

What's next for how we work in the UK?

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Contents

04 | How are employees experiencing the pandemic?

10 | What kind of working model do employees want?

07 | How productive do employees feel?

12 | Designing the right model for long-term success

How can employers learn from mass remote working to change the way we work for good?

By Nick South, Ben Shuttleworth, Christin Owings, Juliana Lisi and Maryam Saleh

In March 2020, organisations in the UK entered an unplanned mass social experiment, asking a huge proportion of the working population to work from home in response to the COVID-19 pandemic. Several months later—as leaders ask themselves what’s next—we asked 2,000 UK employees about their experience and how they want to work in future.

Our goals are to help employers understand how to sustain remote working, where it is required, in the short-term, and to help them re-think how they operate and work in the longer term.

Our findings show that for many, working from home has been a surprisingly positive experience. 82% of those who shifted to working remotely feel trusted by their employer to do so. 78% feel as (or more) valued as they did before the crisis. 86% of remote workers also reported positive benefits, such as fewer distractions and better work-life balance. However, it’s not all good news. 79% also experienced negative impacts, including anxiety, loneliness and increasingly blurred boundaries between home and work.

Your experience of working from home also depends on who you are. Compared to the over-55s, younger people aged 18-34 are twice as likely to experience barriers to working remotely, such as inadequate space. Lower-income workers are more likely to report feelings of loneliness than higher earners. And parents dealing with more than five hours of childcare per day are twice as likely to report being distracted.

The research found that 70% of those who have been working remotely felt they were able to be as productive or more working from home as they were in the workplace. However, there is a split between which tasks are best suited to which location. Nearly half (46%) of UK employees working remotely feel that collaborative tasks are more productive in the workplace, but over 50% find that home, where there may be fewer distractions, is a better place for thinking and planning.

As UK business leaders plan for the future of work, they should listen to these responses, which will help them develop new working models that meet employees’ needs and create more resilient organisations.

What CHROs Want to Know

Our regular conversations with Chief Human Resources Officers have given us a good understanding of what’s on the minds of a diverse range of UK employers. We have seen the immense focus and effort leaders have put into handling the pandemic crisis—demonstrating remarkable agility at pace. Many feel that they executed the operational aspects of their COVID-19 response relatively well, given the circumstances. Survey respondents agree: ~90% felt their employers had supported safety and job retention.

Yet CHROs also recognise that this was, in many ways, the “easy” bit. Now, they must navigate an unpredictable virus, new waves of infection and changes in public policy guidance, alongside pressing commercial priorities, including the need to make organisational changes, carefully manage costs, and put new momentum behind projects that were paused due to COVID-19.

Most, if not all, are assessing how remote working has impacted employees and the business. They want to embed the best aspects of the new model in a way that responds effectively to employees’ needs while keeping them productive and engaged.

To help CHROs understand what employees want, we asked survey participants questions in three key areas:

Our Approach

- 1. How are you experiencing the pandemic?*
- 2. Are you able to be productive working remotely?*
- 3. What kind of working model do you want in future?*

How are employees experiencing the pandemic?

