BOSTON CONSULTING GROUP

Decoding Global Talent 2021

Part 2: Decoding Global Work Preferences

31 MARCH 2021

CADREMPLOI

Messages clés

1. Le bureau n'est pas mort ! 78% des talents français plébiscitent un modèle hybride, mêlant télétravail et bureau.

2. Lorsqu'ils se projettent dans ce nouveau modèle, les talents français désirent passer plus de temps au bureau qu'à leur domicile : 63% des répondants français désirent bénéficier d'un maximum de 2 jours de télétravail par semaine (41% à l'international).

3. Au-delà du lieu de travail, la crise remet en question la journée de travail classique avec des horaires fixes. 80% des talents français souhaitent s'orienter vers un modèle flexible, leur permettant de choisir partiellement ou totalement leurs horaires (64% à l'international).

4. Le top 5 des facteurs d'attractivité professionnelle des talents français demeure inchangé vs 2018. On note toutefois une importance accrue accordée au contenu du poste et à l'intérêt des missions. Avec le télétravail, entretenir de bonnes relations avec son équipe et son manager reste crucial. La flexibilité permise par le télétravail - lieu et horaires - semble répondre au besoin d'équilibre vie professionnelle - vie personnelle.

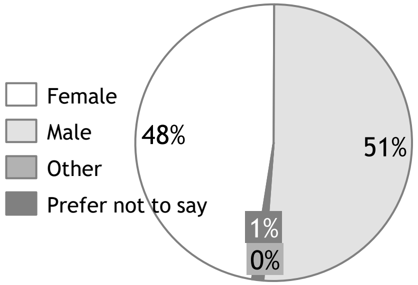
5. Ces enseignements invitent à une remise en cause profonde des pratiques managériales et de l'organisation du travail. Un nouveau modèle de leadership est à faire émerger pour répondre à ces attentes et mettre en place de nouveaux modes de travail flexibles et agiles à l'échelle et de façon pérenne.

