Ahu Yildirmaz | Sara Klein

The Workforce View 2020

Volume Two post-COVID-19

The outlook immediately after the COVID-19 outbreak

ADP Research INSTITUTE®

At the end of 2019 and very early 2020, we surveyed over 32,000 workers in 17 countries around the world to explore workers' feelings towards, opinions about, and experiences of a wide range of workplace issues. The findings were outlined in The Workforce View 2020 Volume One: pre-COVID-19 report.

Then the pandemic hit, triggering major changes to the world of work and altering the outlook for employers and employees alike. It was therefore important to revisit our research to gauge how attitudes have changed since then.

In May 2020, we surveyed over 11,000 workers in six of the countries, seeking their views on key questions in a post-COVID-19 world. These countries were chosen as appropriate representative samples of the Asia Pacific, European, North American and Latin American regions at that time.

Here, in Volume Two, we present these findings and, comparing them against what respondents in those same six geographies said in January 2020, provide a robust picture of worker sentiment immediately before and after the virus took hold.

We recognise that the effects and implications of the pandemic are changing rapidly. New developments are emerging weekly — sometimes daily — and significant variations are occurring in different locations and industry sectors, or from company to company. Nevertheless, shining a spotlight on these issues, in these geographies, over these two snapshots in time, should provide vital insight to help employers support their workforce and thereby support their businesses through these challenging times.

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Executive summary — in the wake of the pandemic

The advent of COVID-19 represents an unprecedented global health emergency and a critical economic test. So far, in terms of its impact on the world of work, in some respects so much has changed, but in others, the trends and issues we were seeing before the pandemic spread remain consistent across the six countries that we selected to represent the four regions of Asia Pacific, Europe, North America and Latin America.

Worker sentiment about the general outlook for the workplace and the long-term prospects for jobs is holding up remarkably well, although there is an awareness that difficult decisions around pay may have to be made in the short term. The gig economy remains as attractive as before, but there are signs that contractors are more likely to expect and accept some tough choices. Unfortunately, there is still progress to be made to combat discrimination. However, the crisis could represent a new dawn for flexible working. It is a complex picture.

1. **Positivity persists:** Confidence has declined less than one might expect, with 84% of workers today still feeling optimistic about the next five years in the workplace (down from 86% pre-pandemic), and 75% who feel buoyant about the year ahead. Optimism among young people is highest of all.
2. **Limited life expectancy for today's jobs:** More than one in five workers (22%) believe their job will not exist five years from today, rising to one in three (33%) in APAC. However, most (65%) are upbeat about the flexibility of opportunities they will have in the future, which is virtually unchanged since before the crisis hit.
3. **Perceived discrimination remains prevalent:** The overall proportion of workers who say they feel they have been discriminated against by their employer remains static at one in three. Incidences of perceived discrimination have inched upwards in APAC and North America since before COVID-19, while Europe has seen a slight decrease.
4. **Flexible working on the rise:** As remote working takes off, 44% of employers now have official flexible working policies in place, up from 24% pre-COVID-19. However, over half of respondents (54%) say they have felt pressure to come into work at some point during the pandemic.
5. **Sacrifices on pay:** The amount of unpaid overtime workers are doing has increased by an hour on average since COVID-19 hit. Almost two in five (38%) of workers would be prepared to take a pay cut if necessary to save jobs due to COVID-19 but one in three (32%) are resistant to any moves to cut pay or defer salaries, even if it ultimately means saving jobs.
6. **Tough choices in the gig economy**: Interest in gig work has not declined since the pandemic; in fact, it has seen a small increase. That said, gig workers are more prepared to take deeper pay cuts, defer salaries longer or even accept termination to save jobs during COVID-19 than regular workers. They are also likely to work more unpaid overtime or feel under pressure to come into work during lockdown.

Introduction

In the immediate wake of the COVID-19 outbreak in early 2020, traditional norms surrounding the way people work and the expectations they have for the future have been upended. Uncertainty abounds and there are many challenges to face, as well as opportunities to be explored.

As we enter this new phase, the impact on economic growth and employment levels remains to be seen, but assumptions around job security and earning power are being put to the test.

At the same time, employers and workers are also finding solutions. Remote working has come to the fore, innovation is ramping up as businesses quickly pivot their operations and new support networks are emerging as people find novel ways to interact with each other.

The decisions employers make today could have a lasting impact on workers themselves and on commercial success. The way workers feel, and the way employers anticipate and respond to those feelings, may be more important right now than ever before. These two dynamics could reshape the world of work forever.

The workers' perspective

Employees' need for stability is a critical factor shaping workplace trends (Yildirmaz and Klein, 2016[1]). With the emergence of COVID-19, concerns about physical health and safety are pitted against concerns for financial and economic wellbeing and the isolation of social distancing is also being felt. By understanding workers' outlook around the world, strategies can be developed to help people navigate changes in the working environment so they feel equipped to embrace them.

The employers' perspective

Employers have much on their minds: from whole industries having to suspend operations and re-design business models, to maintaining productivity while altering how work is done, whether remotely or at a safe social distance. For others in key sectors, dealing with an overload of work brings its own pressures. Amid all this, a strong focus on worker wellbeing and workforce connectedness is advisable. ADP Research Institute's US report A Post-Pandemic Workforce: Tracking Perspectives Amid COVID-19[2] suggests that employers who are taking steps to encourage remote collaboration and social interaction, communicating with positive messaging and focussing on safety are likely to be repaid in staff loyalty.

