

EY Work Reimagined 2022 Survey



Building a better
working world

This survey continues the research performed on reimagining work and understanding employee and employer perspectives

August 2020

Physical Return and Work Reimagined (WR) Study 2020



3,682 employee and **709** employer sample size

3 countries surveyed

Key headline: Six major “resets” in key areas of the work experience

April 2021

WR Employee Survey 2021



16,264 employee sample size

16 countries surveyed

Key headline: Flexibility is the new normal, the great resignation is coming

September 2021

WR Employer Survey 2021



1,083 employer sample size

9 countries surveyed

Key headline: Business suffering “commitment issues” on flexible working

April 2022 +

WR 2022 Survey

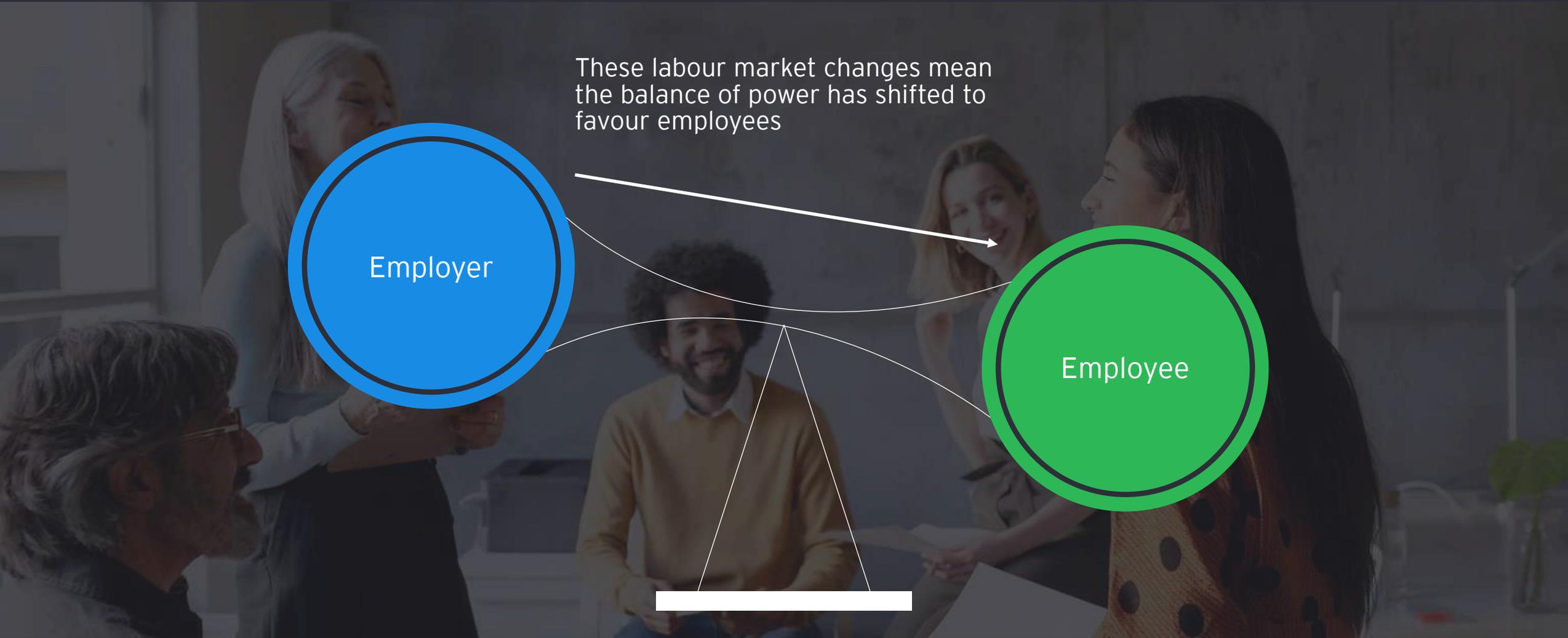


17,101 employee and **1,575** employer sample size

22 countries surveyed

Continued research on work reimagined + evolving themes on talent “fluidity” and sustainability

With a major shift to a balance of power moving toward the employee



These labour market changes mean the balance of power has shifted to favour employees

Employer

Employee

New ways of working have set a new normal and spotlighted questions on compensation and career opportunities

Hybrid working and flexibility needs are here to stay



of employees want to work 2+ days remotely per week.

On average, employees want to work **2-3** days remotely (2.9 days).



The percent reluctant to work remotely i.e., wanting to work 0-1 days remotely, fell from **34%** in 2021 to 20% now.

