



# A New Mindset at Work:

Zeno Group on the  
Evolving Workplace  
in 2021

NEW ZENO GROUP RESEARCH TO  
INFORM THE WAY FORWARD



# Right Now: A Tipping Point for Workplace Change

## THE WALL STREET JOURNAL.

MARKETS

### Wall Street Wants Bankers Back in the Office. Especially Gen Zers.

Top firms like Goldman and JPMorgan hope in-person interaction—and more money—will cure malaise many newbies are feeling

## FAST COMPANY

### Why workers are calling BS on leaders about returning to the office

Workforce scholars find that employees are feeling burned over broken work-from-home promises and corporate culture 'BS' as employers try to bring them back to the office.

## Forbes

Jun 15, 2021, 09:00am EDT | 5,756 views

### The Labor Shortage May Be Permanent

## FINANCIAL TIMES

### The boss is back but the workers are staying at home



## REUTERS

### With 8 mln Americans out of work, why are more companies not filling jobs?

## FORTUNE

COMMENTARY • RETURN TO WORK

### Forcing employees to return to the office? Prepare to face the consequences

BY MIKE MASSARO  
July 7, 2021 7:00 PM CDT

# A Critical Problem: Expectations are Out of Sync

83% of CEOs want employees to return in person

10% of employees want to come back full time

- Newsweek/Best Practice Institute, April 2021

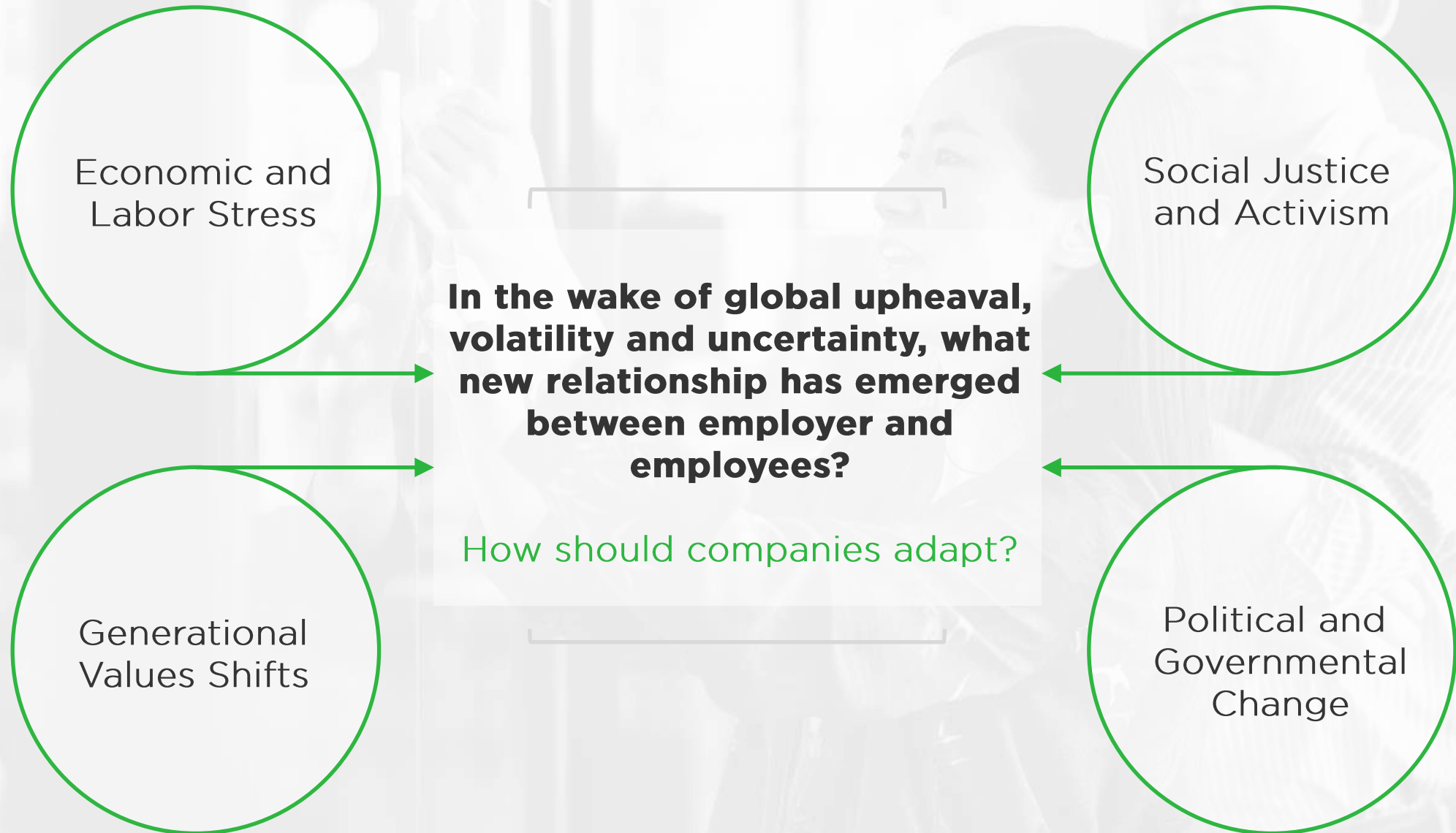
“Those who are uberly engaged with the company want to go to the office two-thirds of the time, at least. Those who are least engaged are very comfortable working from home.”

