Decoding Global Ways of Working

A study of 209,000 people in 190 countries hints at how workplaces will have to change in the future

BCG ✕ **THE NETWORK** Global talent simplified ✕ **Appcast**

BCG

THE NETWORK
Global talent simplified

Boston Consulting Group partners with leaders in business and society to tackle their most important challenges and capture their greatest opportunities. BCG was the pioneer in business strategy when it was founded in 1963. Today, we work closely with clients to embrace a transformational approach aimed at benefiting all stakeholders—empowering organizations to grow, build sustainable competitive advantage, and drive positive societal impact.

Our diverse, global teams bring deep industry and functional expertise and a range of perspectives that question the status quo and spark change. BCG delivers solutions through leading-edge management consulting, technology and design, and corporate and digital ventures. We work in a uniquely collaborative model across the firm and throughout all levels of the client organization, fueled by the goal of helping our clients thrive and enabling them to make the world a better place.

The Network is a global alliance of more than 60 leading recruitment websites, committed to finding the best talent in over 130 countries. Founded in 2002, The Network has become the global leader in online recruitment, serving more than 2,000 global corporations. We offer these corporations a single point of contact in their home countries, and allow them to work in a single currency and with a single contract—while giving them access to a global workforce. The recruitment websites in The Network attract almost 200 million unique visitors each month. For more information, please visit www.the-network.com.

Appcast

Appcast is the global leader in programmatic recruitment advertising technology and services. With advanced technology, unmatched market data and a team of the industry's best recruitment marketers, Appcast's technology and services manage over half a billion dollars in job advertising annually on behalf of more than 1,500 clients. Headquartered in Lebanon, N.H. with offices in Boston, Mass., New Brunswick, Canada and Minsk, Belarus, Appcast is a subsidiary of StepStone, one of the world's largest job classified businesses, and a member of the Axel Springer SE family. Appcast is proud to be the exclusive U.S. and Canada partner for The Network.

Decoding Global Ways of Working

This is the second in a series about the pandemic's long-term impact on work.

At times in the past year, it has seemed that "going to the office" was destined to become an antiquated activity, perhaps the subject of a future museum exhibit whose artifacts would include conference rooms, whiteboards, entry badges, and foosball tables. The belief that work has changed irrevocably has been especially pronounced if you work in certain industries, live in certain countries, and travel in certain professional circles. But the idea has occurred to almost everyone.

We're not there yet.

Although the pandemic has drawn attention to the upside of remote work, *fully* remote work—in which employees never set foot in an office—isn't a model that people are clamoring for as they look toward the end of the pandemic. Rather, remote work is among a set of workplace attributes—along with friendly colleagues, ethnic and racial diversity, and a commitment to environmentally sound practices—that many employees will be seeking.

These preferences come through in a survey of 209,000 people in 190 countries by Boston Consulting Group and The Network. (See Exhibits 1 and 2.) We conducted the survey in October and November of 2020 and are publishing our findings in a series of reports. The first focused on people's lower willingness, in a pandemic-altered era, to consider a job in a foreign country. After this second report on shifting work preferences, the series will continue with a look at evolving career expectations.
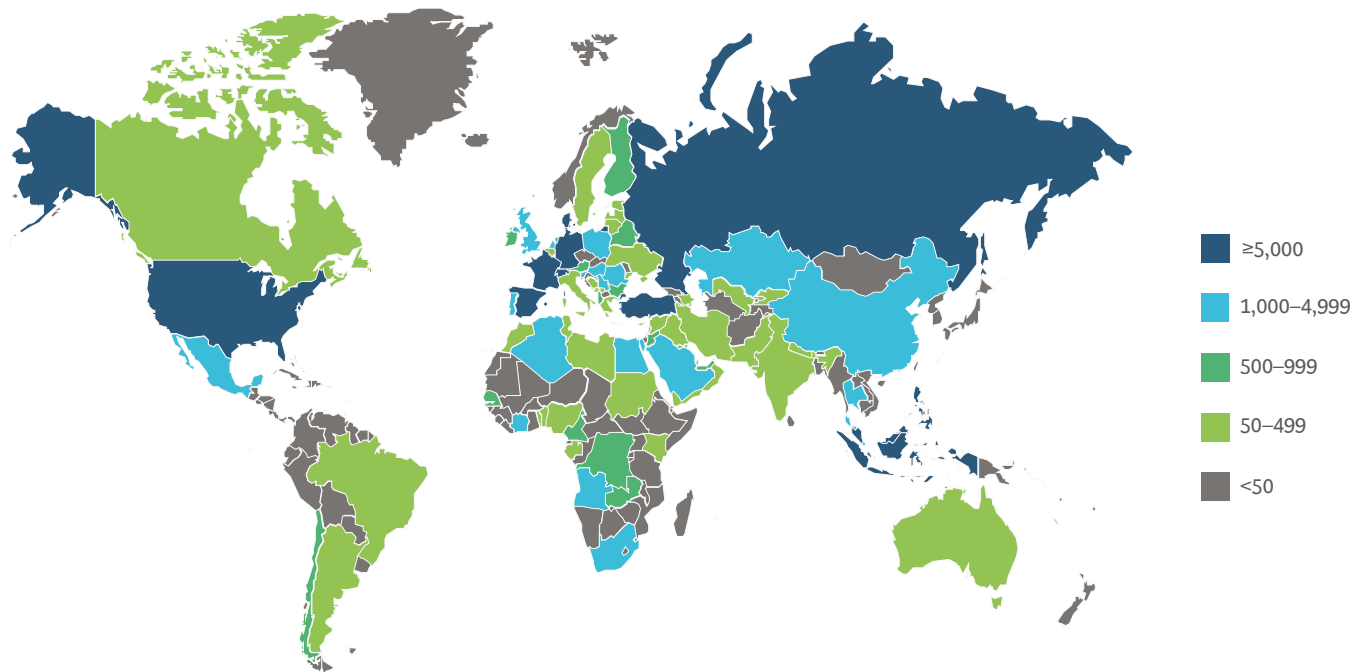
The survey was fielded when the second wave of COVID-19 cases was just beginning and many places weren't in lockdown. (See the sidebar, "Methodology.") The work-from-home percentages would almost certainly be higher if responses had been collected even a few weeks later. That said, the lower level of emergency that prevailed at the time of the survey may make the findings more reflective of the expectations people will have as the pandemic is increasingly brought under control.

