The Economist | INTELLIGENCE UNIT

THE FUTURE OF WORK AND DIGITAL WELLBEING

Protecting employees in a
Covid-19-shaped world

CONTENTS

EXECUTIVE SUMMARY

Covid-19 has accelerated existing trends towards digitalisation. This shift has the potential to improve people's working lives by giving them more flexibility in where, when and how they work. However, it also threatens wellbeing through increased isolation and stress.

Covid-19 has accelerated trends towards greater digitalisation in how we work

- During the pandemic, people globally had to start working remotely, increasing their use of digital communications and virtual collaboration.

  - Most sectors now face a challenge to upskill their workforce with the digital capabilities needed to succeed as industries shift. In the Oil and Gas and Marine sectors, digitalisation presents the opportunity to address key challenges around sustainability, diversity and inclusion.

  - In Finance and Healthcare, digital tools free up employee time to offer their customers and patients a more human experience.

  - In Manufacturing, a new focus on technological skills creates a new way for companies to engage with younger workers.

- Some countries are managing transitions better than others: only 58% of respondents in France working from home during Covid-19 felt sufficiently supported by their employer, compared to over three quarters in the UAE.

Companies need to actively manage these digital transitions to ensure they maximise employee wellbeing benefits and minimise the risks

- More flexibility in where, when and how we work should be good for wellbeing. It is linked to higher productivity, better diversity and inclusion and more active lifestyles.

- However, companies need to manage risks around increased stress and isolation and exacerbating existing social inequalities.

This requires business leaders and people managers to take action at every level of their operations

- Business leaders should lead by example to foster a culture where employees feel comfortable to talk about their challenges and access the support on offer.

- Human resources and people managers need to make sure policies provide a foundation from which teams and individuals can design their own work-from-home systems.

- Employers should make sure they are up-to-date on digital tools to help tackle some of the challenges around technological transitions. They will have to adapt existing practices to work in a predominantly online environment.

By putting employees' mental and physical wellbeing at the heart of any digital transformation, business leaders can access a range of commercial benefits while improving staff satisfaction. In a post-Covid-19 world, or one where the virus remains part of our lives, this employee-centric approach will be essential for helping businesses attract, retain and get the most out of their workforce.

PREFACE

This report summarises the key findings of a research programme developed by the Economist Intelligence Unit (EIU) with support from Allianz Partners.

The report is based on an extensive literature review and a comprehensive interview programme conducted by the EIU between June and August 2020. In total,14 experts were interviewed representing academia, businesses and wellbeing specialists. The white paper also draws from the findings of a survey conducted by the EIU in July 2020 on 'the future of work post the Covid-19 pandemic' – speaking to respondents from Canada, France, Singapore, the United Arab Emirates and United Kingdom.

The EIU bears sole responsibility for the content of this report. The findings and views expressed do not necessarily reflect the views of the partners and experts. The report was produced by a team of EIU researchers, writers, editors, and graphic designers, including:

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SECTION 1

How is digitalisation impacting how we work?

Digitalisation – the increased use of digital and online tools in business operations – is transforming how we work. The rise of online connectivity gives people the option to work from anywhere, be contacted at any time and build teams with colleagues across the world. These three trends, which were already transforming different sectors, have accelerated significantly since the outbreak of Covid-19.

This transition to a more digitalised way of working irrevocably impacts people's experience of their job – in both positive and negative ways. Employers need to make sure there are systems in place to maximise the benefits of digitalisation while helping their workforce minimise associated risks. This is particularly true during the pandemic: the increased rate of change means many companies need to develop new strategies, policies and tools to safeguard and support employee wellbeing in a rapidly changing environment.

In this paper, the Economist Intelligence Unit (EIU) sets out how companies can approach digitalisation in a way that keeps employee wellbeing at the centre. First, we deep-dive into the trends outlined above (work from anywhere, increased communications and global teams) and their drivers across different sectors. Secondly, we look at the benefits and risks they bring to employee wellbeing. Finally, we lay out the next steps business and human resource (HR) leaders need to consider to ensure their workforce feels supported and remains productive as these changes unfold.

1.1 What will the future of work look like?

Over the last three decades, advances in technology have changed the nature of work. The rise of the internet has created a new economic system that emphasises intangible economic assets and is less spatially bound.[1] This shift has had a knock-on effect on how we work. Increasing connectivity has enabled three broad changes:

i. Allowed people to work from outside their offices – **'work from anywhere'**

ii. Increased how frequently and at what hours a person is contactable for work purposes – **'increased communication'**

iii. Opened the possibility to staff a team with people based around the world – **'global teams'**

To be ready for the future of work, especially in 2020, companies need to understand how these shifts are impacting their operations and what drivers are accelerating these changes.

1 Felstead, A. & Henseke, G. (2017). Assessing the growth of remote working and its consequences for effort, well-being and work-life balance. New Technology, Work and Employment, 32(3), pp. 195–212.

1.1.1 'Work from anywhere'

In the last two decades, one of the most obvious ways technology has changed how people work is through facilitating remote working. Improvements in portable computing, remote network access and video conferencing have allowed people (in theory) to do substantial swathes of their jobs either from their homes, while commuting or anywhere with a stable WiFi connection. Regular home working grew 159% between 2005 and 2018[2], and in early 2020, 56% of employees said that at least some of their job could be done remotely.[3]

This trend has clearly been accelerated by the lockdowns imposed in many countries as a result of Covid-19. From mid-March to early-April 2020, the percentage of US workers working remotely doubled to 62%.[4] In April, the International Labour Organisation (ILO) estimated that 2.7 billion workers – 81% of the global workforce – were subject to full or partial lockdown measures.[5] This sudden shift has also transformed many people's attitudes to remote working. A recent EIU survey found that 75% of those who worked from home more during the pandemic want to keep doing so to some extent after restrictions have been lifted, and 69% would want to work the majority (at least three days a week) from home.

Importantly, this shift has also impacted how managers view more junior employees working from home. Prior to the pandemic, junior team members worked from home less often than the expert-recommended rates to optimise worker productivity and wellbeing.[6] According to Alan Felstead, Research Professor at the University of Cardiff, middle managers – rather than company leaders – were a large driver of this imbalance. "It's day-to-day managers who bear the risk around letting people work from home – and therefore, they've naturally been more hesitant…they carry the ultimate responsibility if team productivity falls."

Covid-19 has helped address this: seven-in-ten respondents in the EIU survey are more open to employees or junior team members working from home post-pandemic, and almost two-thirds would be more comfortable with their team doing so more than three days a week.[7]

Technology has changed how we work

Over

80%

of employees keep their email open in the background at all times
Source: Mark, G et al (2016)

Increased connectivity

Pre-Covid-19, remote and home working around the world has grown by

159%

since 2005
Source: Global Workplace Analytics (2019)
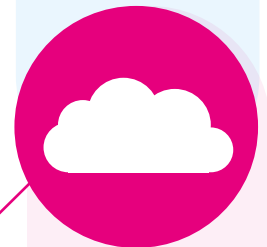
Work from anywhere

48%

of corporate teams include team members from different countries
Source: RW3 CultureWizard (2016)

Global teams

2 Telecommuting Statistics, Global workplace analytics (2019)
3 Telecommuting Statistics, Global workplace analytics (2019)
4 US Workers Discovering Affinity for Remote Work, Gallup (2020)
5 ILO Monitor: COVID-19 and the world of work, International Labour Organisation (2020) 6 Coronavirus and homeworking in the UK labour market, Office for National Statistics (2020) 7 Future of Work post the COVID-19 pandemic, EIU Survey (2020)