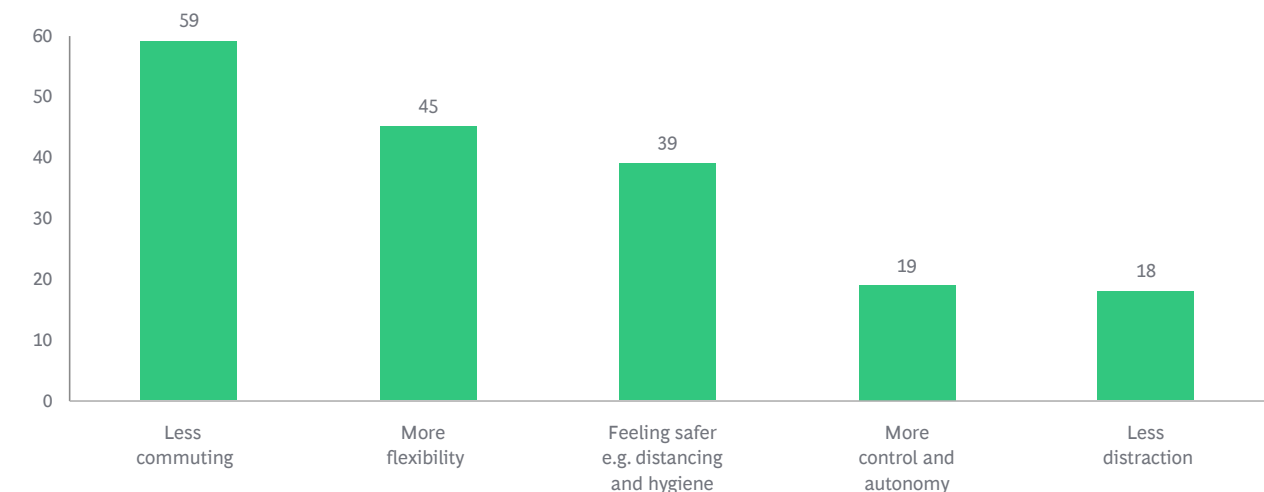
How are employees experiencing the pandemic?

In the analysis that follows, we focus on employees who have switched to remote working for at least a part of the period since March 2020. These employees recognise that they have been, and in many cases still are, in a unique situation, and most do not hold their employers responsible for the negative impacts of remote working.

Two-thirds report they are as satisfied in their jobs now as they were before the lockdown. Only 14% of the total group saw no positive impacts, with the remaining 86% citing a range of positive effects on their lives, chief among which were reduced commute times, more flexibility in working hours, and a feeling of safety. (See Exhibit 1).

Exhibit 1: Major benefits UK employees enjoy when working remotely

By percentage (%) of employees who responded



Source: BCG UK Employee Sentiment Survey, conducted August 24th-31st (2020), n= 1004, UK only

Remote working has been good for some groups

High-risk households. Employees with a high-risk person in the household truly appreciate their employers' focus on

safety, increased access to mental health resources, and good communication from management. As a result, 54% of these employees feel more valued by their employer now than they did before the crisis, compared with 32% of remote workers who do not live with a high-risk person.

Younger workers (18-24 years of age). Of this cohort, 48% feel more valued by their employers now than they did before the pandemic—more than any other age group. They also have the most positive responses about receiving guidance from managers, gaining learning and development opportunities, and feeling connected to their organisations during lockdown. As ‘digital natives’, their comfort with virtual collaboration tools and online relationship building puts them at an advantage compared to older peers.

Workers living in rural areas. This group particularly appreciates reduced commute times and greater flexibility around working hours, with 88% citing positive impacts such as these. Workers living in rural areas experience fewer negative effects—such as blurred home/work boundaries—than their counterparts living in urban areas (74% vs. 88%). They are also more likely to report that they do not experience barriers to remote work vs. workers living in urban areas (32% vs. 26%). Of this same group, 22% say their home office is better than the workplace, compared with just 13% of workers living in urban areas.

However, it has been far from plain sailing across the board. All employee groups struggled with the challenge of building relationships virtually, constrained space, were worried about their employers’ unwillingness to embrace remote working, and lack of visibility.