Exhibit 1 - Demographics of Survey Respondents

208,807
Workforce respondents

- Male **51%**
- Prefer not to say **2%**
- Female **47%**

Age distribution (10–80)

Education:
- Doctorate or equivalent **2%**
- Master's degree or postgraduate qualification **23%**
- Bachelor's degree **46%**
- None/other **1%**
- High school diploma or equivalent **14%**
- Secondary qualification **14%**

Industry

- Consumer **14%**
- Industrial goods **8%**
- Professional services **7%**
- Retail **6%**
- Health care **6%**
- Technology **6%**
- Financial institutions **6%**
- Public sector **5%**
- Travel and tourism **4%**
- Energy **3%**
- Telecommunications **3%**
- Nonprofit **2%**
- Media **2%**
- Insurance **1%**
- Legal **1%**
- Other **25%**

Position

- Owner or senior management **5%**
- Middle management **18%**
- Lower management **25%**
- No management responsibilities **52%**

Source: 2020 BCG/The Network proprietary web survey and analysis.

Note: Some percentages do not total 100 because of rounding.

Exhibit 2 - A Survey of 208,807 Workforce Respondents in 190 Countries

	Americas	Middle East and Africa		Europe		Asia
5,000 or more respondents	US			Turkey Russia Denmark France Germany	Spain Switzerland	Indonesia Philippines Singapore Malaysia
1,000–4,999 respondents	Mexico	Angola Algeria Egypt	Ivory Coast Saudi Arabia South Africa	Hungary Kazakhstan Netherlands Poland Portugal	Romania Serbia Slovenia UK	China Thailand
500–999 respondents	Chile	Cameroon Democratic Republic of the Congo Jordan Senegal United Arab Emirates Zambia		Albania Austria Belarus Bulgaria	Finland Ireland Luxembourg	
50–499 respondents	Argentina Brazil Canada	Benin Gabon Iraq Iran Kenya Kuwait Lebanon Libya Morocco	Nigeria Oman Qatar Sudan Syria Togo Tunisia Yemen	Azerbaijan Belgium Bosnia and Herzegovina Cyprus Estonia Greece Italy Kosovo	Kyrgyzstan Latvia Lithuania Sweden Ukraine Uzbekistan	Australia India Nepal Pakistan
Fewer than 50 respondents	Other Americas	Other Middle East and Africa		Other Europe		Other Asia and Pacific

Methodology

BCG and The Network (together with its affiliate organizations) conducted this survey between October and early December of 2020. All told, 208,807 people, in 190 countries, participated. The sample includes about an equal proportion of men and women, most of whom work in commercial industries. (The public sector and nonprofits are also represented.) The respondents are mostly early- and mid-career, and the majority are 20 to 40 years of age. Almost three-quarters of them have a bachelor's degree or above.

The 40-question survey elicited workers' attitudes regarding a variety of topics, including their willingness to work abroad, the countries (other than their own) that they would most like to work in, and the impact of COVID-19 on their work preferences, employment situation, and willingness to learn new skills.

The information gathered in the survey (which included people's nationalities and level of hierarchy in their organizations) made it possible to analyze workers' attitudes along a variety of parameters.

BCG also conducted follow-up Zoom interviews with select study participants around the world. Those interviews furnish the direct quotes that appear in this report.

Clarifying the Prevalence of Distance Work

One topic explored in the survey relates to the biggest change for many people: the rise of remote working. Most people's sense of who has been working remotely, versus in a traditional physical setting, has been a projection based on their own experience. Our survey offers a more complete picture of what has been happening. Slightly more than half of all respondents globally were working remotely when the survey was conducted, either all the time or as part of a hybrid model with some days onsite. (See Exhibit 3.)

The type of job people hold is a major factor in their likelihood to be working remotely. An average of 70% of people in digital and knowledge-based jobs are now working remotely at least some of the time. Average work-from-home proportions are considerably lower (about 51%) for traditional office jobs, such as sales and purchasing. For jobs that require the handling of physical goods or contact with clients, the average is lower still. For example, only about 20% of people with manufacturing jobs said they are working remotely some or all of the time. (See Exhibit 4.)
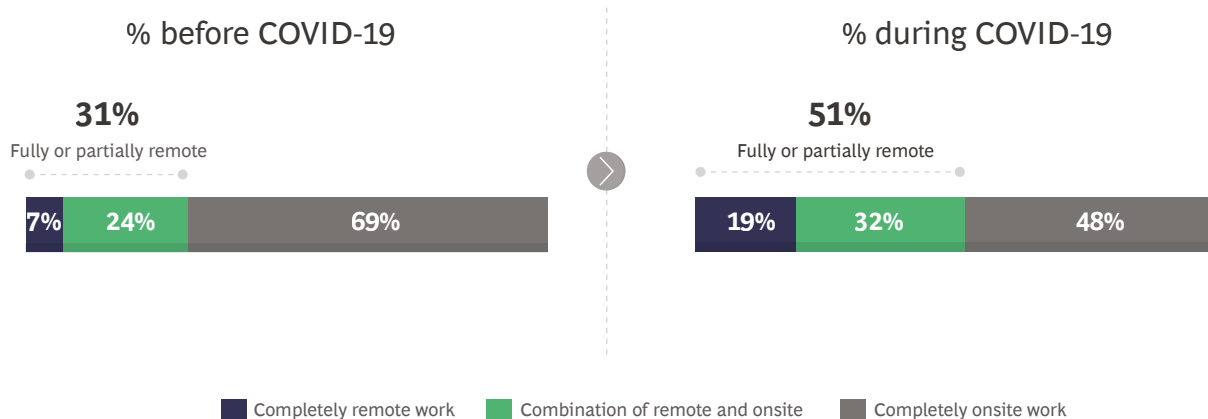
And there are nuances within categories, too. An engineer designing automation software is in all likelihood working from home at the moment. A hardware engineer, or an engineer working on debugging a piece of equipment, may well be visiting a physical lab at least a few days a week.

Matej Hrapko, a mechanical engineer at an Austrian automotive company, knows firsthand about the boost the pandemic has given to remote working. Before the pandemic, Hrapko never worked remotely. "Our company did not allow home office," he explained. Amid shutdowns that kept many European workers out of the office, though, he and his colleagues gravitated to communication tools such as Skype and found new ways to collaborate. "COVID has brought some great progress in our ways of working that we would like to keep," he said.

A closer look at the remote work trend shows that even within similar job categories, there are major differences by country of residence. (See Exhibit 5.) Remote work has most firmly taken root in Western Europe, especially in countries hit hard by COVID-19. The Netherlands and the UK lead all countries in the percentage of people who are working remotely, with Luxembourg and France also ranking high. More than 85% of these countries' digital and knowledge-based workers said they were working from home at least periodically in October and November 2020, far above the global average. (We used a single job category to ensure that country-to-country comparisons would be meaningful, but the percentage differences hold across most job categories.)