[1] Ahu Yildirmaz and Sara Klein. The Evolution of Work: The Changing Nature of the Global Workplace (2016)

[2] ADPRI A Post-Pandemic Workforce: Tracking Perspectives Amid COVID-19

Data and methodology

The Workforce View 2020 Volume Two post-COVID-19 explores whether the effects of the pandemic have impacted employees' attitudes towards the current world of work and what they expect and hope for from the workplace of the future.

ADP Research Institute surveyed 11,428 workers in six countries around the world between 28 April and 14 May 2020, including over 3,000 working in the gig economy.

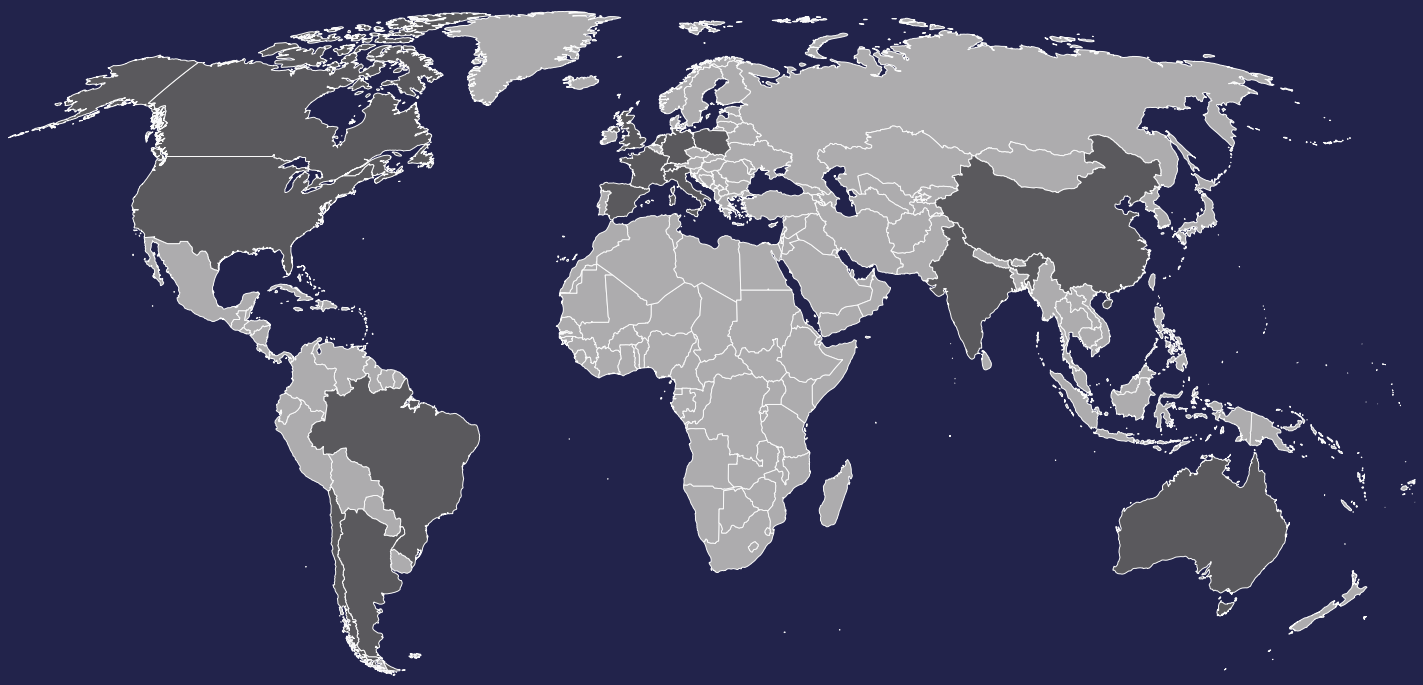
3,808 in Europe (represented by Spain and the UK)
1,909 in North America (represented by the USA)
1,904 in Latin America (represented by Brazil)
3,807 in Asia Pacific (APAC) (represented by China and India)

These countries were selected to provide suitable representative regional samples, based on our knowledge of the unfolding COVID-19 pandemic and national public policy and business responses to it at the time the research was initiated.

We then compared our findings with the research results from the same six geographies with the same sample sizes between 29 October 2019 and 6 January 2020.

All respondents were currently in work when we carried out the research. Gig workers self-identified as those who work on a contingent, temporary, or seasonal basis, or as a freelancer, independent contractor, consultant, gig worker, or use an online platform to source work. Traditional employees self-identified as those who are not working as gig and instead have a regular or permanent full or part-time position.

The surveys were conducted online in the local language. Overall results are weighted to represent the size of the working population for each country.



