



People at Work 2021: A Global Workforce View

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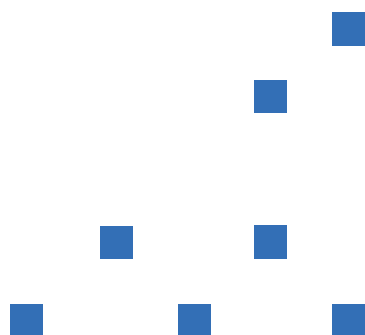
Regional Workforce Views

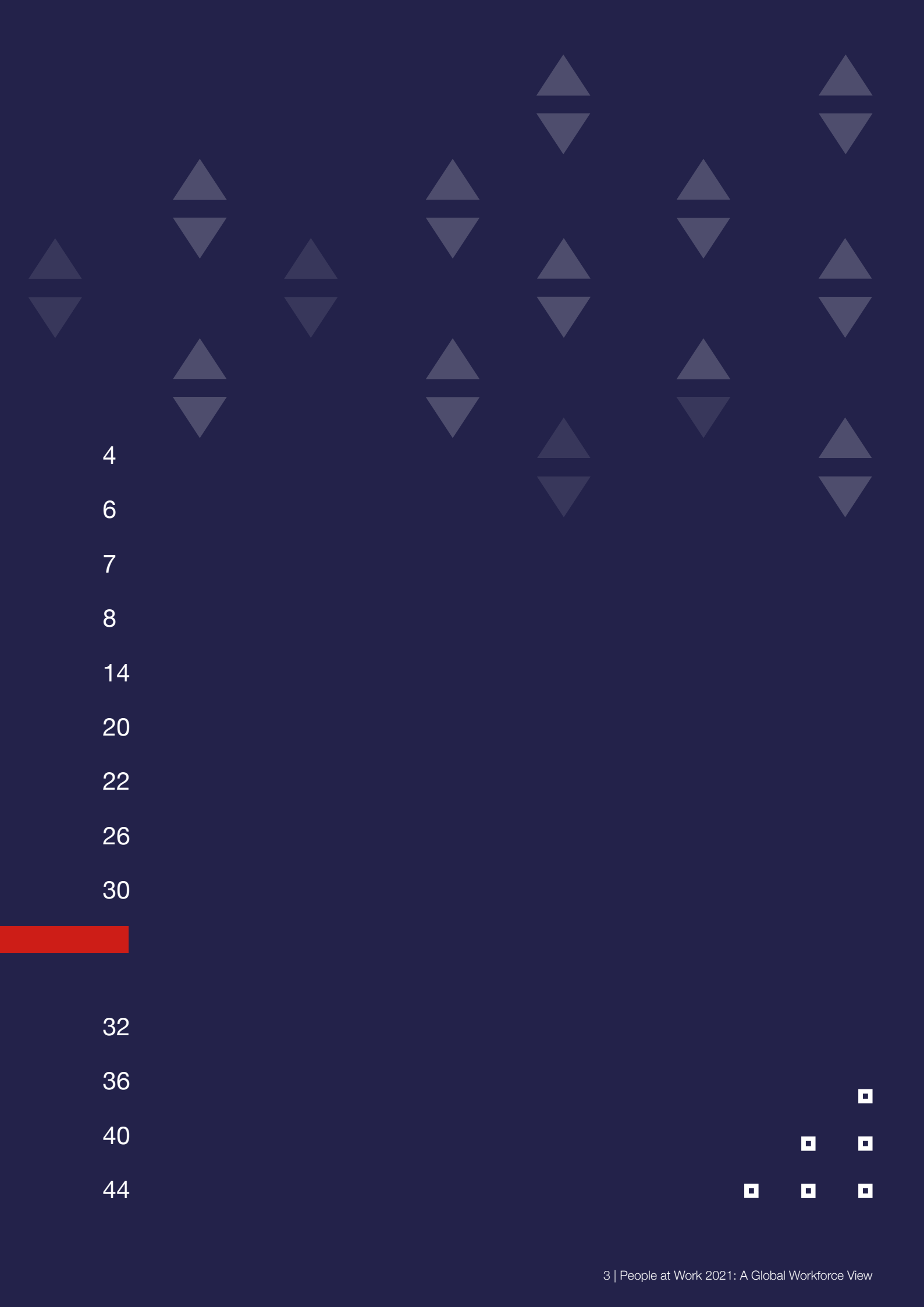
North America

Latin America

Europe


APAC







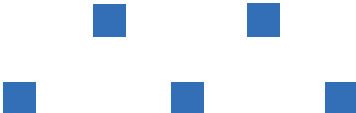
Executive summary



The ADP Research Institute's *People at Work 2021: A Global Workforce View* provides a starting point to understand the situation facing employees today across five dimensions of working life: worker confidence and job security; workplace conditions; pay and performance; worker mobility; and gender and family.

Acting as a barometer of how the global workforce feels one year on from the advent of the COVID-19 pandemic, this year's report delivers unrivaled insight into how workers and employers have coped so far and how the workforce feels about the future.

Though attitudes and behaviors are impacted by the local path of the pandemic in different parts of the world and the policies adopted by various governments, several overarching trends are developing.




1 Worker confidence: Optimism is shaken yet persistent

COVID-19 has dented worker sentiment: although the majority (86%) of workers still say they feel optimistic about the next five years in the workplace, this is down from 92% last year. This decline is understandable given that more than a quarter (28%) report having been laid off, furloughed or temporarily laid off by their employers and almost one in four (23%) having to take a pay cut. The impact on job

security and optimism is uneven, with younger workers being the hardest hit. However, many workers think COVID-19 will have a positive impact on issues like flexibility and development of skill sets.

2 Workplace conditions: Unpaid overtime soars and empowerment rises on flexible working

Unpaid overtime has jumped sharply to 9.2 hours per week on average, up from 7.3 just a year ago. The amount of 'free time' provided to employers is highest among hybrid workers (those who divide work time between home and the office). At the same time,



workers feel more empowered to take advantage of flexible working arrangements: two-thirds (67%) say so today, up from just over a quarter (26%) before the pandemic. Nearly half (47%) say their managers allow more flexibility than company policy provides.

3 Pay and performance: Pandemic ripple effect puts payment precision in the spotlight

More than one in four workers (28%) report having taken on a new role or changing roles due to job losses in their organization and most of them (68%) received a pay raise or bonus for doing so. Unfortunately, underpayments have affected more than three in five workers this year (63%), and late payments are on the increase. Even where payment is accurate, a lack of alignment between pay schedules and when bills are due causes cashflow troubles for a significant proportion of the workforce (24%). Issues around payment accuracy and promptness resonate more when people are concerned about their financial or job security, or when they are working harder than ever, and in more stressful circumstances.

4 Worker mobility: Workers on the move as a result of the pandemic

The pandemic has driven a shift in both where and how workers work and live. Less than a year since COVID-19 was declared a pandemic, its impact has already seen three quarters (75%) of the global workforce make changes to or plan to change their living arrangements, rising to 85% of Generation Z (18-24 year olds). One in seven workers (15%) are actively trying to move into a new industry that they consider more “future proof”. Compared to one year ago, appetite for gig work – the most mobile and flexible work option of all – has increased in Asia Pacific and Latin America while holding steady in Europe and declining in North America.

5 Gender and family: Women feel the strain – and pay gaps hold

Two thirds (67%) of the global workforce say they have been forced to make a compromise between their work and their personal life because of the impact of the pandemic and the research points to some concerns for women and parents in particular. 15% of working parents report that they or someone in their household stopped working voluntarily, rising to 26% for those with children under one. Half of respondents (52%) believe employers’ provisions for working parents will cease within a year. Against this backdrop, women are more likely to report that stress management is a challenge and feel less assured about job prospects compared to men. Women are also less likely than men to receive a pay raise or bonus for taking on additional work or changing roles, with the greatest gap in North America.



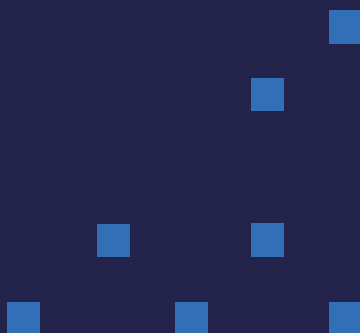
Introduction

The past year has been a year like no other – in life and in the workplace – causing business-as-usual to be suspended, working practices to be turned on their heads and employers and workers to rethink accepted norms and adapt quickly to an uncertain and fast-changing world.

The impact of COVID-19 has been uneven in terms of job loss and job change. Even workers who have held onto their jobs are facing a variety of unexpected choices and compromises – and in some cases, opportunities.

The sudden shift to remote working, interrupted childcare, or job losses has led many workers to rethink their living arrangements, which could prompt new career choices. Employers need to consider anew how best to attract and retain top talent.

Short-term challenges that seemed temporary a year ago could well turn into long-term issues. Attempting to make some sense of these events and understand the impact on businesses and workers is vital as employers plan a way forward and reaffirm a sense of stability and purpose at a time when the much-talked-of “new normal” is still unclear. This report aims to do just that.



Data and methodology

People at Work 2021: A Global Workforce View explores employees' attitudes towards the current world of work and what they expect and hope for from the workplace of the future.

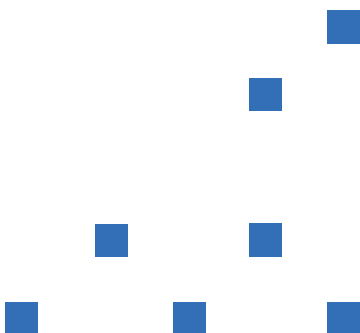
- ADP Research Institute surveyed 32,471 workers in 17 countries around the world between 17 November and 11 December 2020 including over 8,567 working specifically in the gig economy
- 15,307 in Europe (France, Germany, Italy, the Netherlands, Poland, Spain, Switzerland and the UK) including 4,025 in the gig economy
- 3,811 in North America (USA and Canada) including 1,000 in the gig economy
- 5,726 in Latin America (Argentina, Brazil and Chile) including 1,525 in the gig economy
- 7,627 in Asia Pacific (APAC) (Australia, China, India and Singapore) including 2,017 in the gig economy
- Within the worker sample we identified gig workers and traditional workers. 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 survey was conducted online in the local language. Overall results are weighted to represent the size of the working population for each country





Worker confidence and job security

The survey lays bare the extent of the impact of COVID-19 on worker confidence and concerns around job security. Optimism about the next five years in the workplace has fallen since a year ago – but despite all the pressures of the pandemic and the lack of clarity around how much longer its impact will last, the mood among workers remains broadly positive. 86% say they feel optimistic, down from 92% who said the same pre COVID-19.



Optimism is shaken but persistent

How would you describe your levels of optimism for the next five years in the workplace?



% Optimistic about the next five years of the workplace

North America



Latin America



Europe



APAC



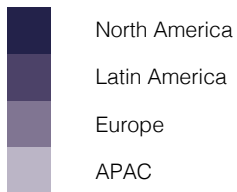
Somewhat counter-intuitively, an optimistic attitude exists because of COVID-19 – rather than in spite of it. When asked specifically about the expected impact of the pandemic on work in the next three years, workers were more inclined to think COVID-19 would have a positive rather than a negative impact, particularly in terms of obtaining greater flexibility at work and developing their skills (where 52% apiece said so).

Critically though, there are notable regional differences in sentiment, with optimism about the impact of COVID-19 at work generally highest in APAC and Latin America, while in Europe expectations for positive outcomes are much lower.