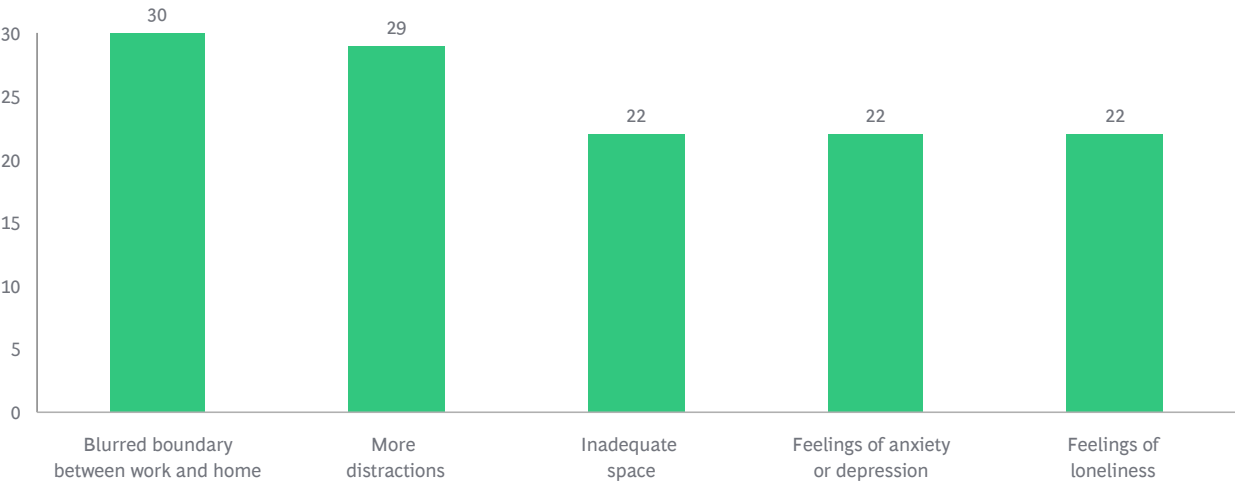
Some found remote working harder than others

Our study reveals that the negative effects of working from home and the barriers it creates have disproportionately affected parents and adult caregivers, lower-income workers, and both the youngest and oldest employees. For example, in March and April when schools were closed, [working parents in the UK spent an additional 28 hours each week](#) on household chores, childcare, and education—nearly double the pre-COVID-19 amount.

How productive do employees feel?

Exhibit 2: Major challenges UK employees face when working remotely

By percentage (%) of employees who responded



Source: BCG UK Employee Sentiment Survey, conducted August 24th-31st (2020), n= 1004, UK only

Caregivers. This group is highly positive about safety, flexibility, and their reduced commute. But caregivers with more than five hours of responsibility per day for other adults are three to four times more likely to report disruptions due to social distancing and to experience inadequate mental health support from their employers.

Parents. Employees dealing with five hours or more of childcare each day are nearly twice as likely to report being affected by distractions at home compared to workers without children (45% vs. 26%). They are more likely to feel a blurring of the boundaries between work and home life (37% vs. 31% for those without children).

Lower-income earners. Employees earning less than £20,000 a year have been almost twice as likely to experience feelings of loneliness, compared with employees earning more than £35,000 a year (34% vs. 18%). They also expressed more feelings of anxiety and disconnection from employers than higher-income earners. Workers in this group say that barriers to remote work include inadequate space and equipment, managing caregiving responsibilities, and a lack of career progression opportunities.



How productive do employees feel?