Positivity persists

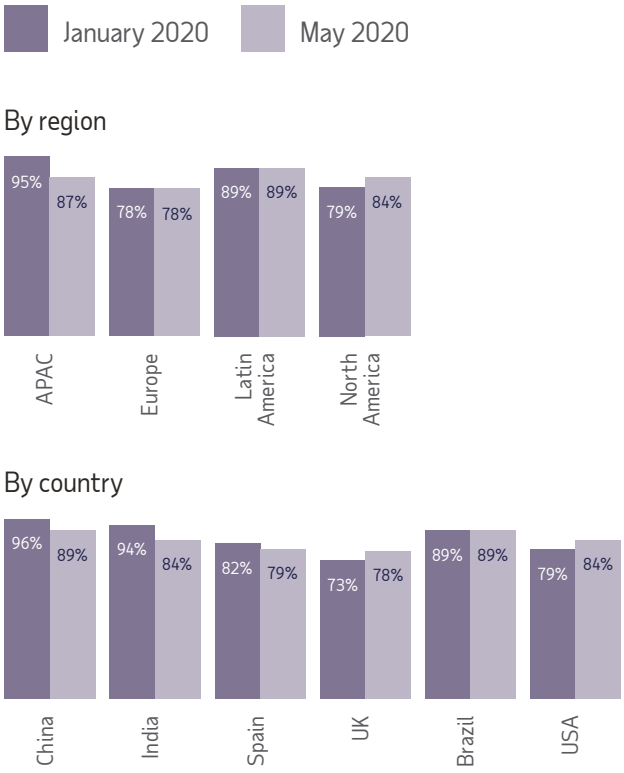
As the last decade drew to a close, confidence about the workplace and employees' prospects was high as we saw in Volume One of this report. At the start of January 2020, 86% of respondents in the six geographies we focus on here said they felt optimistic about the next five years in the workplace, a promising indicator for employee motivation and productivity.

Fast forward and the outlook for the next five years remains largely unchanged: 84% of respondents remain optimistic in May 2020. Just as we saw at the very start of the year, though, there are notable regional differences.

In APAC optimism levels have fallen 8%, albeit from a much higher starting point, bringing the region more into line with the global average. That drop means that employees in APAC no longer top the most positive rankings table — that position now goes to Latin America (represented now by Brazil) which has risen from second place before the pandemic. In contrast, optimism among those working in Europe is unchanged compared to January 2020, while in North America (as represented by the USA) it has actually increased by 5%.

Long-term optimism has declined, but still remains high

Optimism about the next five years in the workplace

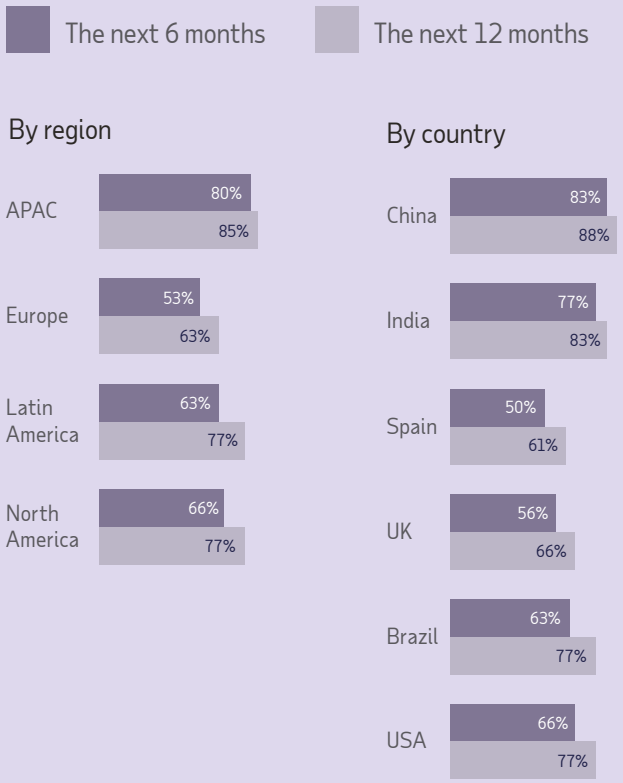


Nearer-term, worker optimism is more cautious — understandably so perhaps, given that virus containment measures are still in place in many areas and predictions about the future are hard to make accurately. Added to which, different timings and approaches to lockdown entry and exit, and to business continuity, re-opening and recovery are taking place across different geographies and industries, and even within different departments within organisations.

Despite this, two thirds of employees feel optimistic about the next six months, and three quarters have a positive outlook for the coming year. However, confidence among European workers is lagging. Albeit slightly, over half are feeling upbeat about the next six months ahead, compared to four in five who say the same in APAC. This pattern is consistent with the long-term (five year) view we saw pre-COVID but may also in part be a reflection that countries like China are further along the infection and recovery curve.