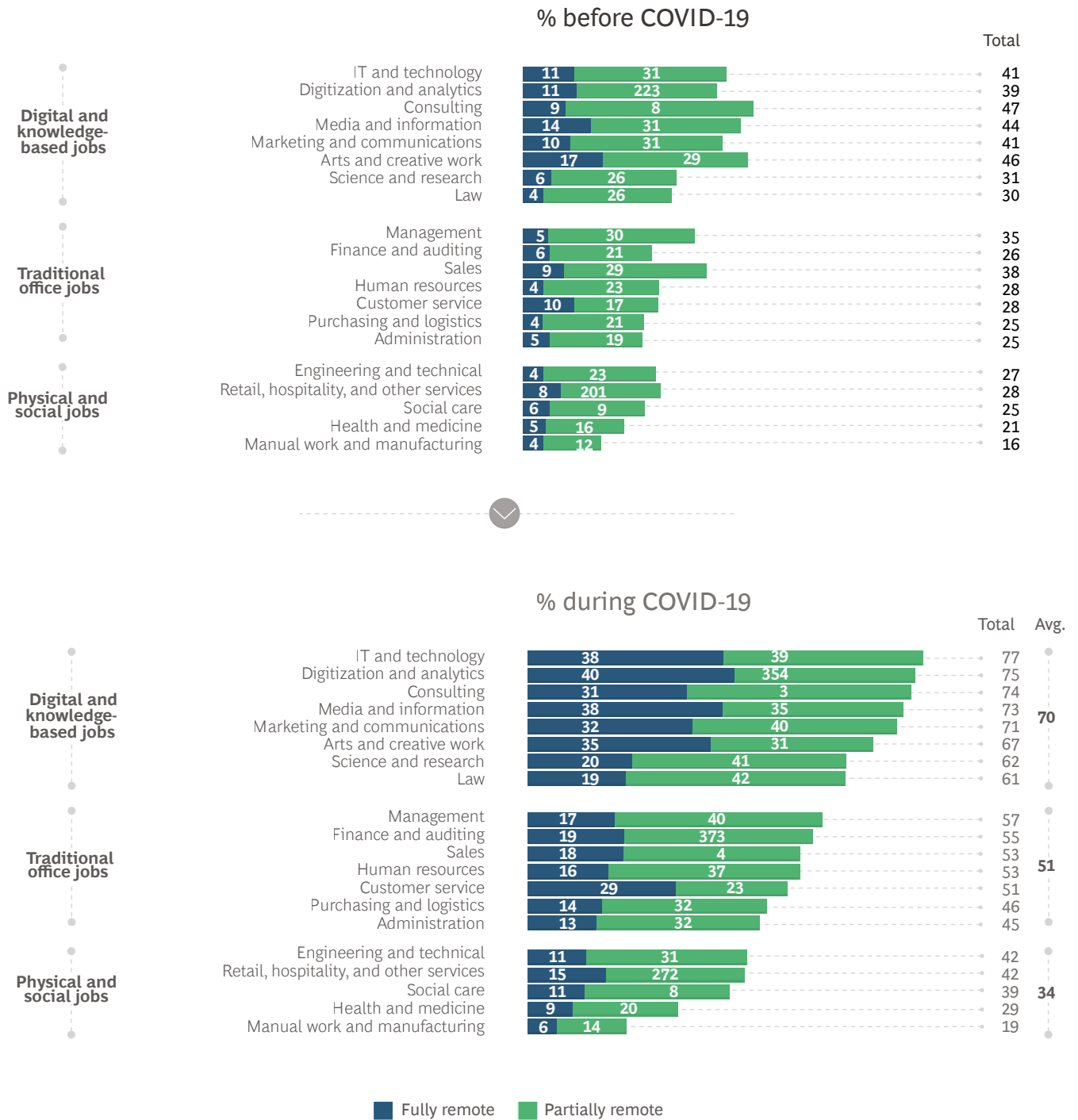## Exhibit 3 - Before and After: How COVID-19 Has Changed Work Models

Percentage of respondents who work from home, part- or full-time

% before COVID-19

31%
Fully or partially remote

| 7% | 24% | 69% |

% during COVID-19

51%
Fully or partially remote

| 19% | 32% | 48% |

■ Completely remote work   ■ Combination of remote and onsite   ■ Completely onsite work

Source: 2020 BCG/The Network proprietary web survey and analysis.

Exhibit 4 - Digital and Knowledge Workers Have Been the Fastest to Embrace Remote Models

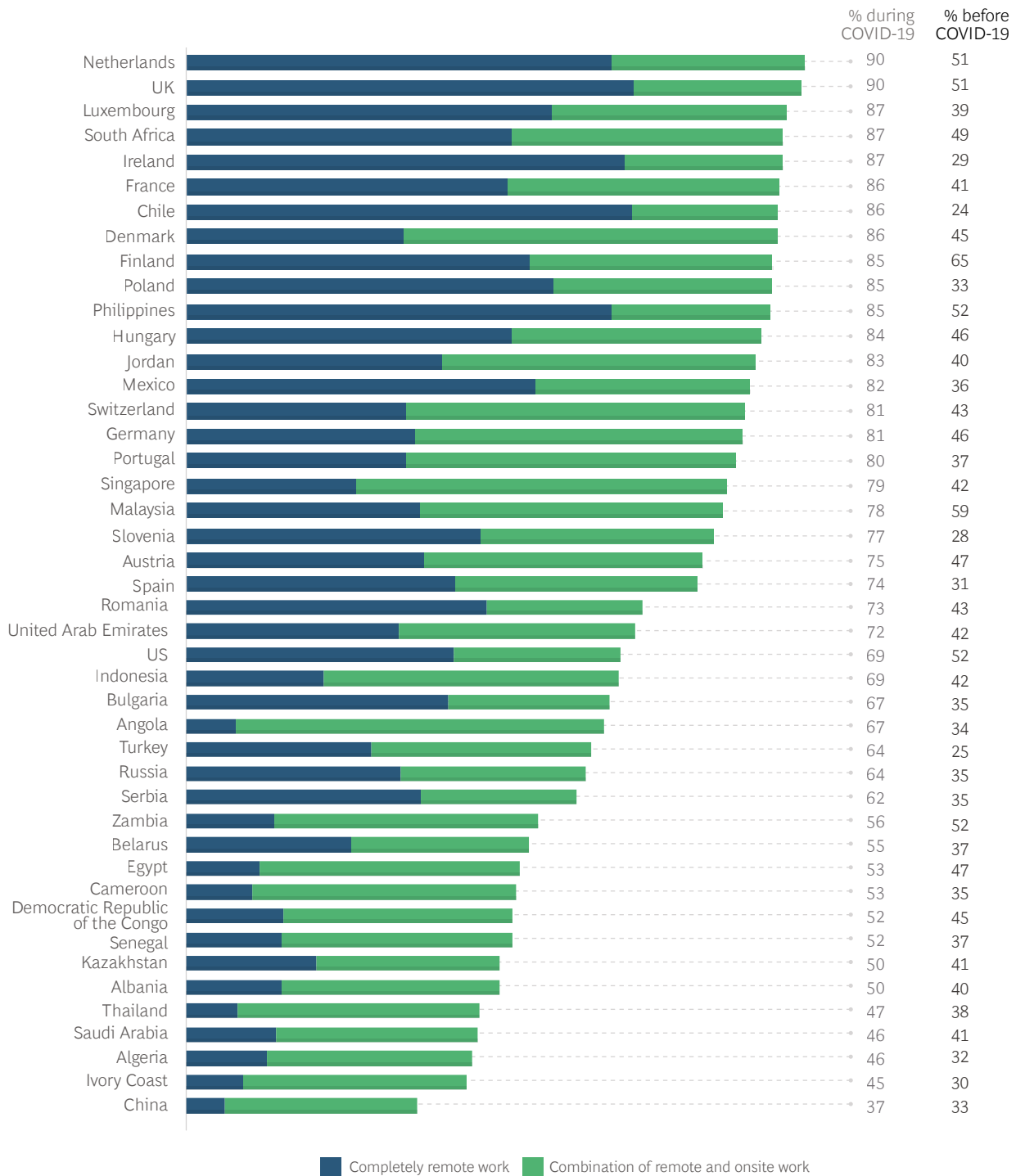Different kinds of workers and the models they have used