Demographics of 2020 survey respondents in France

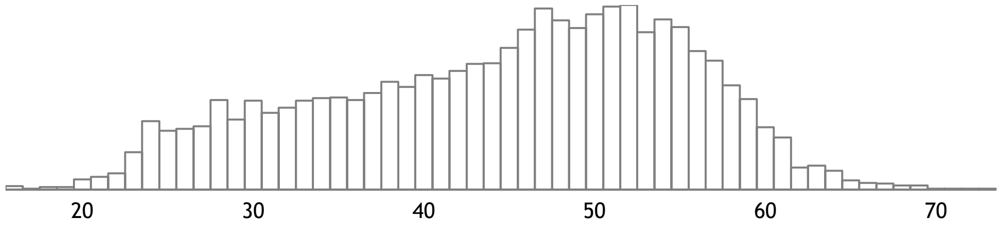
Workforce participants in France

5,308

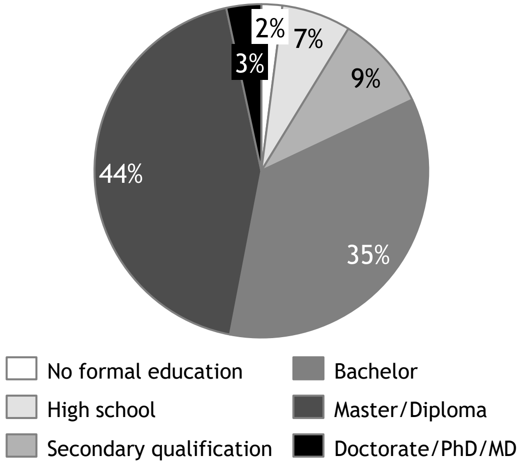
Gender



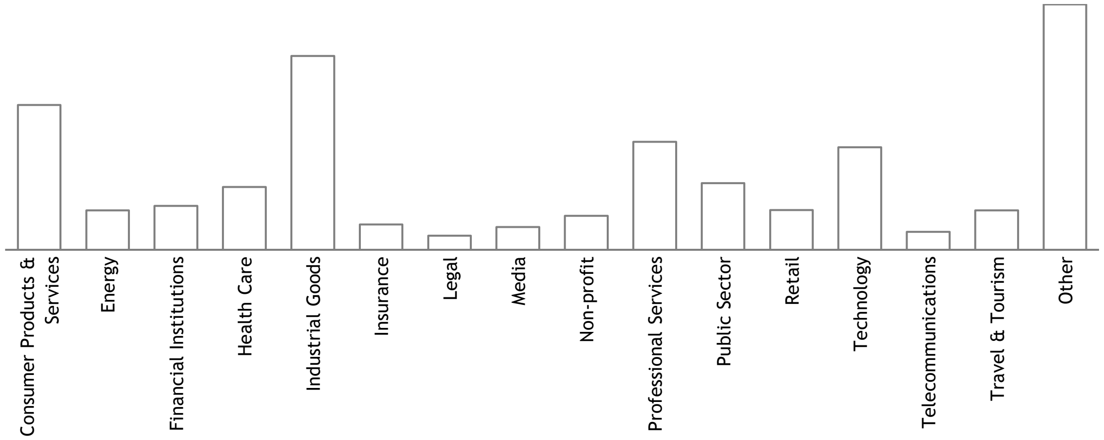
Age distribution



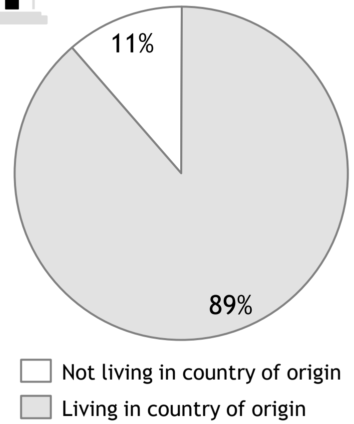
Education



Industry background



Living situation

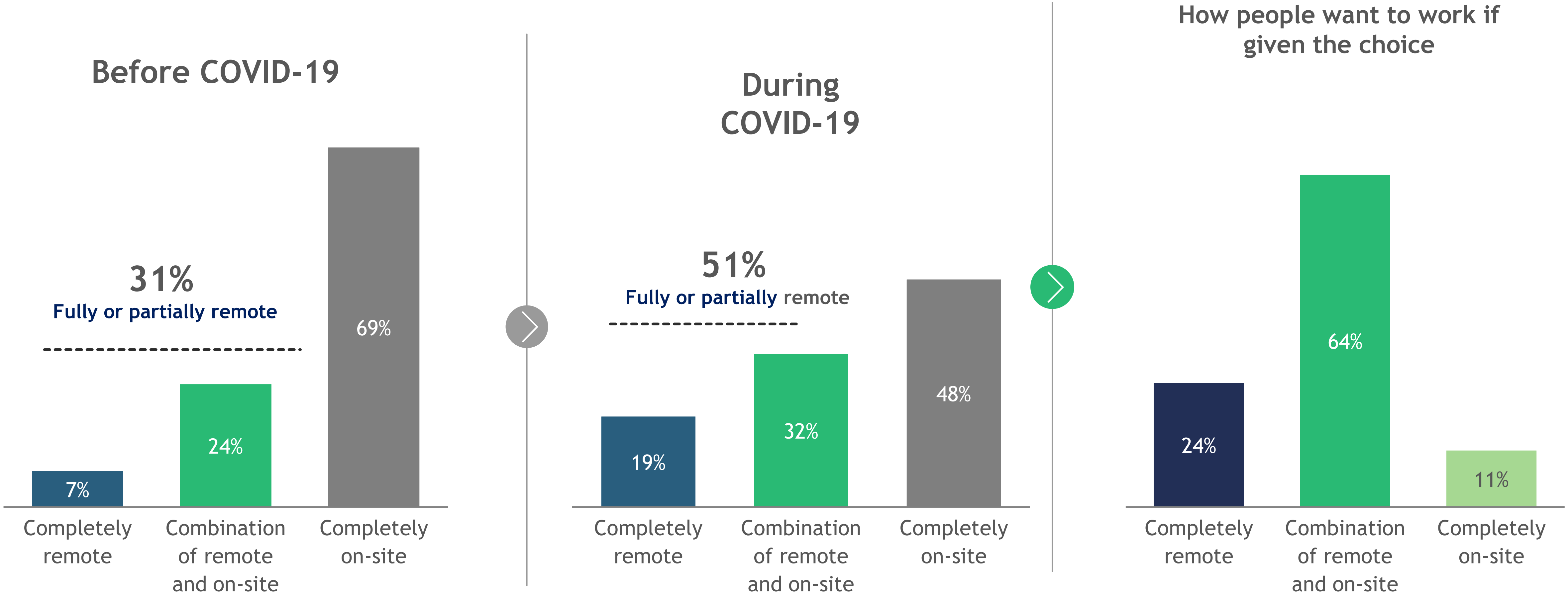


Note: Percentages may not total 100% due to rounding. Responses to questions: “What is your gender?”, “What is your year of birth?”, “What is the highest level of education you have completed?”, “What is/was your employer’s/company’s main activity/services you offer?”, “Do you currently live in your country of origin?”

A desire for flexibility : where they want to work

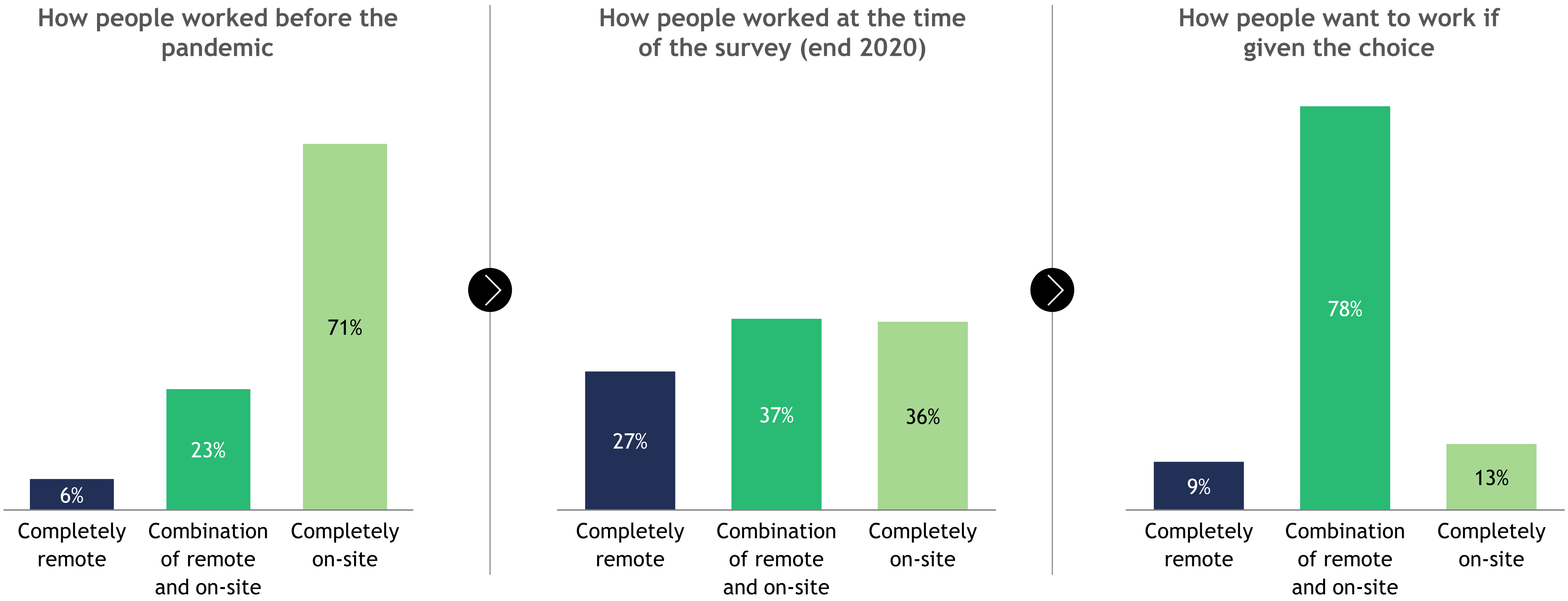
88% of people would like to have some flexibility in where work gets done