Confidence: the short-term view

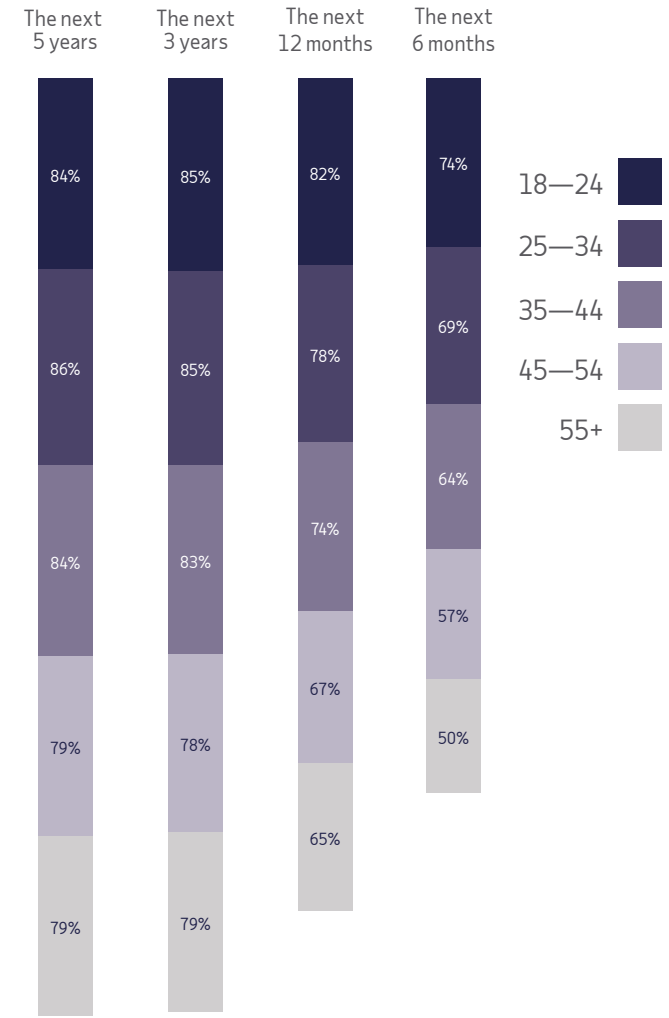
Optimism about the workplace for:



In January 2020, optimism about the workplace was inversely related to age, with optimism declining among older workers. In May 2020, the same is true: younger workers remain the most optimistic, especially for the next six and twelve months. Three in four 18–24 year olds are optimistic about the next six months, compared to only one in two workers over the age of 55. That nearly twenty five percentage point difference narrows considerably when it comes to predictions over time, with only a five percentage point difference between the youngest and oldest workers when considering the workplace five years from today.

Analysis by age (May 2020)

Optimism about the workplace for...



Life expectancy for today's jobs

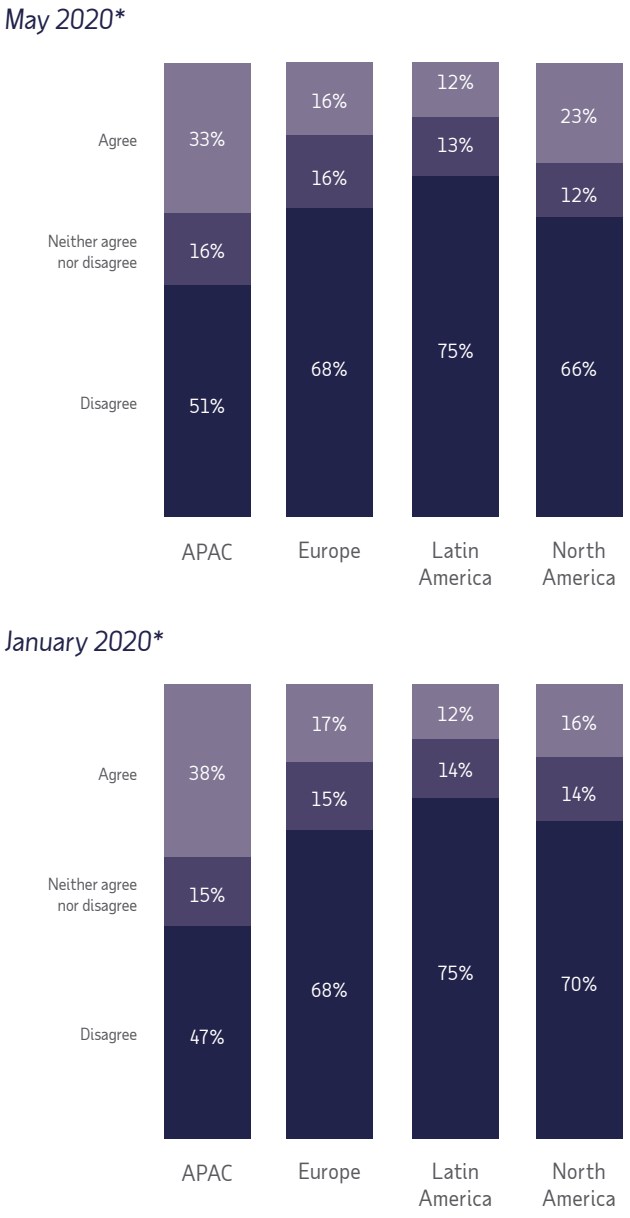
Against this backdrop of optimism, we now look at what workers believe is in store for their jobs specifically. Overall, the proportion of workers who do not think their current job will exist five years from today is similar when comparing pre- and immediately post-COVID outbreak responses, at under a quarter.

Geographical differences are stark, however. Within APAC, 44% of respondents in India believe their job will cease to exist by 2025 — an increase of 7 percentage points since before the coronavirus pandemic. However, in China only 22% now feel like this — 17 percentage points fewer than before.