% before COVID-19

	Fully remote	Partially remote	Total
Digital and knowledge-based jobs			
IT and technology	11	31	41
Digitization and analytics	11	223	39
Consulting	9	8	47
Media and information	14	31	44
Marketing and communications	10	31	41
Arts and creative work	17	29	46
Science and research	6	26	31
Law	4	26	30
Traditional office jobs			
Management	5	30	35
Finance and auditing	6	21	26
Sales	9	29	38
Human resources	4	23	28
Customer service	10	17	28
Purchasing and logistics	4	21	25
Administration	5	19	25
Physical and social jobs			
Engineering and technical	4	23	27
Retail, hospitality, and other services	8	201	28
Social care	6	9	25
Health and medicine	5	16	21
Manual work and manufacturing	4	12	16

% during COVID-19

	Fully remote	Partially remote	Total	Avg.
Digital and knowledge-based jobs				70
IT and technology	38	39	77	
Digitization and analytics	40	354	75	
Consulting	31	3	74	
Media and information	38	35	73	
Marketing and communications	32	40	71	
Arts and creative work	35	31	67	
Science and research	20	41	62	
Law	19	42	61	
Traditional office jobs				51
Management	17	40	57	
Finance and auditing	19	373	55	
Sales	18	4	53	
Human resources	16	37	53	
Customer service	29	23	51	
Purchasing and logistics	14	32	46	
Administration	13	32	45	
Physical and social jobs				34
Engineering and technical	11	31	42	
Retail, hospitality, and other services	15	272	42	
Social care	11	8	39	
Health and medicine	9	20	29	
Manual work and manufacturing	6	14	19	

■ Fully remote   ■ Partially remote

Exhibit 5 - Europe Leads in Remote Work; Less Developed Regions Trail

Percentage of digital and knowledge-based workers in each country who have worked remotely

	% during COVID-19	% before COVID-19
Netherlands	90	51
UK	90	51
Luxembourg	87	39
South Africa	87	49
Ireland	87	29
France	86	41
Chile	86	24
Denmark	86	45
Finland	85	65
Poland	85	33
Philippines	85	52
Hungary	84	46
Jordan	83	40
Mexico	82	36
Switzerland	81	43
Germany	81	46
Portugal	80	37
Singapore	79	42
Malaysia	78	59
Slovenia	77	28
Austria	75	47
Spain	74	31
Romania	73	43
United Arab Emirates	72	42
US	69	52
Indonesia	69	42
Bulgaria	67	35
Angola	67	34
Turkey	64	25
Russia	64	35
Serbia	62	35
Zambia	56	52
Belarus	55	37
Egypt	53	47
Cameroon	53	35
Democratic Republic of the Congo	52	45
Senegal	52	37
Kazakhstan	50	41
Albania	50	40
Thailand	47	38
Saudi Arabia	46	41
Algeria	46	32
Ivory Coast	45	30
China	37	33

■ Completely remote work ■ Combination of remote and onsite work

Source: 2020 BCG/The Network proprietary web survey and analysis.

Note: Percentages may be affected by rounding.

The technical infrastructures and prior work practices in these countries—including an inclination to accommodate employees who need to work from home periodically—seem to have enabled a relatively seamless shift to remote work. These countries also have a clear motivation to support social-distancing protocols given their high COVID-19 numbers. (See Exhibit 6 for a correlation between COVID cases and remote work.)

In other countries, a sense that COVID has largely been vanquished is pushing work models in the other direction. This may explain why most Chinese and Saudi Arabian digital workers are once again back in a physical office. (Chinese digital workers are now the least likely to be working from home of any digital workers in the world.) There are also low remote work numbers in some countries where COVID cases were never high to begin with—Thailand, for example. Ivory Coast, Senegal, and Cameroon have likewise mostly avoided COVID-19—but the low work-from-home numbers in these sub-Saharan African nations may also have to do with their infrastructure limitations.

The two factors of preexisting digital work practices and virus aversion seem to explain most countries' proportion of remote working. There are, of course, many nuances. Finland, Denmark, and Ireland, for instance, have high levels of remote work despite low COVID-19 caseloads. These European countries have seen how quickly COVID cases have spiked elsewhere and likely want to avoid a similar outcome, along with the economic disruption that would ensue. The same is true of some of the high-percentage remote work countries in Asia, including Malaysia, Philippines, and Singapore, where the virus has been well controlled. All of these countries, it may be said, are doing what they can to keep the genie in the bottle.

The US is in the middle of all countries on the proportion of remote work, despite having a very high per capita incidence of COVID-19. Sixty-nine percent of US digital and IT workers have been doing some remote work during the pandemic, very close to the global average. While this is not a low proportion, it falls significantly below that of many countries that have done a better job of pandemic management.

Exhibit 6 - How Remote Work and Virus Response Are Correlated

Percentage of digital and knowledge-based workers in each country who have worked remotely

Sources: World Health Organization COVID-19 cases; 2020 BCG/The Network proprietary web survey and analysis.

Note: Countries shown had more than 500 respondents. Curved dotted line indicates regression for the countries displayed.