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



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

78% of French respondents favor hybrid work post-COVID



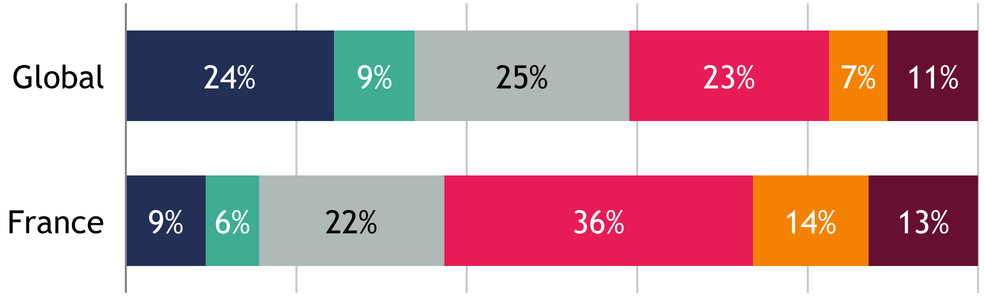
Change due to COVID was quite significant, but people want even more flexibility

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

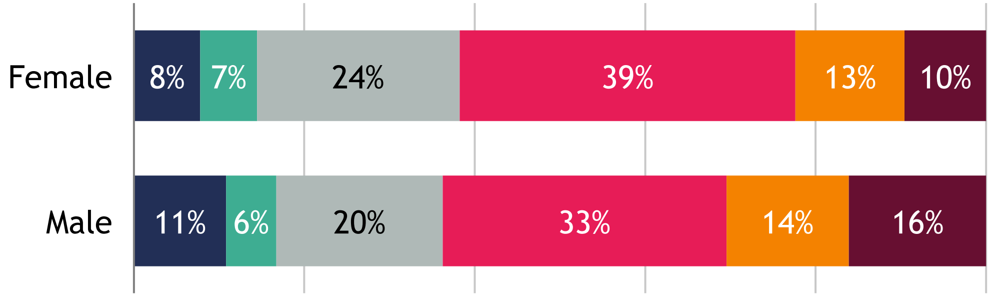
French respondents are much less open to fully virtual set-ups compared to global average, 63% would like to spend at least 3 days per week in the office