Respondents in Latin America (namely Brazil) remain the least likely to predict an end to the job they do within this time with just 12% saying so. And whereas North American respondents' views (in the USA at least) before the outbreak were broadly in line with their European counterparts, that is no longer the case, after a 7 percentage point increase in the proportion who see an end to their job within five years.

APAC most sceptical about job longevity...

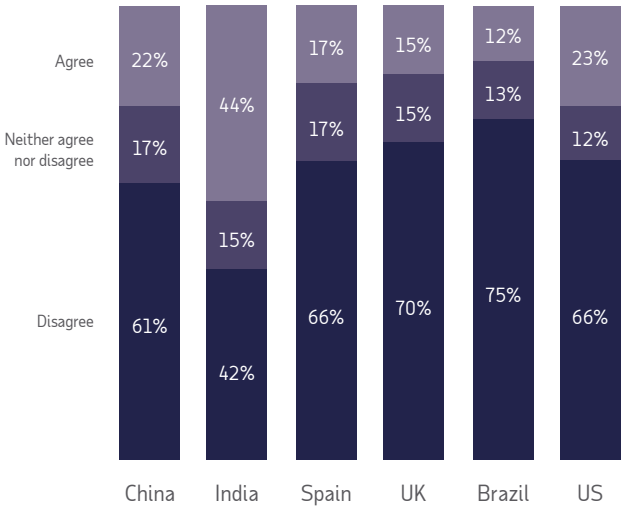
The job I do today will not exist five years from today



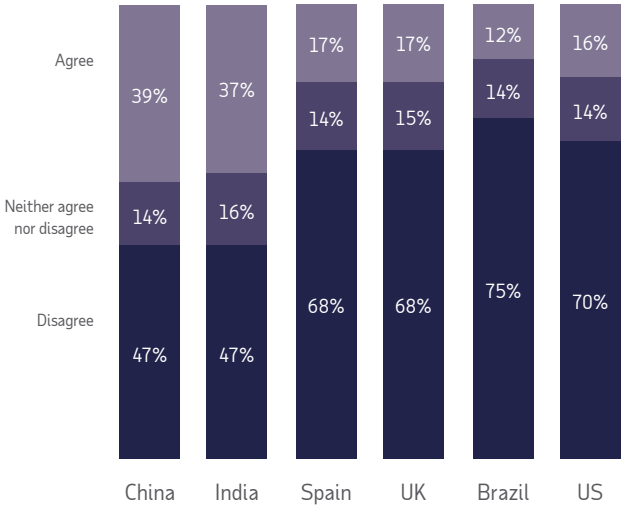
...But views have changed rapidly in China and India

The job I do today will not exist five years from today

*May 2020**



*January 2020**



It does not necessarily follow, though, that workers are overly concerned about this. Two thirds of workers feel they will have more choices around how and where they work five years from today, similar to before the outbreak hit.

Perhaps, rather than seeing this as a threat, for many workers it could be an opportunity; for example to develop skills rapidly, or to pursue linear and non-linear career progression or portfolio careers.

* Numbers may not add to 100% due to rounding.

Perceived discrimination remains prevalent

In January 2020 one in three workers reported having felt discriminated against at work, with age and gender the most likely reasons. In May, that proportion has not changed.

However, drilling down a little deeper into the findings reveals that perceived discrimination has edged up in some areas, while in others it has fallen.

Whilst North American workers have seen a 6 percentage point increase in perceived discrimination, with 10% now saying this is due to gender up from 7%, in Europe, workers are having the opposite experience, with the incidence of perceived discrimination declining by 4 percentage points.

Perceived discrimination remains highest in APAC, as it was before the pandemic, with more than two in five seeing themselves as being affected and where there has been a 3 percentage point increase.

It is worth noting that in Volume One of this report, our research found that many workers said they would not be comfortable raising a claim if they felt they had been discriminated against at work, nor would they know who to contact in the event of an issue. Therefore, employers must consider a proactive approach to ensure they stay alert to this issue. Especially since, once again, the list of possible reasons for feeling targeted is long, including appearance, education, background, mental health, family circumstances and neurological differences, as well as race, religion, disability, gender and age.

Parent power

With schools and childcare closed for extended periods of time in many places, working parents face unprecedented pressures to balance work and family life throughout the whole working week. It is notable that in light of this, reports of discrimination because of having children have not meaningfully changed compared to pre-COVID. Parents as a whole are actually less likely than non-parents to feel they have been discriminated against for any reason, not just due to having children but also because of their gender or other factors. Today, 32% of parents say they have faced discrimination at work, compared to 36% of those without children.

These findings are interesting in light of improved flexible working arrangements (which is dealt with in more detail in the next chapter). We found that parents are not only more likely than non-parents to say their companies have policies that allow flexible working (almost half versus two in five) but also, crucially, that they feel empowered to take advantage of them (28% versus 23%).

Flexible working on the rise

In the short-term at least, COVID-19 has ushered in fresh impetus for flexible working, with mass moves to remote working disrupting traditional nine-to-five, workplace-based working practices.

Employers are adapting fast. Nearly half (44%) of respondents say employers now have official flexible working policies in place, compared to just one in four (24%) before, while the proportion of respondents saying that senior management allow it has jumped from 19% to 28%.