The impact of COVID-19 on the world of work ahead

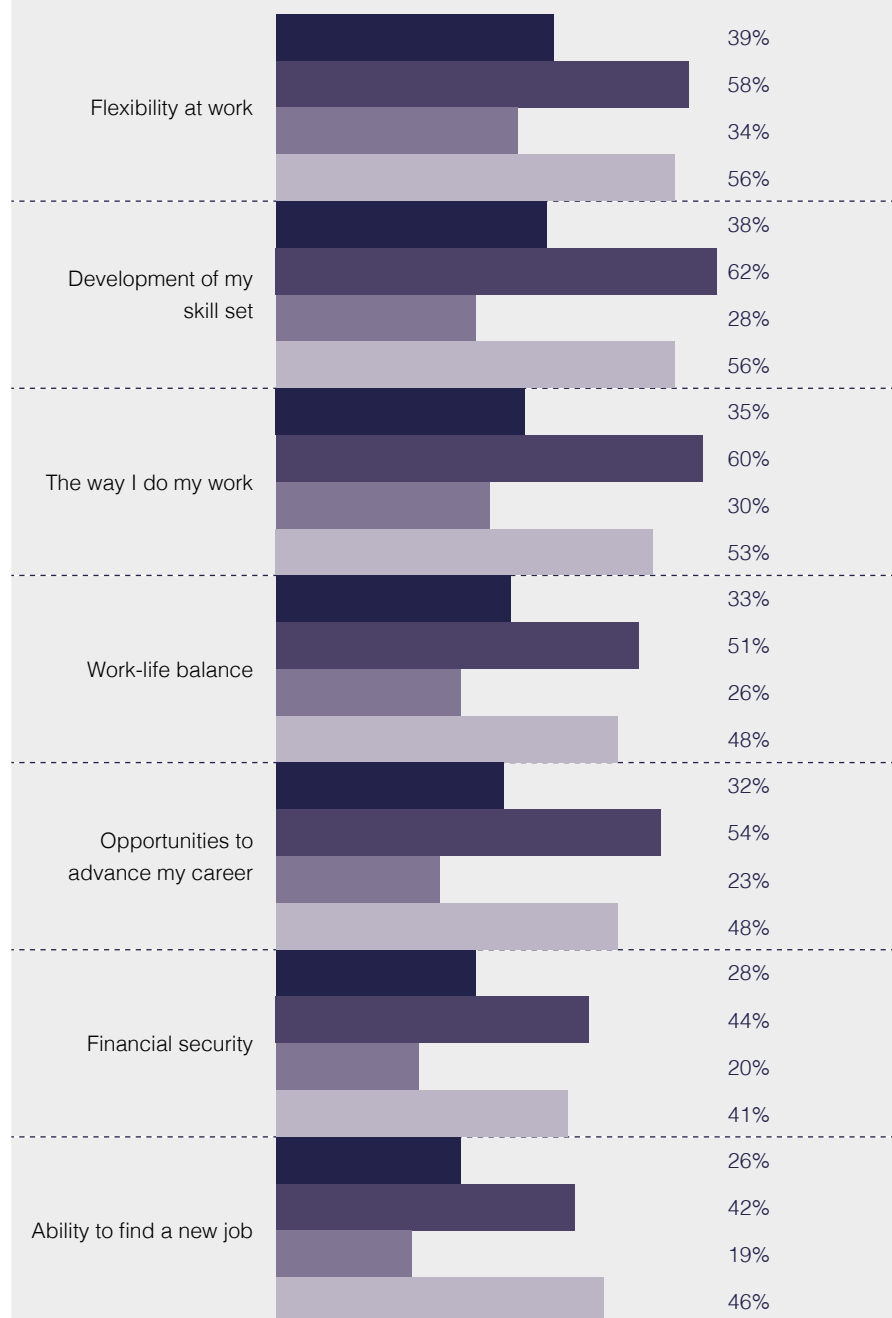
These responses suggest that underlying the general sense of optimism is a complex and nuanced picture that defies easy analysis. This can most clearly be seen in the way unease around job security dominates how workers feel today. 85% of workers say they have had concerns about their job or financial security, and these fears unfortunately reflect reality. In a year when many businesses have had to shut temporarily or permanently, or significantly alter their operations, the effects of the disruption and uncertainty on the workforce have been profound.

Key

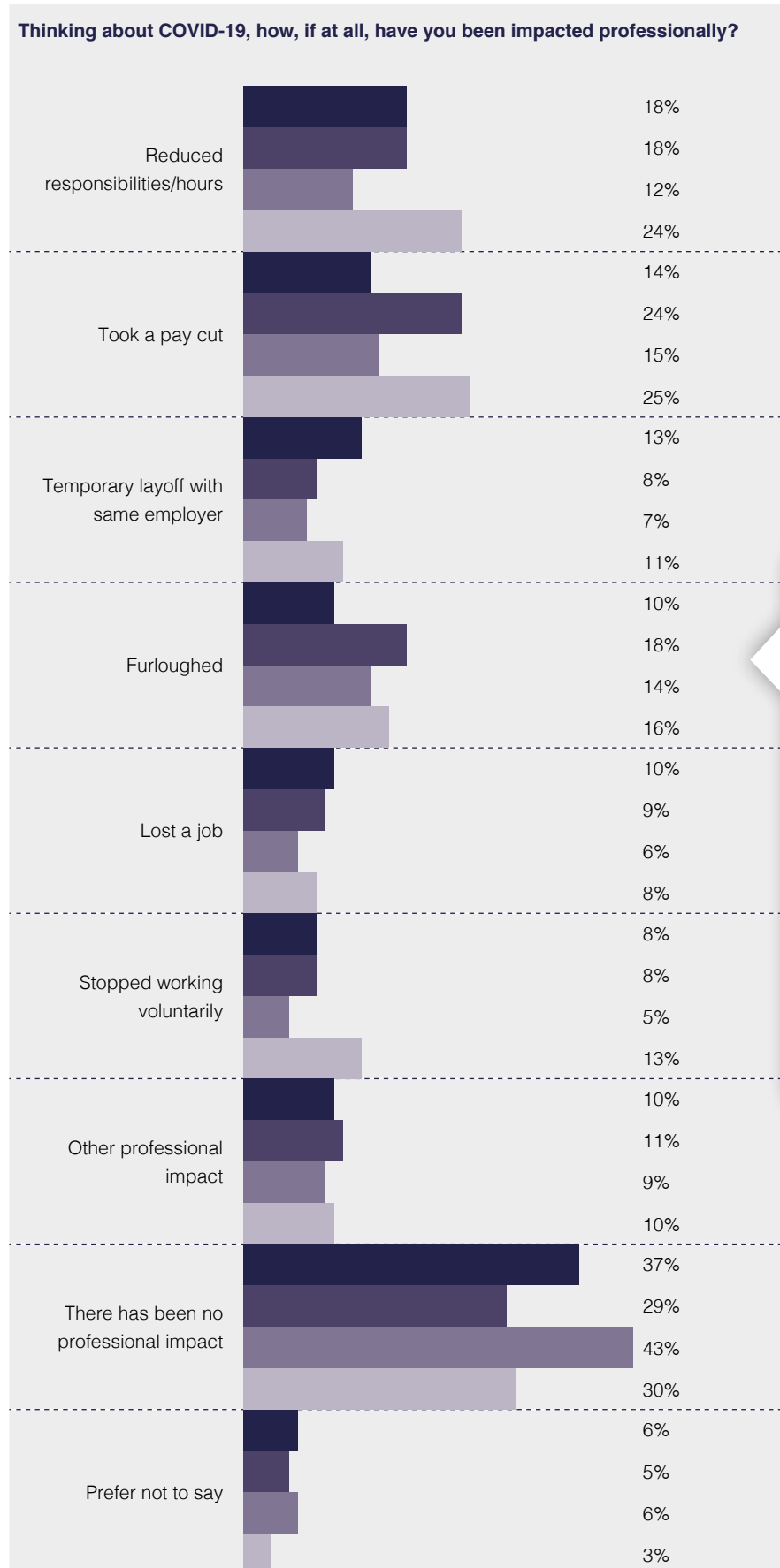


Considering the next three years, how do you expect COVID-19 to impact your work?

% Expecting a positive impact



The scale of the professional impact



The realities of the professional impact

Nearly two thirds of the global workforce (64%) say they have been impacted professionally, with more than a quarter (28%) having either lost a job, been furloughed or temporarily laid off by their employer. Almost one in four (23%) took a pay cut, while a similar proportion (22%) have reduced their hours or responsibilities.

Job security concerns

Fears of job insecurity have compelled three quarters of respondents (76%) to do things differently in their role – most commonly taking on extra tasks or assuming a heavier workload, or by working longer hours. This is especially true in APAC and Latin America, more so than in North America or Europe.

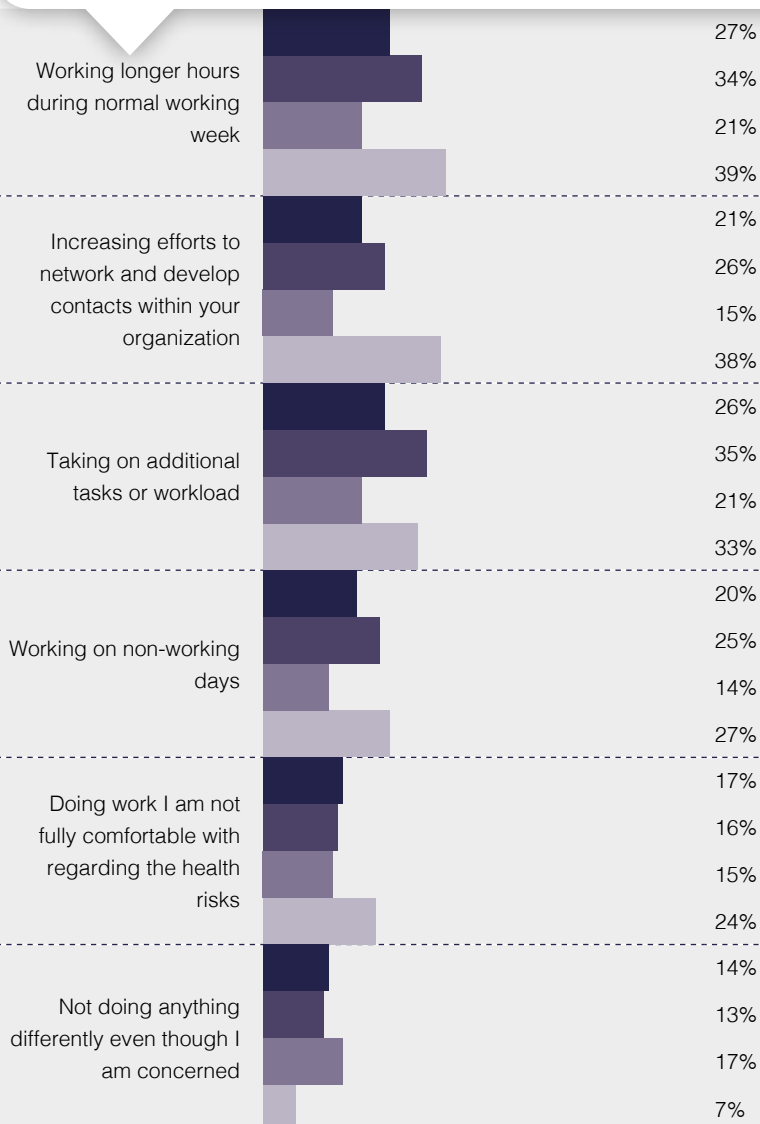


For businesses and HR teams, this additional effort has important implications. Beyond considering whether current financial compensation levels are appropriate in the wake of new responsibilities or change in job function, the impact on employee wellbeing and motivation may also need to be addressed. Our results suggest that finding ways to reduce stress and anxiety, avoid burnout and create a sense of fairness will be key to maintaining a mentally and physically healthy workforce.