The future of work and digital wellbeing

For the privileged few

Share of US private sector workers with access to
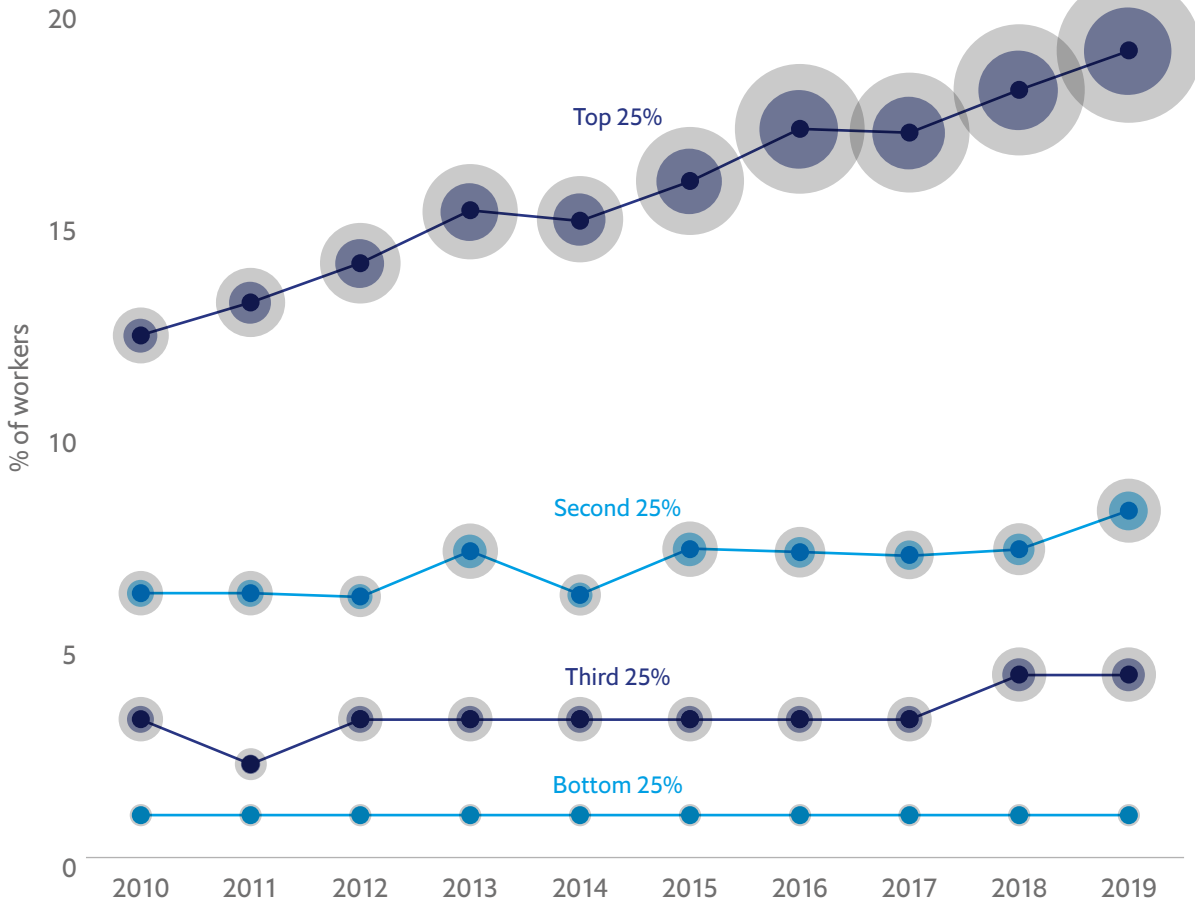remote work before Covid-19 (%)

(Circle size proportional to % of workers with access to remote work)

Source: Pew Research (2019)

1.1.2 Increased communication

Aside from where we work and with whom we work, digitalisation is also changing how we work. Increased connectivity means employees can be contacted more frequently in a range of different ways. According to a 2016 study, on average, workers check their email around 11 times per hour, and over 80% keep their email open in the background at all times while at work.[8] This increased communication trend was accelerating prior to the pandemic, with the advent of instant messaging (IM). In 2004, only around 10% of US workers used IM in their offices, compared to 43% of people in 2017.[9] Today, there are more users on a single provider (Slack has ~12m) than the total number of users of any IM platform in 2004 (11m).[10]

There is a growing body of evidence to suggest these communications help people work more effectively. A study looking into the time taken for employees to complete two typical daily tasks with and without IM found that companies could save an average of 40 minutes a day per user with IM. They estimated that an organisation with 5,000 people could see a rise in productivity with an estimated value of US$37.5m a year.[11]

Technology also makes it easier for us to be contacted at all hours. In many ways, according to Ashley Nixon, Associate Professor of Human Resource Management and Organisational Behaviour at Willamette University, this enables a more natural work-life balance. "Technology has enabled us not to have to ignore large parts of our personal life while at work as well as vice versa. It

8 Mark G, et al (2016, May). Email duration, batching and self-interruption: Patterns of email use on productivity and stress. In Proceedings of the 2016 CHI conference on human factors in computing systems (pp. 1717–1728)
9 How Americans Use Instant Messaging, Pew Research (2004)
10 Slack says it crossed 12 million daily active users, CNBC (2019)
11 Muya Maina, T (2013) Instant messaging an effective way of communication in workplace. arXiv (2013): arXiv-1310.

The future of work and digital wellbeing

has minimised the disruption for people to answer an urgent question while at home, or check in with their families while in the office depending on organisational policies."

However, often this can spiral into work intruding significantly on our home lives and disrupting work-life balance. According to a recent study from the Chartered Institute of Personnel and Development, 40% of UK workers check their emails at least five times a day on weekends or on days off, and over half mentioned struggling to switch off from work "at least sometimes". This inter-mixing of work and personal lives may also blur the boundaries between work and home responsibilities, leading to an increased sense of stress among employees (discussed further in Section 2.2).

Covid-19 is making people more comfortable with communication through digital tools, which is likely to drive its increased use. For example, according to the EIU's survey, seven-in-ten respondents now feel more comfortable doing tasks involving others online than prior to the lockdown. Some of the biggest improvements were seen in conversations with people they may be less familiar with. For example, 44% stated they feel more comfortable doing onboarding of new joiners virtually and over one-third said the same about client or other external meetings.

7/10

respondents feel more comfortable doing tasks involving others online than prior to the lockdown

Source: EIU Survey (2020)

1.1.3 Global teams

Technology has been one of the major drivers of globalisation – enabling companies to expand all over the world. Multi-country operations have led to a rise in so-called 'global-teams' – where people work together across time zones and geographies – often never meeting in person.[12] In the most extreme examples, a single job is shared by multiple people. For example, where four foreign exchange traders in investment banks in the US, London, Singapore and Sydney pass a figurative trading position 'book' between each other on a constant six-hour rotation.[13]

The rise of 'global teams' is also closely linked with the 'knowledge economy', where companies invest and build revenue from intangible assets such as Human Capital. These 'knowledge industries' (including tech firms, consultants etc.) have made it a necessity for top companies to hire and retain the best talent available, wherever it is in the world.[14] This shift presents new requirements for human resources professionals to be able to find candidates from non-traditional, global sources and offer them roles and working environments that motivate them to stay with a company when they may never have met colleagues in person (see examples in Oil and Gas profile in Section 1.2.4).

12 Trends in Global Virtual Teams, Culture Wizard (2016)
13 Why the Forex Market Is Open 24 Hours a Day, Investopedia (2019)
14 Mockaitis, A. I., Zander, L., & De Cieri, H. (2018). The benefits of global teams for international organizations: HR implications, The International Journal of Human Resource Management (29:14), pp 2137-2158

The future of work and digital wellbeing

This trend towards creating virtual teams has been accelerated as a result of Covid-19, as most teams – whether previously co-located or not – are now keeping in touch almost completely online. This increased familiarity with online methods is helping people become more comfortable with the concept of virtual teams, and has made many more companies open to working with people entirely remotely. For example, according to the EIU's survey, over two-thirds of people are now more open to hiring someone to join their team to work entirely remotely.[15]

This shift is changing people's thinking about how teams should be set up to get results. "There used to be a general belief that you should not have more than one or two time zones across teams and that, where possible, they should be co-located," said Kristine Dery, research scientist at MIT Sloan School of Management in the Centre for Information Systems Research. "Previously, we thought people had to physically be there to get results – but now we are seeing that when we are forced to be virtual, we can work in very different ways." This shift might have large implications for current expatriate workers, of which there are currently almost 50 million worldwide.[16] As more businesses are able to coordinate between geographies online, the demand for relocation may decline. If these roles were done remotely, companies would be able to save on relocation and support costs and hire from a talent pool not narrowed by a willingness to move.[17]

Previously, we thought people had to physically be there to get results – but now we are seeing that when we are forced to be virtual, we can work in very different ways

Kristine Dery, research scientist at MIT Sloan School of Management in the Centre for Information Systems Research

1.2 How digitalisation is changing different industries

Operations and processes, specialist skills and sector-specific pressures drive digitalisation in each industry. Although the trends identified above – work from anywhere, increased communication and global teams – are present to some extent across the economy (see table on page 9), it is important to also consider how sector-specific digitalisation is impacting the ways people work.