Sandeep Mathrani, CEO WeWork

“The remote office doesn’t work for generating ideas, preserving corporate culture, competing for clients or for those who want to hustle.”

Jamie Dimon, CEO JP Morgan

# Powerful Factors are Shaping a New Mindset at Work





# Zeno's Evolving View of Employees and the Workplace



**2015**

The Power of Strategy for All



**2019**

Barriers to Employee Engagement



**2021**

**A New Mindset at Work**

# About Our 2021 Global Research Methodology

## WHO

Employees working full-time or part-time

**Markets:**  
**US, UK, France, & China**

22+ Years Old

Languages:  
English, French,  
Chinese

Online Survey

## HOW MANY

$n = 4305$  (Overall)


$n = 1122$  (US)

$n = 1054$  (UK)

$n = 1041$  (France)

$n = 1041$  (China)

## WHEN

03 / 24 / 2021  04 / 04 / 2021

## MARGIN OF ERROR

MOE of +/- 3%  
per market

95%  
Confidence Level

# What You Will See

Our research revealed the emergence of a fascinating and complex workplace, with clear challenges and opportunities, signals for concern, but also signs of optimism and hope.



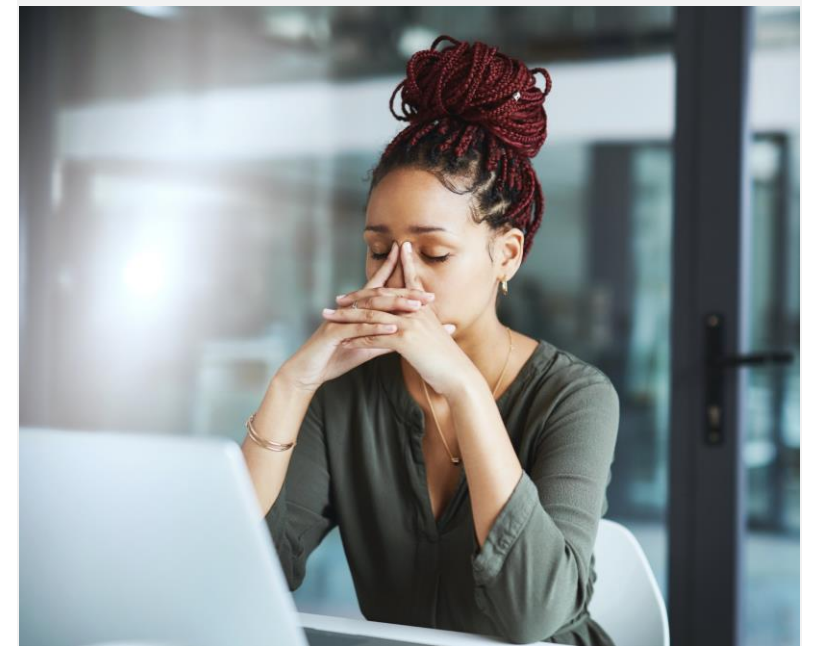
## Optimistic

about a new world of work, eager for change, but on their terms



## Serious

about their future and wellbeing, and not afraid to change to achieve it



## Frustrated

by the lack of opportunity and advancement – and on the hunt for better



A woman with long dark hair and glasses, wearing a white t-shirt, stands in a meeting room pointing at a wall covered in numerous pink and yellow sticky notes. In the foreground, the backs of two people's heads are visible as they sit at a table with laptops and notebooks, looking towards the woman. The scene is brightly lit, suggesting a modern office environment.

# Shifting Expectations for a New Workplace





# 72%

of employees in all markets **DO NOT**  
want their “work life” to go back to  
how it was before COVID

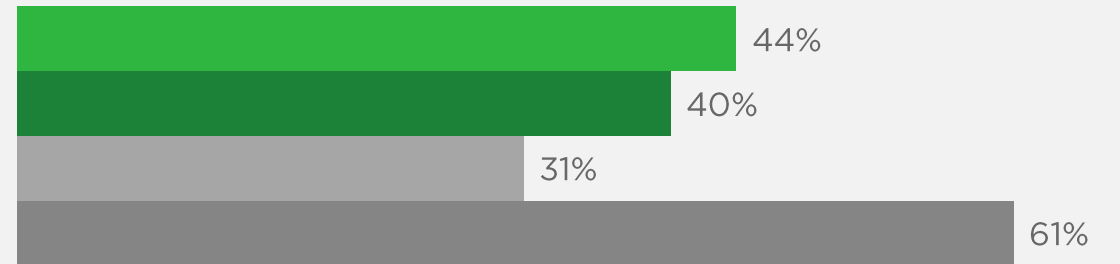
# Workers Don't Want to Lose Perceived Gains

The pandemic forced changes for many aspects of work.. Employees want to retain the flexibility and policies they've come to value during the pandemic.