22% of employers say **EVERYONE** must return to the office five days a week.

Pandemic stress, labour market trends and hybrid work have broken the pay and career equation



of employees believe changes should be made to total rewards, given the impacts from the pandemic.

83% of employers say change to total rewards is needed in light of the pandemic.

Percent who agree pay increases/reviews are needed to address staff turnover



Employee

Employer

Employers are struggling to address the "pay equity" issues between the internal and external markets.

Employees and employers have diverged on a range of foundational issues related to new ways of working

Percentage point gap
(employee vs. employer)



Employees have new opportunities with tight labour markets and less geographic barriers to entry ... their expectations are driven by mix of pay, role and flexibility

Employees (especially next gen) feel empowered

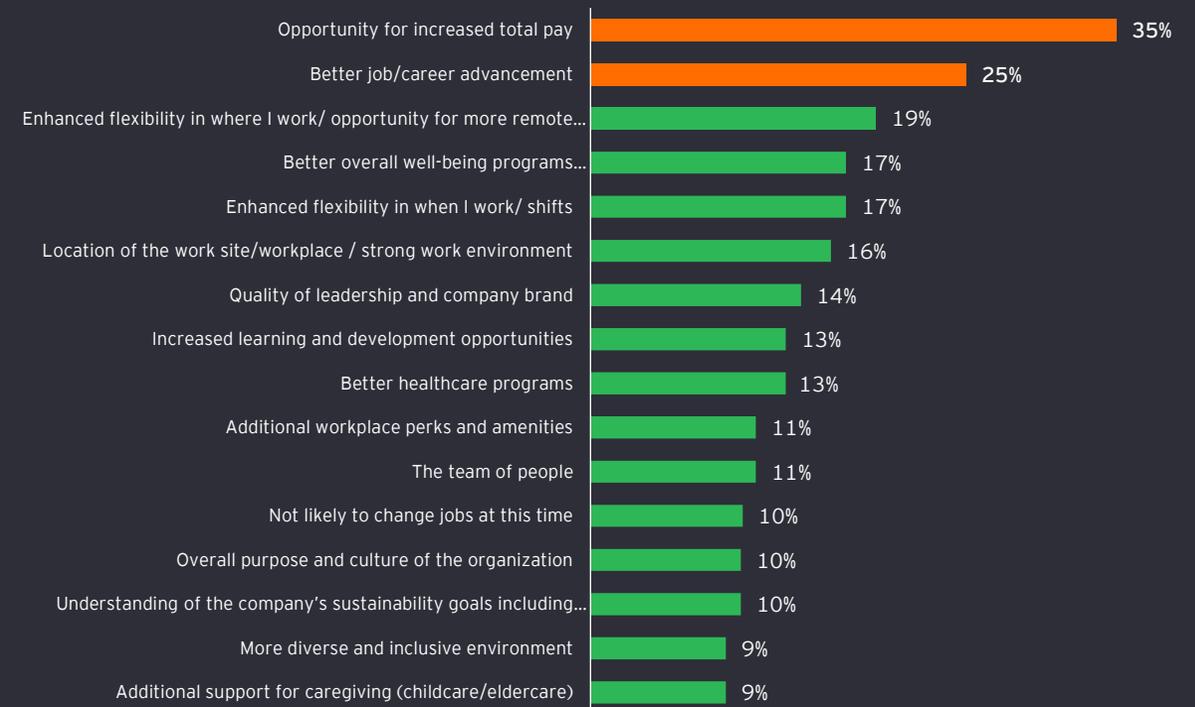


This represents a significant rise from 2021, when just 7% said they'd be unlikely to stay.

This is as high as 53% for US millennials and Gen Z and 60% for technology/hardware employees.

Employees are focused on pay and career growth as primary drivers

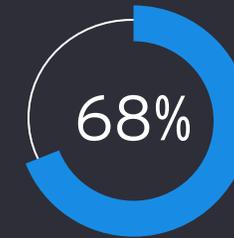
If you would consider another offer, what are the primary reasons you would change jobs?



Inflationary pressures plus lower barriers to finding new external jobs combine to a new employee focus on total compensation and career outside their current employer

As employers are experiencing significant staff turnover, they are feeling less optimistic about how the pandemic has impacted company culture

Employees are feeling more empowered and are experiencing growing optimism on company culture, while employers are feeling less optimistic.