Key



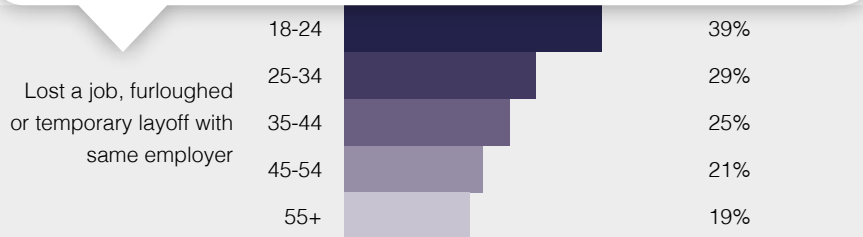
Behavior change due to feelings of financial/job insecurity



The impact on Generation Z

Younger workers suffer most

Thinking about COVID-19, how, if at all, have you been impacted professionally?



The most recent age bracket to enter the workforce – 18-24 year olds (also known as Generation Z) – has been hardest hit, with nearly four in five (78%) finding their professional lives affected and two in five (39%) saying they lost jobs, were furloughed or suffered a temporary layoff from their employer.

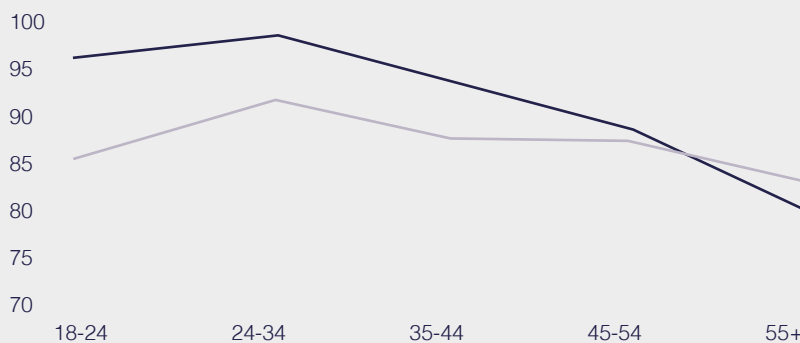
This may reflect the unfortunate reality that entering the workforce in a recession can cause large initial earnings losses and significant changes to local labor market structures¹ which it can take years to recover from. So, it is not surprising that over the past year, optimism among Generation Z has fallen substantially (to 83% from 93%) – far more than any other generation.

Younger workers are also increasing their efforts to network and develop their contacts within their organizations, with three in 10 (30%) Generation Z workers and four in 10 (40%) of younger Millennials (aged 25-34) doing so. This chimes with a long-term trend identified by ADP Research Institute in its Evolution of Work study², which found that employees define job security by the reach of their professional network and the ability to tap into relationships to find non-linear jobs that can extend a career.

Optimism hardest hit among new entrants to the workforce

Optimism about the next five years of the workplace

(Showing % optimistic)



Key

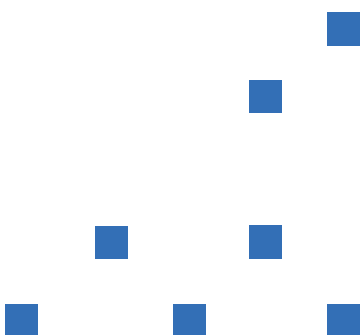
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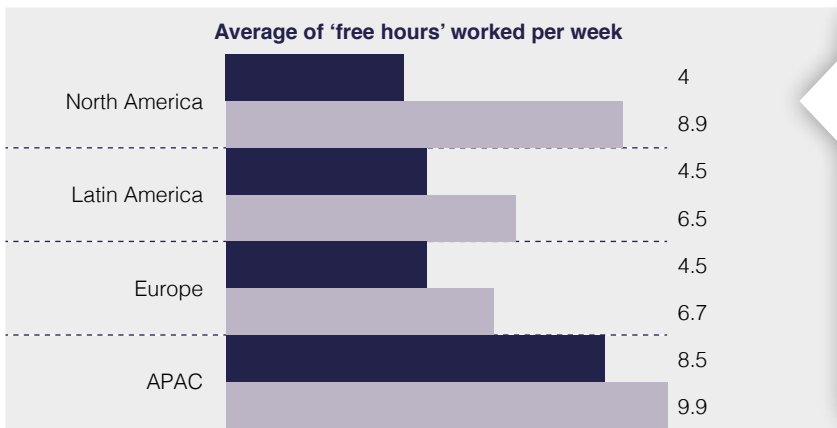
1. Rinz, Kevin. "Did Timing Matter? Life Cycle Differences in Effects of Exposure to the Great Recession." US Census Bureau, Center for Economic Studies, 2019.
 2. "The Evolution of Work: The Changing Nature of the Global Workplace." ADP Research Institute®, 2016.



Remote work and workplace conditions

With concerns around job security looming large, nearly half (46%) of global respondents have taken on additional responsibilities at work, either to compensate for colleagues losing their roles or, particularly when it comes to essential workers, to cope with the extra workload COVID-19 has created. More than half (55%) of essential workers and a third of non-essential workers (34%) have assumed extra duties during the pandemic. Workers in Latin America and Asia Pacific are almost twice as likely as their counterparts in Europe to have done so (51%, 49% and 28% respectively), which parallels the finding that they are more likely to have experienced a professional impact, as discussed previously.





'Free time' on the rise

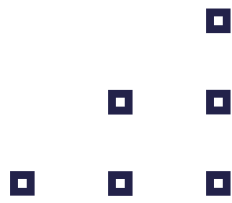
One in 10 workers (10%) globally are now working in excess of 20 hours per week for free. That proportion has doubled in the last year from one in 20 before the pandemic.

Many of those taking on additional responsibilities have been rewarded financially for their commitment, however it is striking to see how much unpaid overtime workers are now doing. On average, the amount of free time being worked each week is now 9.2 hours per person – up from 7.3 last year. The amount has increased significantly in every

region: nowhere more quickly than in North America where the average has doubled from four hours per week to nearly nine (8.9). APAC still leads the world in terms of the amount of unpaid overtime its workers provide to their employers, reaching an average of almost 10 (9.9) hours.

Key

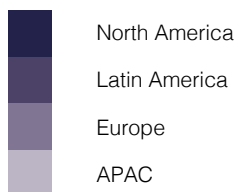
- Jan. 2020
- Jan. 2021



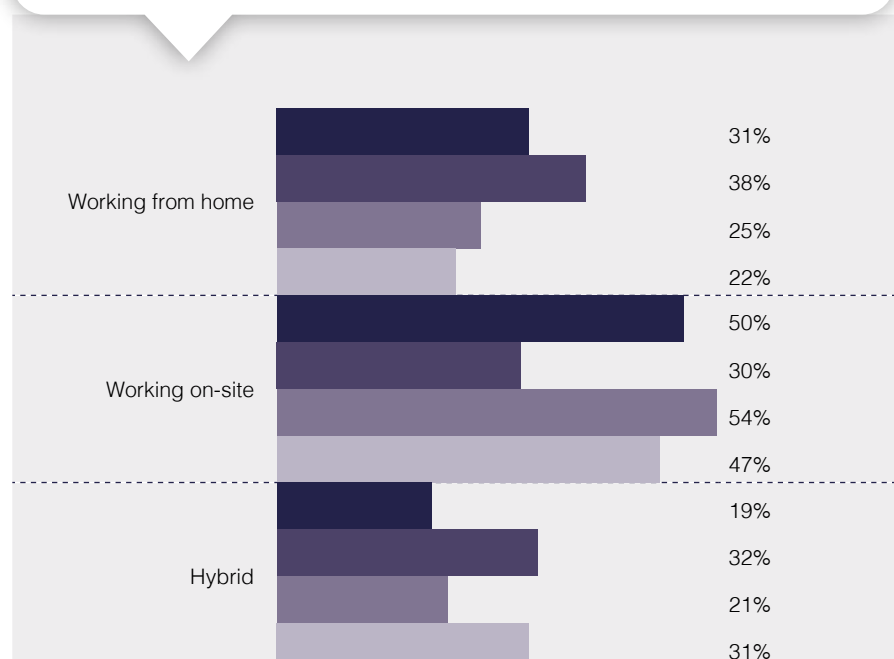
Working from home versus on-site


One of the questions many workers and businesses are asking themselves is which of the changes that have suddenly been forced upon them by the pandemic are here to stay and which will prove to be only temporary measures, from which they will revert when life returns to 'normal'. A key area of debate to date has been around the extent to which working from home will remain the norm for many, for all or part of the week, and what that might mean for productivity, team building, staff development and career progression going forward, as well as office space requirements. The survey indicates that 76% of workers across the globe are in the workplace at least some of the time.

Key



Where are employees working?

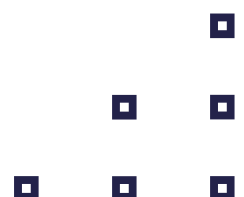
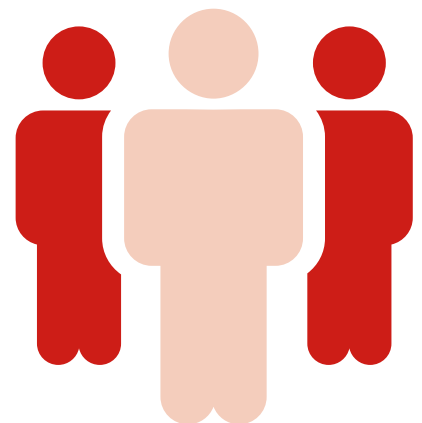




When it comes to productivity, the survey findings reveal some fascinating insights. Contrary to what one might expect given the upheaval to living arrangements and the need to adjust, those working remotely or from home are no more (in fact even marginally less) likely than their colleagues in the office or on-site to report that maintaining productivity is

a major challenge for them (10% compared to 13%). There is food for thought too for those employers considering a hybrid model post-pandemic, where workers return to the workplace for part of the week and work the rest from home, in the finding that more of those currently working in this way (15%) see maintaining productivity as a key challenge.

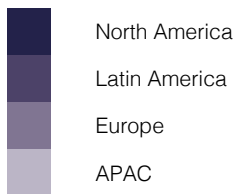
Those working from home estimate they are putting in more unpaid overtime than those based in the workplace or on-site (9.4 hours compared to 8.7 hours). But those adopting a hybrid model of home and on-site working believe they are doing the most of all, at 9.8 hours.



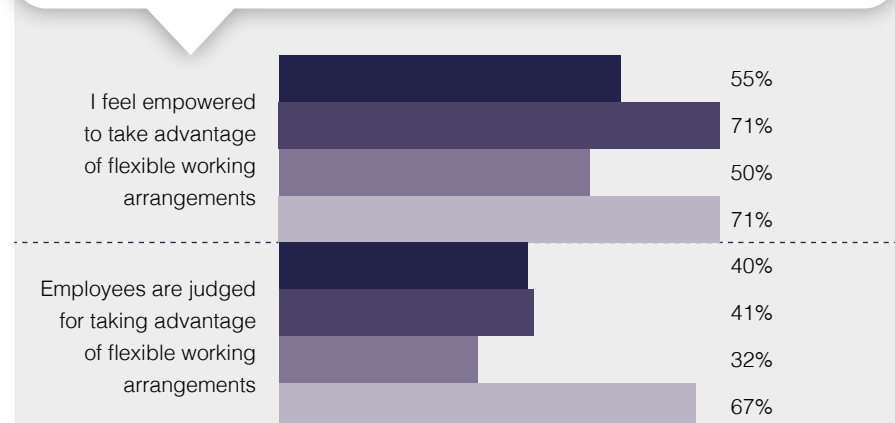
The impact on flexible working

There has been a sharp increase in the proportion of workers who say they feel empowered to take advantage of flexible working arrangements at their companies – more than two thirds (67%) now say so, up from just over a quarter (26%) before the pandemic. What’s more, almost half (47%) say their managers allow them even more flexibility on this front than their company policies dictate. But it may be too soon to call this the moment when flexible working gained full acceptance, as stigma persists. Around three in five (59%) feel judged for working flexibly.