Attitudes About Flexible Working After the Pandemic

Working from home isn't new. Before the pandemic, however, many companies were still treating it as an occasional practice allowed only for certain employees. COVID-19 has democratized distance work. The details vary, but it's clear that overall remote work awareness has created an expectation that will outlive the crisis.
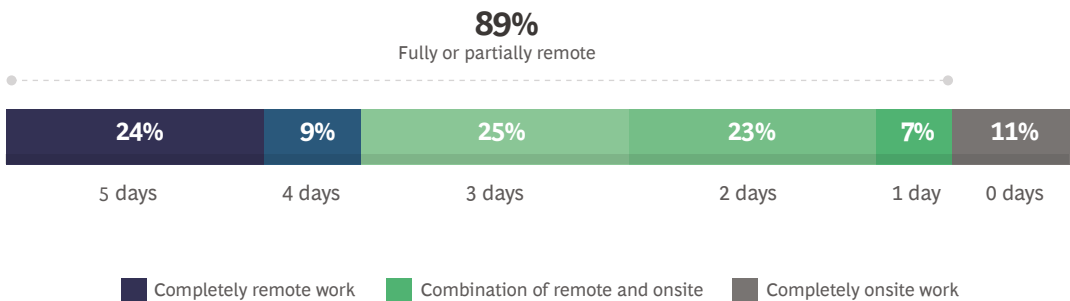
This came through in a part of the survey where respondents were asked where they would prefer to work in the future. Nine out of ten said they want to work remotely at least some of the time, significantly higher than the 51% of people who were working remotely when the survey was conducted, some seven months into the pandemic. But only a relatively small proportion of workers—one in four—would switch to a completely remote model if they could. The rest like the idea of a combination of home days and office days. (See Exhibit 7.) And it is indeed flexibility that most people are interested in, not a 180-degree turn in the traditional model that would have everyone working from home all the time and never going to a physical work location.

"An ideal model for me would be to work from home Mondays and Fridays and go to the office the rest of the week," said Tomilola Abiodun, who works in marketing for a major US software manufacturer. While it took Abiodun a little while to get into the groove of remote work, she now has what she considers a professional home setup and said she has been much more productive.

This wish for flexibility is not limited to those with digital, knowledge, or office jobs. The preference for occasional home office days is evident even among people who have not worked from home at all during the pandemic and in sectors that haven't historically had a way to do distance work, including social care, services, and manufacturing. In many of these seemingly less flexible industries, there's a big gap between the desire for remote work and the incidence of it. For instance, only 29% of health and medical workers and 19% of manufacturing workers have been working remotely during the pandemic, despite 79% and 70% of them, respectively, wishing they could. (See Exhibit 8.) It may be that these respondents are unrealistic about what's possible. Or the responses may be indicative of work model changes destined to transform even more industries.

Exhibit 7 - The Future: How People Would Work If Given a Choice

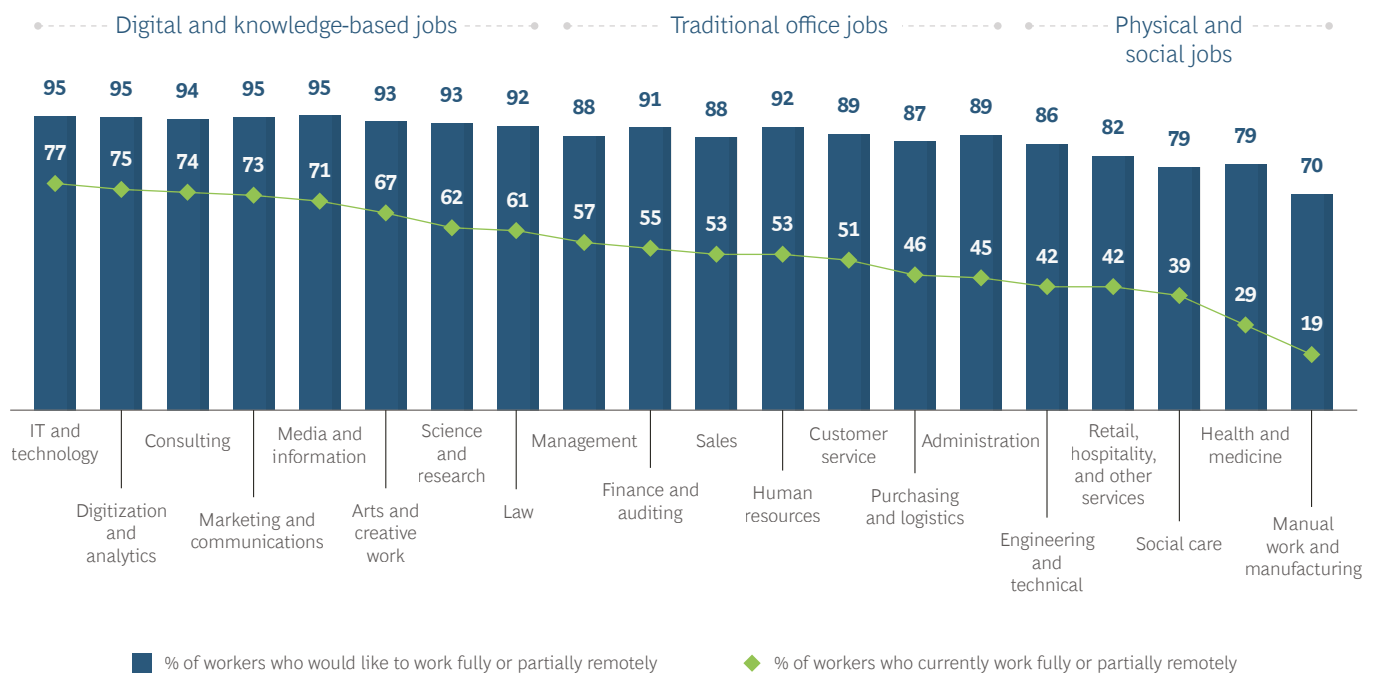How many days per week people would like to work from home, by percentage of respondents

89%
Fully or partially remote

24%	9%	25%	23%	7%	11%
5 days	4 days	3 days	2 days	1 day	0 days

■ Completely remote work　■ Combination of remote and onsite　■ Completely onsite work

Source: 2020 BCG/The Network proprietary web survey and analysis.

Even workers in manual, health care, and social jobs want to work from home occasionally.