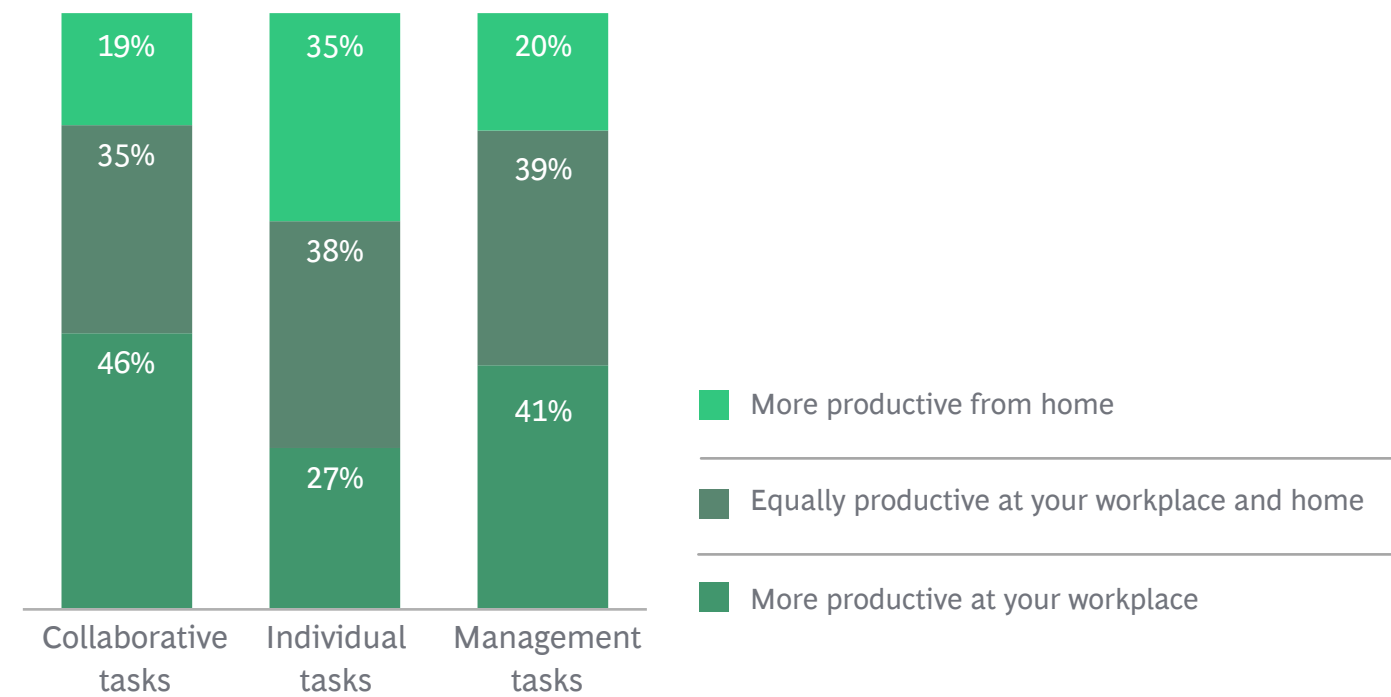
Despite competing views on remote working before the pandemic, the abrupt shift to remote working has shown that employees feel more productive.

Many CHROs from a range of organisations shared similar reflections during our conversations with them. We often hear “We advanced ten years in two weeks” in relation to how quickly tech issues were solved and concerns

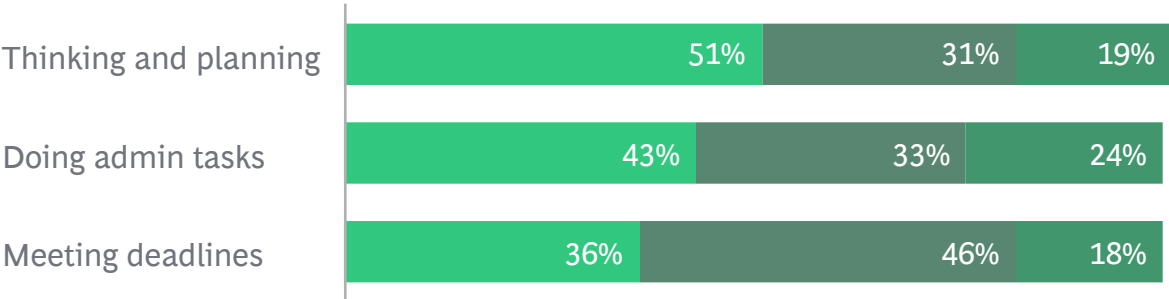
dispelled about whether employees can be trusted to be productive remotely. This progress was reflected in the survey findings. When asked about trust, 82% of remote workers felt trusted by their employers to work remotely. Most employees also believed they could be just as productive or more productive working remotely, but as we have already seen, this depended on the task. (See Exhibit 3.)