Respondents in APAC and Latin America are most likely to say their employers have formal policies, with half or more reporting this is the case (up from just over a quarter before), whereas in Europe only around one in three do so (up from fewer than one in four).

Flexible working goes mainstream

By region

		APAC	Europe	Latin America	North America
My company has an official or written policy allowing flexible working arrangements	May 2020	53%	34%	50%	39%
	January 2020	28%	23%	27%	15%
Senior management states that flexible working arrangements are allowed	May 2020	37%	19%	31%	22%
	January 2020	25%	15%	19%	13%

By country

		China	India	Spain	UK	Brazil	USA
My company has an official or written policy allowing flexible working arrangements	May 2020	57%	49%	34%	33%	50%	39%
	January 2020	25%	30%	25%	22%	27%	15%
Senior management states that flexible working arrangements are allowed	May 2020	35%	39%	17%	21%	31%	22%
	January 2020	27%	23%	14%	17%	19%	13%

The reality on the ground

Despite this progress, there may still be some way to go in enabling workers to feel empowered to take advantage of flexible working options, with only a quarter confident enough to do so (a proportion that has barely changed since the COVID-19 crisis).

Mixed messaging could be at play here. While employers' acceptance of flexible working appears to be on the rise, more than half of respondents say they have at some point during the pandemic felt pressure from their employer to come into the workplace, even though officials recommend non-essential workers stay at home. There are signs that even when senior management and HR direct workers to stay home, individuals in lower management tiers are making their own decisions. In fact, 16% of workers report that individual managers determine whether one can work flexibly, regardless of official company policy.

The proportion of respondents who report feeling compelled to be physically present in the workplace is almost twice as high in APAC as it is in Europe (74% versus 38%). However, in Spain, despite strict lockdown measures, nearly half (45%) of respondents have felt pressure to come into work.

Pressure to come into work highest at the beginning of the crisis

If you live or work in an area where officials recommend/ recommended or required non-essential workers to stay home as much as possible, did you/do you feel any pressure from your employer to still work in the office?

*By region**

	APAC	Europe	Latin America	North America
Yes, I felt pressure at the beginning but not anymore	40%	18%	30%	22%
Yes, I felt pressure at the beginning and continue to feel pressure	24%	15%	17%	17%
Yes, I feel pressure now but didn't at the beginning	10%	4%	7%	5%
No	19%	54%	43%	50%

*By country**

	China	India	Spain	UK	Brazil	USA
Yes, I felt pressure at the beginning but not anymore	41%	38%	21%	15%	30%	22%
Yes, I felt pressure at the beginning and continue to feel pressure	27%	22%	19%	12%	17%	17%
Yes, I feel pressure now but didn't at the beginning	13%	7%	4%	4%	7%	5%
No	12%	25%	51%	57%	43%	50%

For some, this is a persistent problem — and it appears to be worse for younger workers. Although the sense of being expected to come into work appears to have been most intense at the beginning of the crisis as businesses transitioned into lockdown, almost one in five workers say that they continue to feel under pressure to come into work. This is disquieting, given that ADP Research Institute's recent paper A Post-Pandemic Workforce: Tracking Perspectives Amid COVID-19 found that one in four US workers have actually reduced hours or stopped working because of concerns about exposure.

*Respondents who said they do not live in an area where officials said to stay home are not shown.

Sacrifices on pay

Presenteeism has been pervasive in the workplace for some time and now workers are giving employers even more 'free' time in the wake of the COVID-19 outbreak than before.

On average, employees say they work seven hours of unpaid overtime per week, up from six hours when the same question was asked pre-COVID-19. In APAC, workers say the average is nine hours — nearly twice the amount that workers in Latin America (as represented by Brazil) say they do. However, it is notable that China is the only country where the average number of hours of unpaid overtime has fallen since the start of the pandemic. Since this may well be a result of lockdown starting earlier, shutting down or reducing the capacity of some businesses, it will be interesting to see if the pattern in other countries follows suit.

Almost a fifth (19%) of workers say they now work 11 or more hours for no extra pay each week, up from 15% before the outbreak. That rises to 28% in APAC, albeit again with a marked decrease in China. Respondents in North America (as represented by the USA) have seen a marked uptick in 'free' work, with the proportion doing 11-plus hours almost doubling in a matter of months.

There could be several reasons for this rise, from job security concerns spurring people to work even harder to demonstrate their worth, to staff failing to 'switch off' when working from home. Whatever the cause, employers will want to weigh up whether this is resulting in improved productivity and keep a close eye on the impact on stress levels and job satisfaction.

Free labour

On average, how many hours per week do you believe you work for free (i.e. hours worked over lunch breaks, staying late, etc.)?

	APAC	Europe	Latin America	North America
	Mean: (Hours)			
January 2020	8.5	4.8	4.3	4.1
May 2020	9.4	5.8	5.3	7.1

Saving job roles

In an environment where many businesses have had to shut or downsize their operations, temporarily at least, the prospect of having to lay off or furlough workers has been a concern for employers and employees alike. Our survey suggests that many workers recognise that hard choices are having to be made due to the pandemic.