Key



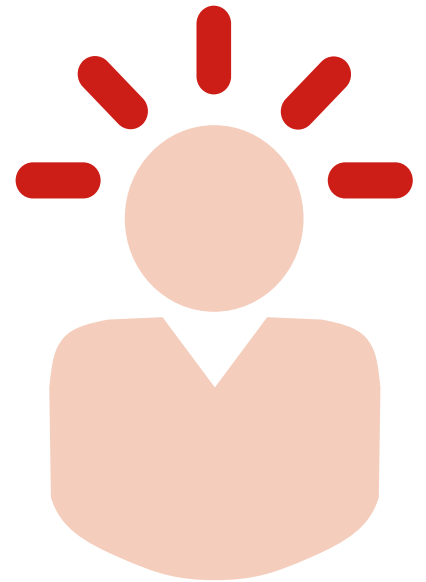
Empowerment versus judgment



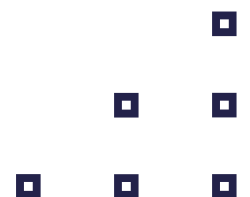
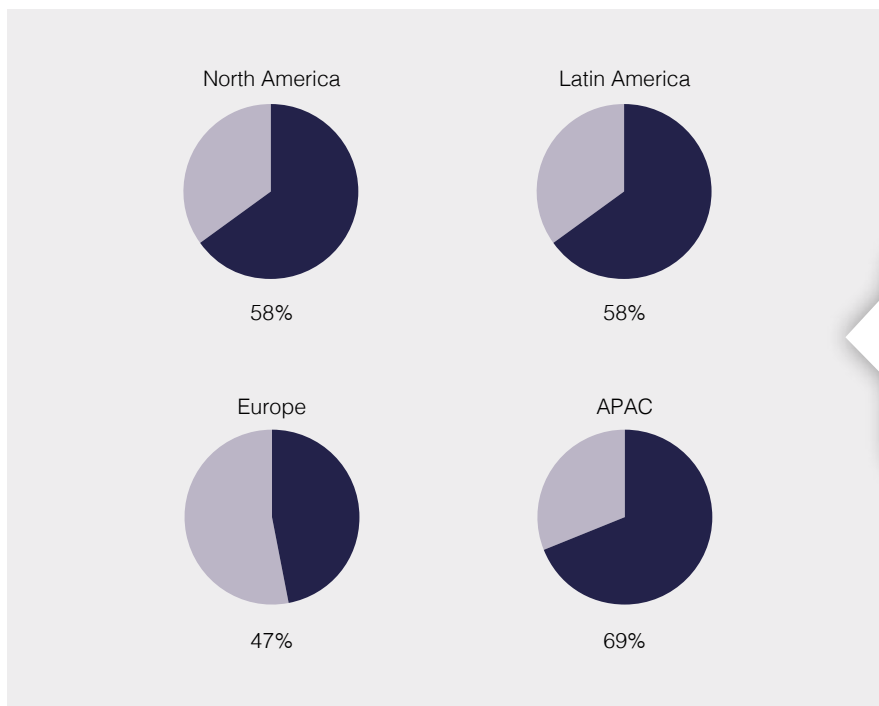
More than three quarters (76%) say their company is taking appropriate health and safety measures to protect staff from the pandemic, via changing working arrangements, implementing social distancing measures, or providing personal protective equipment. Over six in 10 (63%) agree that their employer has provided the equipment they need to do their job remotely, but this rises to only 69% among those exclusively working from home. It appears there is still room for improvement in some quarters, potentially putting worker safety and efficiency under strain and heightening the risk of security breaches if staff use personal equipment with fewer safety features to get the job done.

Employers are well aware that their responsibilities do not stop there, and that their business stands to benefit from supporting workers in other ways. These include supporting their mental health (which two thirds or 65% of workers say their employers are doing), providing financial wellbeing advice (which three in five or 59% say they are doing), and recognizing them for their contributions (which two thirds or 67% say their employers do).

For all the progress made around promoting and facilitating flexible and remote working during the pandemic, there are still hurdles to be overcome: not least how employers monitor and manage teams who are working in different places and at different times. More than six in 10 (62%) say that their employer is monitoring time-keeping and attendance more closely than ever. Given the amount of unpaid work being undertaken, issues around employees' perceptions of fairness may come into play. Managing these contradictions in the changing way people are working may prove to be a key area of focus for managers and HR teams alike going forward.



My employer supports my mental wellbeing



Pay and performance



As well as forcing some workers to work harder to compensate for lost jobs, the ripple effect of COVID-19 has had even wider implications. For some workers (28%), it has meant taking on a new role or changing their existing role as their employers have been forced to adapt the way they work or the skills they need and, in some cases, restructure their operations. Again, it is workers in Generation Z who have had to be most agile: more than one in three (36%) have changed role or taken on a new one.

There are positives for some. While most workers (55%) preferred the role they were doing before the pandemic, more than one in three (36%) actually prefer their new role and responsibilities. For all the challenges of COVID-19, it has offered some workers the opportunity to develop new skills or embark on new career

trajectories that they find satisfying or that unlock their potential in unforeseen ways. Most are being rewarded financially for their efforts as nearly seven in 10 (68%) have received a pay raise or a bonus, though concerning disparities emerge by gender (discussed in more detail below).

Rewards for taking on new roles and responsibilities

“Among those taking on additional responsibility/new role, what the employer provided...”

	North America	Latin America	Europe	APAC
I have taken on additional responsibility and/or a new role due to COVID-19 job losses at my company	57%	68%	44%	67%
Additional training	34%	40%	32%	46%
Bonus	29%	36%	32%	50%
Pay raise	39%	31%	31%	46%
My employer did not provide anything	25%	22%	23%	11%

Pay precision matters

Precision on payments to workers matters more than ever and nearly half (45%) of workers are paying closer attention to their pay than they did before the pandemic.

More than three in five (63%) of the workforce say they have been underpaid at some point, with one in five (20%) saying it always or often happens. More than half (54%) believe they have been overpaid at some point too and a similar proportion (52%) say they have experienced some other form of incorrect payment, such as a failed payment or an incorrect tax code. Worryingly, essential workers are disproportionately affected, with seven in 10 (71%) reporting they experienced underpayment compared to just over half (53%) of non-essential workers. Contract workers are also more likely to say they have experienced payment errors than those with employed jobs (58% versus 50%).

Thanks to technology, tracking pay is becoming easier. Mobile applications and tools are now easily accessible in many parts of the world, enabling people to check and manage their finances digitally. Again, adoption of such tools is far further advanced in APAC and Latin America than it is in Europe or North America, with one in two workers in APAC and Latin America (51% and 48%) embracing mobile applications to manage their finances during the pandemic, compared to one in three (31%) in North America and just one in five in Europe (21%).

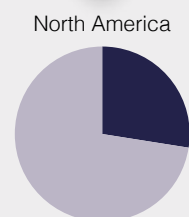
Late payments increase

Payroll struggles post-COVID have become commonplace with late payments more of a problem for essential workers as nearly three quarters (74%) of them have had payments made late, compared to less than two thirds (63%) of non-essential workers. Indeed, instances of late payment are on the increase across the board, potentially putting workers' ability to meet their financial obligations and look after their families under pressure. Today, nearly seven in 10 workers (69%) say they have been paid late at some point, up from six in 10 (60%) pre-pandemic. Late payments are much more likely to happen to workers in APAC than anywhere else (76%, up from 67% pre COVID-19). And, as was revealed in last year's study, the ramifications can be significant, from causing stress, to non-payment of bills, to having to borrow money from family and friends or incurring overdraft charges.

The survey casts doubt on the extent to which more frequent payments help workers to manage their finances. For example, despite typically being paid more often than their counterparts in APAC, Latin America or Europe, approximately one in four workers in North America still struggles to manage their cashflow because their pay schedule does not align with when their bills fall due.

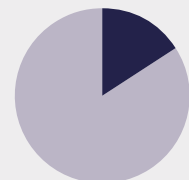
Pay pressures

I struggle to manage cashflow because my pay schedule does not align with when my bills are due



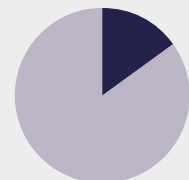
26%

Latin America



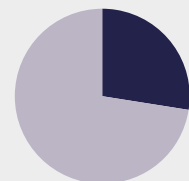
16%

Europe



15%

APAC

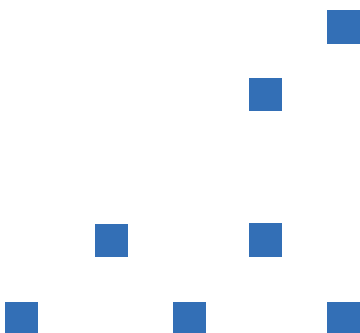


26%



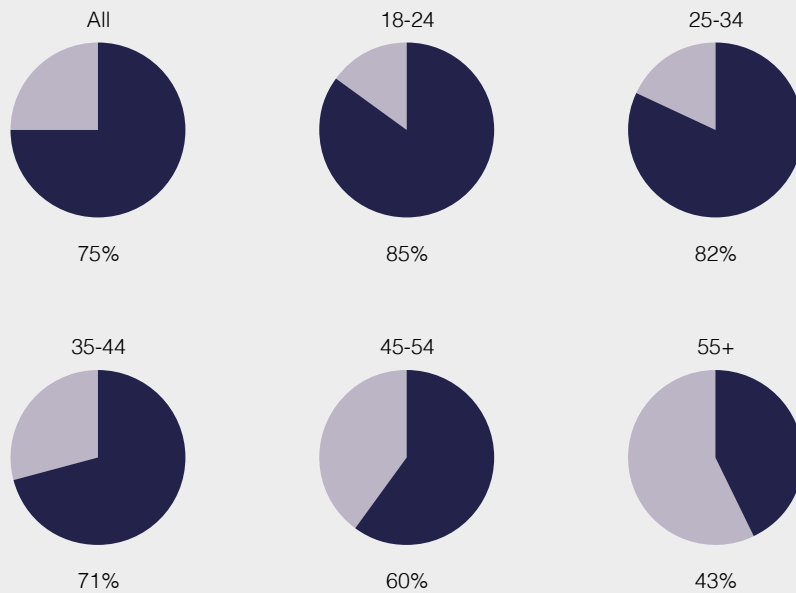
Worker mobility

The survey suggests that people are ready to move – in terms of both where they live and work. Important decisions have already started to be made around workers' living arrangements, with three quarters saying they have (or plan to) change where or how they live as a result of COVID-19. This could have long-term implications for the jobs people do and how and where they work. Essential workers are far more likely to have made or be considering such steps than non-essential workers (83% versus 66%), as are those in APAC and Latin America compared with their counterparts in North America or Europe.

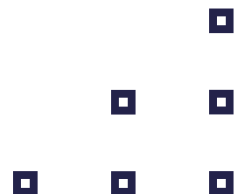


Workers rethink their living arrangements

I have changed or plan to change my living arrangements as a result of COVID-19 impacting my work life



If workers were to lose their job, there is reasonable confidence about the prospects of finding a new one: just over half of workers globally believe they could find another job offering the same or better pay (52%), flexibility (53%) or job satisfaction (56%). What's more, one in seven (15%) are actively trying to future-proof their job by changing role or the sector they work in. Generation Z are leading the way in this respect, with one in five (20%) being proactive about making a change.