Desired flexibility in where work gets done

Global and French respondents



Female and male respondents in France

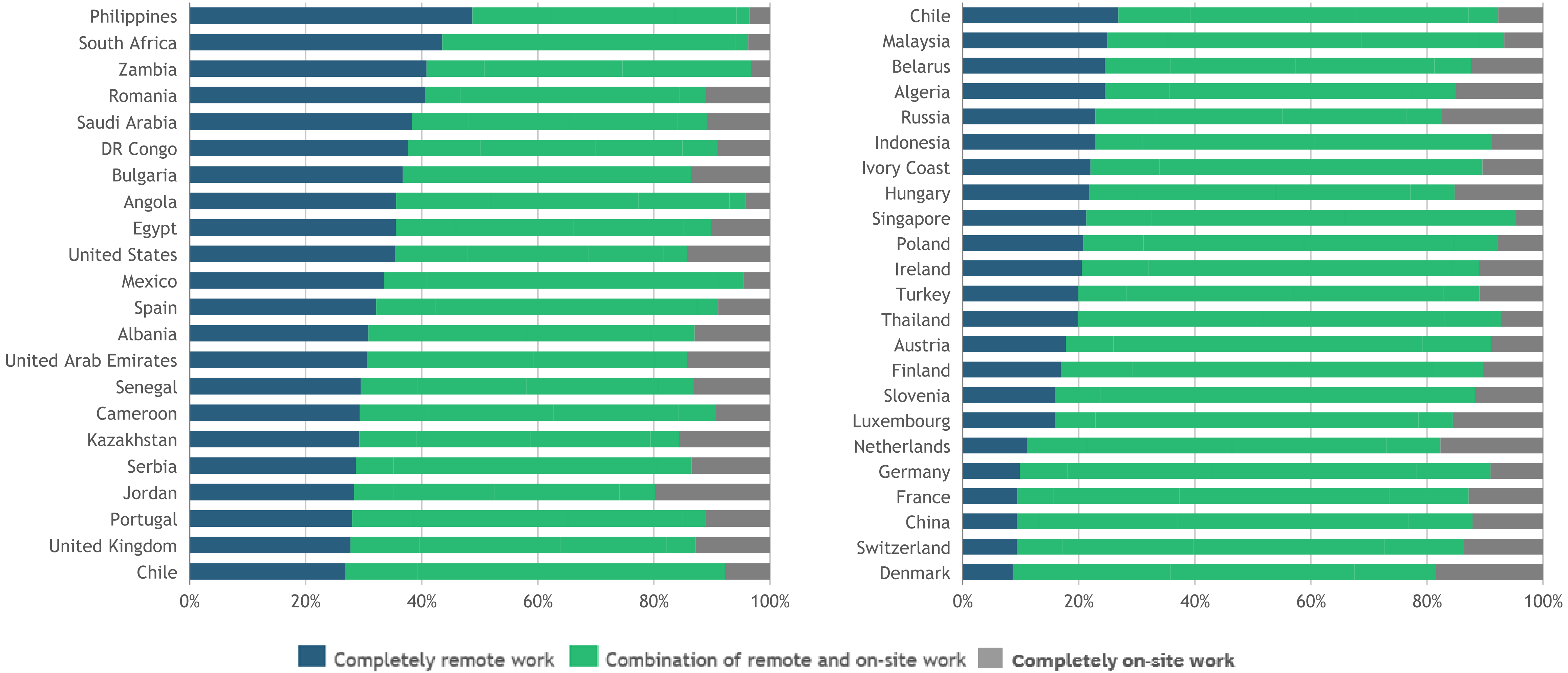


Days spent remotely per week: 5, 4, 3, 2, 1, 0

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

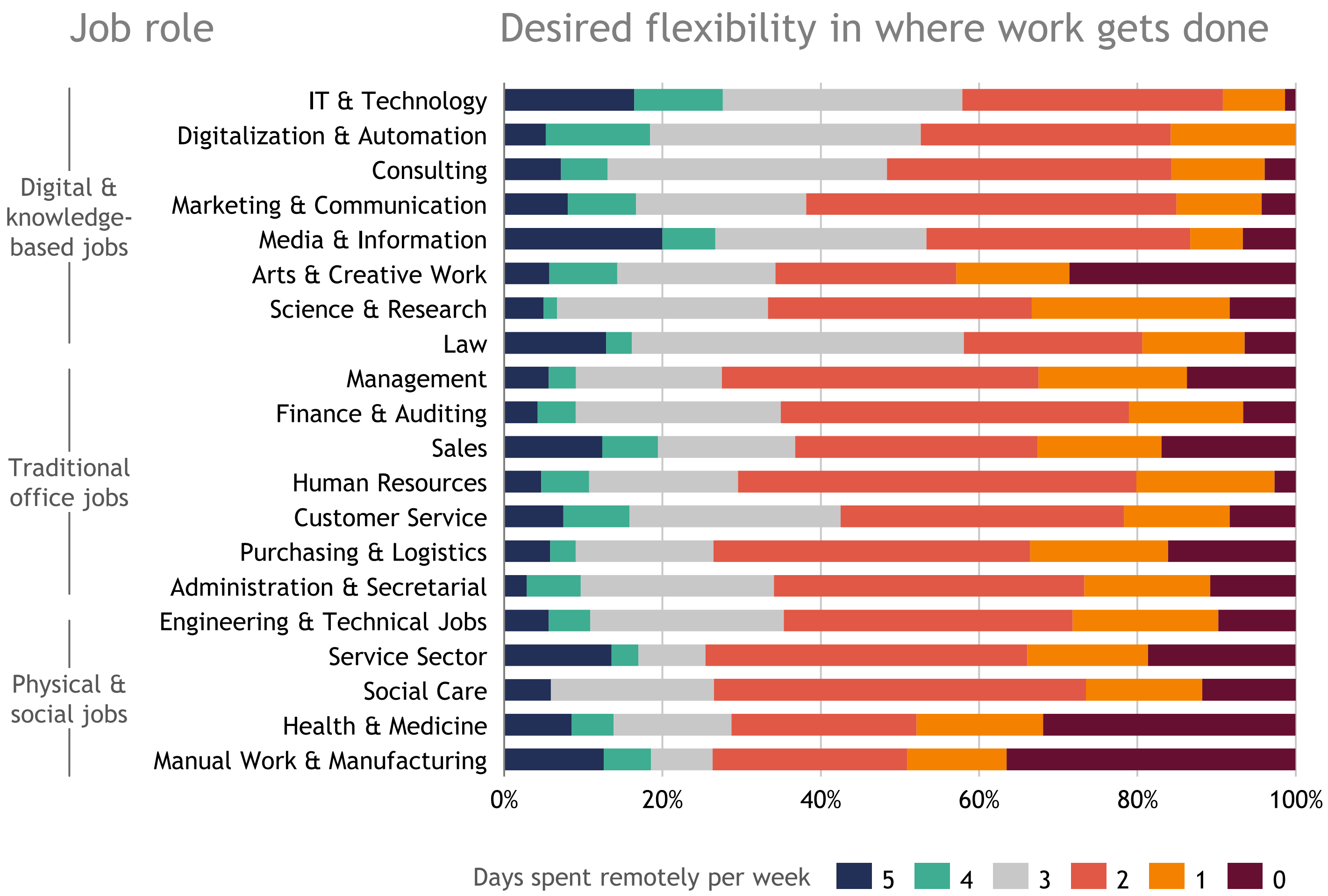
Who Would Prefer Never Being in an Office Again

Filipinos, South Africans, Zambians, and Romanians top the list



Source: 2020 BCG/The network proprietary web survey and analysis
Note: Countries shown have at least 500 survey participants.

Irrelevant of job, French talents still prefer to be a few days a week in the office

