotal case studies widely published in the press. However, it is consistent with other vox-pops of business owners and HR executives who seem reluctant to admit defeat. Government support in both the US and the UK has also cushioned the effects of the virus at this stage in many quarters.

It is also notable that there was little variation in these answers when broken down by age groups, job role, or country.

9. WHAT WERE THE BIGGEST WORK FROM HOME ISSUES TO DEAL WITH?



The massive adoption of ‘working from home’ is one of the most notable effects of the pandemic. Applications such as Zoom, and Teams supported this solution for vast numbers of employees.

But there were challenges in implementing this. One of the standout issues, widely reported anecdotally, were the emotional and personal challenges of this scenario. Our survey backs this up. It is worth noting the following:

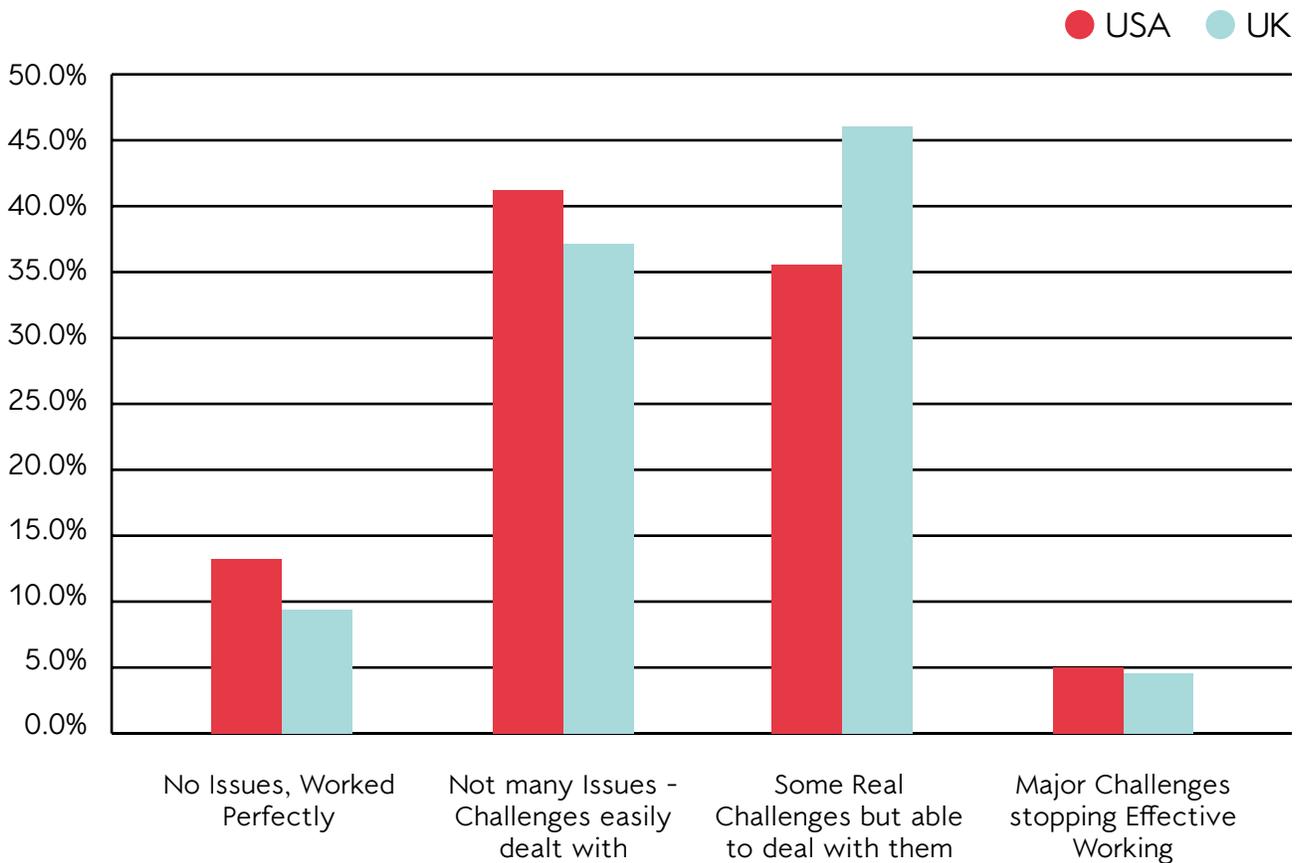
- Almost 44.3% of our sample reported that they had to deal with personal and emotional challenges in implementing working from home procedures. 4.7% of these were significant challenges.

- Managing employees to work effectively was less troublesome; only 27.6% of respondents reported challenges in this area.
- Technology challenges were experienced by 30.8% of our respondents. But in that almost 70% then found that working from home technology worked well, this is mostly encouraging news.
- Least troubles were reported with security and data protection issues, the fact that more than 20% of organizations did have difficulties could be of concern. These challenges tend to be more 'showstopper' in their nature.
- Inevitably some training for the new processes would be required. Unsurprisingly the figures for this need are broadly in line with the management and technology challenges that were experienced (24.6% said that they were challenged).

USA vs. UK

Across the board, the UK reported more challenges and issues than their US counterparts when it comes to working from home. Across all issues, 27.1% of our respondents reported, on average, at least one issue in the US which increased to 31.7% in the UK

The UK experienced greater challenges in two areas; personal and emotional issues, and management. Of these, emotional issues were particularly noticeable, seen as more challenging by more than 10% of respondents. Almost no previous objective data exists to enable us to understand why this is so.