Exhibit 3: UK employees feel productive working remotely depending on the task

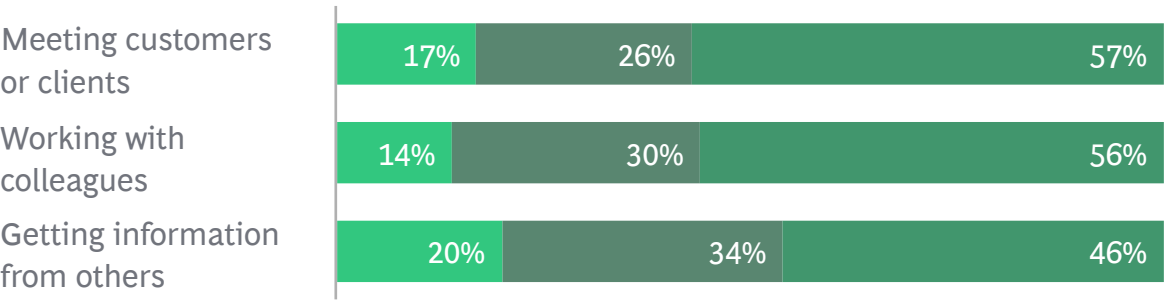
% employees who felt a productivity change



I feel most productive at home when...



I feel most productive in the workplace when...



Source: BCG UK Employee Sentiment Survey, conducted August 24th-31st (2020), n= 1004, UK only

Home is the place where remote workers feel they carry out individual tasks most productively. “Thinking time” leads the top three most productive tasks at home, cited by 51% of our respondents. Only 19% say the workplace is a better place to do this.

On the other hand, the workplace is strongly seen as the best place for collaborative and management tasks such as meeting customers or clients, working with colleagues, and getting information from others. These findings echo a [similar study of remote workers in the US, Germany and India](#). It found that while productive remote working can be achieved with limited preparation, success depends on adequate tools, social connectivity, and support for physical and mental wellbeing.

Three cohorts feel particularly productive working remotely

Younger workers (18-24 years of age). 31% report being more productive on collaborative tasks vs. 9% of workers aged 55 and older. 28% also find performing management tasks more productive at home compared to only 12% of workers aged 55 and older.

Technology workers. This group is far more likely than their peers to report feeling productive working from home. 44% report being more productive at home compared to an average of 37% across all industries.

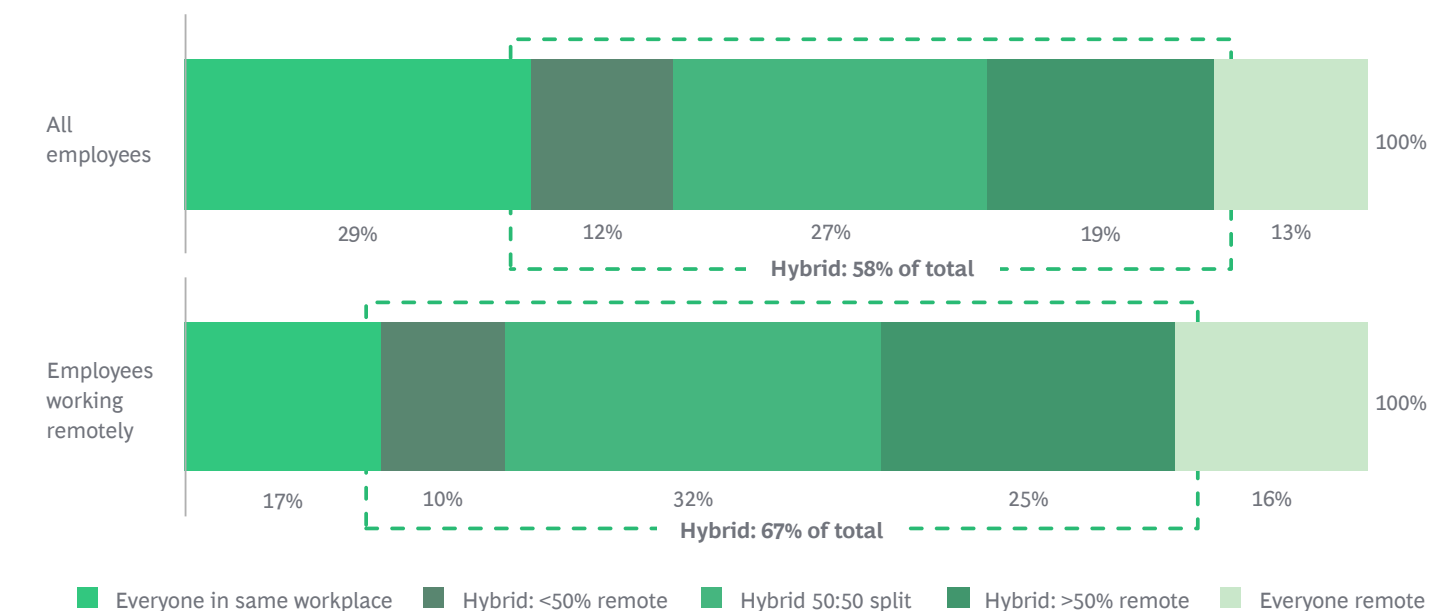
What kind of working model do employees want?