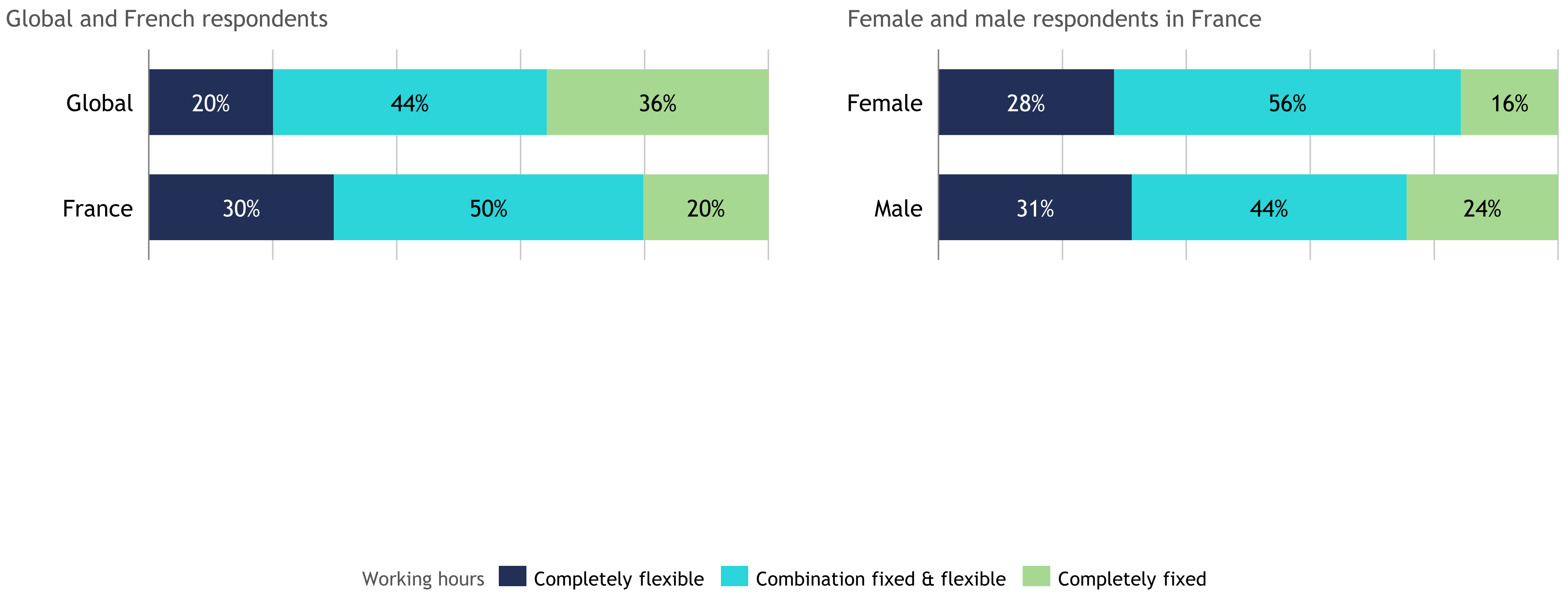


Source: 2020 BCG/The Network proprietary web survey and analysis

A desire for flexibility : when they want to work

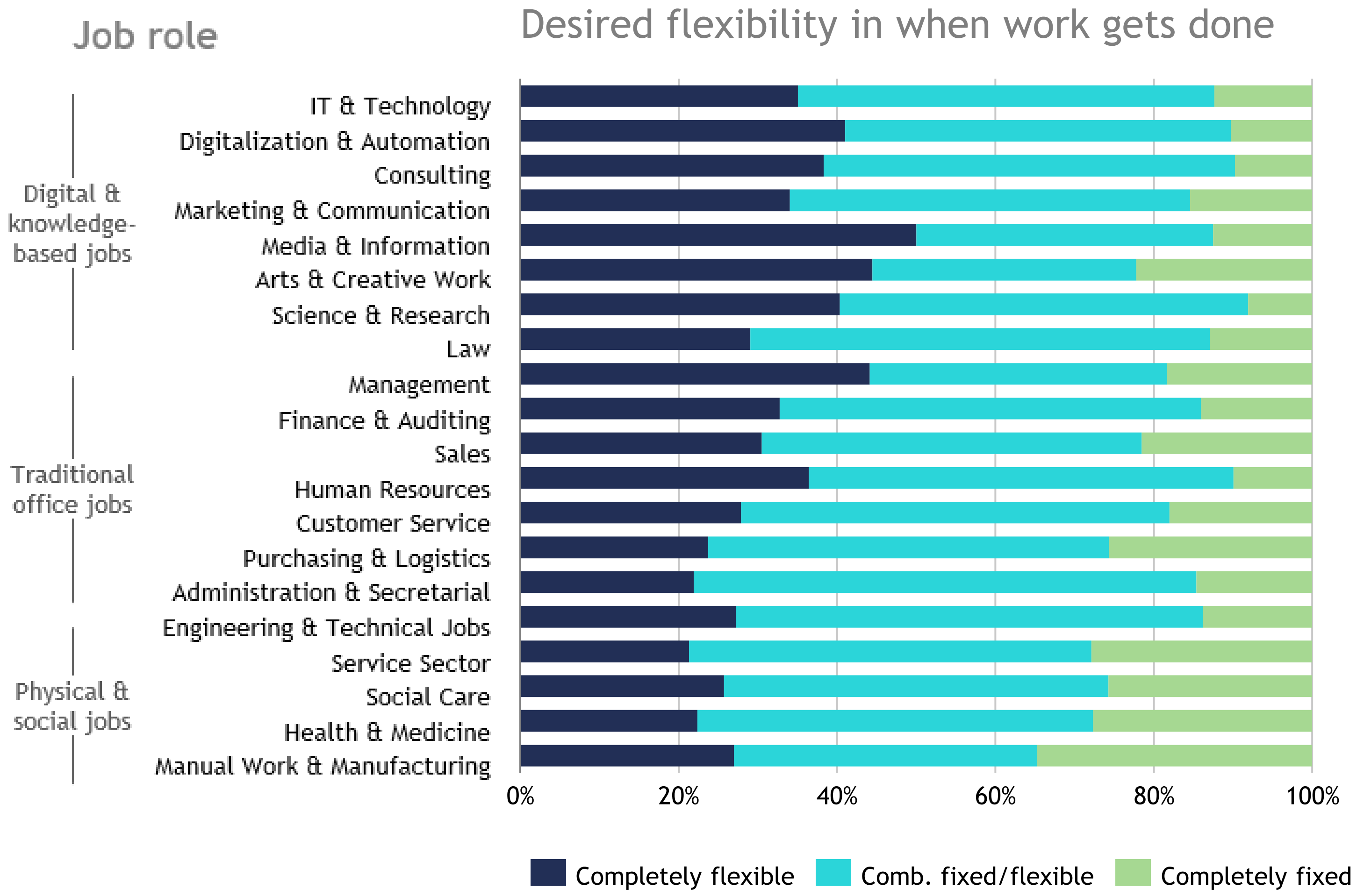
French talents are more open to flexible working hours

Desired flexibility in when work gets done



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

Irrelevant of job, French talent desire flexibility in WHEN to work



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

Shifts in what matters to people at their jobs

Job Content Has Surged in Importance Among French respondents

Job preferences of people in France compared to global respondents

	France 2018	France 2020	Global 2020
1	Good work-life balance	Interesting job content	Good relationship with colleagues
2	Good relationship with superior	Good relationships with superior	Good relationships with superior
3	Interesting job content	Good relationship with colleagues	Good work-life balance
4	Relationship with colleagues	Good work-life balance	Financial compensation
5	Learning & skills training	Learning & skills training	Financial stability of employer
6	Career development possibilities	Company values	Appreciation for work
7	Company values	Financial compensation	Job security
8	Financial compensation	Appreciation for work	Learning & skills training
9	Financial stability of employer	Financial stability of employer	Career development possibilities
10	Appreciation for work	Collaborative working approach	Interesting job content