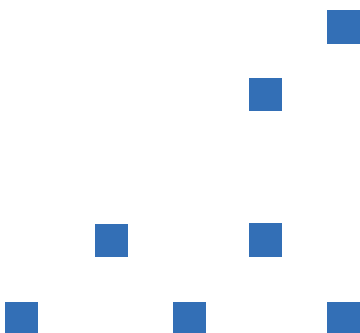
The gig economy

Worker mobility also plays into considerations around whether employed roles or gig work are preferable, in terms of freedom of choice about how and where to work. The gig economy was already on the rise pre-pandemic. However, the arrival of COVID-19 has renewed scrutiny around the benefits and drawbacks of gig working, as those who have lost their jobs weigh up whether to seek contract work or traditional employment, and demand for gig workers in areas like deliveries spikes during lockdowns.

More than half (54%) of the global workforce say they are more interested in contract work since the advent of COVID-19, the main reasons being that they believe there are new opportunities for them to perform contract work (35% say so) or because they have learned new skills that they can apply to contract work (32%).

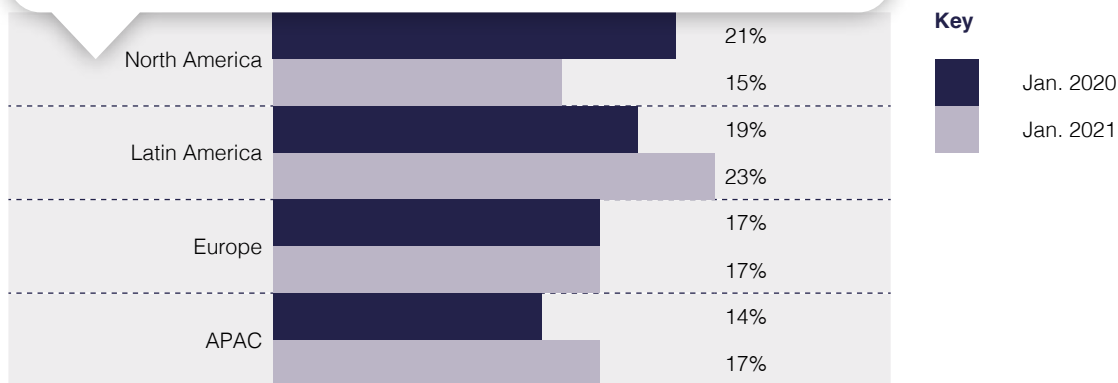
Despite this heightened interest, given the choice and assuming they could find a good job, the majority of workers (83%) would still opt for a permanent, traditional job rather than contract work, a proportion that is relatively unchanged since last year. Workers in Latin America are more enthusiastic than in other parts of the world.

North America is the only region where interest in gig work has declined, validating a trend we first identified in our May 2020 survey.



Proportion of workers who would choose contract work over employed roles

Assuming I had the choice and could find a good job, I would prefer contract work.



Job security is a key consideration when workers evaluate whether to do gig work versus traditional employment, but there is little agreement as to which structure offers more professional stability. For those who say they are more interested in contract work now than pre-pandemic, 30% say that

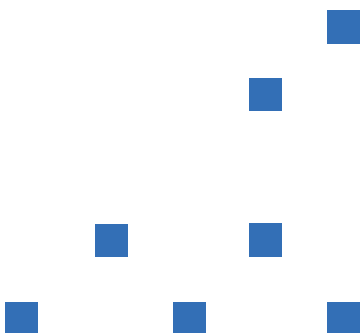
concerns around the job security of traditional employment are a major factor. Conversely, for those who say they are less interested in contract work now, 35% say that concerns around the job security of gig work are a major factor. Opinions are certainly divided.

Older workers are the most open to the idea of shifting into contract work (29% of over-55s and 22% of 45-54-year-olds), followed by Generation Z (19%).



Gender and family

One of the defining characteristics of the COVID-19 pandemic is the way in which it has exacerbated the work/life conflict. Whereas pre-COVID, ideas about work/life balance were focused on ensuring work did not take over workers' personal lives, now the issue includes managing risk and responsibilities in terms of health and safety. People are being forced to reconsider the interplay between their interactions with family and friends, their own physical and mental wellbeing and their working practices.



Two thirds (67%) of the global workforce say they have been forced to make a choice or compromise between their work and their personal life because of the impact of the pandemic.

This has created some difficult decisions. Two thirds (67%) of the global workforce say they have been forced to make a choice or compromise between their work and their personal life because of the impact of the pandemic. This could be having to choose between their work and their

health by continuing to go out to work or their work and their family due to difficulties seeing or caring for relatives or home-schooling children during lockdowns.

For many people, juggling their various personal needs while meeting their work requirements

has been tricky and the struggles are remarkably consistent across the globe. Staying healthy has been the biggest challenge, followed by meeting the demands of both work and family, managing stress, maintaining productivity and managing workloads.

What has been your biggest challenge at work since COVID-19 began? *	North America	Latin America	Europe	APAC
Staying healthy	20%	18%	22%	22%
Balancing work and family needs	15%	22%	12%	17%
Stress management	19%	15%	15%	11%
Maintaining productivity	9%	13%	10%	14%
Managing workload	7%	8%	10%	10%

Juggling a variety of challenges

*Responses with less than 10% mentions in all regions are not shown.

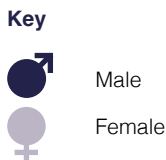
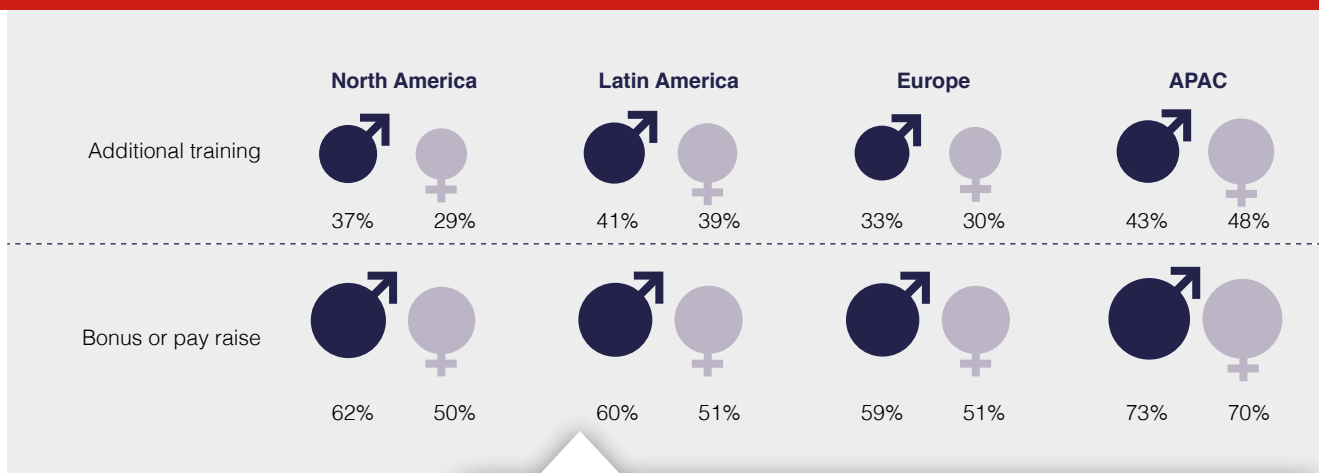
Women are feeling the strain

It is worth noting that in all regions except for APAC, stress management ranks as a greater challenge for women than it does for men – something that employers will want to be particularly alert to.

There could be many reasons for this – one being the heavy burden many women are assuming for childcare and home-schooling which has been widely reported in many countries. At the same time, however, the survey findings point to other potential causes of stress among women: less

assurance around job prospects than men, and the feeling of being comparatively undervalued at work.

Women are less confident than their male colleagues about their ability to find a new job that offers pay and flexibility that is comparable to their current one. The survey findings also show that men are more likely than women to get a bonus or pay raise for taking on additional responsibilities or changing roles.



Gender splits in how workers have been rewarded for taking on more work/ changing roles

What did your employer provide, if anything, when you took on this additional responsibility and/or new role?

The challenges for working parents

Working parents are no strangers to the challenges of balancing work and personal life, and the pandemic has had both significant positives and negatives for this group in this respect.

COVID-19 strong-armed companies into providing flexible working arrangements. Our pre-COVID report found that regardless of an employer's intentions, the manager may be the deciding factor in the flexibility a worker enjoys. This latest survey suggests that this continues to be the case, and that managers may be more flexible for working parents. Half of workers who are parents (51%) say their manager allows them more flexibility than company rules provide for, whereas two in five (42%) of non-parent workers say the same. Unfortunately, a significant proportion – 18% of parents and 25% of non-parents – say their managers actually allow less flexibility than that which the company has set out. Clearly, employers and HR teams have a role to play here in ensuring policies are consistently applied by managers and implemented as intended.

Encouragingly, men and women feel similarly empowered to take advantage of flexible working arrangements in their current role, although in North America men are noticeably more prone than women to feel this way. This could be because men in this region are far more likely than women to get

more flexibility from their manager than company policy allows (45% of North American men say so, compared to just 36% of women).

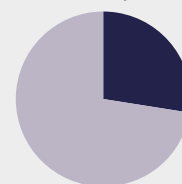
The majority of employees (71%) say their employers have also been accommodating the needs of working parents struggling with childcare or school closures. Although this picture is promising, the reality is that many employees think that there are limits to the accommodations working parents receive. Half of respondents (52%) believe employers' provisions for working parents will cease within a year.

Without this, there is a risk that more parents could exit the workforce. Just over one in four parents with a child less than one year old say that they or a member of their household has already stopped working voluntarily in light of the impact of COVID. Even among parents of older children and teenagers (11-17-year-olds), more than one in seven have dropped out of work "by choice". This loss of talent will be a real concern to employers and to policymakers.

Proportion of households where someone has "voluntarily" dropped out of the workforce

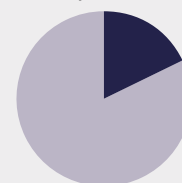
Age of children

Less than 1 year old



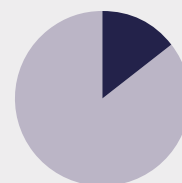
26%

1-5 years old



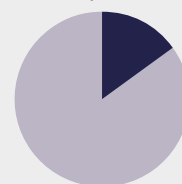
18%

6-10 years old



14%

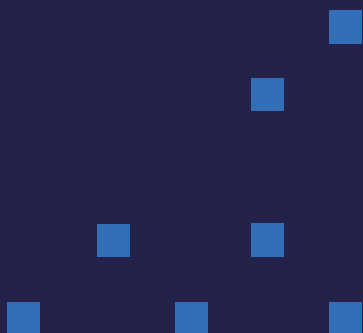
11-17 years old




15%

Conclusion

COVID-19 has taken a heavy toll on many businesses and workers around the world, but while the survey findings reveal the extent of the impact, they also offer glimmers of hope for the future. At a time of extraordinary economic, professional and personal disruption, workers and employers alike have largely stepped up to the mark, putting in extra effort and providing extra support.

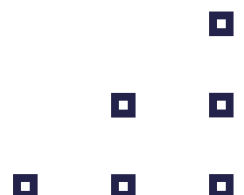




In some respects, the world of work has been changed irreversibly by the pandemic. Employees and employers will need mutual understanding, adaptability and co-operation as they establish what works well and should change forever, and what needs to revert as soon as possible. As this happens, Generation Z is entering the workforce, with their education as well as job prospects having been affected, but also with new ideas and expectations, which could change the status quo even further. Now more than ever, businesses need to think about the future and how they can adjust to monumental changes in worker expectations, needs and desires.