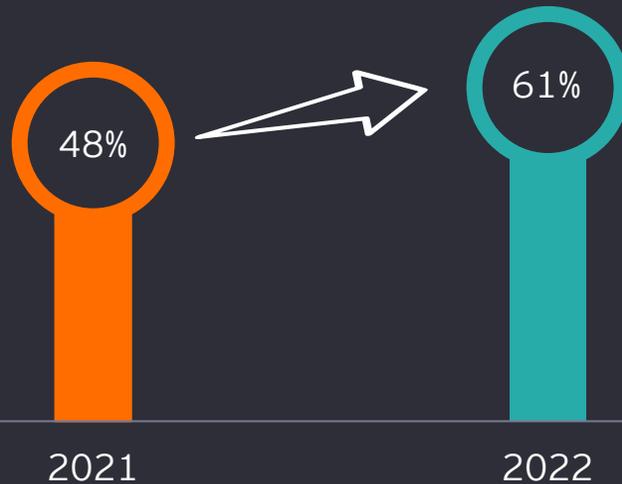


of employers agree staff turnover has increased over the past 12 months.



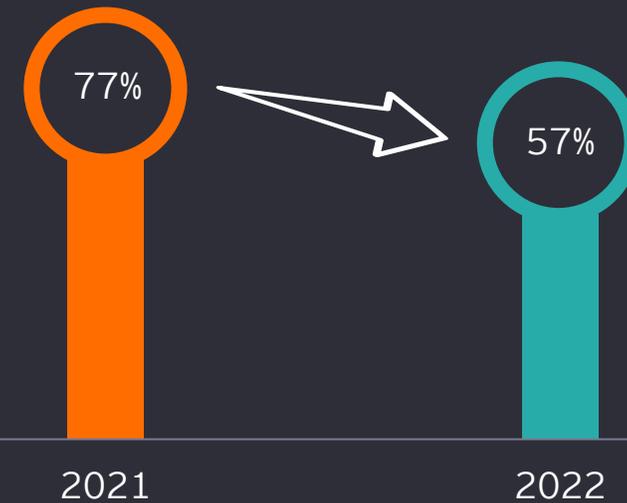
Employees are more optimistic on culture

Agree company culture has gotten better since the beginning of the pandemic



Employers are less optimistic on culture

Agree company culture has gotten better since the beginning of the pandemic



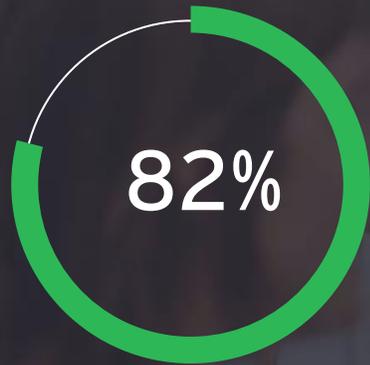
Failure to lean into new ways of working comes at a significant and measurable cost to businesses

Employer group comparisons based on views of either improved productivity and culture or worsening productivity and culture

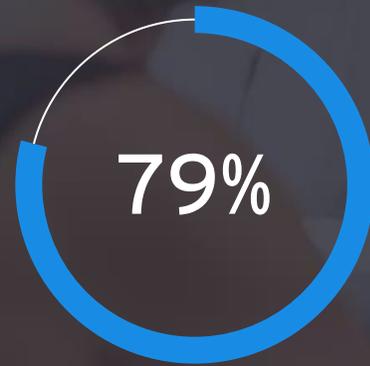
	Optimist employers	vs.	Pessimist employers	
Strategy	95%		61%	Agree their company has been successful in dealing with the pandemic
	90%		53%	Agree their company has successfully operationalised flexible work
	94%		64%	Agree leadership team is aligned on future of work
	91%		65%	Committed to flexible ways of working going forward
	95%		62%	Agree they have the agility to respond to new ways of working
Real Estate	39%		18%	Making investments in onsite amenities
	47%		19%	Making investments in better workplace technology
	44%		21%	Giving employees choice in working onsite vs. remote
Technology	46%		18%	Measuring productivity of remote work
	92%		69%	Moderate/extensive technology investment needed in the future
Well-being	93%		83%	Planned moderate/extensive change to ensure safety and well-being
Business Travel	52%		68%	Plan a decrease in business travel in the future

Hybrid work and addressing rewards can advance approaches to diversity, equity and inclusion

Employers and employees are aligned that there is more work to be done on DEI



of employees say more can be done.



of employers say more can be done.

What is the single most important action your company should take to improve diversity and inclusion?