Exhibit 8 - Desired Work Model of Workers in 20 Job Roles

Remote work expectations in the future versus what's happening today

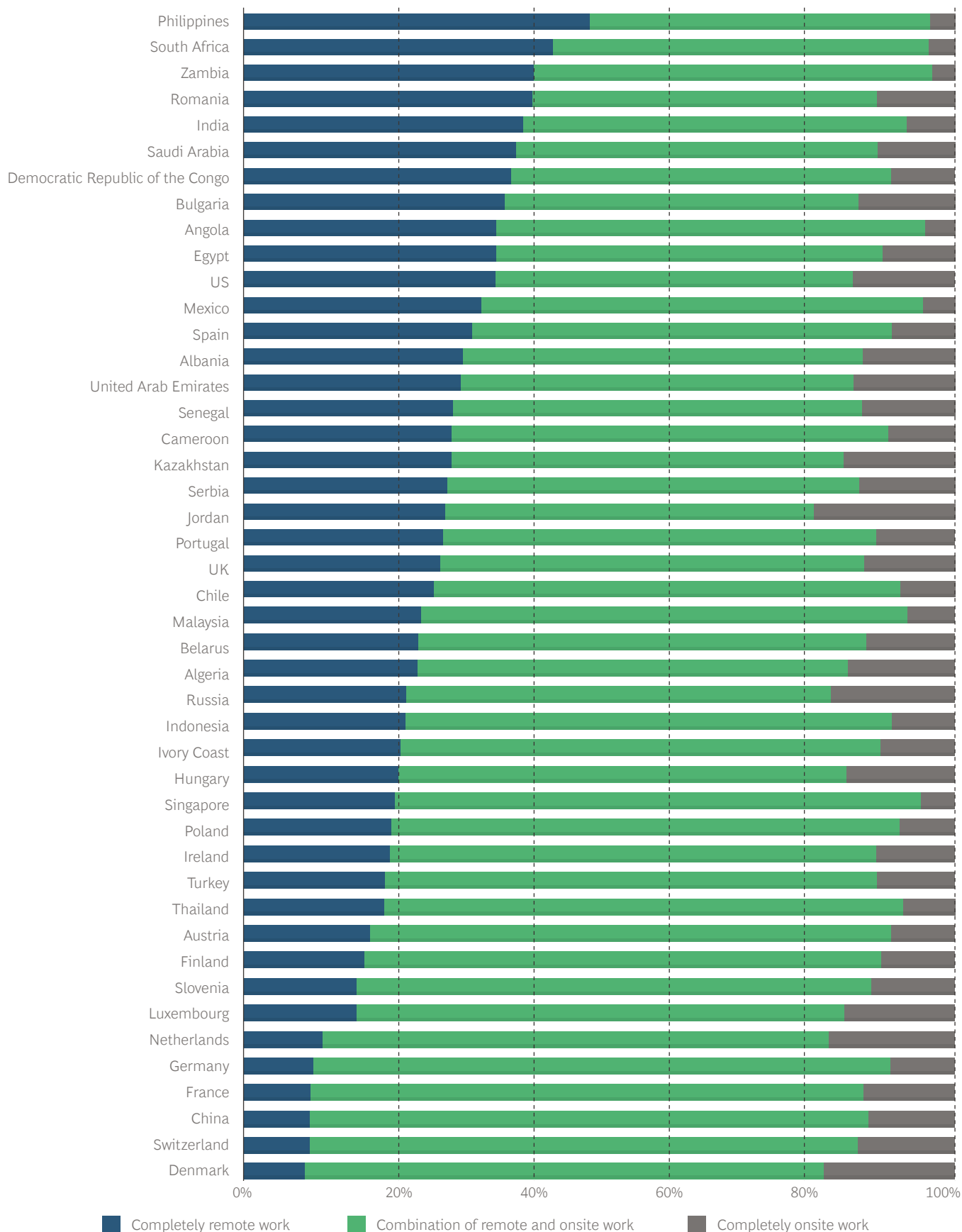**Source:** 2020 BCG/The Network proprietary web survey and analysis.

To the extent that there is an appetite for fully remote work, that appetite seems not to be in the most economically advanced countries. For instance, residents of the Netherlands, Luxembourg, France, Denmark, and Finland—who are among the most likely nationalities to be working from home now—are among the least likely to say they would be okay with never going to the office again. (See Exhibit 9.) China's workers are similarly uneasy about a future that would have them not working together physically with their colleagues.

The enthusiasm for fully remote work is highest in developing countries, including parts of Africa. (In our first report in this series, we noted that African respondents were among those expressing the highest interest in remote international work, in which a person accepts a job with a

foreign employer but performs the work in his or her own home country.) The different attitudes about fully remote work may reflect differences in transportation systems, including the time and effort needed to get to the office in one city or country versus another. Companies in highly developed countries may also invest more in their office spaces or to create workplace amenities, making their employees more eager to be on site.

In a bit of a surprise, Americans are near the top of all nationalities in their appetite for fully remote work, with 35% of US respondents saying they would be happy to work from home permanently. In part, this might reflect the huge cost-of-living differences between big US cities where many large businesses are located and the more affordable suburbs and towns where many Americans

Exhibit 9 - Different Levels of Enthusiasm for Fully Remote Work

Legend: ■ Completely remote work ■ Combination of remote and onsite work ■ Completely onsite work

Countries (top to bottom): Philippines, South Africa, Zambia, Romania, India, Saudi Arabia, Democratic Republic of the Congo, Bulgaria, Angola, Egypt, US, Mexico, Spain, Albania, United Arab Emirates, Senegal, Cameroon, Kazakhstan, Serbia, Jordan, Portugal, UK, Chile, Malaysia, Belarus, Algeria, Russia, Indonesia, Ivory Coast, Hungary, Singapore, Poland, Ireland, Turkey, Thailand, Austria, Finland, Slovenia, Luxembourg, Netherlands, Germany, France, China, Switzerland, Denmark

might live if they didn't have to go to an office. The 35% makes the US the highest-ranked developed country for fully remote work and the tenth-ranked country on this measure overall.

The desire for flexibility does not stop at location; it extends to work time as well. Only 36% of respondents globally say they want a traditional 9-to-5 job with fully fixed hours. The largest proportion (44%) would prefer a combination of fixed and flexible time, which could take the form of a daily window of a few hours when everyone is required to work and flexibility regarding the remaining required time. (Another 20% of respondents would like to have complete timing flexibility, with no fixed work hours at all.) Flexibility relating to when one is at one's desk is obviously helpful to the work-from-home model in that it allows for personal preferences and family commitments. Of course, the model also requires discipline on the part of the remote worker and a reverse sort of flexibility so that colleagues in other time zones aren't forever unable to engage the remote worker in real time.

One big change is people's increasing facility with using digital tools for work. (See Exhibit 10.) Even industries that haven't traditionally thought of themselves as high tech have become heavy users of Zoom, Slack, file-sharing solutions, and virtual flip charts. "We were not used to working with digital tools before," said Anne Granelli, who manages a medical center in Sweden. "COVID-19 has shown us that anything is possible remotely, even medical consultations."

The improved use of digital tools during the pandemic was noted by people in every industry and every location. In terms of job roles, people who do digital and IT work are the most likely to say they have become better at using digital tools because of the pandemic, followed by people in consulting. Muriel Giroud-Villaine, an independent French consultant who works with companies in the mining, pharmaceutical, and technology fields, said she has learned to speak more slowly in Zoom calls than she does in person and to ask more questions. This is to compensate for "all the nonverbal cues that I don't get anymore," she said.

COVID-19's Impact on Workplace Culture and Effectiveness

The pandemic's impact on people's work experience goes well beyond the dimension of where and during which hours jobs get done. The way people collaborate, the tools they use, the effectiveness of their work, and their well-being have also been affected.