In such an environment, the role of HR professionals within businesses is central to company performance post-COVID, as co-ordinators of a variety of different – and sometimes competing – needs both between the workforce and employers, and among different workers themselves. However, these are issues that apply across the entire business: it is far from being solely the remit of HR. Leadership from the top will be as important as listening and learning at all levels. A dynamic organizational culture will play a vital part in creating the right conditions for workers and the whole enterprise to survive and thrive.

While employers grapple with the economic and commercial headwinds, issues around worker confidence and job security, workplace conditions, pay and performance, mobility and gender and family concerns will continue to significantly impact the world of work and the people within it. Even once the pandemic has played out, the ripple effect is likely to continue to be felt for many months and years to come.





People at Work 2021: A Workforce View in North America

Introduction

Comprising the world's largest economy, North America has long led the way in terms of commercial success, underpinned by a reputation for innovation. GDP across the United States and Canada topped US\$22 trillion in 2020 according to the International Monetary Fund (IMF)¹ despite the impact of the COVID-19 pandemic on jobs and growth. Nonetheless, this 'black swan' event has changed the lives and altered the outlook of the massive working population across the continent.

Worker confidence and job security

Overall, optimism about the next five years in the workplace remains robust and largely unchanged compared to pre-COVID days for 74% of Canadians and 78% of US workers. The vast majority in both countries (more than nine in 10) feel they have the skills to succeed in their careers and few (16%) foresee a decline in opportunities to develop their skills. However, in the shorter term due to the impact of COVID-19 specifically, the proportion who feel that the pandemic will positively or adversely impact career development opportunities in the

next three years was fairly evenly split at three in 10 apiece, while four in 10 foresee no impact. More workers than not expect there to be a hit on financial security, with 39% predicting a negative impact versus 28% foreseeing a positive impact. On a positive note, the opposite is true for flexibility at work: a higher proportion expect a positive impact on flexibility (39% positive versus 27% negative).

The professional impact of the COVID-19 pandemic has been directly felt by more than half of workers in North America (56%) – slightly below the global

average of 64% – and reported rates of impact are similar across Canada and the US. As elsewhere, Generation Z (18-24 year olds) and younger Millennials (25-34s) have been worst hit by job losses, pay cuts, being put on furlough, having hours reduced or suffering a temporary layoff, while their older colleagues have been comparatively less affected. Contract workers have been hit particularly hard as well, with 77% reporting some kind of professional impact compared to 58% of traditional employees.

1. IMF, 2021.

Workplace conditions

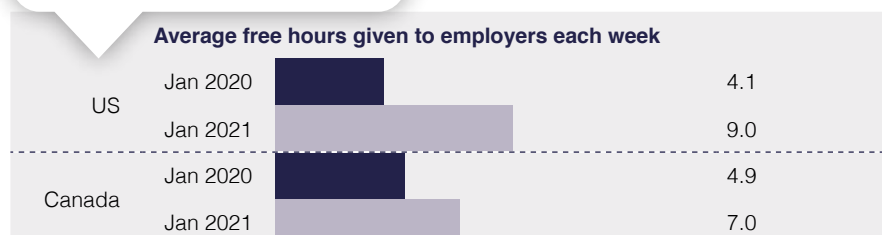
Flexible working has been brought even further into the spotlight by the pandemic as the traditional 9-to-5 on-site working day has been transformed, and there is much to be positive about. 55% of North American workers feel empowered to take advantage of flexible working arrangements offered by employers, although a certain amount of stigma persists, with four in 10 (40%) saying they feel judged for doing so. Many managers even allow more flexibility than their company policy dictates, more so in the US where 41% of workers say so, than in Canada (34%).

A concerning picture arises when it comes to the amount of ‘free’ time that workers are giving to employers by working over lunch breaks or after hours. In just a year since the pandemic struck, workers in the US have more than doubled the amount of time they are working for free on average, clocking up nine unpaid hours per week now, up from 4.1 pre-pandemic. The proportion of US workers who say they do not undertake any extra hours for free has dropped from more than half (55%) to a third (32%) in a year. Canadian workers are also giving away more time for no extra pay, rising to an average of seven hours of additional free time from 4.9 a year ago. Overall,

North America had the sharpest year-on-year rise in hours worked for free of any region in the study.

When it comes to offering support to help employees cope professionally and personally during the pandemic, North American employers have performed better than those in Europe but appear to have been less proactive than those in APAC or Latin America. For example, almost six in 10 of workers (58%) say their employer supports their mental wellbeing and seven in 10 say they are taking appropriate health and safety measures, but only half are providing the necessary equipment for remote working.

‘Free’ time soars



Pay and performance

Tough times call for extraordinary measures, causing two in five workers in the US (40%) and one in three Canadians (32%) to take on additional responsibilities following COVID-19-related job losses at their organizations. One in four US workers took on a new role for the same reason (25%), as did nearly one in five Canadians (18%). Concerns around job or financial security doubtless played a part here, with 65% of Americans and 53% of Canadians saying they had started to do things differently in their job for this reason.

However, while the majority of workers in the US were rewarded for doing so with pay raises and

bonuses (57%), less than half of their peers in Canada got the same treatment (45%).

Problems with incorrect or late payment are less prevalent in Canada than in the US but they are nonetheless affecting a substantial proportion of people. Overall, more than half (55%) of North American workers say they have been underpaid at some point. Perhaps because payment discrepancies are less common, fewer Canadian than US workers are checking their pay checks more closely since COVID-19 (32% versus 36%), and they are less prone to use digital tools such as mobile apps to manage their finances

(23% versus 32%). Cashflow management difficulties due to pay schedules not aligning with bill due dates are more problematic in the US than in Canada (28% versus 17%), and it is younger workers who are struggling the most.

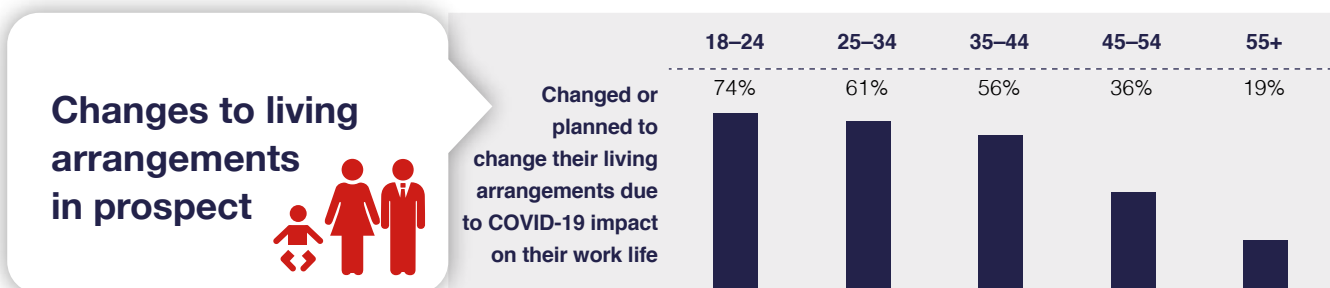
A third (33%) of Generation Z are experiencing problems, despite the prevalence of weekly and biweekly payments, suggesting that more support and advice around money management is needed for this new cohort entering the workforce.

Worker mobility

More than half of North American workers say they have made or plan to make a change to their living arrangements due to the impact of COVID-19 on their work, a trend driven by the US (where 52% say this) rather than Canada (42%). Remote workers have led the charge, with 30% having already made a change, while 29% of on-site workers are still considering such a move (29%).

Though traditional employment remains the option of choice for most North Americans (85%), almost one in five Canadian workers (18%) would prefer contract work, compared to one in seven US workers (14%). Preference for gig working has declined more in North America than any other region when compared to last year. New or more concerns about the job security provided by contract work is the most commonly cited

reason for a decline in interest. Still, four in 10 US workers (41%) say they are more interested now than before the pandemic, against three in 10 Canadians (29%). In contrast to Europe where changing personal needs and priorities dominate reasons for higher interest, those in the US and Canada cite a sense that there are more opportunities to perform contract work now (31% say so, with changing needs and priorities a close second at 29%).



Gender and family

Far more workers in the US than in Canada say they have been forced to make a choice or a compromise between their work and their personal life – either in terms of protecting their health or attending to family commitments (58% compared to 46%), although this is below global levels (where 67% said so). Signaling the disruption of the pandemic, 44% of parents in North America report having changed or considering changing their living arrangements due to COVID-19 (a lower percentage compared to non-parents, but a disruption for many nonetheless). Looking ahead, over a third (35%) expect employers’ willingness to accommodate the needs of working parents struggling with childcare or school closures during COVID-19 to cease within a year, but one in 10 are confident their employers will continue to do

so indefinitely.

North America stands out from other regions in the survey when it comes to the impact of gender on the experience of workplace flexibility. Women are less likely than men to feel empowered to take advantage of flexible working arrangements (52% versus 58%). They are also less likely than men to say their manager allows more flexibility than the company rules provide – an issue which is more pronounced in the US (where 36% of women versus 46% of men say so) than in Canada (32% versus 36%). Women may be concerned about holding on to whatever flexibility they have, as only 37% are confident they could find a job with the same or better flexibility as their current position allows, compared to 53% of men who feel confident about their ability to do so.

The ADP Research Institute has previously identified the role of bonuses in driving wage disparities among men and women, and this pattern holds in the information reported about pay raises and bonuses in this survey². Among those who say they have taken on additional responsibilities or changed roles due to COVID-19, 63% of men in the US and 52% in Canada report having received a pay raise or bonus for doing so, compared to only 51% and 37% of women respectively – overall, a larger gap than is observed in any other region. Furthermore, since the gender gap is smaller when it comes to training, the disparity in income is highlighted all the more.

The depth of the gender pay gap

Among those who changed roles or took on additional responsibilities due to COVID-19, the percentage who...	US		Canada	
	Male	Female	Male	Female
Received bonus or pay raise	63%	51%	52%	37%
Received training	38%	30%	31%	29%

What does this mean for employers?

Issues such as the increasing amounts of extra, free time being committed to their work, the timing of worker payments and flexible working have very much come to the fore in North America in the past

year, as workers grapple with the impact of a pandemic which has radically altered their professional and personal lives. Many employers are offering financial rewards and practical support, but they may need

to keep a close eye on how sustainable current ways of working are and whether even more help is needed to shore up workers’ health, morale, productivity and loyalty in the longer term.

2. Yildirmaz, Ahu; Goldar, Mita. "Rethinking Gender Pay Inequity in a More Transparent World" ADP Research Institute, 2019

People at Work 2021: A Workforce View in Latin America

Introduction

The COVID-19 pandemic has hit Latin America exceptionally hard in both public health and economic terms, according to the United Nations¹, and the IMF predicts that recovery in the region in terms of GDP per capita may take longer than in other parts of the world². However, although the risks from the pandemic loom large here, the survey findings reveal several excellent examples of worker and employer initiative that provide hope for the future.

Worker confidence and job security

The region is still displaying high levels of optimism about the next five years in the workplace, similar to one year ago, and this can be seen most clearly in Brazil, where 86% of workers feel optimistic. Overall, workers in the region are more inclined to believe that COVID-19 will have a positive impact on the world of work in the next three years in a variety of ways, such as opportunities to advance their careers and flexibility, with Brazilians the most bullish of all. Confidence about the prospects of finding a new job

with the same or better pay are higher here too than elsewhere in the region (55% are confident in Brazil, against 42% in Chile and 39% in Argentina).