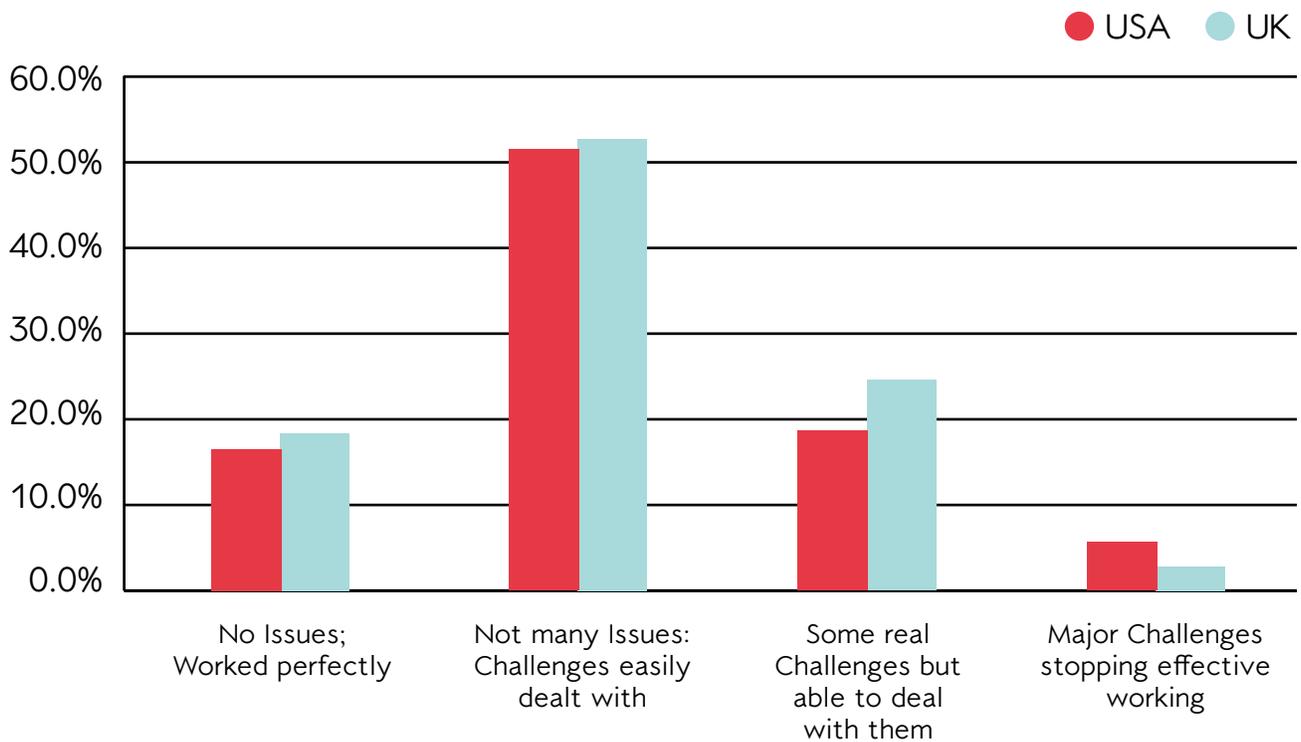


- In the UK, a significant 50.7% of our sample reported real challenges that stopped effective working from home due to personal and emotional issues.
- Only 9.2% of UK organizations reported that there were no personal or emotional issues that required attention. That said the figure for the US only rises to 12.9%

Some of this disparity may be ascribed to the size of the US which has encouraged dispersed workforces, whereas it is more likely that people work regularly from an office in the UK.

UNDERSTANDING WORKING FROM HOME EMOTIONAL ISSUES

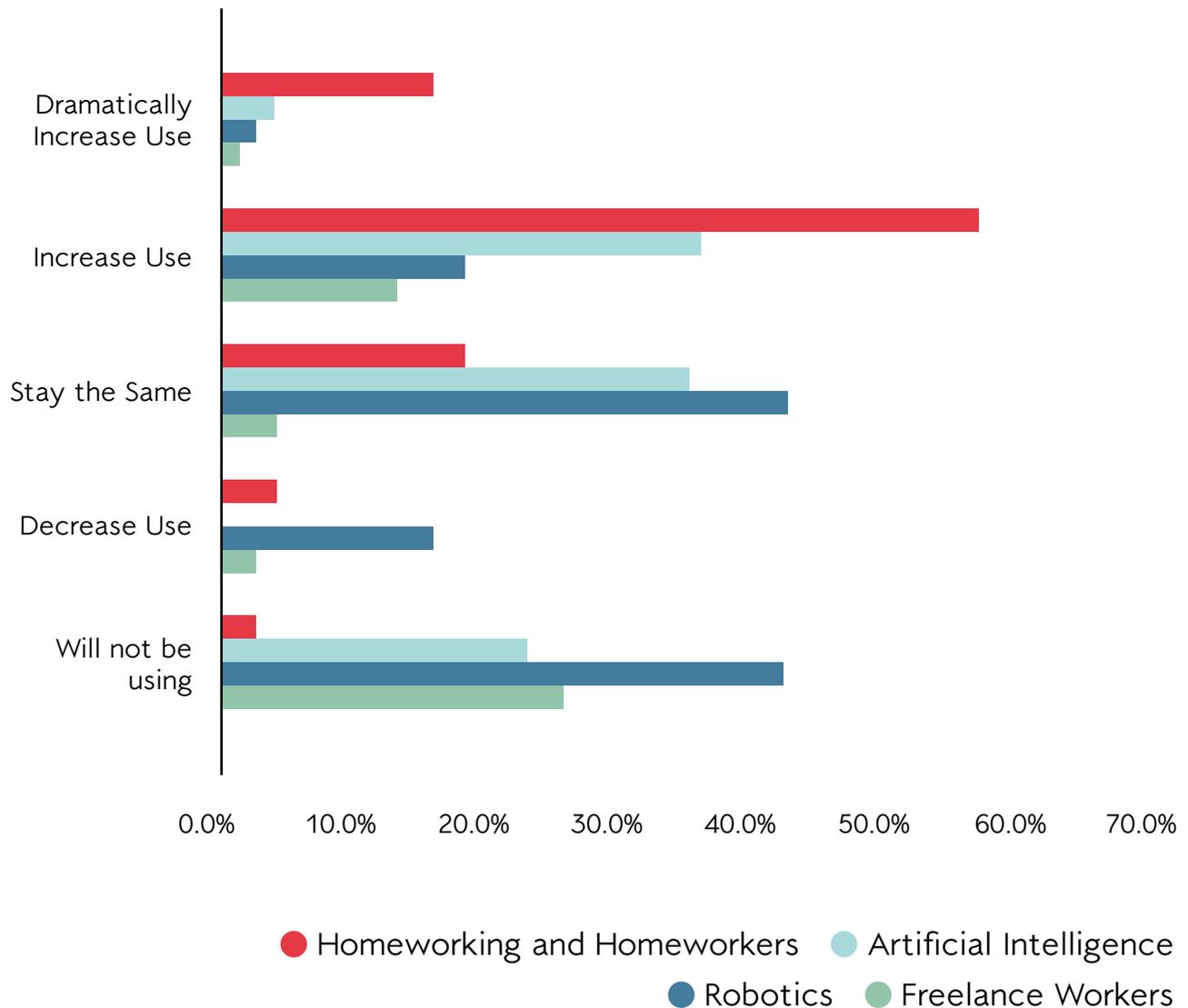
The study found that people who score highly on traits such as conscientiousness and honesty were more likely to work effectively from home. According to Myers-Briggs Company, more attention should be paid to personalities within teams. They suggest that people find it difficult, especially with the relatively sudden imposition of remote working. Managers need to think about how employees with different attitudes and personality preferences may cope with this stress and uncertainty, and the blurring between work and home life.