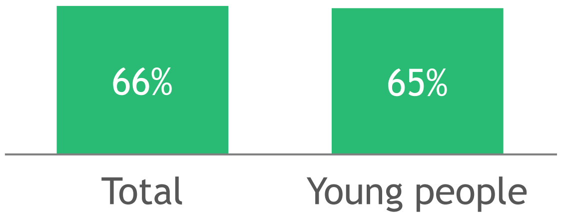
Note: Score calculated as average of answers ranging from 1 (not important at all) to 4 (very important)
Source: BCG/The Network proprietary web survey and analysis

One French respondent in two would not work for employers not Environmentally friendly and/or promoting Diversity and Inclusion

Environmental Responsibility

Issue of Environmental Responsibility became more important over the last year

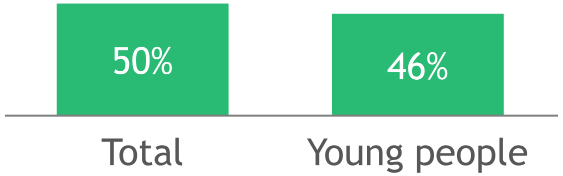
France



69.6%
Globally

Would exclude companies that don't match their beliefs in Environmental Responsibility

France

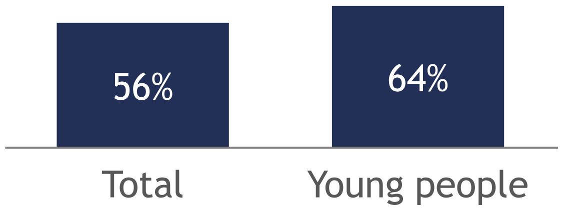


51.7%
Globally

Diversity and Inclusion

Issue of Diversity & Inclusion became more important over the last year

France



68.7%
Globally

Would exclude companies that don't match their beliefs in Diversity & Inclusion

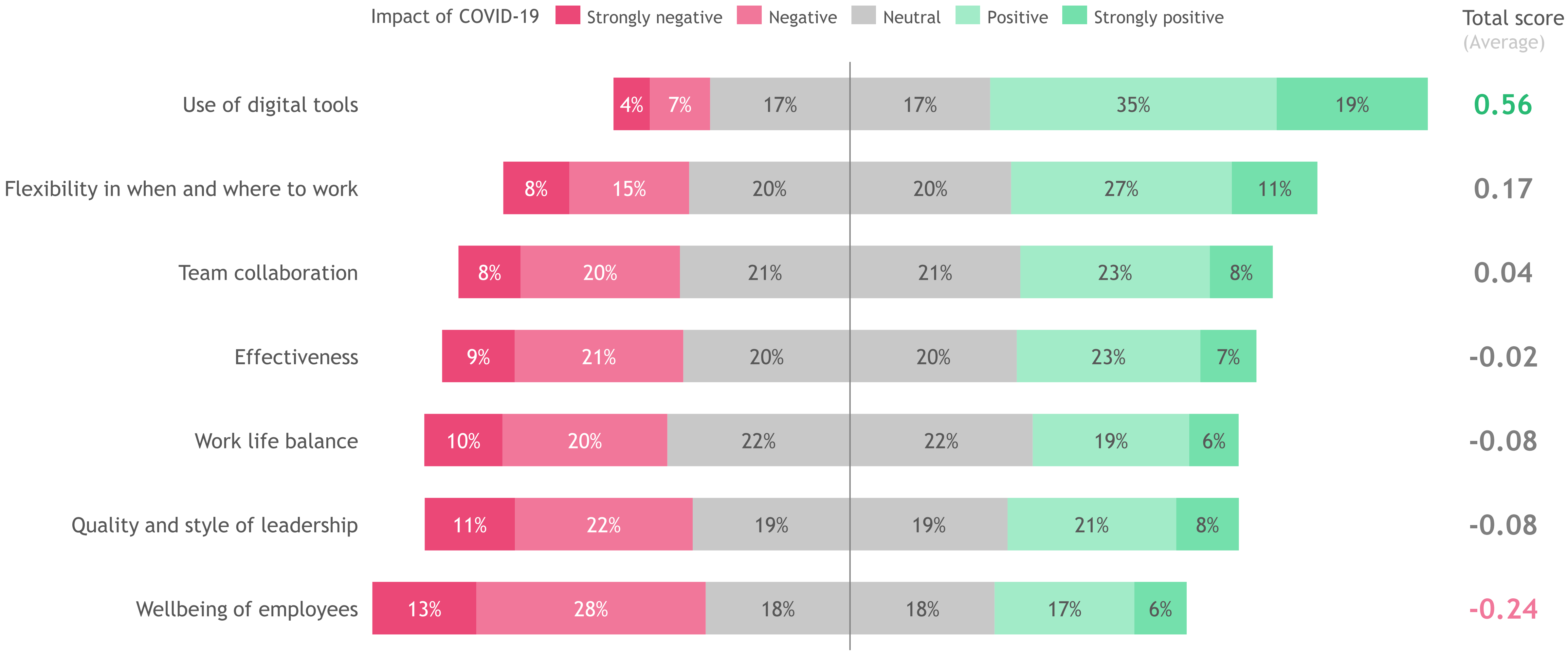
France

51.4%
Globally

Note: 'Young people' are respondents below 30 years old
Source: BCG/The Network proprietary web survey and analysis

Impact of COVID on work practices

COVID-19 also impacted how people collaborate and their work-life balance



Source: 2020 BCG/The Network proprietary web survey and analysis
Note: Average score calculated as average of answers ranging from +2 (strongly positive) to -2 (strongly negative)

How companies can meet expectations

How to build an attractive future workplace?

Develop a thoughtful remote working strategy

Carefully consider what model works for which job role.

Balance governance and flexibility.