Optimism slips slightly but remains strong



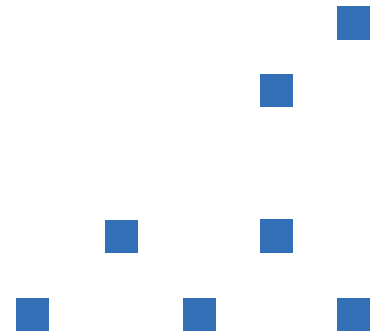
Brazil	2020	89%
	2021	86%
Chile	2020	83%
	2021	82%
Argentina	2020	87%
	2021	79%

1. [The United Nations Economic Commission for Latin America and the Caribbean \(UNECLAC\), 2020.](#)

2. [International Monetary Fund, 2021.](#)

That's despite two thirds of workers in Latin America feeling the professional impact of COVID-19 (66%), rising to almost seven in 10 (68%) workers in Brazil – the second highest proportion in the world. Within Latin America, there are differences in the rates of job loss and furlough. A third (33%) of Brazilian workers lost their job, were furloughed or were temporarily laid off by their employer, with Chile not far behind (at 30%), compared to a fifth of Argentinians (21%). However, instances of pay cuts were relatively similar across all three Latin American nations

studied, at just under a quarter (24%) of workers having had to accept one. Probably for these reasons, more than three quarters of workers in Latin America (78%) say they have started to do things differently in their job due to job or financial security concerns.

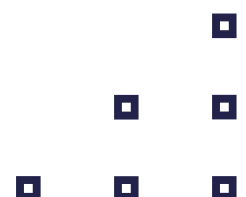


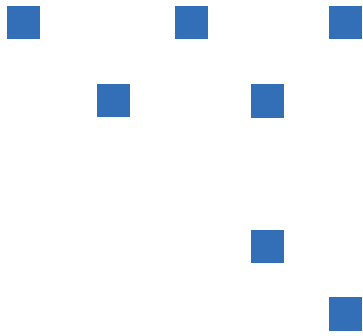
Workplace conditions

For those in work, the workload appears to be piling up. The amount of unpaid overtime being undertaken has increased significantly, with the average across the region now standing at 6.5 hours extra per week, up from 4.5 pre-pandemic. Workers in Chile are giving away the most 'free time' in the region at 6.8 hours, compared to 6.5 in Brazil and 6.2 in Argentina. Latin America might have the lowest proportion of workers of any region working in excess of 10 extra unpaid hours per week (16% compared to 30% globally), but it is notable that the proportion of workers doing so has more than doubled since last year (from 7%).

Employers in the region are more likely than those in North America or Europe to provide workers with the equipment they need to work remotely (63%) or to take appropriate health and safety measures (75%), with Brazil leading the way. Support for workers' mental health and the provision of financial wellbeing advice is also most prevalent in Brazil, although the whole region is comparatively proactive in these respects too, in global terms. For example, more than half of Latin American workers (52%) say their employer provides financial health advice, compared to 46% in North America and 33% in Europe, with only employers in APAC being more proactive.

Around four in 10 (40%) Latin American workers say their manager allows them to have more flexibility around the way they work than their company policy actually stipulates, but 14% say they get less, rising to 18% for workers in Chile. A high proportion across the region feel empowered to take advantage of flexible working opportunities, especially so in Argentina (where almost three quarters or 74% of workers say so). In the region generally, that feeling of empowerment is also riding higher among parents than non-parents (77% versus 66%).





Pay and performance

Workers in Chile were most likely of any in the region to receive a pay raise or bonus for taking on additional responsibilities or new roles due to COVID-related job losses in their organizations. Six in 10 did so (61%), compared to 56% in Brazil and 54% in Argentina. Brazilians were more likely than their counterparts elsewhere in Latin America to receive training to equip them

for this change (42% did so). Incorrect payments to workers can be problematic in parts of Latin America. For instance, workers in Argentina and Chile are among the top three countries in the entire global study where workers are most likely to have experienced underpayment (78% and 70%) – far more so than in Brazil (59%). The situation is similar when it comes to late

payment, with Argentinians suffering most. Chilean workers are most likely to have started to review their pay packets more closely since the pandemic, with half doing so. However, they are less inclined than their counterparts in Brazil or Argentina to be deploying digital tools such as mobile apps to keep an eye on their finances (40% compared to 47% and 49% respectively).

Worker mobility

Three-quarters of Latin American workers have taken on more responsibilities or changed role due to COVID-19-related job losses (74%). For the most part, workers said they felt extremely or very well equipped to handle those new duties, with workers in Argentina the most confident (75%). However, across the region, workers in this situation were more likely to say they prefer the way they

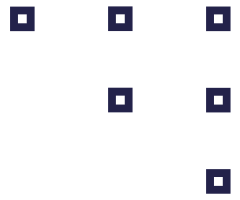
worked pre-pandemic than during it (51% versus 39%). Appetite for contract work in Chile is among the strongest in the world, with a quarter (25%) of workers saying they would choose it over a traditional job, although that proportion has shrunk from a third (33%) last year, and Brazil is not far behind at 23%. Regionally, interest in gig work is growing fastest in Brazil,

where 55% of workers say they are now more interested than they were before the pandemic, driven by having learnt new skills that they can apply to this kind of work, alongside an expectation of more opportunities becoming available and a greater appreciation of the benefits.

Preference for contract work over traditional employment		
Brazil	2020	18%
	2021	23%
Chile	2020	33%
	2021	25%
Argentina	2020	20%
	2021	19%

Preference for gig work





Gender and family

The pandemic has affected workers' personal lives as well as their professional lives, with more than six in 10 (63%) saying it has had an impact in terms of forcing them to make choices and compromises. Workers in Chile are the most inclined to say so, with nearly seven in 10 (69%) saying they have had to make a choice between their work and their family or their work and their

health, while fewer than six in 10 (58%) said so in Argentina.

In all three countries, balancing work and family needs was the biggest challenge of the pandemic (22% said so) – more so than staying healthy (18%), which was the number one issue on a global level. Unsurprisingly, parents were far more likely than non-parents to struggle with balancing

work and family needs (26% versus 17%). When it comes to accommodating the needs of working parents struggling with childcare or school closures during the pandemic, however, Argentina is trailing behind its Latin American peers and most of the rest of the world, with 18% of workers saying their employer has never done so.

Personal versus professional choices and compromises

Considering the impact of COVID-19 on your work and personal life, do you feel you have been forced to make a choice or compromise between ... (Select all that apply)	Brazil	Chile	Argentina
My work and my family	39%	42%	33%
My work and my health	38%	44%	37%
Other choice/compromise between my work and my personal life	1%	1%	1%
No, I have not been forced to make a choice or compromise between my work and my personal life	37%	31%	42%

What does this mean for employers?

The challenges of COVID-19 are well documented but the response from large swathes of Latin American employers and workers appears to be positive. Many employees are going above and beyond in terms of taking on more responsibilities and workload,

although such steps are not always easy. At the same time, many employers appear to be taking proactive measures to ensure staff feel supported both at work and in their personal lives in terms of mental health or financial wellbeing. While the difficulties are far from over, this

suggests that there is a strong foundation on which employers can build in the months and years ahead, to retain talent, boost productivity and take advantage of any opportunities thrown up by the crisis.

People at Work 2021: A Workforce View in Europe

Introduction

Europe has long been seen as a bastion for worker rights, with some of the strongest employee protection laws in the world. However, in the era of COVID-19 what employers do – rather than what the law requires of them – has come under the spotlight as major changes that might otherwise have taken years to fully materialize (such as the shift to remote working) have happened almost overnight. Workers too have been put under unprecedented pressure, different from any other economic crisis in recent memory and their responses to the pandemic have major implications both for their careers and business success.

Worker confidence and job security

Optimism about the next five years in the workplace has fallen more in Europe than any other region, from 78% to 71%, making it now the lowest in the world, despite having been on a par with North America at the beginning of 2020. Within Europe, Dutch workers are the most optimistic (the proportion saying so is just under the global average at 83%), whereas less than two thirds of workers in Spain (62%) and Italy (63%) agree. When it comes to financial security in the wake of

COVID-19, in the UK, France, Spain and Poland, at least twice as many workers expect COVID-19 to have an adverse impact in the next three years as those who believe it will have a positive one.

More than half of European workers (52%) report being directly professionally impacted by the COVID-19 pandemic: a lower proportion than in other regions, but significant nonetheless. A quarter (24%) of workers lost their job, were furloughed or temporarily laid off by

their employers. Those in France, the UK and Spain were most likely to have experienced these measures, with around a third being affected in each, whereas in Poland and Italy pay cuts were more prevalent, with more than one in five workers accepting reduced pay. Workers in the Netherlands and Germany were the least likely not just in Europe but in the world to say they have experienced a professional impact.

Measuring the professional impact of the pandemic

Professional impact due to COVID-19	UK	FR	DE	NL	PL	CH	ES	IT
Been furloughed	24%	22%	8%	9%	11%	7%	23%	2%
Reduced responsibilities/ hours	13%	9%	12%	11%	14%	17%	9%	13%
Took a pay cut	11%	15%	13%	8%	21%	14%	15%	21%
Lost a job	8%	6%	6%	5%	5%	9%	7%	3%
Stopped working voluntarily	6%	7%	6%	5%	4%	6%	3%	4%
Temporary layoff with same employer	6%	9%	10%	5%	4%	10%	4%	4%
Other professional impact	5%	7%	9%	13%	11%	11%	7%	11%
There has been no professional impact	42%	35%	47%	51%	44%	42%	40%	46%
Prefer not to say	4%	10%	6%	5%	4%	5%	3%	4%

Workplace conditions

For those in work, workloads have been increasing, to the extent that the amount of unpaid overtime being performed has increased significantly, by almost half as much again. The average amount of time spent working for free per week rose to 6.7 hours from 4.5 last year. Swiss and UK workers are putting in the most unpaid overtime at 7.9 and 7.8 hours apiece on average, compared to 5.4 in Poland. More than one in five workers (21%) in Europe are now working an average of more than 10 hours of unpaid overtime each week.

While many European employers have been putting in place initiatives to support and reward employees during the pandemic, such as implementing financial advice or mental health support initiatives, such measures appear to be less prevalent than in other regions of the world. UK employers are most likely among

their European neighbours to offer financial wellbeing advice, while Poland and Switzerland lead the pack in the region for prioritizing workers' mental health.

Demands for flexible working were growing pre-pandemic, but COVID-19 has brought the issue into sharp relief as the potential benefits (versus the disadvantages) become clearer. European workers are less likely than those in other regions to say their managers grant them greater flexibility than company policy allows (just under a third say so). Feelings are divided when it comes to workers' sense of empowerment to take advantage of flexible working arrangements. Half (50%) say they feel empowered to do so, rising to around six in 10 in Spain, Switzerland and Poland, compared to just over four in 10 (42%) in France.

Pay and performance

Like their counterparts in North America, businesses in Europe perform better than those in APAC or Latin America in terms of being precise and timely with staff payments. Even so, 55% of workers have experienced being underpaid, and 49% say they have been paid late, with the risk of this occurring highest in Spain (67%) and Italy (58%). Perhaps because of this, workers in these countries are some of the most likely to have started reviewing their pay more closely since the pandemic (at 41%

and 37%). Polish workers have been quickest to adopt mobile applications and tools to manage their finances (three in 10 say they have done so).

At the same time, concerns around job or financial security prompted 57% of workers to do things differently at work. In Spain particularly, this has manifested itself in workers taking on additional tasks or workload or working longer hours. For German workers, these concerns appear to be less

pressing than they are for many of their European neighbours, and they are the least likely to have changed their working habits or arrangements (49% have done so). Where workers have taken on extra responsibilities or a new role, the Polish, French, German and Dutch are most likely to have received a pay raise or a bonus, with around six in 10 workers benefiting on average, whereas less than half (48%) of workers in the UK have received the same benefits.