	Employee	Employer
Address pay equity	20%	13%
Hold leader accountable to make sure inclusion is a core value	14%	13%
Review hiring criteria	13%	17%
Ensure safe culture to express views	13%	14%
Recognise bias in the workplace	13%	10%
Provide more sponsorship programs	9%	12%

Rank
1
Gap

Greatest gap in perspectives for employers vs. employees is pay equity where this is the number one focus for employees

Beyond pay, employers need to focus on building trust and creating a sustainable people experience

Trust

57%
ONLY

Employees trust their employer and feel supported by them.

This is significant, as research has consistently shown **trust to be the ultimate currency** in business, and is likely to bring employee advocacy.

Employers need to make sure their approach around health and safety or why employees need to be in the office or how rewards are structured is well understood.



People experience

53%
ONLY

- ▶ Only about half of employees believe that their company has a sustainable employee experience that is allowing employees to thrive with new ways of working.
- ▶ This highlights how important it is for employers to build this into **transformative talent, workplace and technology plans** to enable them to be sustainable in the future.



What actions do employers need to take based on the learnings?

Getting new ways of working right: key areas of focus for employers



- a** **Operationalise hybrid models**
Structuring job categories and approach to new ways of working with compliant tax, payroll and regulatory processes



- b** **Reinvent the workplace**
Integrated workplace plan with office and network of space enabled with leading technology and amenities



- c** **Create the work-technology experience**
Provide tools for collaboration, productivity and learning to match the personal with the work-tech experience.



- d** **Reshape and optimise programs and career frameworks**
Update total rewards and career progression to reflect pandemic learnings to retain and attract.



- e** **Define culture and organisational networks**
Define key behaviours and identify network of influencers in a physical and digital world.

Putting it all together

1

Flexibility and hybrid is the new normal, expanding when and where employees can work.

2

Employees are not afraid to leave jobs to take advantage of expanded career opportunities and have broken the pay and role equation, putting pressure on the labour market.

3

However, employers are reluctant to reset pay and career opportunities to retain talent with concerns about escalating inflation/cost of labour and complexities of legacy org structures.

4

Companies need to address pay equity between the internal and external markets – even if you get culture and productivity right, total compensation, including flexibility, is a more critical driver than ever for retention, attraction and DEI.

5

Need to build trust and create a strong experience to support these new ways of working.

Employers are layering in new functionality to integrate data and analytics and manage critical risks

Operationalise hybrid models

Remote work viability to assess and map jobs

For each job title reporting to you, please select the appropriate persona.

Please use the persona definition for one selected job per office location.

	ONCE	SOMETIME	REGULARLY	NEVER
Hybrid (30% in-office)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3-5 days/week in-office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3-5 days/week remote	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1-2 days/week in-office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1-2 days/week remote	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Worksite evaluator uses tech data to summarise work locations



EY Mobility Pathway – Hybrid Work to manage hybrid work transactions

My requests

Home | Another Location | Another country | Anywhere

Flexible Working | Business Trip | Cross-Border Commute

Business requests

Role Assessment | Assignment | Transfer

Reinvent the workplace with new intelligence for employers/employees

Digital twin to synthesise real estate and workforce data



Resilient workplace to use AI provide employees and leaders with info on how to use space



Create the work-technology experience

My Work to provide a single pane of glass for digital tools



Persona-based tech assessment to determine the role that tech plays in the hybrid work experience



New learning solutions for immersive experiences



Reshape and optimise programs and career frameworks

TRIO 2.0 to optimise rewards and experience

If these were the only options your employer was offering for your total rewards package, which would you select? (Choose only one below and please assume these two options offer only on the feature shown)

Base pay: Your base pay remains unchanged | Your base pay is increased by 5%

Time-off: Traditional time-off plan | Your time-off is increased by 5 days

Schedule: Work current schedule | Work flexible schedule

Sick time: Current sick time allowance | Your sick time is increased by 5 days

Technology spend: No spend for at-home technology | Annual technology spend of \$800

Caregiving: No caregiving provided | Onsite caregiving available

Org and Talent Hub to evaluate job family architecture and more agile org structures



Journey maps to enable a targeted approach to behaviour change



Define culture and organisational networks

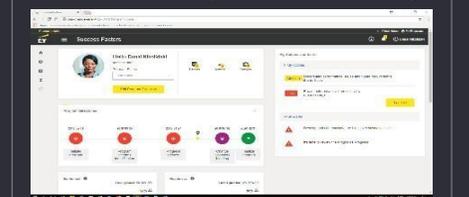
Culture fit diagnostic to assess culture and identify critical gaps