Exhibit 10 - COVID-19's Impact on Different Areas of Work

Total score

	Strongly negative	Negative	Neutral		Positive	Strongly positive	
Use of digital tools	4%	7%	17%	17%	35%	19%	0.56
Flexibility in when and where to work	8%	15%	20%	20%	27%	11%	0.17
Team collaboration	8%	20%	21%	21%	23%	8%	0.04
Effectiveness	9%	21%	20%	20%	23%	7%	−0.02
Work-life balance	10%	20%	22%	22%	19%	6%	−0.08
Quality and style of leadership	11%	22%	19%	19%	21%	8%	−0.08
Well-being of employees	13%	28%	18%	18%	17%	6%	−0.24

Impact of COVID-19 ▮ Strongly negative ▮ Negative ▮ Neutral ▮ Positive ▮ Strongly positive

Source: 2020 BCG/The Network proprietary web survey and analysis.

Note: Total score was calculated as the average of answers ranging from +2 (strongly positive) to −2 (strongly negative).

64%

The Desire for Flexible Hours

Sixty-four percent of workers would prefer to have flexible hours. Only 36% want a traditional 9-to-5 job.

The other area where the pandemic has had an unmistakable impact is on employee well-being. Most people said they feel they are still getting the job done—the barely changed perceptions of team collaboration and organizational effectiveness underscore this—but that feeling has come at the cost of their well-being, to some degree. This was true of every respondent cohort, but lower well-being was especially pronounced among service-sector and manual workers. These are the workers who, during the pandemic, have had to travel to their jobs and who often work in physical teams. For some of these workers, the increased risk of contracting the virus and the discomfort of having to wear masks for hours at a time may have turned work into something to be dreaded.

(One thing that—surprisingly—didn't show up in the data is a difference based on gender or family circumstances. People with families were no more likely to say that the pandemic lowered their well-being or work-life balance than were people without families. Nor was there an appreciable difference by gender in response to these questions.)

Shifting Attitudes Toward What Matters on the Job

Apart from work location and work practices, the survey also identified some shifts in what people value at work.

In our last study, in 2018, people said that they expected their jobs to provide them with a mix of both short- and long-term benefits. Job seekers at the time wanted to be surrounded by people they liked, and they wanted their jobs to give them time for outside activities too. The 2018 survey respondents also expected to get some long-term benefits from work—specifically, a chance to develop new skills and advance their careers.

Today, these long-term attributes are much further down the list. It's all about the here and now—people care the most about the colleagues and manager they work with and a good work-life balance. Meanwhile, personal financial security has jumped in importance. (See Exhibit 11.) Indeed, it would be surprising if people *weren't* saying this, given the economic and existential crisis everyone has experienced.

Exhibit 11 - The Most Basic Reward of All—Pay—Has Surged in Importance

How different attributes rank now versus in the past

Source: 2020 BCG/The Network proprietary web survey and analysis.

More than half of respondents would refuse to work for an employer whose social and environmental policies don't match their beliefs.

There is some variation, by region, in what workers are focused on. For instance, financial attributes are central for workers in China, Russia, and Poland. Good relationships and a desire to be appreciated for the work one does remain the top priorities in Europe; they are also important in the US. European and US HR departments will have to figure out how to foster these feelings at a time when COVID-19 protocols are still keeping many employees and managers physically separated. And some African, Middle Eastern, and Latin American countries are exceptions to the lower importance of learning and career development. Those long-term goals remain near the top of the list in parts of these geographies. (See Exhibit 12.)

COVID-19 is not the only event in the past year that has changed people's expectations about work. The Black Lives Matter protests and the #MeToo movement have job seekers paying more attention to social values in the workplace. And a succession of climate catastrophes, including the Australian bushfires of 2019 and 2020, have prompted some job seekers to question prospective employers' environmental commitment.

Roughly seven in ten respondents said diversity and climate had become more important issues in the last year. (The younger the cohort, the higher the likelihood of the issue growing in importance.) And half of all workers said they would not accept a job with an employer whose policies in these areas didn't match their personal beliefs. (See Exhibit 13.)

Awareness of social issues has certainly risen for software marketer Tomilola Abiodun. "The BLM events really affected me," said Abiodun, a 29-year-old Black woman from Nigeria who has been in the US for four years. "I have always thought that inclusion and diversity were important, but 2020 showed me it could be a deal breaker for me if a company did not have these core values." Her employer has "responded very well to the BLM movement," she added, with colleagues calling her to see how she is doing.

Exhibit 12 – Top Workplace Attributes, by Respondents' Location

	Latin America and Caribbean		Asia-Pacific				Middle East and North Africa			
	Brazil	Mexico	China	India	Indonesia	Philippines	Algeria	Egypt	Saudi Arabia	United Arab Emirates
1	Good relationships with colleagues	Career development	Financial compensation	Good relationships with colleagues	Good relationships with colleagues	Job security	Learning and skills training	Good relationships with colleagues	Good relationships with colleagues	Good relationships with colleagues
2	Learning and skills training	Learning and skills training	Good work-life balance	Good relationship with superior	Good relationship with superior	Good work-life balance	Good relationships with colleagues	Employer reputation	Career development	Good relationship with superior
3	Good work-life balance	Financial stability of employer	Financial stability of employer	Opportunities to lead	Financial compensation	Good relationship with superior	Career development	Appreciation for your work	Job security	Career development
4	Good relationship with superior	Good work-life balance	Good relationship with superior	Good work-life balance	Career development	Good relationships with colleagues	Job security	Good relationship with superior	Appreciation for your work	Financial stability of employer
5	Interesting job content	Job security	Good relationships with colleagues	Company values	Company values	Career development	Good work-life balance	Financial stability of employer	Good relationship with superior	Job security

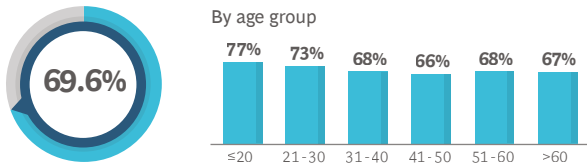|	Europe and Central Asia							Sub-Saharan Africa		North America
	France	Germany	Spain	Poland	Turkey	Russia	UK	Democratic Republic of the Congo	South African	US
1	Interesting job content	Appreciation for your work	Good relationships with colleagues	Financial compensation	Career development	Financial compensation	Good relationships with colleagues	Good relationships with colleagues	Company values	Good work-life balance
2	Good relationship with superior	Good relationships with colleagues	Good work-life balance	Financial stability of employer	Good work-life balance	Financial stability of employer	Good work-life balance	Learning and skills training	Good relationships with colleagues	Job security
3	Good relationships with colleagues	Interesting job content	Job security	Good relationship with superior	Job security	Interesting job content	Good relationship with superior	Good relationship with superior	Appreciation for your work	Financial compensation
4	Good work-life balance	Good relationship with superior	Career development	Good relationships with colleagues	Learning and skills training	Learning and skills training	Appreciation for your work	Company values	Good work-life balance	Financial stability of employer
5	Learning and skills training	Good work-life balance	Financial stability of employer	Appreciation for your work	Good relationship with superior	Good relationships with colleagues	Interesting job content	Financial stability of employer	Learning and skills training	Good relationship with superior