In this section, we look at five different industries: Logistics (focused on Marine), Manufacturing, Finance, Oil and Gas, and Healthcare. We examine what digitalisation looks like in each sector, how it is impacting the workforce and what companies should be doing to manage the transition. However, for the purpose of the following table, we have looked at the broader Logistics and Transport industry (this as opposed to looking at the Marine industry, due to a lack of data).
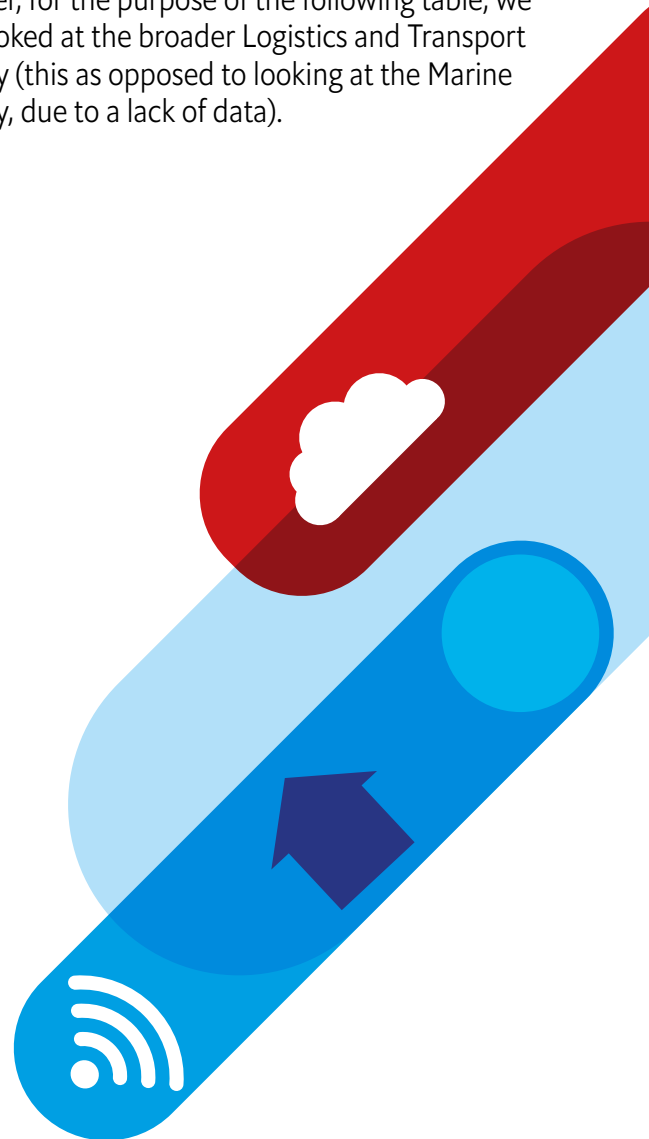
15 Future of Work post the COVID-19 pandemic, EIU Survey (2020)
16 Global Expatriates: Size, Segmentation and Forecast for the Worldwide Market, Finaccord (2018)
17 Trends Reshaping Expatriate Compensation & Mobility Policies, Mercer

The future of work and digital wellbeing

Sectorial divides

Technology impacts ways of working differently across industries

Industry	Work from anywhere	Increased connectivity	Global teams
Indicator	*% of people who worked from home at least once a month (pre-Covid)*	*Score on "Digital interactions" in the MGI Industry Digitisation Index*	*Score of "Global coverage" and "Ethnic diversity" in the Oxford Economics Global Diversity Report*
Logistics and Transport	Medium	Medium	High
Manufacturing	Medium	High	Medium
Finance	High	High	Medium
Oil and Gas	Low	Low	Low
Healthcare	Medium	Medium	High
Source:	Global Workplace Analytics (2019)	McKinsey Global Institute (2016)	Oxford Economics (2011)

1.2.1 Creating opportunities for human-technology collaboration to drive sustainability in the Marine sector

Across the Marine industry, companies, policy makers and investors are focused on how to reduce the sector's greenhouse gas emissions.[18] In recent years, new regulations have increasingly incentivised business leaders around the world to reduce their footprints. For example, a 2020 sulphur cap is likely to cost the industry US$1trn in compliance-related investments over the next five years.[19]

As the Marine industry looks to become more sustainable, technology is providing companies with the tools they need to adapt. Big data opens avenues to improve energy usage, through better analysis of ships' fuel patterns.[20] In parallel, the sector can capitalise on renewable energy and enhanced energy storage technology to reduce emissions. Ship operators can now consider using liquefied natural gas or fuel cells to generate cleaner power and harness renewable energy produced on land.[21]

This shift towards greater sustainability will have knock-on benefits for workers. For example, technology could replace humans in more dangerous tasks, such as fuel tank and boiler inspections on vessels. Instead of manual checks of these equipment pieces, drones piloted by human operators can now conduct these inspections.[22] The role of the human inspector remains critical in the analysis of the information collected, but the safety of the role is much improved. Machinery damage or failures caused over 1,000 maritime incidents in 2019 and represented the biggest overall cause of maritime problems, highlighting the importance of adopting new practices.[23]

18 Reducing greenhouse gas emissions from ships, International Maritime Organisation
19 Pollution: the race to clean up the shipping industry, Financial Times
20 Maritime Technology Challenges 2030 New Technologies And Opportunities, European Council for maritime Applied R&D
21 Maritime Technology Challenges 2030 New Technologies And Opportunities, European Council for maritime Applied R&D
22 Technology in Maritime: Dehumanising the Industry or Creating New Job Opportunities?, Sea Asia (2019)
23 Safety and Shipping Review, Allianz (2020)

The future of work and digital wellbeing

This example is just one illustration of a wider trend towards greater human-technology collaboration (rather than full automation) in the Marine industry.[24] Overall employment in the sector is set to increase by ~3% year-on-year through 2026; however, the nature of the skills required is changing as technology becomes more dominant.[25] This shift means the Marine industry's workforce must now adapt to this more digital landscape. Smarter, more sustainable shipping will transform roles as the industry shifts to increasingly software-focused positions.[26]

As jobs evolve, the industry will need to support its workers through the changes.[27] Currently, the workforce is relatively unprepared and lacks the skills needed to adapt to a tech-minded Marine sector.[28] According to Captain Mike Meade, CEO of M3 Marine, with new technologies, new types of ships – such as hybrid and solar-operated ships – could be built that "require different types of manpower or skills to operate than we have in the industry today".[29]

Governments and companies need to work together to help the Marine workforce develop the needed digital skills. Marine is a capital- and infrastructure-intensive industry, which often has strategic importance to countries with large ports.[30] Therefore, as with other investments made in the sector, closing the digital skills gap is likely to involve some public private cooperation.[31,32] Getting government support to upskill workforces gives companies access to additional resources in an area in which they are unfamiliar, while helping countries provide new jobs and remain competitive in an industry often located in urban environments that struggle to provide other opportunities.[33]

One interesting example of where this collaboration is happening already is the Maritime and Port Authority of Singapore (MPA), which launched the Sea Transport Industry Transformation Map in 2018.[34] This plan aims to create over 5,000 new jobs in the Marine industry by 2025, and to upgrade the skills of the existing workforce through ensuring that training institutes and universities design their curriculum in close engagement and consultation with the industry, factoring in the new skills needed within the industry.[35]

The MPA also established a Maritime Cluster Fund, worth over US$70m, providing support for maritime companies wishing to upskill their employees. This programme jointly funds, along with companies, training, career development programmes and efforts for multi-enterprise cooperation in areas such as manpower strategy.[36] Companies can upskill their employees using this fund in general areas like data analytics and cyber security, as well as soft skills, like communication and executive leadership, and specialised areas.[37]

24 Technology in shipping The impact of technological change on the shipping industry, Institute of Marine Engineering, Science and Technology (2017)
25 UK seafarer projections, Oxford Economics (2016)
26 Technology in shipping The impact of technological change on the shipping industry, Institute of Marine Engineering, Science and Technology (2017)
27 Technology in Maritime: Dehumanising the Industry or Creating New Job Opportunities?, Sea Asia (2019)
28 Technology in Maritime: Dehumanising the Industry or Creating New Job Opportunities?, Sea Asia (2019)
29 Technology in Maritime: Dehumanising the Industry or Creating New Job Opportunities?, Sea Asia (2019)
30 Oceans Economy and Trade Strategies (OETS): An implementation tool for SDG 14, UNCTAD (2018)
31 Sources of Capital in the Shipping Industry, A Survey of Shipping Finance Research: Setting the Future Research Agenda (2018)
32 A strategy for growth for the UK Marine industries, UK Marine Industries Alliance (2011)
33 Stebbings E, et al (2020). The Marine economy of the United Kingdom. Marine Policy, 116, 103905. 34 Technology in Maritime: Dehumanising the Industry or Creating New Job Opportunities?, Sea Asia (2019)
35 Blueprint for sea transport industry promises more than 5,000 new jobs by 2025, Channel News Asia (2018)
36 Technology in Maritime: Dehumanising the Industry or Creating New Job Opportunities?, Sea Asia (2019)
37 Sea Transport Industry Transformation Map to Drive Singapore's Vision to be a Global Maritime Hub for Connectivity, Innovation and Talent, Maritime and Port Authority of Singapore (2018)

The future of work and digital wellbeing

Next Steps for Marine Companies

Get visibility on who wants to learn: Issues attracting people with technology skills are present in all sectors; therefore, companies may find it more efficient in the long term to develop a pathway for their existing employees. This could require moving people from one part of the business (where employment is falling) to another with high growth prospects. In 2018, Conway Freight was experiencing a severe driver shortage as dock workers' roles were becoming less in demand. Instead of trying to find more people with the technical experience to drive freight, they created an internal recruitment process from their existing Marine staff.