Ensure the right enablers are in place

Pilot and monitor success

Build a value-based workplace culture

Enable leaders to succeed in the new world, post-COVID leadership models will be different

Encourage virtual connections

Focus on employee well-being holistically

Get serious about social and environmental issues

Conclusions:

Develop a thoughtful remote working strategy

What workers want

- Our data shows that workers in all job roles desire at least some level of flexibility – but it may not be easy to provide this, or managers may not be ready

- A previous BCG survey shows managers expect 35% of employees to work (partially) remotely after COVID, which is a big contrast with our findings where 89% of employees expect this!

How to meet expectations

Carefully consider what model works for which job role.
- Evaluate "remoteability" of job families based on infrastructure need, frequency of interaction with stakeholders, etc.
- Think in different personas, the activities they perform, the experiences they go through, and how remote work may affect them
- Models may range from offering remote working as a *perk* (few days a week based on request in selected job roles) to moving to remote work *by design* (where most employees work from home and come to office only for special occasions)

Balance governance and flexibility.
- Introduce guidelines on what models are available under what circumstances, and how to request these…
- …but leave space for individual employees to decide on what they personally prefer
- Workers who can't benefit from remote working due to the nature of their jobs may feel disadvantaged, which can cause huge imbalance within the same company. Consider offering them different benefits, e.g. provide good health services, or additional days off.

Ensure the right enablers are in place
- New collaboration tools and mechanisms (e.g. asynchronous instead of meeting-based, virtual agile stand-ups…)
- Right infrastructure at home and at the office (e.g. financial support for home office set-up, hybrid meeting rooms…)
- Virtual learning solutions

Pilot and monitor success
- Think in smaller experiments before full rollout of new policies
- Continously monitor employee engagement, experience, output, and adjust models as needed

Conclusions:

Build a value-based workplace culture

What workers want

- Cultural elements such as relationships, appreciation for work, and work-life balance are still top importance for workers, even when working virtually
- Meanwhile, majority felt their wellbeing suffered during the last year
- Social and environmental issues are increasingly important, especially for younger generations

How to meet expectations

Enable leaders to succeed in the new world
- Post-COVID leadership models will be different, multi-faceted – leaders need to be able to use their head, heart and hands
- Trust is essential, the crisis has shown that people will still perform even without being continously monitored
- Leaders must be technology champions to enable bionic organizations to emerge & support switch to virtual work

Encourage virtual connections
- Informal communication needs to be formally organized (e.g. buddy system, virtual watercooler chats, team evenings on zoom…)
- Set up virtual team routines (e.g. morning coffee, evening checkout…)
- Ensure regular feedback on how employees feel and perform, both through surveys/apps and in person with leaders

Focus on employee well-being holistically
- Provide mental health offering: measure stress levels, design wellbeing programs
- Improve physical health standards and build socially distanced work areas
- Improve health services and insurance offer

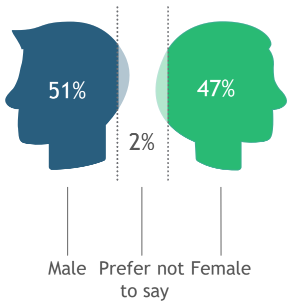
Get serious about social and environmental issues
- Take a proactive stand on social issues that matter to the company
- Encourage employees to speak up and contribute, e.g. provide time off for social impact activities
- Set targets, monitor KPIs and adhere to high D&I and environmental standards
- Upgrade employer brand to reflect these values