General management issues for working from home were much more comparable. There were some more significant challenges in the UK, but less so than for the emotional aspects.

Although we analyzed from other viewpoints, including breakdowns by job role, age, organization size, and country, there were no further significant variations to these statistics. This at least suggests that the data remains consistent and reliable.

10. HOW WILL USAGE OF SOLUTIONS AND SERVICES CHANGE IN THE COMING YEAR



This graph shows that the homeworking is the key upshot of COVID-19. Freelance workers are set to suffer. However, organizations are looking to increase their use of Artificial Intelligence (AI) and, to a lesser degree robotics.

More than 39% of our respondents suggest that they will be looking to increase, or dramatically increase, the use of AI during the coming year. Nobody admitted they would decrease use, although 23% still make no use of AI.

Robotics are less exciting for our respondents – only around 20% are hoping to increase use while more than 43% do not use robotics, and 2% will surprisingly decrease use.

PANDEMIC INCREASES INTEREST IN ROBOTICS AND AI

Although the relative interest in robotics and AI remains lower than some of the other issues we have examined, it is noticeable that attention on both issues has increased since our previous survey in February 2020. Then, only 14% of respondents felt that AI and automation were critically important to them during 2020. Now, 35% of respondents are keen to extend their use of AI.

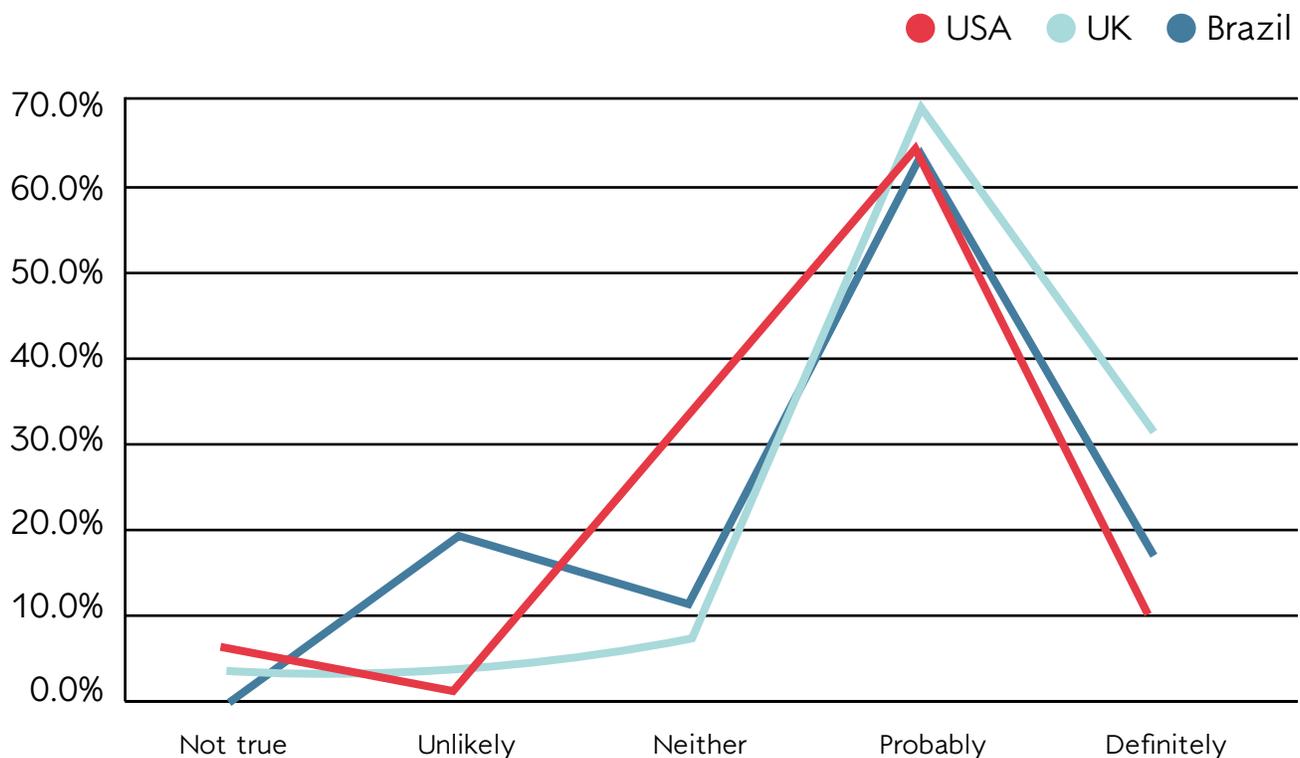
- The standout figure here is 74% of organizations that are increasing their use of homeworking and homeworkers. Note though that 4.3% of respondents would like to decrease working from home. This suggests that only a very few organizations have found that homeworking did not work for them.
- The big losers in this pandemic are freelance workers. This is perhaps unsurprising given the economic problems being caused by the pandemic. Around 17% of organizations confirmed they would be decreasing the use of freelances. 28% will not be using freelance services at all.

USA vs. UK vs. Brazil

There was little to choose between the countries when it came to adopting services. Homeworking proves to have the greatest differential: a staggering 87% of UK respondents were either definitely or probably going to increase

working from home. This compared to just over 64% in the US and 68% in Brazil. This may be because, as a smaller country, the UK populous was already more likely to travel and work in an office. The change to homeworking was liable to be far more pronounced under those circumstances.