What kind of working model do employees want?

With the novelty of remote working well behind us and stricter government guidelines being put in place, the next six months present a real test for UK employers seeking to sustain remote working. Understanding what drives or hinders productivity and engagement across employee groups—and how all groups want to work from now on—will help leaders to adapt.

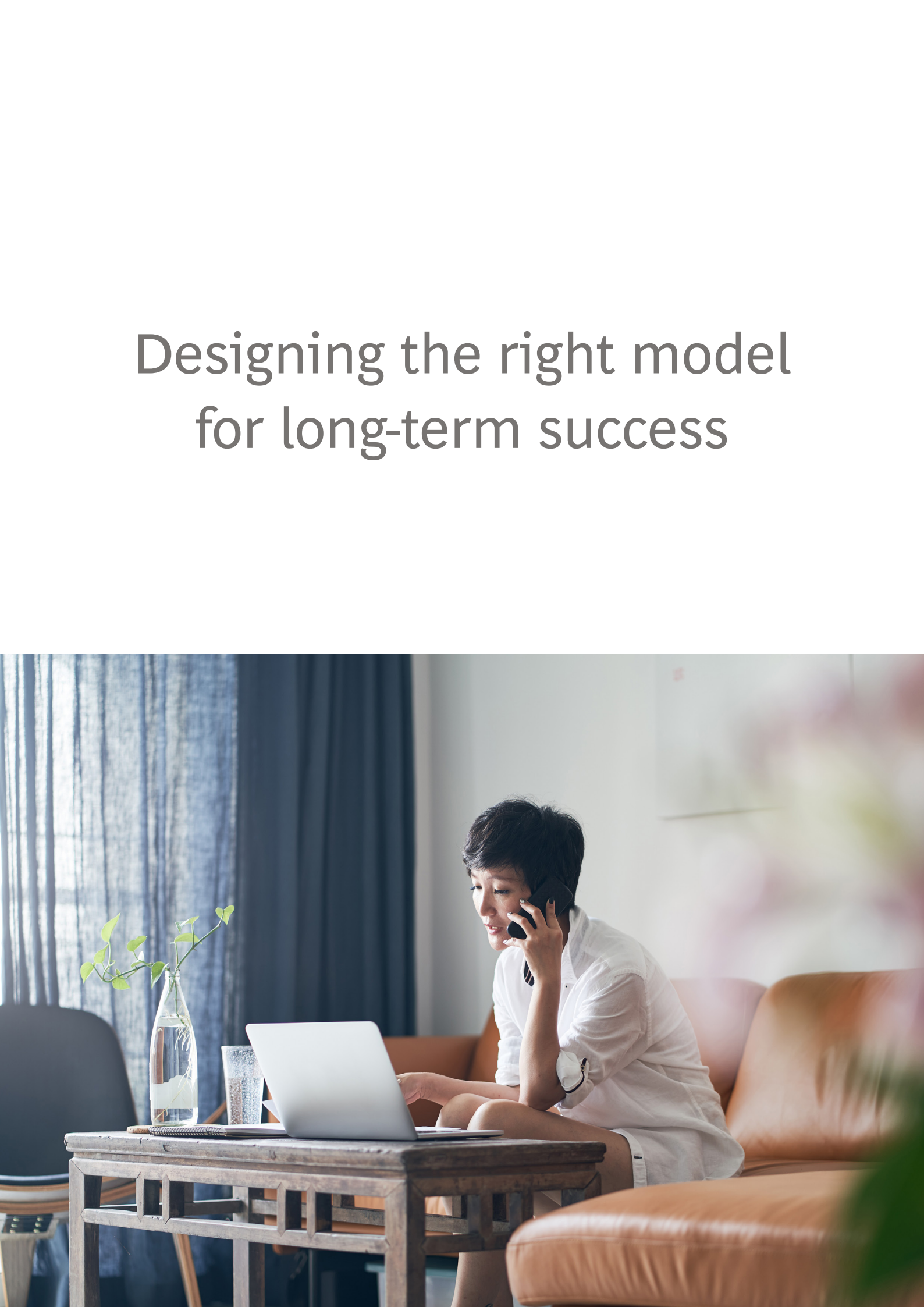
Overall, 67% of employees who worked remotely since COVID-19 believe a hybrid model of remote and in-workplace work is ideal for them and their colleagues. This kind of model allows for the benefits of working from home plus the human connection, in-person relationship building, and increased visibility enjoyed in the workplace. (See Exhibit 4.)