According to Bruce Moss, Vice President of Human Resources for Conway Freight, "drawing from this pool for the driving schools has two benefits. First, employees already have a sense of the business, the pace of work and the culture. Second, managers have a chance to evaluate employees' attitude, work ethic, compatibility with the culture and ability to work on a fast-paced team".

Find the resources to develop digital skills in your workforce: The European Union's recent research on the digital skills gap in the Marine industry highlighted a lack of 'off-the-shelf' training and resources.[38] Given the gap, it is unlikely that a single existing provider will be able to meet companies' training needs. To share the cost of developing trainings, business leaders should consider joining a 'cluster' (see above) where companies develop and deliver trainings in tandem.

The BlueTech cluster has chapters globally and offers funding opportunities to members who have ideas of how they want to tackle the skills gap.[39] For example, the Norwegian cluster supported by GCE Ocean Technology runs monthly webinars where three companies (two from within the cluster and one from outside) present their recent innovations and plans to other members. Recent topics include software companies' perspective on green shipping and how to run successful innovation trainings.[40]

38 Radical changes required to future-proof training and education of maritime professionals, European Transport Workers' Federation (2020)
39 GCE Ocean Technology Webinar (2020)
40 GCE Ocean Technology Webinar (2020)

1.2.2 Focusing on 'life-long skills' to manage the rise of automation in Manufacturing

Changing consumer habits and competition from abroad are transforming market dynamics in the Manufacturing sector. Annual shopping events, such as Black Friday, Cyber Monday and Singles Day (an online shopping festival hosted by Alibaba), require retail manufacturers to ramp up operations to meet temporary, extremely large, peaks in demand.[41] In addition, in many high income economies, competition from companies abroad is driving industrial manufacturing to become even more specialised – increasingly focused on high-value-added areas such as precision manufacturing.[42]

To keep pace, manufacturers rely on ever increasing automation: according to the Boston Consulting Group, there will be 1.2 million industrial robots deployed worldwide by 2025 and a World Economic Forum survey of UK manufacturers found that over 90% are currently investing in automation.[43]

This strategy has an inevitable side effect of reducing and changing the demand for labour.[44] The US Bureau of Labour Statistics records a long-term decrease in manufacturing jobs: in 1910, manufacturing accounted for 32% of nonfarm work. By 2015, this share had fallen to 9%.[45] However, studies show that increased automation also leads to the creation of demand for a 'new' form of labour.

41 Why Black Friday Had More Online Shoppers Than Cyber Monday, And 3 Other Trends From Retail's Big Weekend, Forbes (2019)
42 The Internet of Things: Applications for Industry, EIU (2020), Manufacturing in the UK: An economic analysis of the sector, Department for Business Innovation and Skills (2010)
43 7 charts on the future of automation, World Economic Forum (2019); Advanced Robotics in the Factory of the Future, BCG (2019)
44 The Internet of Things: Applications for Industry EIU (2020);
45 Automation And A Changing Economy, Part I: The Case For Action, Aspen Institute (2019)

Deloitte expects the number of jobs in Manufacturing to grow by 1.96 million by 2028, as overall demand in the sector increases.[46] However, these jobs will need a new set of 'automation-ready' skills, including tech and computer skills, programming skills, and working with tools and technology.[47]

The high rate of technological change in Manufacturing, however, means that technical skills become defunct quickly. Instead, critical-thinking skills, creativity, attention to detail and – crucially – an ability to learn have become the most valued skills in the sector. As the technical side of the job continues to evolve, people who have the core skills to work well in a team and adapt will be priceless.[48]

Focusing on building non-technical skills in the manufacturing workforce now may also help address the consequences of future falls in overall employment levels. If companies focus on building overall digital literacy and soft skills, they can prepare their employees ahead of time for roles in new sectors, while simultaneously increasing their productivity in Manufacturing in the short term.[49] From a company's perspective, the business case for this comes from reducing the cost of redundancies and the negative press associated with mass layoffs.[50,51] On the more positive side, re-positioning the sector as more agile and a place to learn fundamental skills may help Manufacturing attract a younger, more digital-focused workforce who want to start their career in the sector because it is a good place to learn core skills for a broader career.[52]

1.2m

industrial robots will be deployed worldwide by 2025

Boston Consulting Group (2019)
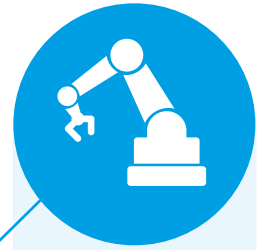
46 The jobs are here, but where are the people? Key findings from the 2018 Deloitte and The Manufacturing Institute skills gap and future of work study, Deloitte (2018)
47 The jobs are here, but where are the people? Key findings from the 2018 Deloitte and The Manufacturing Institute skills gap and future of work study, Deloitte (2018)
48 The jobs are here, but where are the people? Key findings from the 2018 Deloitte and The Manufacturing Institute skills gap and future of work study, Deloitte (2018)
49 Regions in industrial transition, European Commission (2013)
50 Cooper, C. L., Pandey, A., & Quick, J. C. (Eds.). (2012). Downsizing: Is Less Still More? (Chapter 7, p 199) .
51 Schulz, A. C., & Johann, S. (2018). Downsizing and the fragility of corporate reputation: An analysis of the impact of contextual factors. Scandinavian Journal of Management, 34(1), pp 40–50.
52 A millennial problem for manufacturers; New forces at work, RSM (2018)

The future of work and digital wellbeing

Next Steps for Manufacturing Companies

Examine current graduate and apprentice employment support in your area: Many high-income countries have support available for employers looking to help young people get their first role in Manufacturing or run programmes that pair companies with young talent with core STEM skills:

- France: In 2017, the French government announced state-sponsored digital technology training, including digital Manufacturing, for one million low-skilled job seekers and one million young people from disadvantaged backgrounds.[53] France also recently increased the maximum age for apprentices from 25 to 30 years old.

- Canada: Employers in Ontario are offering between C$6,000 to C$8,000 to hire youth workers, including in the Manufacturing sector. Employers can also receive financial support to cover 50%–83% of training programme costs.[54]

- UK: Lloyds Bank and MTC Apprenticeships offer support to SMEs looking to develop technology skills related to Manufacturing.[55] The partnership offers a £1m annual fund to cover the cost of hiring an apprentice for small engineering and Manufacturing businesses in the UK.

- UAE: Young Emiratis can join a new vocational training programme developed in partnership with Lockheed Martin Corp and the United Arab Emirates University (UAEU). This 22-month training course focuses on the manufacture of composites and ends with a work placement programme at a UAE Manufacturing company.[56] Companies taking part in the scheme get the chance to hire talented young citizens – an important consideration for many given the Emiratisation process, while the participants get to learn new skills from a top global manufacturer.

- Singapore: The Regional Training Centre in Singapore, sponsored by Rolls Royce, offers companies the chance to engage with a top research organisation that also trains roughly 4,000 young people a year on a broad spectrum of skills, from IT to management and leadership and technical skills. Young people joining this programme can benefit from employment opportunities with Rolls Royce or partner organisations and many graduates go on to a career in high-value Manufacturing for the Defence, Aerospace and Marine industries[57]

Become a champion of lifelong learning in your local community: To develop the attitudes to lifelong learning, teamwork and leadership mentioned above, HR departments should consider new 'community-based' learning opportunities. US company Stanley Black & Decker hosts local school teachers in their factories during the summer holiday. Here, existing employers take the teachers through the new technologies and skills pupils will need after graduation.

This helps educators tailor their courses to the skills in demand from potential employers and gives current employers the opportunity to develop presentation, leadership and empathy skills in a context they would not have been exposed to on the factory floor.[58]

53 In an Industrial Corner of France, 18,000 Jobs Are On Offer. Why Aren't People Taking Them?, NYTimes (2019)
54 Employment Ontario Government Incentives for Hiring Youth Workers | Newsroom, Excellence in Manufacturing Consortium (2018)
55 Calling all SMEs, MTC Engineering Apprenticeships Lloyds Non-Levy (2020)
56 Strata Manufacturing: Working to Empower Emiratis and Women of the UAE (2016)
57 Powering a digital future, Rolls Royce
58 A Global Standard for Lifelong Learning and Worker Engagement to Support Advanced Manufacturing, World Economic Forum (2019)

1.2.3 Using technology to create a more human Finance industry

Advanced analytics and Artificial Intelligence (AI) are changing Finance.[59] AI can deliver personalised services on a scale not possible from human teams. Self-driving agents manage day-to-day finances entirely autonomously, avoiding fees and monitoring. For instance, JP Morgan has invested in 'COiN', an AI technology that can review and extract data from approximately 12,000 documents in a matter of seconds, whereas a human would spend more than 360,000 hours of work on the same.[60] Machine Learning can also recognise patterns across data sets, making it an ideal tool to detect fraud or money-laundering.[61]