How will your usage change of homeworking and homeworkers change in the coming year?

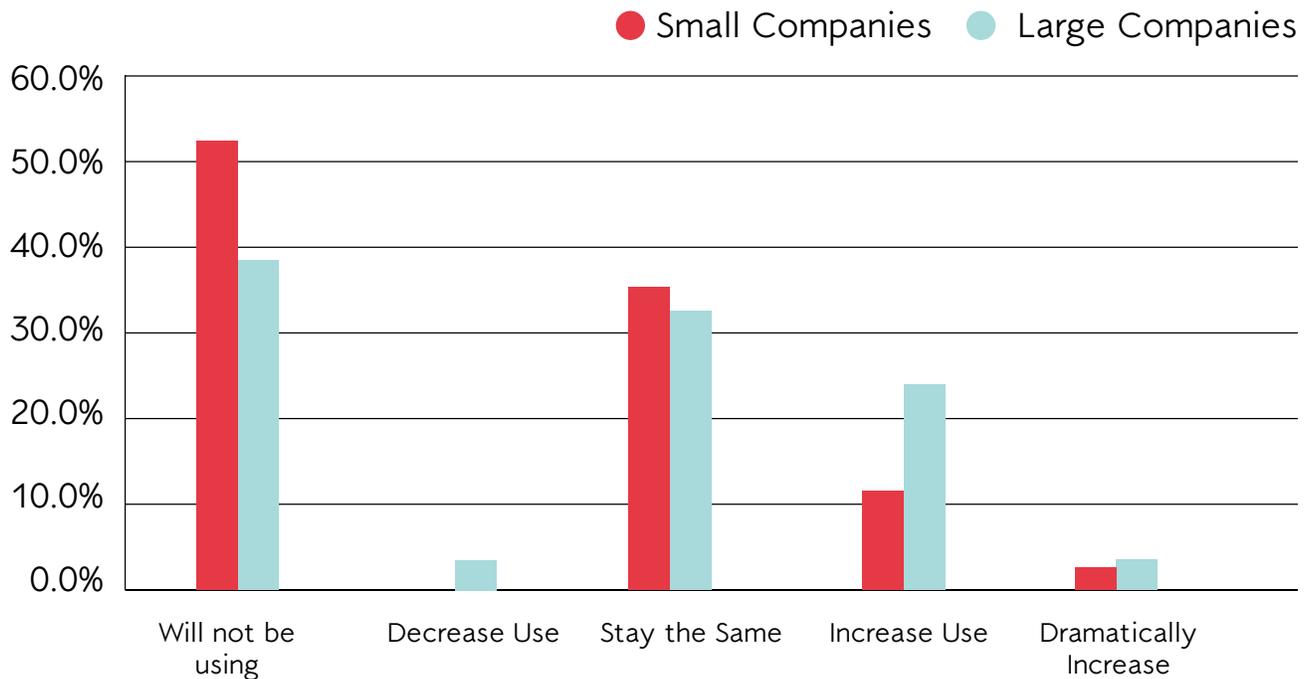


The size of the organization did have some bearing on the way they would prepare for the future. The following three graphs reveal these differences.

As already seen, there is an increasing trend towards adopting AI and robotics to deal with the vagaries of future pandemics. But, as we can see from the graphs, the larger organizations (defined here as those with above 1,000 employees) are more inclined to take those steps.

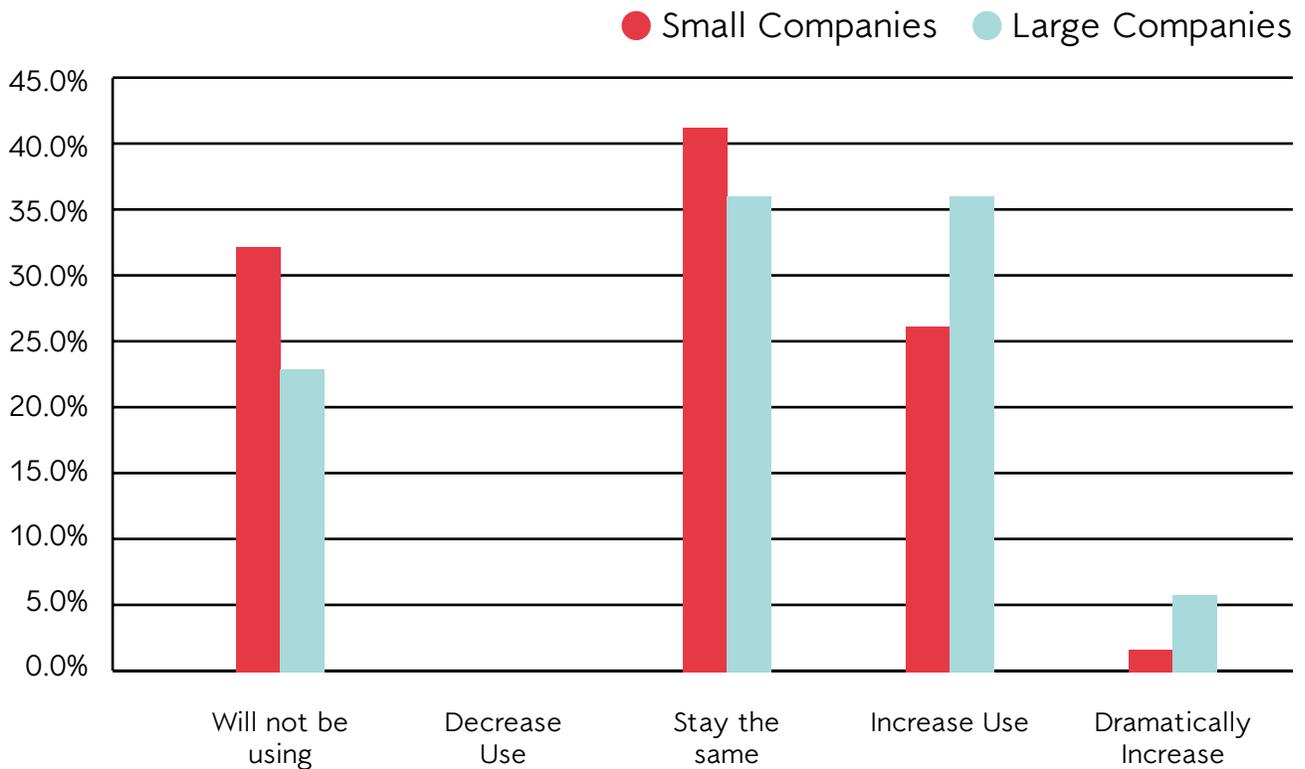
How will your usage of robotics change in the coming year?