In order to save as many jobs as possible amid the pandemic, the most palatable option out of pay cuts, salary deferments, or no action to prevent employment terminations, is to take a pay cut — though there are important regional differences which are discussed below.

Almost two in five respondents said pay cuts would be an appropriate and acceptable course of action for their employer to take if they had to, in order to save jobs during lockdown. This is certainly the preferred option in Latin America, where nearly half of respondents said this would be acceptable as a job-saving measure — far more than taking a deferred salary (less than one in five).

What level of pay cut workers would be prepared to take is the obvious follow-on question. On average, a cut of 15% is the maximum amount employees would be willing to accept if it meant jobs would not be lost, although less than 10% is the most common answer. Most people consider more than 20% to be unacceptable.

One in three would consider it acceptable for their employer to defer salaries if necessary to save jobs during COVID-19, with the consensus being that two months should be the maximum. China stands out as the only country where a salary deferment is far more likely to be considered appropriate than a pay cut.

Clearly, different countries and sectors have varying needs and COVID-19-specific support measures in place, and these will drive differences in responses. In addition, the strength of worker protections already on offer and employees' expectations of job security prior to the pandemic are likely also to have an effect, when coming to terms with these new realities.

Our findings indicate that workers in APAC are more likely to consider these actions acceptable if it meant saving jobs, followed by Latin America (as represented by Brazil). There is widespread resistance in Europe and North America, where

the most common response (40% and 43% respectively) is that no action on the part of employers would be acceptable to save jobs. Only 26% say the same in Latin America and 21% in APAC. The level of pay cut workers in Europe and North America would be prepared to accept is lower too.

A thorny issue requiring careful handling

Clearly, this is a contentious issue. Even if some workers recognise that sacrifices may have to be made as a temporary measure or as a last resort, employers should be prepared for significant resistance. Moves to reduce or delay pay would have a serious negative impact on workers, so employers will want to tread carefully, ensuring that decisions are not made lightly and that their actions can be justified. That could include keeping measures to the absolute minimum necessary to ensure the continued smooth running of the business while maintaining employee motivation and taking care over the consultation/communication process to create transparency and maintain trust.

If implementing such moves does become unavoidable, it is even more important that workers are paid correctly and on time, and more frequent payments also merit consideration. The research we presented in Volume One shows that late or inaccurate payments can cause serious financial hardship and emotional strain for workers. Respondents reported that late payments or payment errors trigger stress, cause bills to go unpaid or mean that they are forced to borrow money from family and friends.

What sacrifices are workers willing to make?

What would you consider appropriate and acceptable for your employer to implement on your role If it meant saving jobs within your company during COVID-19?

By region*

	APAC	Europe	Latin America	North America
A pay cut	42%	32%	46%	33%
Deferred salary	51%	24%	18%	24%
Termination	11%	5%	9%	7%
I wouldn't consider anything appropriate and acceptable	21%	40%	26%	43%

By country*

	China	India	Spain	UK	Brazil	USA
A pay cut	34%	51%	32%	33%	46%	33%
Deferred salary	60%	42%	25%	23%	18%	24%
Termination	9%	13%	6%	5%	9%	7%
I wouldn't consider anything appropriate and acceptable	20%	22%	39%	42%	26%	43%

*Percent selecting "other" is not shown, less than 5% in all countries.

How deep a cut?

Of those who considered it appropriate and acceptable to receive a pay cut: What is the maximum decrease you would be willing to receive?

By region

Maximum acceptable pay reduction during COVID-19	APAC	Europe	Latin America	North America
10% decrease or less	40%	45%	25%	48%
11-20% decrease	32%	38%	34%	29%
21-30% decrease	19%	12%	27%	13%
More than 30%	9%	5%	14%	11%

By country

Maximum acceptable pay reduction during COVID-19	China	India	Spain	UK	Brazil	USA
10% decrease or less	47%	35%	45%	45%	25%	48%
11-20% decrease	35%	30%	36%	40%	34%	29%
21-30% decrease	13%	24%	14%	10%	27%	13%
More than 30%	5%	12%	6%	4%	14%	11%

The view on the gig economy

The term 'gig economy' has come to the fore in recent years, most frequently as a way to describe platforms such as Uber and Deliveroo, which enable individuals to work flexibly by taking on 'gigs', to fit around their lifestyle. But the term also encapsulates the broader workforce of contractors and freelancers employed on a flexible basis across a whole range of industries, which has also been on the rise in the last decade.

Although permanent roles remain by far the preferred option both pre- and post-COVID, our findings reveal gig work has not declined in appeal. Before the crisis, 15% of all workers (regular and gig) said they would choose gig work over a permanent role if both were available. Today that figure is 18%. North America (namely the USA) is the only region where the attraction of gig working has dipped slightly. There, 16% of workers would now prefer a gig role, compared to 21% before COVID-19.