Within the next three years, machines may be able to perform 30% of the work done at a bank.[62] In some parts of the sector this is already happening. Between 2000 and 2018, the number of traders on the US cash equities trading desk at Goldman Sachs' headquarters fell from 600 to two. These two traders are supported by 200 computer engineers working with automated trading programs.[63] Deutsche Bank says that machine-learning and mechanisation will enable it to reduce its overall headcount by 10% in 2020.[64]

Though overall employment in sub-sectors like investment banking will decrease, automation presents a real opportunity to re-think retail banking. "[Outside of trading,] these changes are most likely to change parts of how people work rather than replace whole jobs", says Andrew Young, Financial Services Talent & Organisation Lead at Accenture. "Regarding the work done today, technology can automate simple, repetitive tasks or enable straight-through processing from customers, freeing up time for more complex or client-centric activities and demanding skills like empathy, problem-solving and judgement."[65]

This increase in customer interaction and decrease in more repetitive tasks is likely to boost overall job satisfaction. A natural experiment run in the financial services department of a large

As technology works best on simple, repetitive tasks, it can free up time for more complex or client-centric activities

Andrew Young, Financial Services Talent & Organisation Lead, Accenture

multinational corporation in 2005 found that increased customer orientation of roles was linked to overall job satisfaction.[66] And a study looking at job satisfaction in financial intermediary firms found that satisfaction was strongly linked with people's ability to deal with customer issues effectively – which is likely to become more common as people have more time to devote to tougher client challenges.[67] In turn, increasing job satisfaction has been shown to benefit financial services businesses. According to World Economic Forum analysis, the correlation between employee satisfaction and business unit profitability was stronger in the Finance industry than in any other industry except Manufacturing.

This evidence suggests financial services firms should embrace automating repetitive tasks and a more human-centric approach to non-routine customer interactions. In order to be successful, however, firms need to maintain transparency and inclusivity at each stage of the transition to ensure the 'human-focused' aspect is not lost in the face of short-term commercial interests. For example, shifts to more online tools have been linked with local branch closures in many places, which can cause localised job losses and greater financial exclusion for the elderly.[68] When considering how to make this shift, firms need to involve all stakeholders to ensure new systems and processes actually align with what people need and create space for employees to have a greater focus on the customer experience.

59 The new physics of financial services | How artificial intelligence is transforming the financial ecosystem, Deloitte (2018)
60 Artificial intelligence in finance, Alan Turing Institute (2019)
61 The new physics of financial services | How artificial intelligence is transforming the financial ecosystem, Deloitte (2018)
62 Machines could take over 30% of bank jobs: McKinsey, Finextra (2017)
63 The future of talent in banking: workforce evolution in the digital era, EY (2018)
64 The future of talent in banking: workforce evolution in the digital era, EY (2018)
65 Fit to compete: Accelerating digital workforce transformation in financial services, PwC (2019)
66 Saura, I. et al (2005). Relationships among customer orientation, service orientation and job satisfaction in financial services International journal of service industry management.
67 Gil, I., Berenguer, G., & Cervera, A. (2008). The roles of service encounters, service value, and job satisfaction in achieving customer satisfaction in business relationships. Industrial marketing management, 37(8), pp 921–939.
68 Bank branch closures hit over-50s hardest, Financial Times (2017)

Next Steps for Finance Companies

Design an inclusive digital transformation:
Digital transformation, especially when it involves redundancies, can be a source of tension between employers and employees.

However, when plans are transparent and focus on upskilling existing employees, it can benefit clients, managers and the workforce. For example, in 2018, Lloyds Bank in the UK realised it needed to embrace technology to improve its customer experience – a task that required new digital skills. To fill this gap, Lloyds announced an additional 4.4 million hours of learning and development for existing employees to help them build these capabilities over three years. People were kept informed about the progress of the strategy through a dedicated intranet site, quarterly magazine and through 300 dedicated internal 'learning champions' whose role it was to help people in their immediate network access the new resources.[69]

Creating technology tools with a human face:
A lot of the changes mentioned above involve more client interactions with technology. When considering these technologies, companies need to ensure people's overall user experience improves.

For example, Chase bank in the US (owned by JP Morgan) recently improved its customer experience by simultaneously offering new services online and in branch. In their app, they moved away from the traditional bank statement to more insight-driven notifications. This includes a 'today's snapshot' – a simple dashboard that uses basic visualisation to capture a client's spending and cash inflows. In their branches, the company launched a new service called 'Chase Chats', a series of live events to help customers improve their financial literacy in an informal, community-based experience.[70]

69 Towards a Reskilling Revolution, World Economic Forum (2019)
70 Best banks customer experience, Bankrate (2019)

1.2.4 Technology-enabled shifts to a diverse workforce in the Oil and Gas industry

Pressure from governments, consumers and, increasingly, activist investors is pushing many Oil and Gas companies to improve their sustainability.[71] Recent 'Net Zero' pledges from the world's top oil companies show the sector knows it needs to shift to a more sustainable business model.[72] Anticipating a low-carbon future, many Oil and Gas companies are turning into 'energy businesses', shifting their portfolios towards renewables.[73] Much of this shift is enabled by digitalisation. The wind energy sector is using predictive simulation systems that, by building a virtual 'twin' of each turbine, allow operating companies to remotely monitor their individual status and reduce the unpredictability in supply that previously held back the use of wind technology.[74]

In many ways, Oil and Gas companies may be better placed than others to cope with the transition to digitalisation, according to Professor

Paul de Leeuw, Director of the Robert Gordon University Energy Transition Institute. "Due to the cyclical nature of the sector, Oil and Gas companies are used to frequent transformation and change. With volatile commodities prices, companies have to be able to respond quickly to ensure that operations, business models and service provisions adapt to any new landscape."

A side effect of many of these transitions towards net-zero carbon emissions is a move away from working 'on site' on remotely located oil rigs in different countries or at sea. On-going research on robotised platforms, unmanned wellheads and robotised offshore operations may soon remove the need for humans on some of these sites entirely.[75] Research by Woodside Petroleum combining cognitive science technology with a NASA-developed humanoid robotic system is aiming to design offshore facilities fully operated by robots.[76]

71 Activist investors force change in the oil industry, Carbon Tracker (2019)
72 Oil giant BP is latest to pledge net zero emissions by 2050, Marketwatch (2020)
73 Energy companies turn to renewables to power oil and gas operations, Energy Mix Report (2020)
74 From bytes to barrels: the digital transformation in upstream oil and gas, Deloitte (2017)
75 From bytes to barrels: the digital transformation in upstream oil and gas, Deloitte (2017)
76 From bytes to barrels: the digital transformation in upstream oil and gas, Deloitte (2017)

These changes will not only ensure a more green future for the sector, but also present a new opportunity to help tackle one of the industry's other major problems: low diversity and inclusion. According to Professor de Leeuw, "this transition makes it easier for people from a more diverse background to apply for jobs [in the sector], as well as people less able to travel to remote sites". Being able to open up talent requirements to anyone with a STEM (Science, Technology, Engineering, Mathematics) background will also help the industry attract more women. Currently, women hold 30% of STEM degrees in the United States, but constitute only 14.5% of the Oil and Gas labour force.[77]

To make the most of this new opportunity, Oil and Gas firms should re-position some of their recruitment practices. During the downturn in 2014, many firms cut back on their graduate or entry-level schemes, which often bring the most diverse group of people into a company.[78,79] With commodities prices likely to remain volatile, companies should embrace recruitment as a long term solution to the digital skills gap and as an opportunity to introduce different types of talent to the sector.[80]
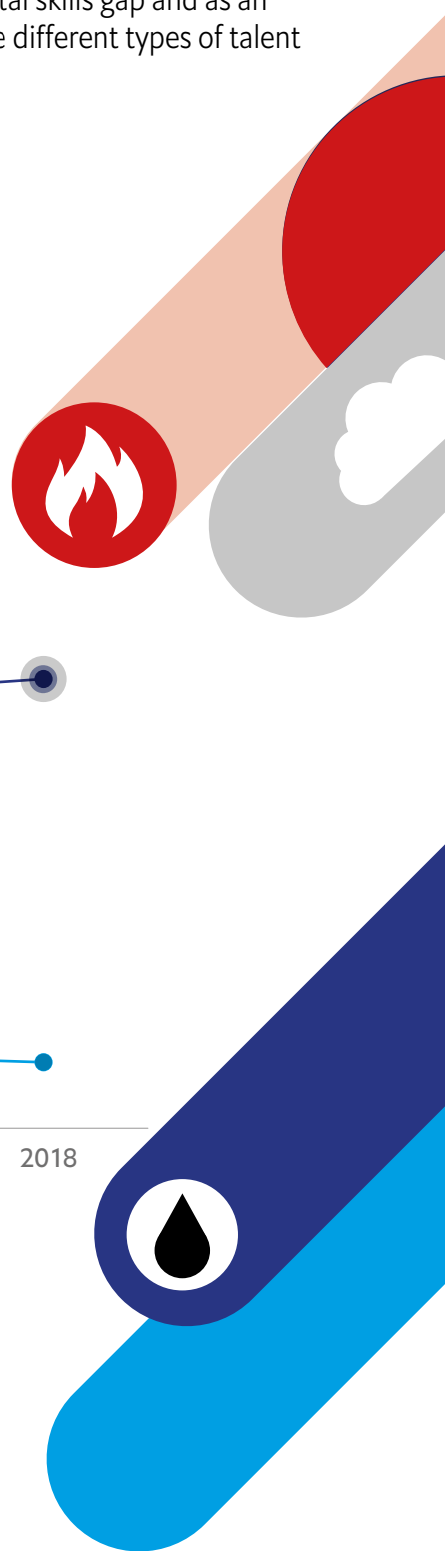
Burning the midnight oil