Small Organizations vs. Large Organizations



Larger companies are turning to robotics far more readily than smaller companies. In that 52% of smaller organizations say that they will not be using robotics, this is probably not interesting in terms of business trends. They might not have the capital required for the kinds of products and services that demand such solutions. But it is interesting that, while over 26% of large organizations that are already using robotics intend to increase their use, only 12% of smaller organizations plan to take this same path.

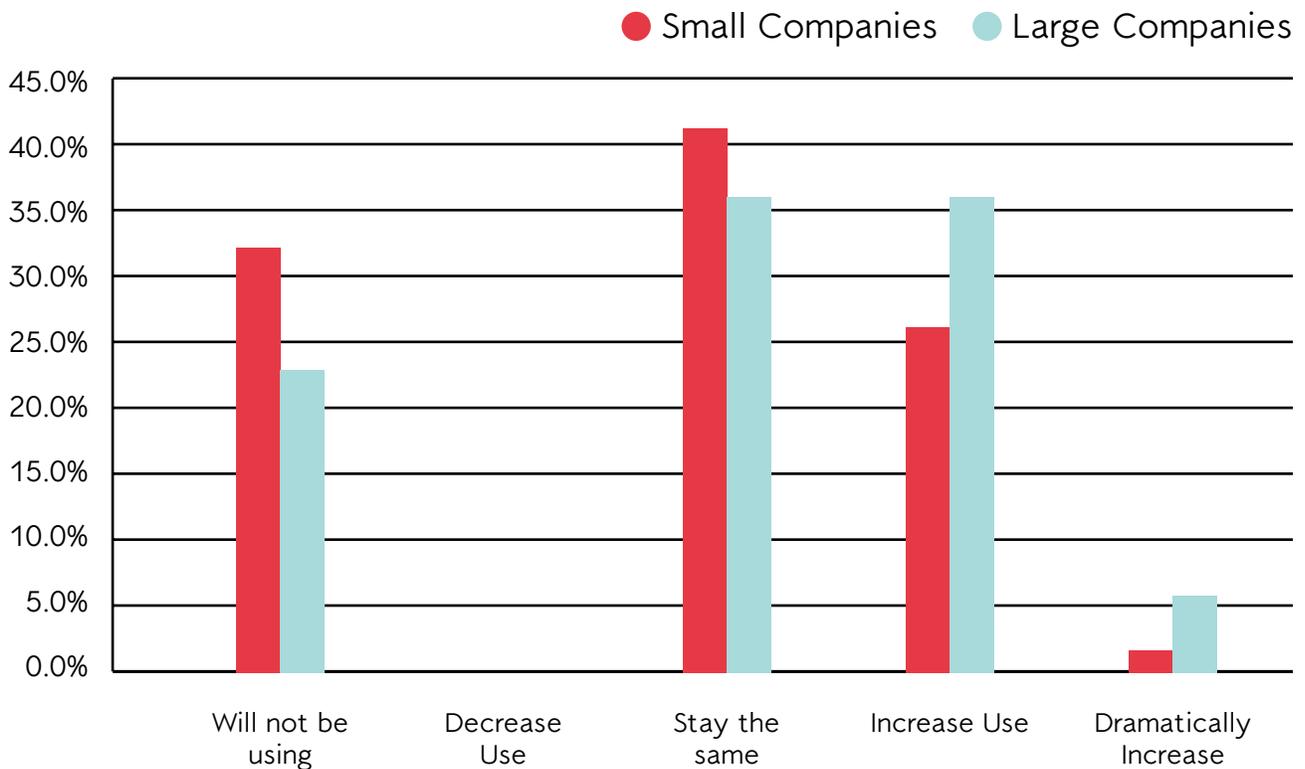
How will your usage of AI change in the coming year?



Similarly, Artificial Intelligence (AI) has also captured larger organizations' interest more readily than their smaller counterparts. A significant 42% of them are looking to increase their reliance on AI in the coming year.

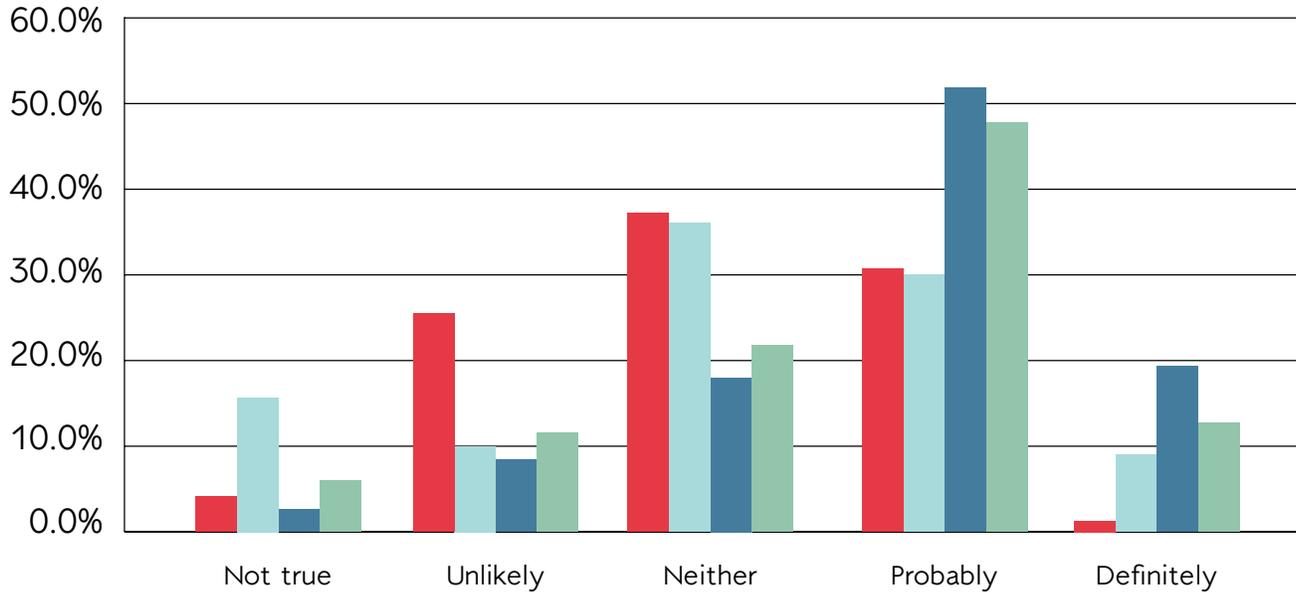
The variance between the organizations is harder to explain than for that of robotics. Artificial Intelligence is less dependent upon company operation type and size for its deployment. It could be argued that smaller organizations are merely lacking the expertise to deploy this kind of solution. Capital requirements may also influence these results.