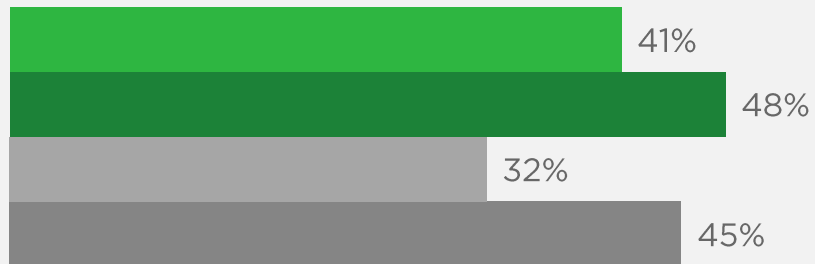
Flexible schedules



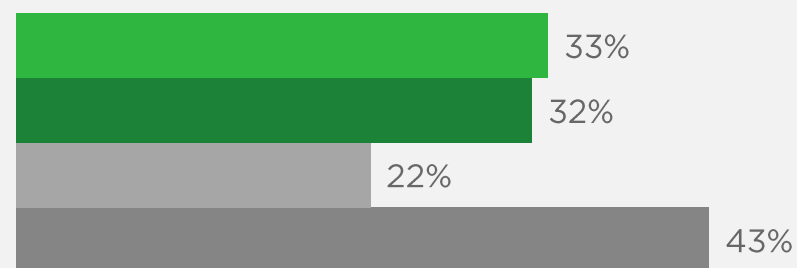
Providing technology / tools to get the job done while staying safe



Mental health awareness







Accommodating working parents



# Hybrid, Thanks!

## Workers Recognize the Price of Working Fully Remote

The top perceived concerns of workplace flexibility include the mental health impact, like stress and anxiety, and feeling disconnected from colleagues / workplace culture.

				
Poor mental health / feeling more stressed or anxious	48%	46%	37%	54%
Feeling disconnected from colleagues / workplace culture	48%	46%	39%	59%
Challenges with technology / internet	47%	42%	33%	61%
Can make it challenging to keep my team motivated and productive	47%	41%	40%	62%
Poor physical health (e.g. diet, posture, sleep)	47%	47%	38%	55%
There are no boundaries / I feel like I am always “on call”	45%	39%	39%	57%
Less active lifestyle	44%	42%	41%	53%
Difficulty completing tasks / distractions from home environment	44%	38%	34%	56%

# Employees Say Flexibility Works and It's Here to Stay

Employees are looking for greater ability to work from home. Less than 20% say this benefit is not important to them.





# What They Want Most:

## To Unplug the Device and Connect with Family

Family has become increasingly important for employees over the past year. “Protecting the family” is the TOP rising value for employees in all four markets.



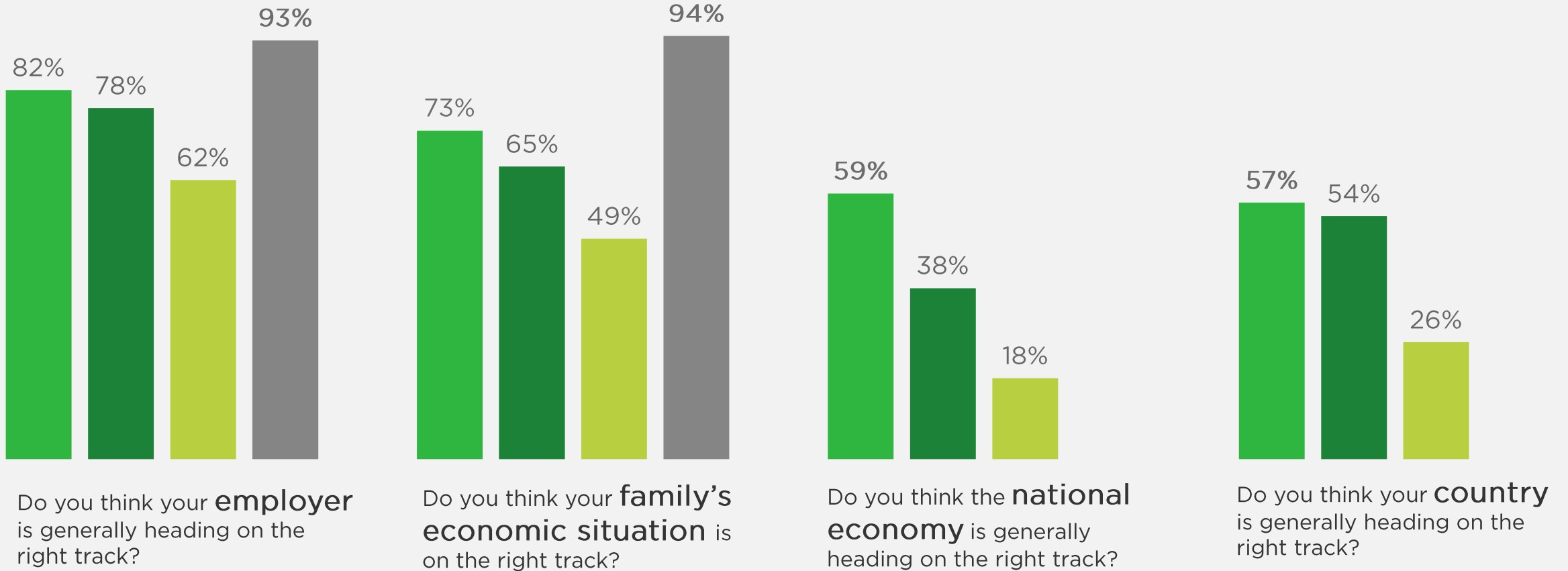
A close-up, slightly blurred photograph of a person's hands writing on a yellow sticky note. The person is holding a black pen. The sticky note is on a white surface, and several other yellow sticky notes are scattered around. In the bottom right corner, there is a white cup with a wooden stick inside. The overall tone is warm and focused.