Methodology

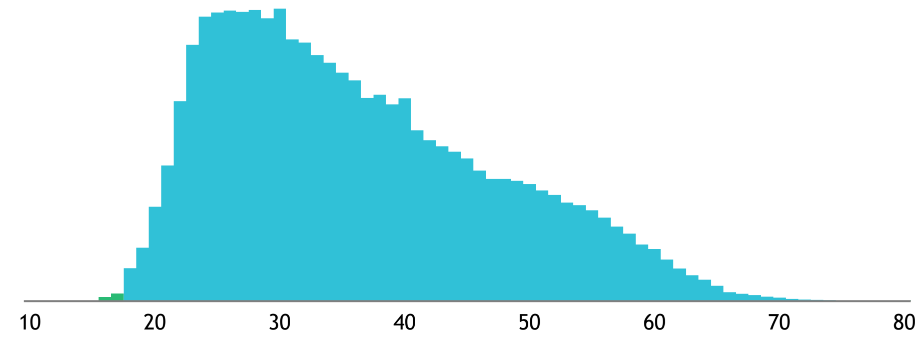
Demographics of Survey Respondents

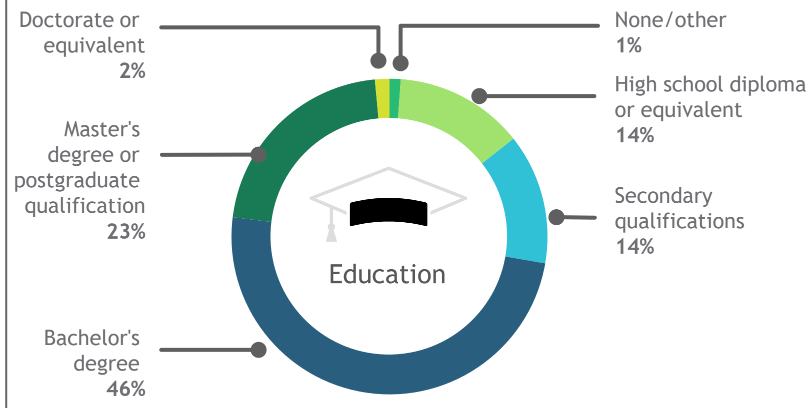
208,807

Workforce respondents

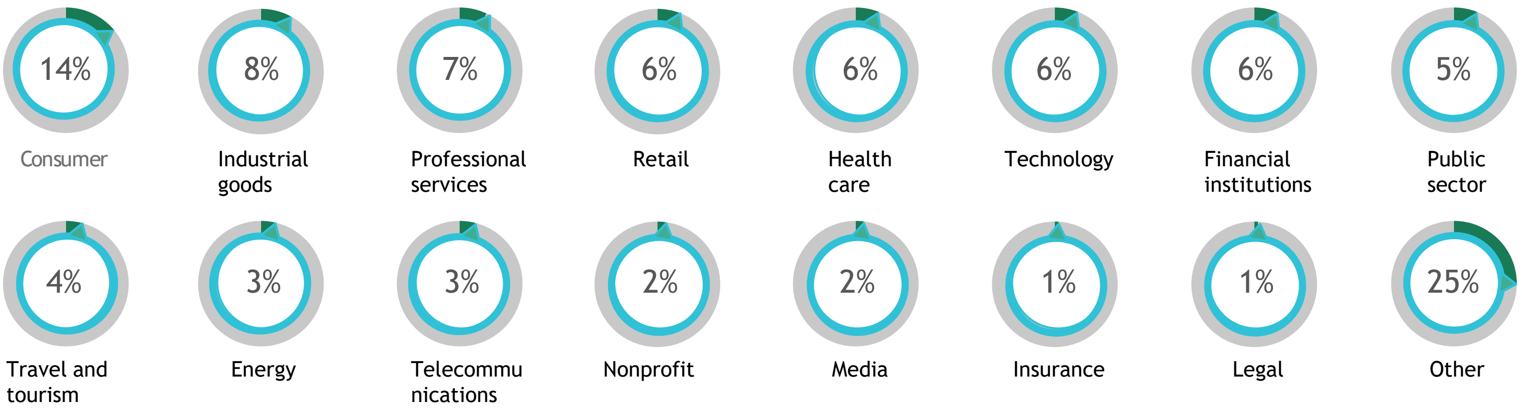


Age distribution

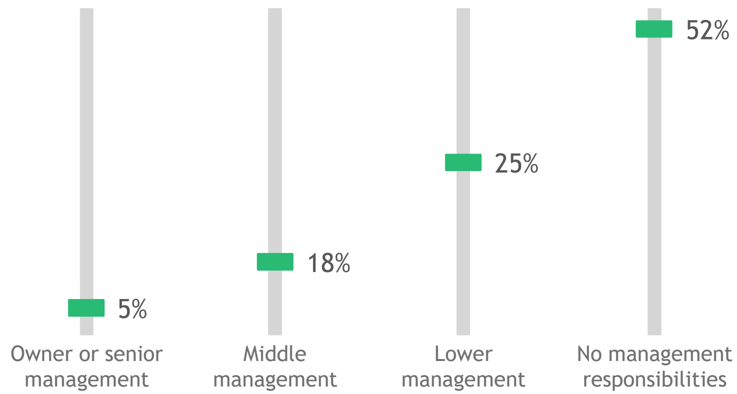




Industry

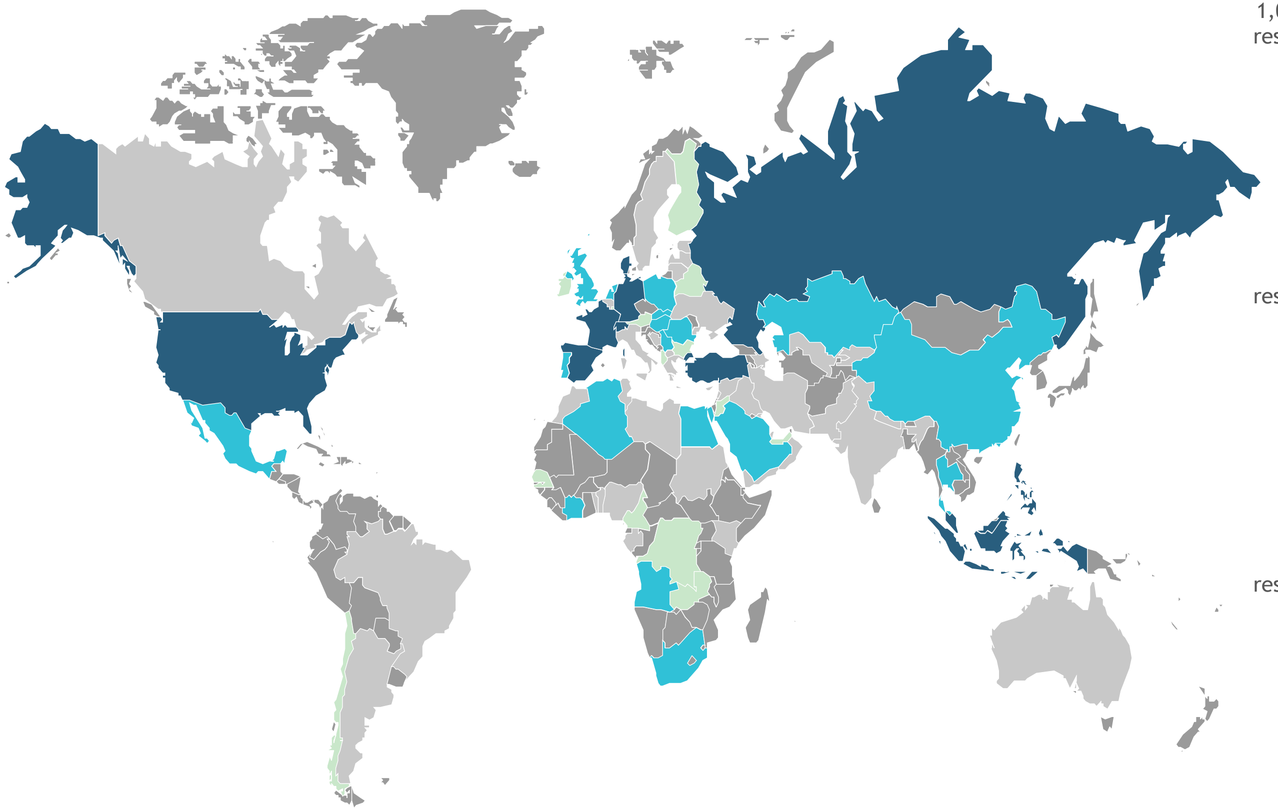


Position



Source: 2020 BCG/The Network proprietary web survey and analysis.
Note: Some percentages do not total 100 because of rounding.

A Survey of 208,807 Workforce Respondents in 190 Countries



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

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