How will your usage of homeworking and homeworkers change during the coming year?



We have already seen that homeworking has been the major trend during the pandemic. But again, it is the larger organizations that are seeking to make the greatest use of homeworking in the coming year. A breath-taking 87% of them are looking to increase their use of homeworkers. All of the larger companies we surveyed will be using homeworking to some extent.

11. HOW DO YOU FEEL ABOUT THE FOLLOWING STATEMENTS?



- The government will deregulate to encourage employment
- Our younger workers adapted more easily to the challenges of the pandemic
- My organization will increase use of technology to protect against future pandemics
- My organization will be re-assessing its management training programmes now

We offered a range of statements to our respondents to see how they rated them in terms of expectancy and likelihood. This question is designed to gauge opinions and feelings rather than produce measurable scientific results. Readers should beware of drawing formal conclusions from the results.

The outstanding results of this question are the number of organizations turning to greater technology to protect against future pandemics.

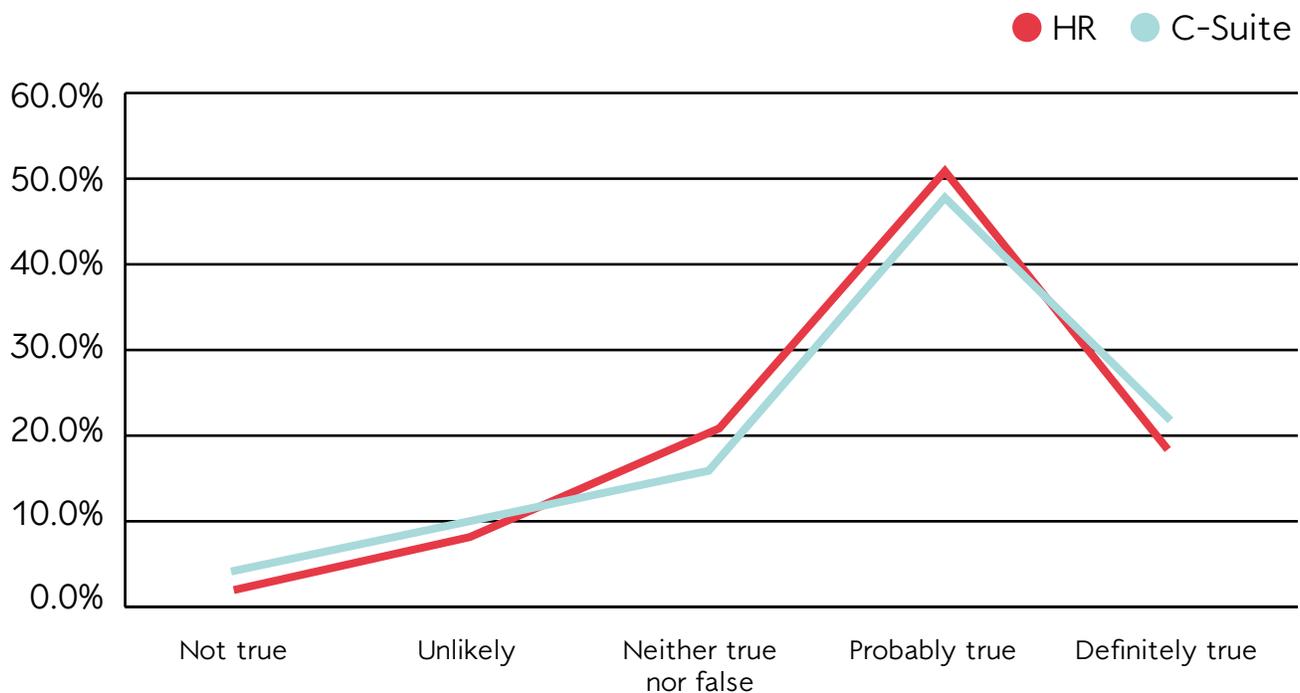
- Almost 72% of organizations said they would probably or definitely turn to technology to protect themselves further from future pandemics.
- Only 2.8% of organization will not be looking to technology for greater protection

- Organizations have little faith in governments to encourage employment. However, there does appear to be a broader realization that management training needs to be assessed. More than 60% of organizations will definitely or probably be reassessing its management training programs.
- Some authorities have suggested that younger workers were better placed to deal with the increase in home working and the effects of the lockdown in general. This survey gives little indication that this is true. Indeed, 15.1% of respondents stated that this was not true with only 8.9% feeling that this was definitely true.

HR vs. C-Suite

Previous surveys have revealed a significant disconnect between the way non-HR C-suite executives viewed the future of work when compared to their HR and learning colleagues. The following graphs reveal that COVID-19 has helped to realign their views.