# The Call for Change

# Employees Say Their Own Future Lags That of Their Employer

Employees saw a better economic future for their companies than for their own families, or their country.

■ USA ■ UK ■ France ■ China



# Employers Take Note: Workers Dissatisfied with Opportunities, Advancement

Employees rated how satisfied they were on various aspects of their personal and professional lives:



## Top 3:

Job security: 66%

Personal safety & security: 64%

Co-workers: 63%

## Bottom:

Political leadership: 36%

National economy: 34%

Job opportunities outside of current company: 22%



## Top 3:

Co-workers: 58%

Personal safety & security: 55%

Job security: 54%

## Bottom:

National economy: 54%

Political leadership: 47%

Tie – Job opportunities inside and outside of current company: 32%



## Top 3:

Job security 45%

Family/Social life: 41%

Physical health 39%

## Bottom:

National economy: 69%

Political leadership: 63%

Job opportunities outside of current company: 44%



## Top 3:

Personal safety & security: 80%

Job security: 73%

Mental health: 69%

## Bottom:

Current “work life”: 16%

Job opportunities in current company: 16%

Job opportunities outside of current company: 15%



# Many Employees Think NOW is the Time for Change

When employees were asked if "amid all the changes and challenges facing companies today, now is a GREAT time for a company to consider making changes for its workforce," many employees said YES.





# New Expectations for Career and Economic Mobility

# Many Workers are Stuck

## Brookings Institute Research

### Highlights from Key Findings

*Many workers get trapped in low-wage occupations – over 10 years, only 43% leave low-wage work*

### Opportunities to move up are full of hurdles

*workers are 3.8X likelier to move within their current industry than outside it*

### Access to higher wage work is unequal

*in manufacturing, white workers see 14 percentage points higher upward transitions than Black colleagues*





### Low-wage industries offer workers less upward mobility

*only 36% of hospitality workers see upward mobility and are in a sector with the lowest median wage*



# Seeking a New Mobility in the Workplace – Upward or Lateral Change

In addition to economic mobility, employees are looking for other benefits when thinking about switching jobs. These factors include interesting work, opportunities to grow, and the ability to move within the company.

				
Interesting/challenging work	79%	77%	76%	73%
Opportunities to develop new skills/grow professionally	78%	71%	67%	83%
Job mobility	73%	62%	60%	79%



# Professional Growth is Now Expected and A High Priority

While there is an increased call for purpose at work, professional growth for employees still remains the priority. Employees in all markets are overall satisfied with the professional development and growth opportunities their current employers are providing.

The importance of opportunities to  
develop new skills/grow professionally







My organization is helping me  
develop and grow as a professional



# Employees Are Ready to Jump, Putting Retention Levels at Risk

1 in 4 employees are already seeking new job opportunities – and this may increase once the pandemic ends and economies fully reopen. Employers are underestimating the extent to which they and/or their colleagues are currently seeking new job opportunities at other organizations.

				
Currently seeking new job opportunities	26%	24%	23%	28%
Colleagues are currently seeking new job opportunities	27%	26%	22%	25%
Employer thinks employees are currently seeking new opportunities	23%	20%	19%	23%

*Top-3 box actively / currently seeking new job opportunities*

A group of approximately 15 people, including adults and children, are standing on a beach at sunset. They are all facing away from the camera, looking out at the ocean. The sky is filled with dramatic, colorful clouds in shades of orange, yellow, and blue. The sun is low on the horizon, creating a warm glow. The people are dressed in casual clothing, and some are holding hands. The overall mood is peaceful and contemplative.