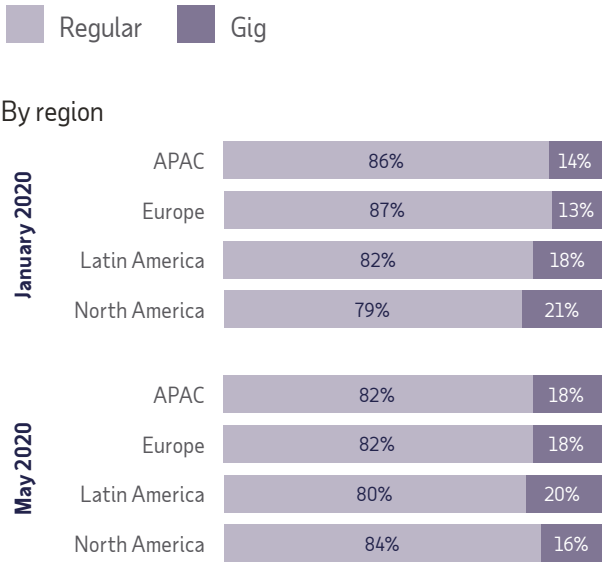
Not all gig workers work this way out of choice, but two in five prefer it — and they have good reasons for doing so. Our pre-COVID research found that contractors scored gig work higher than permanent employment on a number of important factors, including flexibility, ability to balance personal and family needs, enjoyment and control over what they work on. Perhaps, now that home working is the norm for so many, the appeal that gig working provides of having even greater flexibility over how and when to work could increase further.

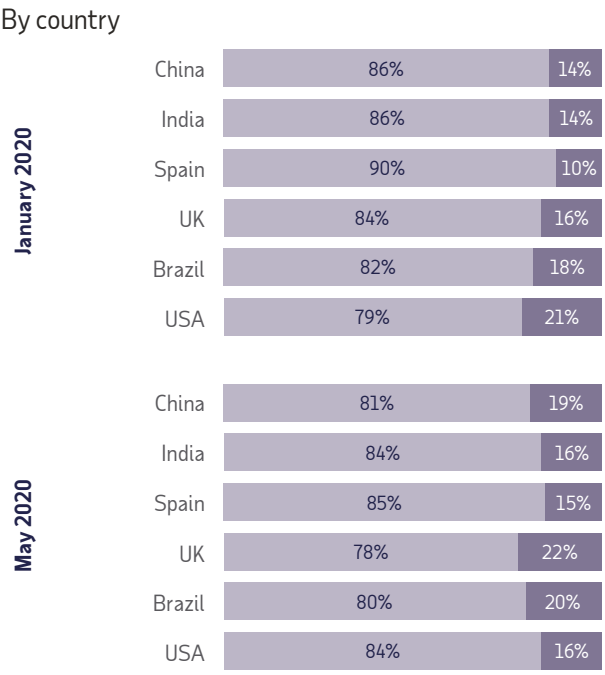
Issues around job security may also come into the equation. The protections that permanent work ostensibly provide may have been somewhat tarnished as unemployment rises in many areas. Some people may see working for more than one employer as a way to spread their sources of income and mitigate employment risk.

Having said that, gig workers ranked permanent work more highly for financial considerations, such as annual income and pay rate and for providing regular hours or notice of hours. In tough times, these factors matter even more.

The appeal of gig work holds up well

Assuming you had the choice and could find a good job, how would you most prefer to work?





Hard choices

Gig workers are more likely to work a greater number of hours of unpaid overtime than employed colleagues (an hour more on average) and may be more likely to feel pressure to go into work despite official calls to stay at home (57% versus 53%). At the same time, they are also more likely to accept that employers may have to make some hard choices, such as pay cuts or deferred salaries to save jobs.

Our research suggests that the dynamics of the gig economy and how it fits into the wider world of work have not altered radically since the advent of COVID-19 and it remains to be seen how this will play out as time goes on. There is a possibility that some gig workers may have less choice over how they work in the immediate future at least.

However that may be, optimism among gig workers is on a par with that of regular workers when looking ahead at the next six months, one year and five years in the workplace. What's more, they feel just as confident that they will have more choices about how and where to work five years from today. All of which paints a positive picture about prospects for the gig economy in the future.

The outlook for employers

Although the immediate impact of COVID-19 has been significant, the long-term ramifications remain unclear. Things may never be quite the same again but while there are hurdles to overcome, this presents the potential for the world of work to evolve in a raft of positive ways.

Shifts to remote working are unlikely to be immediately reversed, even when offices re-open, partly because businesses and employees have adapted and partly due to ongoing social distancing requirements. The health and safety of all workers will remain a top priority. Financial security may feel uncertain for some time.

Employers and HR professionals face having to juggle multiple — and sometimes competing — imperatives. That might mean making tough calls around jobs and pay while maintaining worker morale and motivation. It may mean normalising flexible working on a more permanent basis, but in a way that is fair for everyone and takes into account their different needs, as well as those of clients and customers.

It could also mean supporting workers in new ways, for example ensuring people feel part of virtual teams, that individuals can continue to develop their skills, or improving conditions for those working on the 'front line'.

In a post-COVID-19 world, traditional corporate structures may have to be re-shaped to fit more closely around the fundamental needs of workers as well as around the requirements of the organisation itself. Closer alignment between employers and employees can only be a good thing, resulting in a more dynamic working culture and a more productive and satisfied workforce.

All of this is predicated on understanding the outlook of those who will be personally impacted by these changes — the workers. Businesses often say their people are their greatest asset. If that is true, then this year more than most, insight into the workforce view is critical.

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