Number of nights spent offshore by employees in the oil and gas industry

● More than 50 nights offshore ● More than 80 nights offshore

'000s of personnel spending X nights at sea

Number of nights offshore
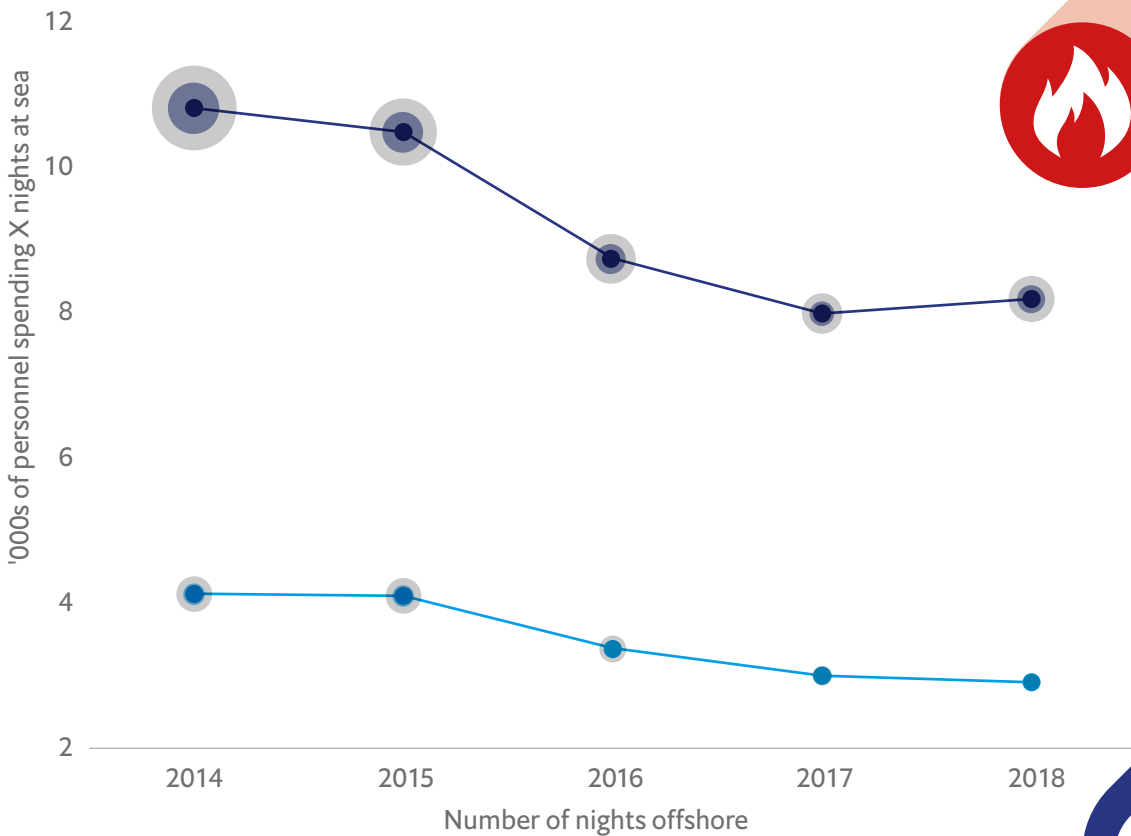
(The bigger the circle, the higher the '000s of personnel spending)
Source: OGUK (2019)

77 Promoting Gender Diversity and Inclusion in the Oil, Gas and Mining Extractive Industries, The Advocates for Human Rights (2019)
78 The Global Energy Talent Index Report (2019)
79 Addressing the barriers to BAME employee career progression to the top, CIPD (2017)
80 The Global Energy Talent Index Report (2019)

The future of work and digital wellbeing

Next Steps for Oil and Gas Companies

Changing recruitment practices to help boost diversity: As mentioned, entry-level employment can be a great way to bring more diversity into organisations. HR leaders need to ensure they have a dedicated approach to reaching and supporting people from different backgrounds. For example, Shell, which is repeatedly the only Oil and Gas company that is ranked in the top-50 employers for women, runs a dedicated programme for young people called 'Girls in Energy'. Delivered in partnership with North East Scotland College, the programme delivers weekly lessons, workshops and field visits to girls aged 14–16 in secondary education. Crucially, this programme goes to where their target group is to inform them about the potential in the sector, removing the need for self-selection to go for a job in energy.[81]

Offering bespoke support to make the sector more inclusive for groups with different needs: Tackling the Oil and Gas sector's diversity and inclusion issues also requires offering greater support for people within the industry – in particular, around flexible working, which is less available than in other industries. Centrica is a company that has been a leader in this since mid-2000s: their dedicated Carers Support Network offers benefits to people looking after someone part- or full-time, such as time off work for caring responsibilities, in addition to annual leave and 24-hour access to councillors. In 2014, they launched dedicated training for managers of carers to help them build the skills needed to support someone in this position, in addition to providing dedicated written resources on their website.[82]

81 Girls in Energy, Shell UK
82 Balancing work and family commitments, Centrica (2014)

1.2.5 Digital tools in Healthcare

Healthcare systems around the world, already facing stretched resources and talent shortages, are now further stressed with the outbreak of Covid-19. This situation is not set to improve on its own. According to the World Health Organisation, by 2035, the world will see a projected shortage of 12.9 million Healthcare professionals.[83]

In many areas, digitalisation can help Healthcare workers make better decisions more quickly – allowing them to work more efficiently and focus on the tasks that genuinely require a highly skilled person. In radiology, advances in Artificial Intelligence and Machine Learning mean computers can identify some clinically important information (e.g. the presence of a mass or diseases such as pneumonia) at near human levels of accuracy.[84] As the technology is still in its nascent stages, the potential for advances in these applications is significant.[85]

More broadly, advances in the uses of Internet of Things (IoT) technology are creating the option for more detailed monitoring of patients. For example, pills that contain ingestible sensors can tell a doctor if a patient has taken their medication and provide information from inside a person's gut in a non-intrusive manner.[86] More information from these digital tools will allow for better decision-making and more tailored treatment plans, but could also give Healthcare workers more opportunities to focus on the human side of caregiving, as routine checks are completed by digital tools.

In many ways, collecting information from patients is only the beginning. In the most advanced examples, technology is moving from helping people interpret information to allowing doctors to perform procedures while located thousands of miles away. In Canada, a doctor based in Hamilton has performed more than 20 remote surgeries including colon operations and hernia repairs for patients at a remote hospital over 400 kilometres away.[87] This technology is now expanding into more complex procedures. In 2019, a man with Parkinson's disease in China received remote robotic brain surgery from a doctor located on the other side of the country.

83 Depleting resources adding pressure to healthcare: Emerging trends: Healthcare: Industries, PwC
84 Yasaka, K., & Abe, O. (2018). Deep learning and artificial intelligence in radiology: Current applications and future directions. PLoS medicine, 15(11), e1002707.
85 Hosny, A et al (2018). Artificial intelligence in radiology. Nature Reviews Cancer, 18(8), pp500–510.
86 The Internet of Things: Applications for Industry, EIU (2020)
87 The surgeon who operates from 400km away, BBC (2014)

The implications of such capabilities are endless, especially for opening access to advanced treatment options. According to a study by the Lancet Commission on Global Surgery in 2019, "5 billion people do not have access to safe, affordable surgical and anaesthesia care when needed", resulting in approximately 1.5 million avoidable deaths per year.[88] This presents opportunities for efficiencies and advances in treatment plans.[89]

Technology can also help improve people's health, reducing overall demand on Healthcare systems. In India, a platform called Saathealth helps educate parents about the need to feed their children protein using the same customer relationship management (CRM)-based approach that many companies use to monitor customers. This method delivers content, vouchers and other incentives to those who use the digital tool and significantly increased children's protein intake.

The side effect of this transition to more use of digital tools is that the boundaries between Healthcare and tech workers are becoming more fluid. The co-founder and CEO of Saathealth, Dr Aakash Ganju, was a trained doctor before realising he could make more of an impact through technology-supported public health. "People coming in for treatment had such preventable problems, such as malnutrition from a lack of protein or diabetes which had gone undiagnosed," he noted. "I realised we could use technology to educate them in a way that empowered them to be included in the decision-making around their own health".