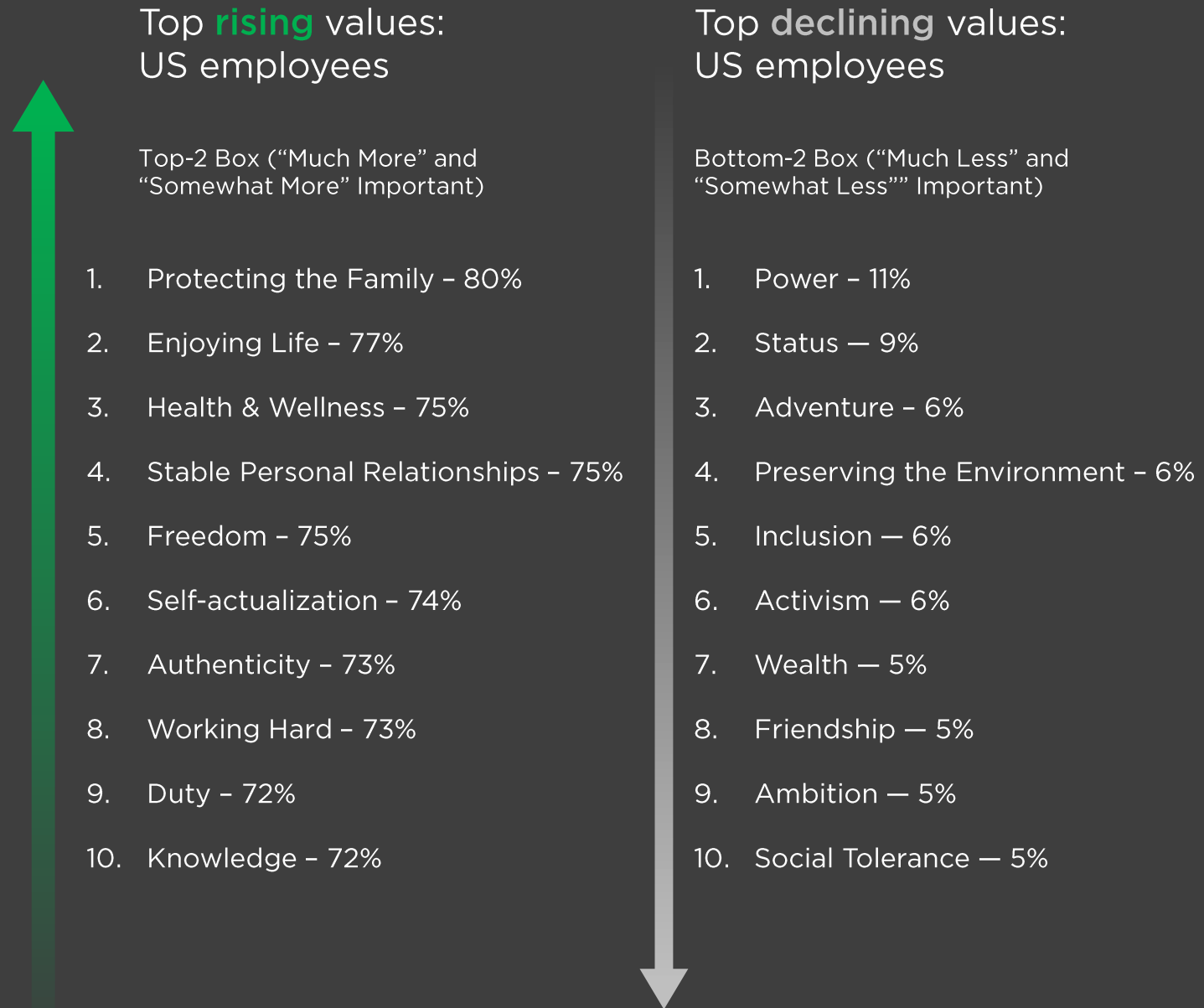
# Evolving Values are Shaping a New Mindset

# Shifting Values Reflect Pandemic's Effects on Priorities



There is a newfound appreciation for and prioritization of close personal relationships with friends, family, and loved ones.





Material values such as status, wealth, and power saw the most pronounced decline in importance.





# New Values Drive Expectations for the Workplace

In addition to economic mobility, employees are looking for other qualities while thinking about switching jobs.

				
Work life balance	85%	83%	76%	83%
Greater purpose at work	73%	67%	57%	81%

IN THE U.S.