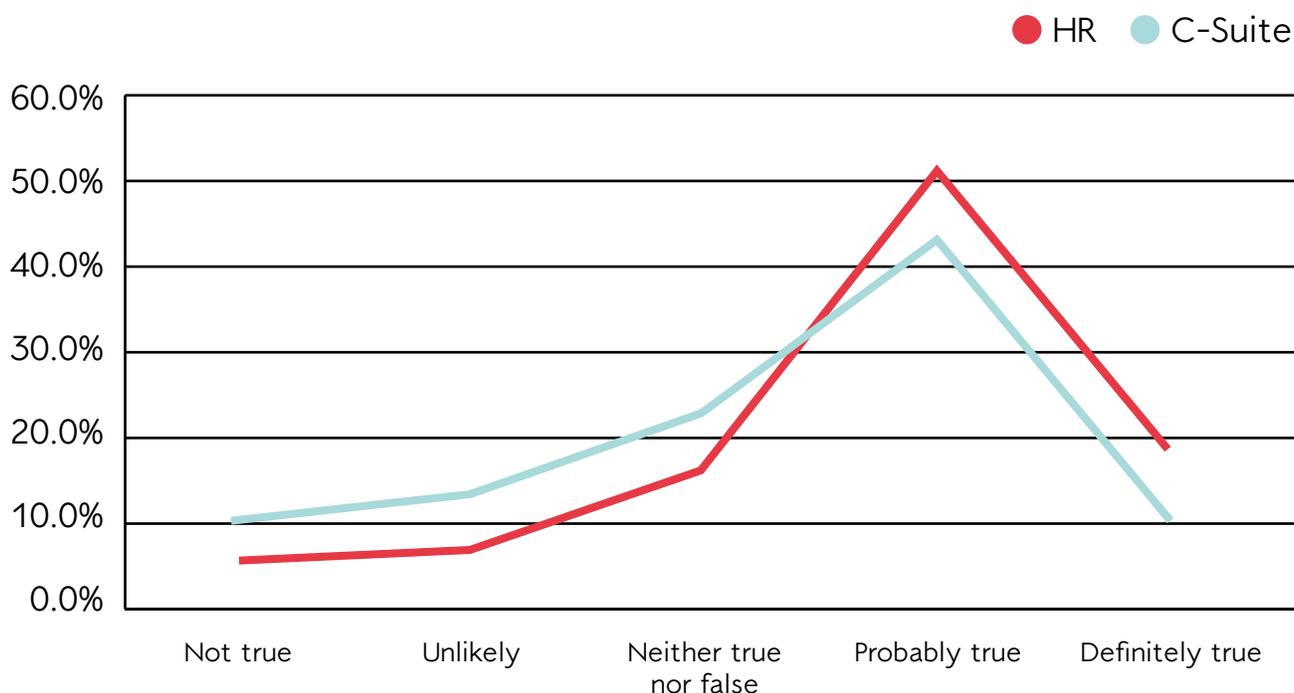
My organization will increase use of technology to protect against future pandemics



There was no notable differentiation between them when it came to technology use, both agreeing that increased use will help them protect against further pandemics. Note that:

- 69.8% of HR staff believed that increasing technology use would help protect against future pandemics. A remarkably similar 70.2% of C-suite felt the same way.

My organization will be re-assessing its management training programmes now

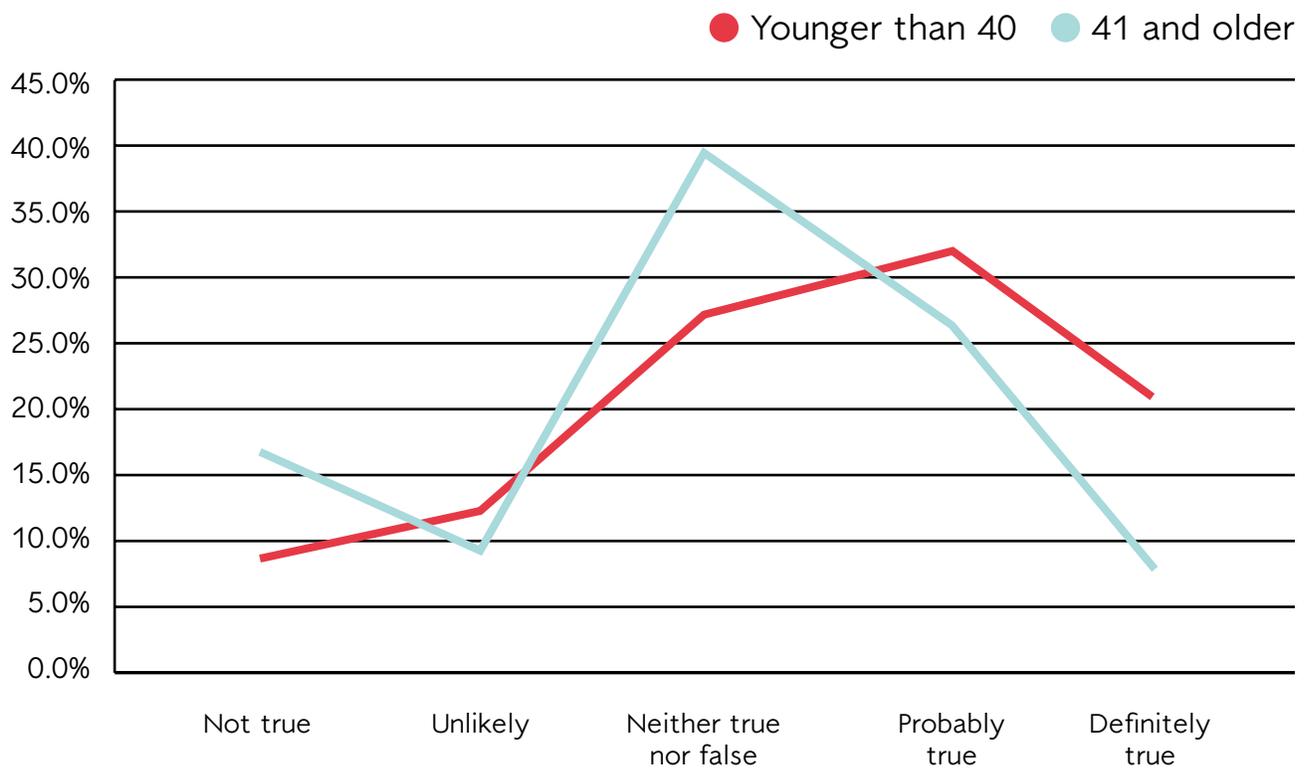


Unsurprisingly perhaps, HR and learning and development saw a greater need to reassess the training solutions, but the two groups were still broadly aligned.