Exhibit 4: Over 50% of UK employees prefer a hybrid model



Source: BCG UK Employee Sentiment Survey, conducted August 24th-31st (2020)

Age also influenced employees' preferred working model, with younger workers between 18-24 years of age three to four more likely to prefer a fully remote model than their colleagues aged 55 years or over.



Designing the right model for long-term success

Designing the right model for long-term success

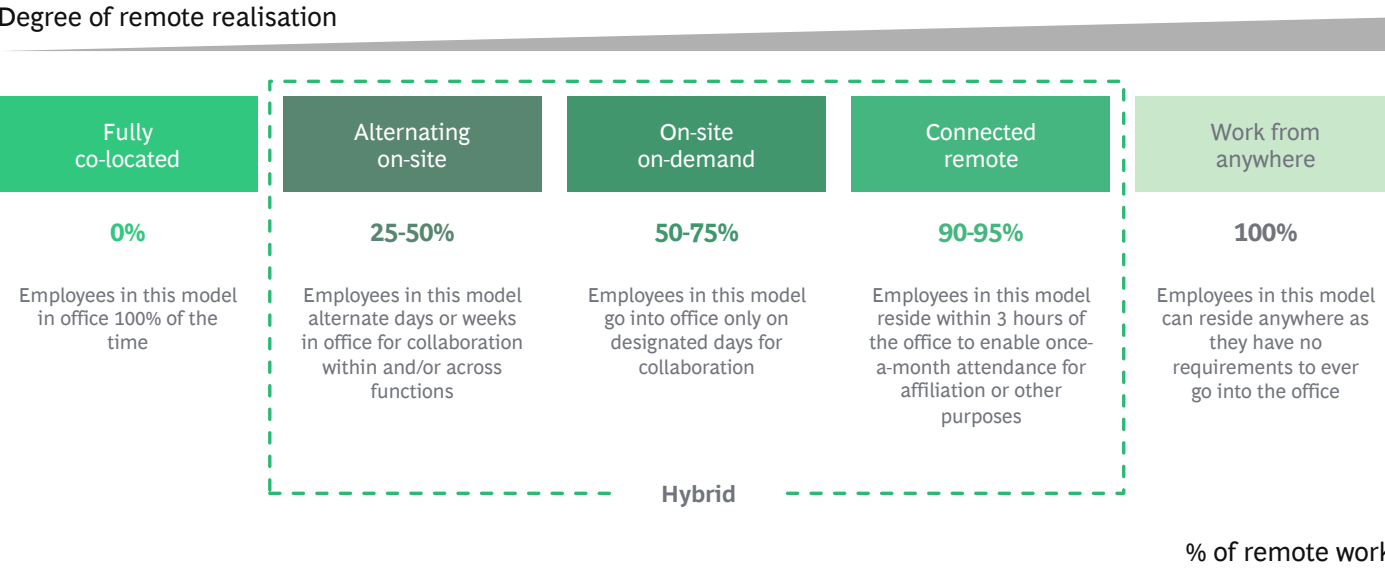
One thing is clear: no single model will suit an entire workforce. As they determine the work model to establish going forward, employers should bear in mind that different cohorts of workers have experienced remote working quite differently. Balancing this with organisational constraints and, in the short-term, uncertainty around government guidelines will be key.