Exhibit 13 - A Greater Focus on Environmental and Social Issues

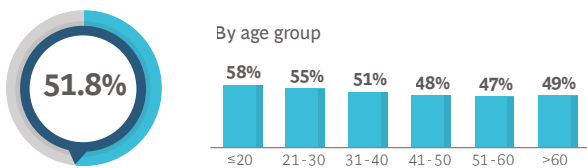Percentage of respondents who agree with the following statements

Environment

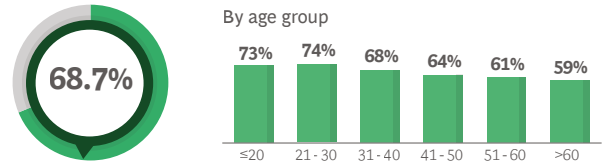The issue of environmental responsibility became more important to me over the last year

69.6%

By age group

≤20	21-30	31-40	41-50	51-60	>60
77%	73%	68%	66%	68%	67%

I would exclude companies that don't match my beliefs in environmental responsibility

51.8%

By age group

≤20	21-30	31-40	41-50	51-60	>60
58%	55%	51%	48%	47%	49%

Diversity and inclusion

The issue of diversity and inclusion became more important to me over the last year

68.7%

By age group

≤20	21-30	31-40	41-50	51-60	>60
73%	74%	68%	64%	61%	59%

I would exclude companies that don't match my beliefs in diversity and inclusion

51.4%

By age group

≤20	21-30	31-40	41-50	51-60	>60
53%	54%	52%	49%	47%	47%

Source: 2020 BCG/The Network proprietary web survey and analysis.

What the New Attitudes Mean for Employers

The preferences about future work that the survey found aren't all surprising. But the findings show how deeply rooted some new attitudes have become. The question for employers: How to respond?

First, develop a thoughtful remote work strategy. For all the publicity that has greeted a few high-profile staff-can-work-from-home-forever declarations, fully remote work is rarely the right answer—and for many companies it is not a possibility. Instead, the right remote work strategy will come to companies that do four things:

- **Differentiate by job role.** Certain job roles, by their nature, are better suited to remote work than others. Companies should think in terms of personas—the activities performed as part of certain jobs, the experiences of the people who perform them, and how a shift to a remote work model would affect those people. For many companies, there will be jobs that could all be remote by design and other jobs where working from home can be no more than an occasional perk.

- **Balance governance with flexibility.** Companies should introduce guidelines to help workers understand the choices they have. (The guidelines should leave some room for employees' personal preferences.) Those for whom remote work isn't a possibility should not be left feeling that nothing is being done for them. Consider offering such workers other benefits, such as additional days off.

- **Provide the right enablers.** A year into the pandemic, many companies have already made sure that their workers have the infrastructure and tools they need to work effectively from home. For companies planning to support remote work on a more permanent basis, the next step is to adapt their ways of collaborating. Implementing agile work practices in virtual settings (through virtual daily standup meetings or online team rooms with digital whiteboards) can help teams replace the everyday, in-person meetings they used to stay in touch in more normal times.

- **Experiment, and monitor success.** Even with the head start on remote work that companies have gotten, there aren't many situations where the processes are already perfected and no further adjustments are needed. So, whatever models are chosen, companies should start with small pilots and ensure good data collection on employee experience and productivity. The insights from these pilots can then be used to design remote work models for other parts of the organization.

Second, build a culture that emphasizes interpersonal relationships and societal values. The higher ranking of pay and financial stability in this year's survey is notable. But these are also end goals that come with some inherent constraints—all the more reason why companies should focus on some of the softer attributes that may make a difference. Four steps will give organizations a shot at making this shift:

- **Prepare leaders for the world that's coming.** Leadership models will be different postpandemic. People in management and executive positions will need to be more multifaceted and adopt an attitude of trust rather than trying to monitor everything. The best leaders will also be technology champions, allowing them to support their organization's switch to remote work.

- **Use virtual tools to build personal connections with employees.** The informal communication that typically takes place in an office must be made more formal in a remote work dynamic, whether through the use of online buddy systems, virtual "water cooler chats," or Zoom team evenings. Managers should also seek to get regular feedback on how employees are feeling, given that their employees may be out of sight on many days. Quick pulse-check surveys (with only a few questions) and mobile apps can make it easier to stay connected.

- **Take a holistic approach to employee well-being.** Many companies are already paying attention to the physical health of workers by making their offices more "touchless," their common areas more hygienic, and their workspaces more socially distanced. Postpandemic, companies may want to put more emphasis on their mental health offerings as well, by supporting stress relief through yoga classes, meditation sessions, and gym memberships. As part of this effort, managers could get training in how to handle employees' personal and emotional challenges.

- **Get serious about making a positive impact.** Not every company is in a position to address the full gamut of the world's social and environmental needs. But companies should figure out which issues they can realistically act on and what practices they want to follow to build an inclusive workplace. In those areas, they should set targets and look at key performance indicators. Employers should also take a more active stand on the topics that matter to them and encourage employees to contribute by giving them time off for social impact activities.

As headquarters and other physical offices reopen in the coming months, workers will inevitably be wondering how the organizations they're returning to have changed. They'll be grateful about the paycheck that came their way during the pandemic. But they'll also return to their workplaces with new expectations—of reimagined remote work policies, of better on-the-job relationships, of organizations that share their social values. Organizations that step into this future now will have a huge advantage as the competition for talent resumes postpandemic.

Next in the series: how the crisis has affected people's career plans and prospects.

About the Authors

Rainer Strack is a managing director and senior partner in the Düsseldorf office of Boston Consulting Group. You may contact him by email at strack.rainer@bcg.com.

Pierre Antebi is a co–managing director of The Network and the business marketing director at Figaro Classifieds. He is based in Paris. You may contact him by email at pierre.antebi@the-network.com.

Orsolya Kovács-Ondrejkovic is an associate director in BCG's Zurich office. She is a member of the People and Organization practice. You may contact her by email at kovacs.orsolya@bcg.com.

Kate Kavanagh is a co–managing director of The Network and the group international sales director at StepStone. She is based in the UK. You may contact her by email at kate.kavanagh@stepstone.com.

Jens Baier is a managing director and senior partner in BCG's Düsseldorf office. You may contact him by email at baier.jens@bcg.com.

Ana López Gobernado is the international operations director of The Network. She is based in Brussels. You may contact her by email at ana.lopez@the-network.com.

Acknowledgments

For Further Contact

If you would like to discuss this report, please contact the authors.