76%

of Gen Z would be willing to accept a job earning less money if it was for an employer that shared their personal values and had a strong social purpose



>80%

of respondents report they would be more likely to work at a company that lives by a clear and strong purpose

Yet only around

50%

of respondents felt their company had one

# Get Clear on Your Purpose and Values

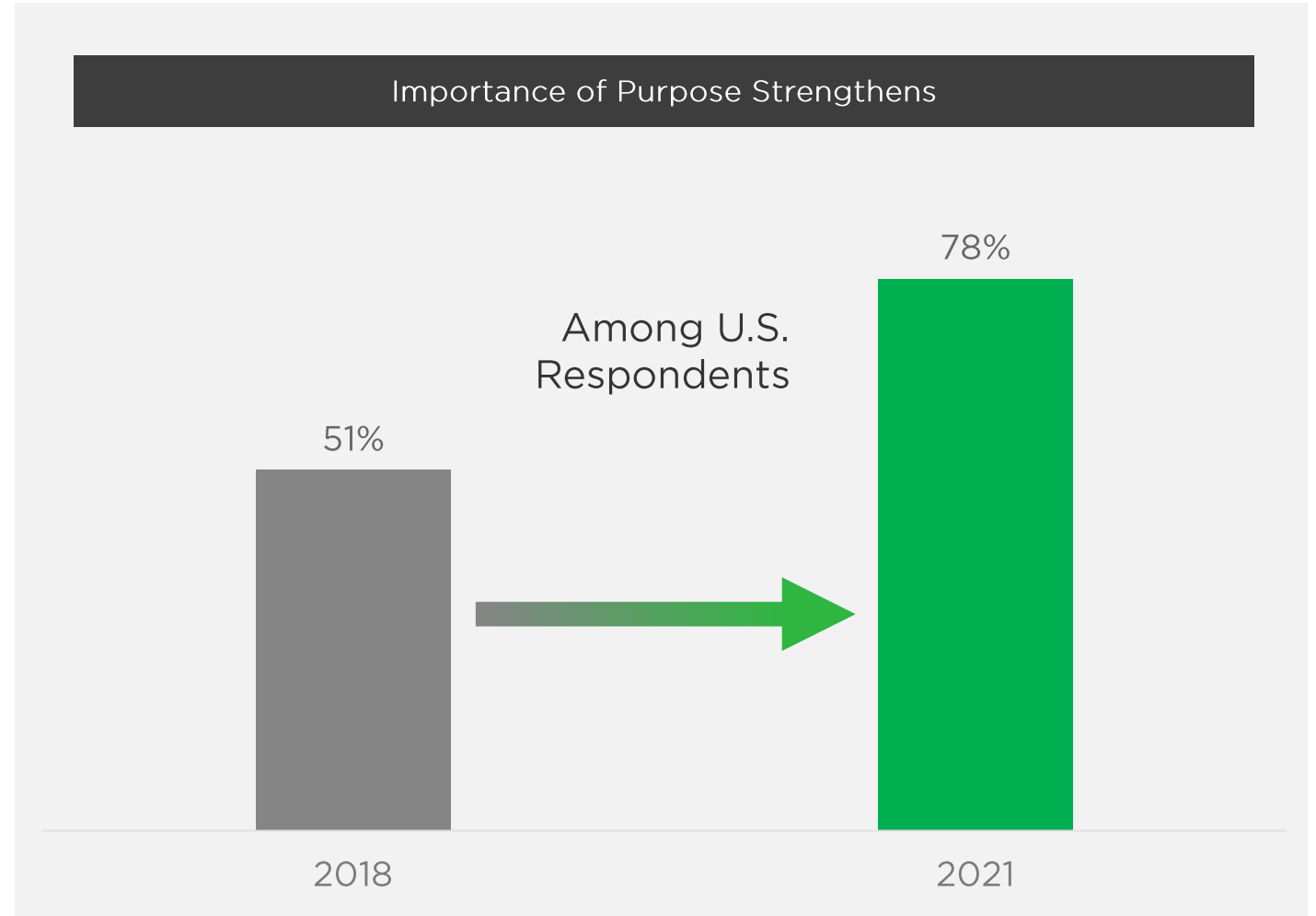
**OVER 71%**

of employees across the globe agree that their work is an important part of their identity.

An employer's purpose may have a direct impact on job retention with majorities in all markets more likely to work at a company that lives by a clear and strong purpose.





**OVER 70%**

of employees across all regions feel like they would perform better at their jobs if they had a clear understanding of their company's values.



# What We Value at the Office: The Human Element

Among employees that have been working from home, employees rated what they missed the most:

	Seeing work friends colleagues	In-person meetings, working sessions, etc.	Social events at the office or with colleagues	Office amenities (food, gym, etc.)
	56%	39%	43%	31%
	61%	44%	38%	25%
	61%	31%	41%	21%
	49%	39%	55%	43%




A photograph of three diverse women sitting at a table in a meeting. The woman on the left is a Black woman with short curly hair, wearing a yellow and black patterned top. The woman in the middle is a woman of Asian descent with long dark hair, wearing a white blazer over a black top. The woman on the right is a woman with curly hair and glasses, wearing a light blue patterned top. They are all looking towards the right side of the frame. The background is a plain, light-colored wall.