- Only 5.7% of HR people surveyed will not be expecting to reassess their management training programs in the light of their COVID-19 experiences.
- 69.8% of HR and 53.7% of C-Suite executives believe that they will probably or definitely be reassessing these solutions.

Younger vs. Older workers

Younger workers adapted more easily to the pandemic



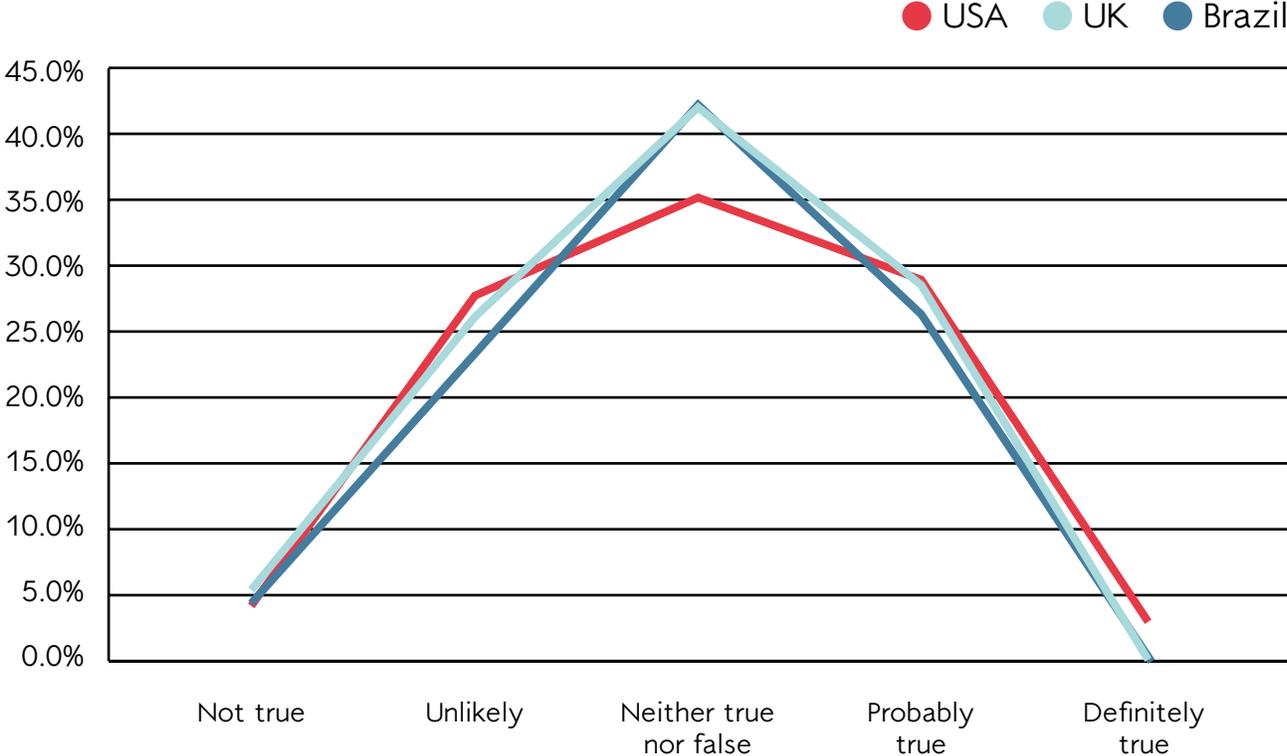
Although these results are hardly surprising, it is interesting to note that individuals seemed to think they adapted well to the pandemic, whatever their age.

- Our survey says that almost 53% of younger workers (workers under the age of 40) believe it is probably or definitely true that they adapted to the pandemic better than their older colleagues.
- Conversely, more than 65% of people, 41 and over, did not believe this to be necessarily true. While less than 8% of them definitely believed that their younger colleagues were better equipped to deal with the challenges.

One statistical anomaly should be noted; because of the nature of the people we surveyed, we received no replies from 'Generation Z'. Had we have done so, and given the distribution of the existing responses, this would almost certainly affect the data in favor of younger people being better equipped to deal with the pandemic.

USA vs UK vs Brazil

The government will deregulate to encourage employment: by country



Breaking down the replies to future government regulation plans by country gives us a uniform response. Respondents in Brazil, UK, and the US all perceived there were no clear deregulation opportunities for government that would encourage employment. This could suggest that, despite the different circumstances surrounding the pandemic's progress in different countries, these governments at least have not articulated any clear 'kick start' plans to encourage employment in the economy.

ABOUT THE SURVEY

Survey Date: June 2020

The Talent Transformation Guild conducted this survey in June 2020 to uncover the impact of the COVID-19 pandemic on organizations.

Surveying Attitudes

The questions cover a range of topics designed to tease out the different attitudes regarding the pandemic rather than establish any scientific premise.

Sample Size

In total Talent Transformation surveyed 232 people. We consider this a fair sample to draw some significant conclusions even when the sample is dissected across our three main target countries, the UK, the US, and Brazil. Each of these countries has been affected by the pandemic in a significant way compared to other countries.

Additional Observations

To add further veracity to this survey, we have also included some observations drawn from other recent studies. This provides us with both additional background information and can help to validate our data and support our conclusions.

Issues Not Covered

Not included in this survey are the steps that employees would like to see as a condition to return to work, such as social distancing, deep cleaning, access to hand sanitizing, etc. These subjects have been widely surveyed by others. - moreover, the answers to these questions are changing rapidly. We have however, included some of this analysis as part of this data.

ABOUT THE TALENT TRANSFORMATION GUILD:

This 2020 World of Work Survey Report is published by the Talent Transformation Guild which is a community of leaders, talent management professionals, and consultants who are managing the transformations which are being driven by today's automation revolution. The Guild is a community built around the best practice and real-life issues involved in identifying and supporting talent and helping it grow in and during this the 4th Industrial revolution!

The Guild stimulates conversation by providing podcasts, webinars, articles, conferences, and a framework known as the Talent Transformation Pyramid. This framework, licensed under creative commons, provides a vocabulary to enable specific conversations and interventions to prepare for digital transformations.

For more information please visit <http://www.talenttransformation.com>

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