Healthcare leaders need to be ready to actively encourage technology-based innovations. In some countries, this is already happening: the National Health Service (NHS) in the UK is considering accredited continuous professional development (CPD) and flexible on-going training and career opportunities available completely online to facilitate reskilling.[90] Other ideas include the introduction of 'portfolio careers' – where Healthcare workers take secondments in academia or industry to foster the development of specialist skills. The aim of this programme is to enable synergies with other sectors, especially technology, and to support research and development of new approaches.[91]

Next Steps for Healthcare Companies

Examine which digital solutions worked during Covid-19 to build a more technology focused Healthcare system: Digital tools have been crucial in trying to keep Healthcare workers safe during the Covid-19 outbreak. For example, smart sensors, utilising 'Internet of Things' technology allowed doctors in the Shanghai Public Health Clinical Centre to remotely monitor patients with confirmed Covid-19 cases – reducing overall viral exposure.[92] Similarly, Israel's Sheba Medical opened a coronavirus telemedicine programme to allow physical isolation of patients with the disease.[93] Many of these changes, adopted during the crisis, could also bring benefits to Healthcare systems in the long term. As the virus becomes a more permanent feature of Healthcare landscapes, providers should review what worked in terms of digital tools employed in the pandemic and how they can be adapted for more long-term use.

Consider how public private partnerships will impact both commercial and health system performance: Technological advances have often been associated with the 'disruption' of sectors – where new start-ups challenge the dominance of existing, larger companies. As the sector is often providing a public good, Healthcare companies looking to expand their use of digital tools often need to take a more collaborative approach with existing players than seen in other sectors. For example, in the UK, technology company QDoctor worked with community practices when rolling out their new telemedicine service, rather than operating as a rival provider. By understanding and working within the existing parameters of the industry, the company can establish itself without forcing other options out of business, which could lead to gaps in service.[94]

92 The Internet of Things: Applications for Industry, EIU (2020)
93 The Internet of Things: Applications for Industry, EIU (2020)
94 Q doctor Company Site

88 Global Surgery 2030: evidence and solutions for achieving health, welfare, and economic development, The Lancet Commissions (2015)
89 Caregiving Isn't Easy — but digital tools make it easier, Medium (2016)
90 Preparing the healthcare workforce to deliver the digital future, NHS (2019)
91 Preparing the healthcare workforce to deliver the digital future, NHS (2019)

SECTION 2

Are these changes a good thing for employee wellbeing?

2.1 How is digitalisation benefitting employees?

The digitalisation of how we work gives people more flexibility over where, when and how they do their jobs. Flexibility allows individuals more control in their working lives and can drive increased inclusivity, diversity and productivity. In this section of the report, we look at how the three trends associated with the 'future of work' can create a better relationship between people and work, and the positive impact this has on employees themselves and a company's bottom line. However, digitalisation may also be associated with certain risks for employees and their mental wellbeing. We discuss these in Section 2.2.

2.1.1 Inclusion

Digitally-enabled flexible working has been shown to benefit parents, people with health conditions or disabilities and other groups who may otherwise struggle to remain in the workforce. According to a 2019 survey, 31% of women who took a career break after having children said they were forced to because of lack of employer flexibility.[95] Similarly, an experiment conducted in 2020 by Eliot Sherman, Assistant Professor of Organisational Behaviour at the London Business School, showed that offering remote working to all people in a company benefitted mothers' wellbeing and productivity significantly, with no negative impact on other employees.[96] For people who have mobility issues as a result of disability, remote

Dig(italise) it

Digitalisation in the way we work has benefitted both employees and businesses

Inclusion

Diversity

Productivity

83%
of people with a disability stated they were able to work because of the option to do so either partly or wholly from home
Source: GitLab (2020)

48%
of people working in virtual teams reported that over half their team members were members of other cultures
Source: Dulebohn and Hoch (2017)

85%
of businesses have increased productivity through technology-enabled flexible working
Source: Merchant Savvy (2020)

95 How the coronavirus pandemic will impact the future of work, CNBC (2020)
96 Sherman E and Doris A, Discretionary remote working benefits everyone , London Business School (2020)

working and online communications can offer them new opportunities: in a 2019 survey of people with a disability, 83% stated they were able to work because of the option to do so either partly or wholly from home.[97]

There is a clear commercial imperative for inclusion: it drives employee retention. A recent survey of company managers found that 78% of respondents believed "flexible schedules and telecommuting" are the most effective non-monetary ways to increase employee retention.[98] It is estimated that increasing the retention rate of women by 5% would save a 50,000-employee company up to US$8m per year.[99]

An experiment showed that offering remote working to everyone in a company benefitted mothers' wellbeing and productivity with no negative impact on other employees

Eliot Sherman, Assistant Professor of Organisational Behaviour at the London Business School

Expert Advice:

Eliot Sherman, Assistant Professor of Organisational Behaviour at the London Business School

Make sure, where possible, that policies are available to everyone, even if they're designed to support a specific group: "Work-from-home policies need to be available, and their use should be encouraged, universally within a company. When workers think the policy is exclusive to working parents, which often means working mothers, it can generate quite a lot of backlash and frustration, much of which reinforces existing stereotypes around motherhood and work. Covid-19 has of course reduced much of the pre-existing stigma associated with remote working, but we still have a long way to go in that regard.

2.1.2 Diversity

As well as supporting colleagues to stay in the workforce, digitalisation can also broaden who can access particular jobs, driving increased diversity. The advent of global teams also opens up the possibility of recruitment unbound by geographic location, which can support greater diversity and allow corporates to bring in people with skills and viewpoints they would not normally have access to. A recent survey of business respondents from 80 countries found that almost half of those who worked in virtual teams said their team included people from different cultures.[100]

Organisations looking to benefit from a more diverse and inclusive workplace should be aware of the impact of unconscious biases, which can influence people-related decisions, especially in areas like recruitment, promotion and performance management.[101] An unconscious bias is displayed when one unintentionally favours or discriminates against people due to the influence of background, experiences and environmental conditions. The prevalence of this bias prevents organisations from hiring diverse teams and improving workplace inclusion. This bias can manifest in many forms, including affinity for people with similar characteristics, basing opinions on impressions rather than facts, and gender bias.[102]

The use of new digital tools, such as AI, when appropriately developed, can help remove the attributes that lead to biases and learn how to detect potential biases.[103] For example, AI-driven recruitment software can be programmed to eliminate age, gender and other demographic information from the recruitment process, providing recruiters with a more diversified talent pool.[104] In addition, tools can compare an employee's Key Performance Indicators (KPIs) against tenure and alert managers when someone is consistently assigned fewer or less important tasks because of an unconscious bias.[105] Hence, AI can play a critical role in two areas: ensuring all qualified candidates have equal access to opportunities, and supporting managers in making fair employment decisions.[106]

100 Dulebohn, J. H., & Hoch, J. E. (2017) Virtual teams in organizations, Human Resource Management Review 27(4)
101 How can AI be used to Reduce Bias in Recruitment?, my HR Future (2019)
102 What is unconscious bias in the workplace, and how can we tackle it?, CIPHR (2019)
103 The role of AI in mitigating bias to enhance diversity and inclusion, IBM (2019) 104 Diversity in the workplace: using AI tools to reduce human bias in hiring (2018)
105 Can Technology Remove Bias From The Workplace?, Digitalist (2018)
106 The role of AI in mitigating bias to enhance diversity and inclusion, IBM (2019)

97 The Remote Work Report by GitLab: The Future of Work is Remote, Git Lab (2020)
98 25 Key Remote Work Statistics for 2020, Business 2 Community (2020)
99 Culture of Equality in The Workplace, Accenture

The future of work and digital wellbeing

However, if AI is not designed to exclude bias, it can instead become a tool that perpetuates inequalities. According to Monideepa Tarafdar, Professor of Information Systems at Lancaster University, it is important to understand and educate on the biases that can stem from the individual who is building or operating the AI. "Any digital tool will not be bias-free if it's not specifically designed, tested and checked to be. This includes critically examining any historic data being used that might perpetuate an unequal status quo."

Increasing diversity also feeds back into better overall business performance. A McKinsey-led study of companies in the UK, France, Germany and the US found that in the period 2008–2010, companies with more diversity in their highest managerial teams were also top financial performers.[107] Investments made by teams with people from different ethnic groups outperformed those of people from the same ethnic group by 26%.[108]

According to Laurel Smith-Doerr, Professor of Sociology at the University of Massachusetts at Amherst, to realise these benefits, companies need to do more than simply have employees from different backgrounds working in their company: "the gains from diversity around, for example, increasing innovation are only felt when teams are integrated and non-hierarchical – when everyone's voice can be heard". Unless companies actively foster this, Smith-Doerr warns, not being co-located could actually make discriminatory practices more common. For example, recent research from Sharla Alegria at the University of Toronto shows that South Asian employees, though not as underrepresented in the technology sector as some ethnicities, were often routinely left out of decision-making, as meetings are often held at times when it's unfeasible for them to participate.