# Diversity, Equity, and Inclusion is a Business Imperative

# DE&I: Employers are NOT Meeting Expectations

Diversity, Equity, and Inclusion is a top concern for most employees across all markets when evaluating a potential employer.

Many employees hesitate to give their current employer strong marks on the subject.

	Expectations	Current Performance
	DE&I “extremely” or “very important” when evaluating potential employers	Rate current employer as “excellent” or “great” on DE&I
	79%	64%
	73%	60%
	64%	52%
	55%	29%

# DE&I: A Critical Part of Purpose

DE&I and company purpose are deeply intertwined. In the US, the UK, and China, many employees consider having a diverse workforce and inclusive company culture one of the most important elements of a purposeful company.

In those three markets, nearly 50% of employees ranked DE&I as one of the most important elements of a purposeful company, trailing only proper treatment of employees in that category.



49%



46%



45%



27%





# Implications and Imperatives for Communications and HR Leadership



# Assess Gaps in Expectations for the Return

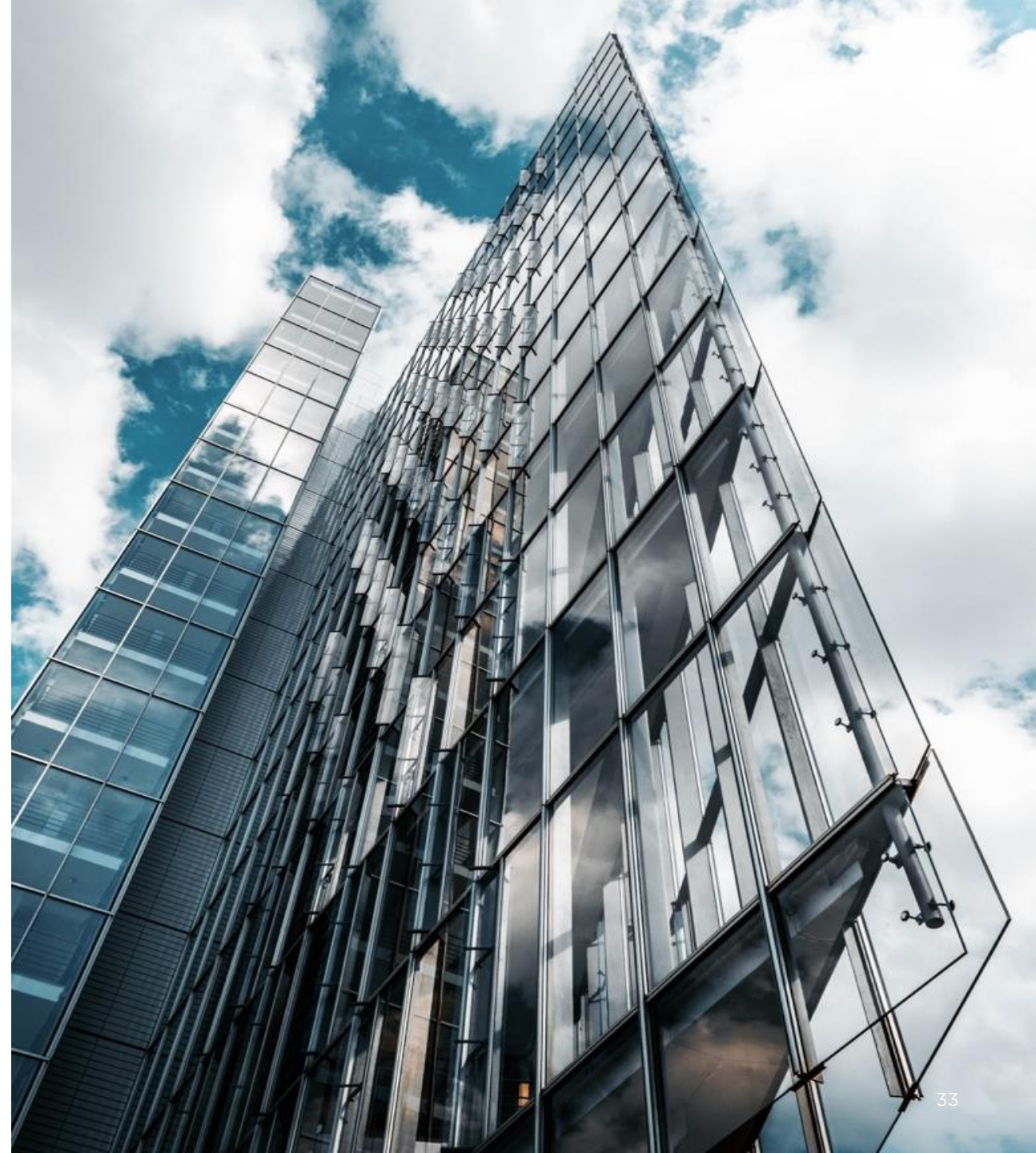
Demonstrate that you see your employees' new found appreciation and prioritization for close personal relationships with friends, family and loved ones.