Behaviour Influencer Platform to identify collaborative patterns to drive culture and behaviour change



Change insights to use client data and behavioural analytics to drive change



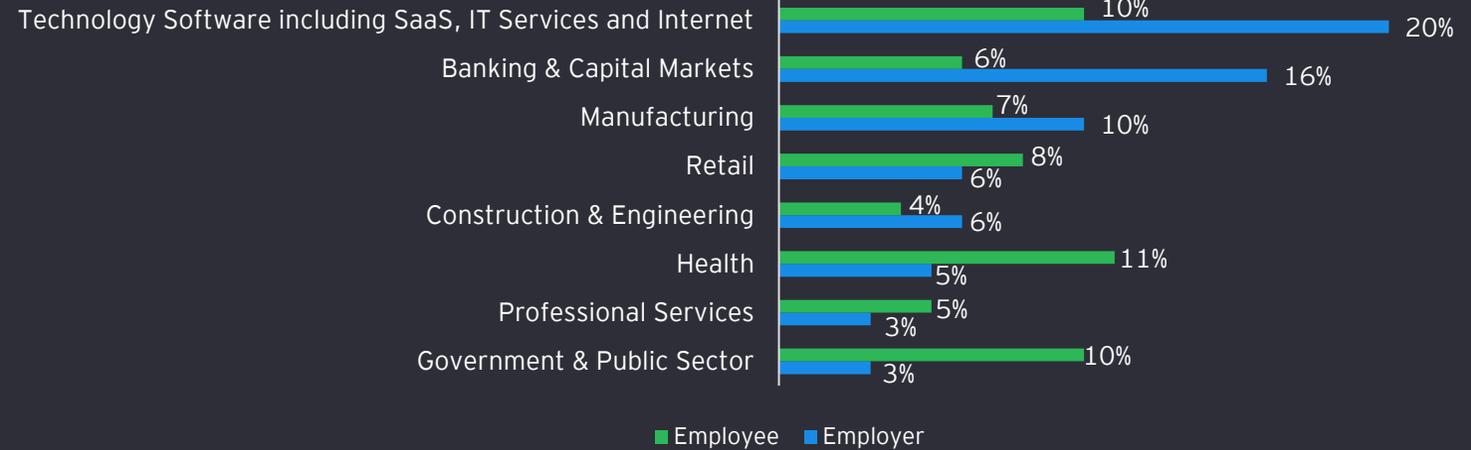
Disclaimer: EY Mobility Pathway – Hybrid Work, My Work, Behaviour Influencer Platform are under final stages of development and are not yet ready for client use.

Work Reimagined 2022 Survey – survey demographics

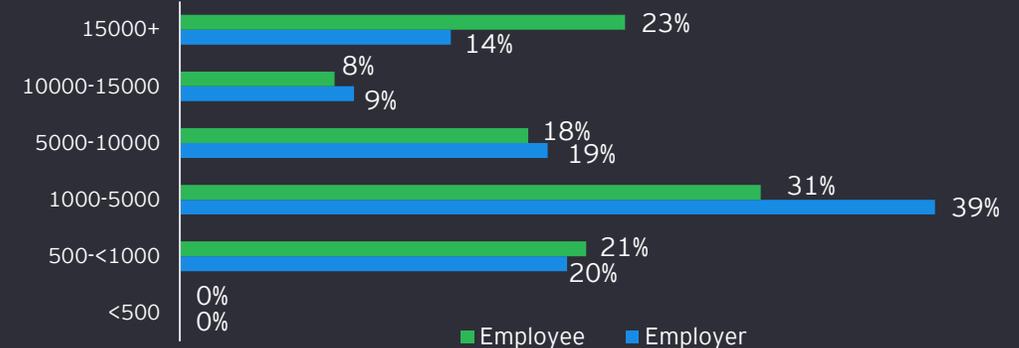
18,676 respondents across
22 countries

Country	Employee 17,101 total	Employer 1,575 total
Argentina	250	25
Australia	800	50
Brazil	300	100
Canada	1000	50
Chile	250	25
China	0	50
Colombia	300	0
France	500	50
Germany	1000	100
India	500	100
Indonesia	250	50
Japan	1000	30
Malaysia	250	50
Mexico	300	50
Middle East	250	25
New Zealand	200	20
Nordics	250	50
Philippines	300	50
Singapore	300	50
South Africa	100	50
United Kingdom	1000	100
United States	8001	500

26 industries represented, with most coming from technology software (20%)



Range of company sizes reflected from 500 to 15k+



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