Second, employers should think about the range of work models they could potentially offer, from fully face-to-face to fully remote, and different hybrid models in between. They should then break down the workforce into different ‘job families’, allowing them to consider more closely the nature of the work done by the various individuals and teams.

- Organisations should also ask themselves five questions:**
- 1. *Where is in-person customer interaction most important?*
 - 2. *Where do individuals need access to specialised equipment or facilities?*
 - 3. *What level of supervision or regulatory oversight do workers need?*
 - 4. *How much collaboration and interaction with colleagues is required?*
 - 5. *How important is creativity and innovation in each role?*

For example, a single organisation may have different teams performing a range of activities with varying levels of face-to-face interaction. One cohort may need to be in the workplace all the time, another may only need to come into the workplace for essential team meetings or events, and another group may work best in a model with alternate days or weeks in the workplace. (See Exhibit 5.)

Exhibit 5: Range of remote models to consider



Five Practical Tips for Navigating the Future of Work

As our traditional view of the workplace changes, leaders must equip themselves to navigate these new models. This goes beyond simply choosing the right model for each of their teams. Sustaining and enhancing workforce engagement and productivity will also require empathy, thoughtfulness and proactive leadership. Building on the lessons learned since the COVID-19 crisis, leaders should consider these five tips:

1. **Avoid creating an echo chamber** in which people who have had a broadly positive experience working remotely talk primarily to others who feel the same way. Instead, get to know your people’s experiences, challenges and concerns using surveys and other forms of staff engagement to understand the obstacles they have faced.
2. **Test and test again** using a data-driven perspective to avoid a one-size-fits-all approach across all employee groups. Understand what worked well, both before and after the lockdown, and incorporate this insight into developing and piloting new models, rather than drifting back to pre-COVID-19 ways of working.
3. **Allow more flexibility, even within the hybrid model**, by mapping out flexible hours, workplace options and career paths, and providing additional support to employees who may be at a disadvantage.
4. **Enable middle management** by training them to become more comfortable leading in a new hybrid model, so that they can provide clarity and stability in the more flexible world you are creating.
5. **Prioritise human connection and well-being.** Ensure remote employees are brought together for activities that build affiliation and foster connection to peers and the organisation e.g. leadership meetings focused on building high performing teams, or team lunches. In the workplace, this could mean prioritising time spent on group problem solving and knowledge sharing, especially through on the job learning, apprenticeships and coaching.

As the pandemic continues, organisational resilience is more important than ever. Much of it will come from enhanced workforce engagement and productivity. Listening and responding to employees across the spectrum of demographics and experiences will not only provide a solid foundation for new work models and approaches to be created, but also keep employees feeling trusted and valued, no matter what the future holds.

You may also be interested in:

- Hybrid Work is the New Remote Work
Boston Consulting Group, September 2020
- What 12,000 Employees Have to Say About the Future of Remote Work
Boston Consulting Group, August 2020
- Remote Work Works – Where Do We Go from Here?
Boston Consulting Group, June 2020

Our Approach

We surveyed 2,000 individuals across the UK currently employed part- or full-time to understand perceptions of their current work model and their preferences for the future. Of the respondents, 50% shifted to remote working as a result of COVID-19, while 36% remained in their pre-COVID setting. For the purposes of this report, we have chosen to focus only on those workers who have shifted to a remote setting at some point.

Note that 13.4% of respondents were either furloughed at the time of the survey or marked “other” on the survey response and have therefore been excluded from this analysis. In addition, 21% of total respondents were furloughed at some point over the past six months (compared to the national average of 26%); of those, 63% have now returned to a remote or hybrid work model and have been therefore included in this analysis.

Ipsos MORI assisted with the questionnaire design and was responsible for the sample, the fieldwork, and the provision of data. The data analysis, interpretation, and reporting of the survey data is the full responsibility of Boston Consulting Group.

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10/20