Design a clear Return-to-the-Office strategy that meets your culture, business requirements and team's expectations.

- For hybrid models, it is critical to define the purpose of being in the office to meet expectations around the importance of the 'human element' of the office.

Audit your benefits (i.e., wellness, working parent) to ensure they meet today's workforce expectations.

Based on input from your team, develop a comprehensive communications plan that paints a vision for the future.



# Put Career Mobility at the Center of Your Employer Brand

Rethink your talent model to support traditional and non-traditional employee growth needs.

Communicate with managers to ensure they know the importance of coaching, providing challenging assignments and creating internal mobility opportunities.

Tell stories of employees who have moved up and laterally.

Measure and report on the mobility impact for your communities as part of ESG and sustainability reporting.





# Shape an Executive Narrative Around Retention Factors, Especially Values that are Shaping a New Mindset



## Be explicit with company purpose and values communication

Develop an Employee Value Proposition based on organizational values; create communications plans for existing employees and to recruit future talent

Ensure performance management and employee recognition programs hold people accountable and reward employees for “living” organizational values

## Rise to expectations on Diversity, Equity and Inclusion

### **Workforce Diversity:**

goal-setting, recruitment, advancement, compensation & pay

### **Culture of Inclusion:**

employee resource groups, training, mentorship

### **Business Decisions & Operations:**

supply chain and vendors, product offerings, philanthropy

### **Marketing & Communications:**

executive support, inclusive and multicultural marketing, thought leadership

# QUESTIONS?

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# Appendix

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# Employee's Overall Top Values



United Kingdom

What are the most important values for employees in 2021 and which are becoming more and less important?

*A total of 37 values were rated in this research by respondents*

## Top-3 Box ("9", "8" and "7")

1. **Protecting the Family – 82%**
2. **Honesty – 82%**
3. **Enjoying Life – 81%**
4. **Self-Reliance – 79%**
5. **Freedom – 77%**
6. **Control – 77%**
7. **Authenticity – 77%**
8. **Stable Personal Relationships – 76%**
9. **Open-Mindedness – 76%**
10. **Working Hard – 76%**

## Top **rising** values: employees

1. **Protecting the Family – 75%**
2. **Enjoying Life – 72%**
3. **Self Reliance – 71%**

*Top-2 Box ("Much More" and "Somewhat More" Important)*

## Top **declining** values: employees

1. **Status – 13%**
2. **Power – 12%**
3. **Success – 11%**

*Bottom-2 Box ("Much Less" and "Somewhat Less" Important)*



# Employee's Overall Top Values



What are the most important values for employees in 2021 and which are becoming more and less important?

*A total of 37 values were rated in this research by respondents*

## Top-3 Box ("9", "8", and "7")

1. **Protecting the Family – 79%**
2. **Honesty – 75%**
3. **Enjoying Life – 73%**
4. **Self-Reliance – 73%**
5. **Self-Esteem – 72%**
6. **Authenticity – 71%**
7. **Freedom – 70%**
8. **Stable Personal Relationships – 70%**
9. **Equality – 70%**
10. **Open-Mindedness – 69%**

## Top **rising** values: employees

1. **Protecting the Family – 68%**
2. **Enjoying Life – 65%**
3. **Self-actualization – 64%**

*Top-2 Box ("Much More" and "Somewhat More" Important)*

## Top **declining** values: employees

1. **Activism – 9%**
2. **Power – 9%**
3. **Inclusion – 8%**

*Bottom-2 Box ("Much Less" and "Somewhat Less" Important)*

# Employee's Overall Top Values



China

What are the most important values for employees in 2021 and which are becoming more and less important?

*A total of 37 values were rated in this research by respondents*

## Top-3 Box ("9", "8", and "7")

1. **Health & Wellness – 89%**
2. **Equality – 88%**
3. **Self-Esteem – 87%**
4. **Protecting the Family – 87%**
5. **Honesty – 87%**
6. **Success – 87%**
7. **Open-Mindedness – 86%**
8. **Stable Personal Relationships – 86%**
9. **Belonging – 86%**
10. **Authenticity – 86%**

## Top **rising** values: employees

1. **Self-actualization – 88%**
2. **Protecting the Family – 85%**
3. **Knowledge – 83%**

*Top-2 Box ("Much More" and "Somewhat More" Important)*

## Top **declining** values: employees

1. **Excitement – 15%**
2. **Adventure – 10%**
3. **Having Fun – 5%**

*Bottom-2 Box ("Much Less" and "Somewhat Less" Important)*