Rewards for extra responsibilities and new roles

What employers provided for taking on additional responsibility or a new role	UK	FR	DE	NL	PL	CH	ES	IT
Additional training	34%	27%	34%	25%	33%	32%	34%	28%
Pay raise	29%	30%	33%	35%	36%	25%	30%	27%
Bonus	27%	36%	33%	33%	38%	34%	30%	29%
My employer did not provide anything	28%	21%	18%	22%	23%	24%	24%	28%
Other (please specify)	2%	0%	2%	1%	1%	1%	1%	1%

Worker mobility

Changes in living arrangements parallel changes at work. Just as European workers tended to be less likely to say they experienced any professional impact due to COVID-19 than

their peers in other regions, they are also less likely to report that the impact of COVID-19 on their work caused them to change or consider changing their living arrangements. Within Europe, this

varies widely, from a high of 74% in Italy saying the pandemic has caused them to re-think how and where they live, to a low of 39% in Germany.

Workers on the move

Changes to living arrangements due to COVID-19 impacting work life	UK	FR	DE	NL	PL	CH	ES	IT
I have changed my living arrangements	16%	30%	14%	18%	15%	19%	23%	46%
I have not changed my living arrangements, but plan to	29%	30%	24%	24%	49%	24%	36%	28%
I do not plan to change my living arrangements	55%	40%	61%	58%	37%	57%	40%	26%

Workers in Switzerland and Germany demonstrate the greatest preference for gig working of any countries studied (alongside Chile), with around a quarter saying they would choose gig work if they could

find a good job. In these two countries, workers who say their interest in this kind of work has increased report changing priorities or personal needs as the top reason for their increased interest. Spain is at the other end

of the spectrum, with just one in 10 showing a preference for gig work. Three in 10 (29%) European workers have become more interested in the opportunities for gig work since the pandemic (half as many as in APAC at 60%).

Gender and family

Managing stress at work due to the impact of COVID is a top challenge for more women in Europe than men (17% versus 12%). Part of the struggle may be related to flexible work arrangements, where women are less likely than men to be given additional flexibility than company policy permits by their managers. Mothers in particular seem to lose out: the survey findings suggest that mothers may have less flexibility than fathers *and* non-parents. 35% of fathers say their manager allows more flexibility than company policy dictates,

compared to 29% of mothers, and non-parents of both genders fall in between.

Another source of stress is likely to relate to job concerns. Though these resonate with all types of workers, mothers in the region again stand out from fathers and non-parents as the least likely to feel confident about their prospects of finding another job that offers the same or better pay and flexibility as their current role.

It's parents of young children in particular who feel that they have been forced to make a choice or compromise between

their work and their family. Almost 39% of parents of under 1-year-olds, 38% of parents of 1-5-year-olds and 37% of parents of 6-10-year olds say this has been the case. Even one in three (29%) of parents with children in the 11-17-year-old age range feel this way.

How companies in different European countries approach these concerns varies slightly. For example, nearly one in five workers in Spain (19%) say their company never accommodated working parents during COVID-19, the highest reported in Europe.

What does this mean for employers?

Although the survey findings suggest that workers in Europe appear to have been comparatively less acutely affected professionally by the pandemic than their counterparts elsewhere in the world, the impact of COVID-19

has still been significant in many areas of working life. Finding sustainable solutions to issues like managing remote working, boosting productivity, rewarding additional effort, and maintaining drive could be an ongoing challenge for some

time. Employers who take proactive steps to support and motivate their workers should increase their resilience and could even turn COVID-19's impact on employment from a threat into an opportunity.





People at Work 2021: A Workforce View in APAC

Introduction

The APAC region is an economic powerhouse on the global stage, comprising some of the world's fastest-growing and most competitive commercial entities and a massive working population. The labor force of the countries studied in this report – China, India, Australia and Singapore – encompasses more than 1.25 billion people¹. In such a diverse and dynamic region, understanding worker perspectives and their interplay with employer behavior is a major task at the best of times – all the more so when a global pandemic hits. The survey findings shine a spotlight on where some of the clearest similarities and differences exist.

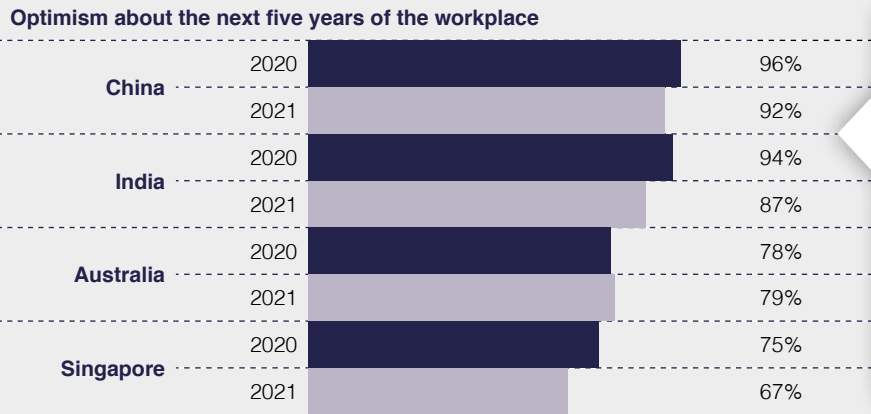
Worker confidence and job security

Consistent with last year's survey, Chinese and Indian workers remain the most optimistic in the world about the next five years in the workplace, and across the region there is a great sense of confidence that workers have the skills they need to succeed. However, dig deeper and disparities soon start to emerge within APAC. For example, Singaporean workers are less than half as confident about their prospects for finding

a new job with the same or better pay as Indian workers (28% compared to 65%). Indeed, both are far less convinced about how secure their job or industry is than their counterparts in China particularly, but Australia too. When it comes to the potential impact of COVID-19 specifically on the world of work ahead, from its impact on work-life balance to career advancement opportunities, the view from Australia and Singapore is less

optimistic than in China and India. Though Australia is less optimistic overall, there has been barely any change compared to pre-COVID days.

1. [The World Bank, 2020 data.](#)



Workers in China and India display world-beating optimism



The professional impact of the COVID-19 pandemic has been most keenly felt in APAC – and in India in particular. Almost four in 10 Indian workers (39%) lost their job, were furloughed or temporarily laid off by their employer, compared to just over one in five in China (22%). They were most likely to have taken a pay cut – twice as likely as

Australians in fact (30% versus 15%). Perhaps for this reason, the vast majority (86%) are doing things differently in their roles due to concerns around financial or job security (as are those in China and Singapore, at 77% and 75%), compared to 57% of Australians.

Many workers have been forced to take on additional

responsibilities or changed roles due to job losses in their organization. Regionally, workers feel very well equipped for this challenge (69% say so overall). Indian workers lead the way here: three quarters feel very well equipped, compared to less than half (45%) of workers in Singapore who feel the same.

Workplace conditions

In such a high-pressure environment, a significant amount of ‘free time’ is being provided to employers, and the amount of unpaid overtime undertaken in APAC remains the highest in the world, just as it was in 2020. The amount of extra time worked for no additional pay has actually increased compared to last year. Workers in India are now averaging over 11 hours per week, with Singapore and China not far behind, at more than nine hours apiece. This average is being pushed up by the fact that two in five Indian workers (40%) are doing more than 10 hours of unpaid overtime each week, rising to 45% for essential workers.

Managers in the region appear to be more willing than elsewhere to allow workers greater flexibility than company policy provides – but within APAC itself there are

stark variations. While Chinese and Indian workers are the most likely in the world to be granted more flexibility, those in Singapore have the highest chances of working for a manager who actually allows *less* flexibility than company rules permit. Ironically however, with greater freedom to work flexibly also comes greater stigma: Chinese and Indian workers are most likely to say they feel judged for doing so.

Employers in APAC are being particularly proactive in terms of the support they are giving their staff on every measure the survey investigated. Employees here are far more likely than those in Europe or North America to say their company provides the equipment they need to work remotely and to feel strongly the company is taking appropriate health and safety measures. Asian

employers are also the most likely to offer financial wellbeing or mental health support, recognize workers for their contributions and communicate clearly with their staff. That said, they are also the most inclined in any region to closely monitor attendance and timekeeping. However, it is worth noting that all of these activities are much more prevalent in China and India than in Singapore and Australia.



Pay and performance

Pay packets come under the least scrutiny from workers in Australia, with only a third (34%) of workers there saying they have reviewed their pay more closely since COVID-19, whereas almost half of workers in the other three APAC countries studied now check more carefully. Australian workers are also far less likely to have started to use digital tools such as mobile apps to

manage their finances during the pandemic (24% versus 53% in China, 50% in India and 37% in Singapore). It makes sense to do so: late and incorrect payments are a common occurrence in APAC, especially in India.

COVID-related job losses have meant that nearly half (49%) of workers in APAC have taken on extra responsibilities at work

and a further three in 10 (30%) have changed role. Prospects for a bonus or pay raise for taking on new responsibilities and roles were highest in China, where more than three in four workers (76%) received additional remuneration, and worst in Singapore, where less than half (49%) were rewarded financially for their efforts.

Worker mobility

Workers in APAC are making significant life choices. For example, nearly nine in 10 (88%) Indian workers say they have changed or plan to change their living arrangements because of the impact of COVID-19 on their work, the highest of all countries surveyed, perhaps related to the high rate of professional disruption such as layoffs. Elsewhere in APAC, the proportion

of workers considering or making this kind of change is more than three in four Chinese (78%), six in 10 Singaporeans (63%) and almost half (45%) of Australians.

APAC is displaying the greatest increased interest in contract work in light of COVID-19: six in 10 workers (60%) are now more interested, mainly because they believe there are new opportunities to work in this

way. Globally, interest in the possibilities gig working offers has spiked most among workers in India (69%), but there is a caveat. Paradoxically, workers here are also the most likely of almost anywhere else in the world (joint with Spain) to say they would favor a traditional job if given the choice (90%).

Gender and family

These professional imperatives have forced workers in APAC to make more difficult personal choices and compromises, such as around whether to prioritize their health or their work, or their family or their work, than their counterparts in any other region. Around seven in 10 (71%) say they have had to do so, compared to around one in two in Europe (51%). Again, this is highest in India (85%), and lowest in Australia (49%).

Driven by China and India, APAC stands out as the only region in this survey where the experience of men and women is similar. Men and women in APAC are equally likely to say they feel empowered to take advantage of flexible

working arrangements and there is no difference in the flexibility offered by managers relative to official company policy. In other regions, men were more likely to take advantage of flexibility.

APAC is also the only region where men and women are equally likely to report receiving training and a bonus or pay increase for taking on additional responsibilities due to COVID-19. In other regions, men are more likely to receive training and compensation compared to women. Furthermore, men and women report equal confidence at their prospects of finding a new job that offers the same pay and flexibility they have now, whereas men tend to be

more confident about this than women in the other regions.

It is important to note however that this experience is not consistent across all of the countries within APAC. The gaps between men and women observed in other countries outside APAC are similar in Australia and Singapore. For example, a large gap in compensation for changes at work appears in Australia, with 61% of men having received a pay raise or bonus for changes at work compared to only 43% of women. In both Australia and Singapore, women also appear more stressed and less confident about job prospects.

Received a pay raise/bonus for taking on additional responsibilities/changing roles due to COVID-19 impact on their company

China	2020	76%
	2021	76%
India	2020	70%
	2021	65%
Australia	2020	61%
	2021	43%
Singapore	2020	51%
	2021	46%

Variations in gender pay gaps across APAC



What does this mean for employers?

The APAC region appears to be powering ahead in many respects, despite the huge and diverse challenges presented by COVID-19, with workers going above and beyond in terms of the work they do and employers going the extra mile in the

support they offer to staff. There is a strong sense of optimism and confidence overall, but there are also real concerns around issues like financial security in some quarters, and opinions can at times vary starkly between countries. There is much that is

positive for employers to nurture and harness, all the while keeping an eye on the negatives to ensure that burnout, lack of morale or waning staff loyalty do not start to emerge and become problematic.



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