Expert Advice:

Laurel Smith-Doerr, Professor of Sociology, University of Massachusetts, Amherst

Learning inclusive practices from activism:
"Less hierarchical modes of organizing have been developed in collectivist network organizations, building on knowledge created by Black feminist activists in the 1970s, for example in the Combahee River Collective (1977).[109,110,111] Some of the feminist approaches to equitable meeting practices are simple but effective, such as turn taking, and have been applied in academic settings. They may also be adapted to business settings, particularly in knowledge intensive industries.'"

109 Rothschild, J. (2016). The Logic of A Co-Operative Economy and Democracy 2.0: Recovering the Possibilities for Autonomy, Creativity, Solidarity, and Common Purpose . The Sociological Quarterly, 57(1), 7–35.
110 Smith-Doerr L (2004) Flexibility and Fairness: Effects of the Network Form of Organization on Gender Equity in Life Science Careers, pp 25-54
111 (1977) The Combahee River Collective Statement, BlackPast

Any digital tool will not be bias-free if it's not specifically designed, tested and checked to be
Monideepa Tarafdar, Professor at the Lancaster University
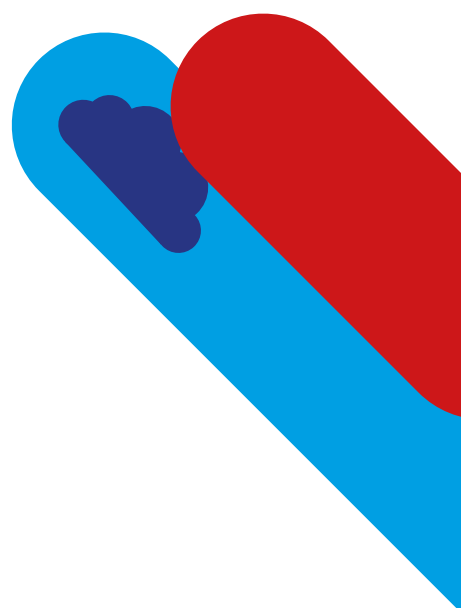
107 Is there a payoff from top-team diversity?, McKinsey (2012)
108 Finally, Evidence That Diversity Improves Financial Performance, Harvard Business Review (2018)

2.1.3 Increased productivity

Increased digitalisation in how we work can also improve productivity. Studies show that 85% of businesses have increased productivity through technology-enabled flexible working,[112] and remote workers can be 20%–25% more productive than their onsite colleagues.[113] Greater control over their working day, fewer distractions, and less time wasted commuting all contribute to this increased productivity.[114] It may also be linked to higher levels of overall positive sentiment associated with flexible working: 90% of employees say the practice improves their morale. Interestingly, a Harvard Business Review study highlights that remote workers who go to the office at least once per week report higher rates of engagement and are more likely than fully remote or fully office-based workers to say they have a best friend at work.[115]

These productivity benefits come alongside cost savings for businesses that would otherwise maintain a large office presence. A recent study shows that by allowing remote working, an organisation saved nearly $2,000 per employee on its office space rent, simply by using the space more efficiently.[116] These financial benefits are also felt at an employee level. According to Global Workplace Analytics data, individuals can save between US$2,500 and US$4,000 per year working remotely half the time,[117] primarily due to reduced costs for travel, parking, and food.[118]

2.1.4 Physical health benefits

As discussed above, skipping the daily commute is a key benefit of working from home. In addition to saving time and money, not having to commute can also help employees stay healthy. Gallup research has found that one-in-three workers who spend over 90 minutes on their commute have a neck or back condition that has caused recurrent pain in the past 12 months.[119] Hence, one way to limit exposure to these physical issues is through working from home. However, working from home in non-ergonomic set-ups may actually be harmful for the physical health of employees (further discussed in Section 2.2.4).

Individuals can save between

US$2,500

and

US$4,000

per year working remotely for 2–3 days a week

Global Workplace Analytics (2020)

Remote working also enables employees to create a personalised schedule. Employees have designed various ways to stay active while working from home during the pandemic, such as scheduling walking conference calls, using mid-work day breaks to exercise, or utilising standing desks.[120] Working from home can also promote healthy eating. While food options are limited in the office, at home employees can access their own kitchen and studies have shown that 42% of all remote workers eat healthier than they did in the office.[121]

Better physical health is not only beneficial for employees but also for businesses. A study has found that employees who experienced better physical health during the pandemic are twice as likely to have maintained or improved their productivity on collaborative tasks, compared to those with worse physical health.[122]

112 Remote Working Statistics & Charts (2020 Update), Merchant Savvy (2020)
113 25 Key Remote Work Statistics for 2020, Business 2 Community (2020)
114 Covid-19 Outbreak: Supporting Employee Wellbeing, AON (2020)
115 Helping Remote Workers Avoid Loneliness and Burnout, Harvard Business Review (2018)
116 The benefits of remote work—for both employees and managers, WeWork (2020)
117 Work-at-Home After Covid-19—Our Forecast, Global Workplace Analytics (2020)
118 Productivity, Retention And Cost Savings: Why Working From Home Benefits Employees And Employers, wbur (2019)
119 Well-Being Lower Among Workers With Long Commutes, Gallup (2010)
120 10 Ways To Stay Active While Working From Home, Forbes (2019)
121 Remote Work: The Surprising Effects On Our Health, Digital Nomad Soul (2020)
122 What 12,000 Employees Have to Say About the Future of Remote Work, BCG (2020)

The future of work and digital wellbeing

Expert Advice:

Sara Maude, Workplace Wellbeing Specialist

Workforce survey on the impact of Covid-19:
"As we move into the next phase of the Covid-19 crisis, now is a key time to take a sense check of your people and establish how they are feeling, what their needs are and what it will take to enable them to move forward. We are all in the same boat, but in different cabins, so we need to check in with people to ask what it is that they need going forward.

Find out what worked well for your people during the Covid-19 mandated lockdown and what they found difficult and why. Make sure to include considerations of meeting culture; workstation assessments; equipment and technology; systems and processes and mental health support. This level of data and intelligence will help you assess the impact lockdown has had on your teams, your managers, performance, operations and the business as a whole and create comprehensive plans to confidently move forward."
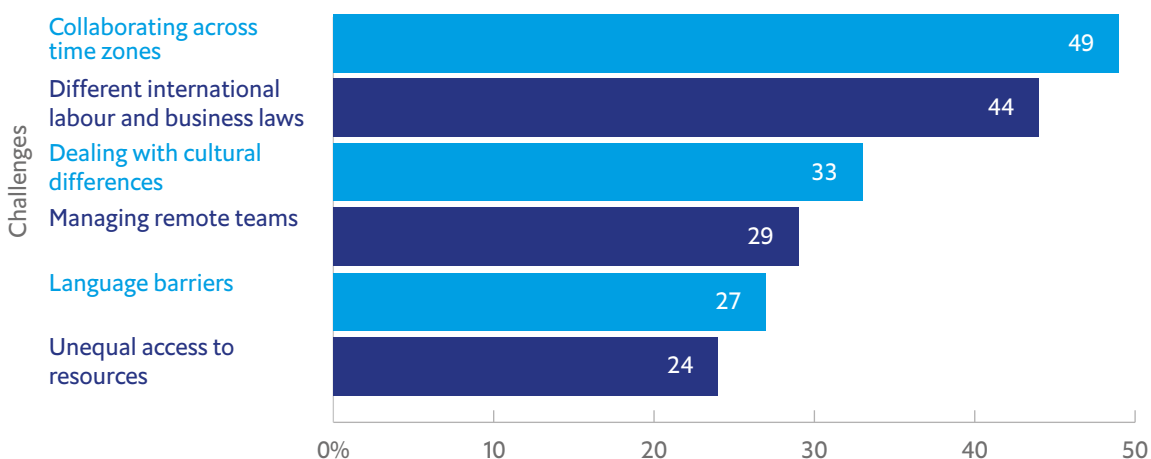
2.2 What are the risks?

Despite the potential benefits, employees do not automatically stand to gain from digital transformation. Many of the issues that were challenging in traditional working environments continue, and can be amplified, by unchecked digitalisation. In this section, we look into three critical risks businesses need to consider: work-home conflicts, difficulties in communication and exacerbating inequalities. At the end of this section, we discuss how these risks impact employee mental health.

2.2.1 Work-home conflicts

Increased digitalisation of how we work blurs the lines between our work and home lives, potentially increasing work-home conflicts. This ambiguity can be physical. Most remote working – especially in current pandemic times – occurs at home, bringing partners, children, parents and roommates into closer proximity to the workspace. It can, however, also be psychological, as constant communications from work make it harder to 'switch off'. We discuss these dangers in Section 2.3 on mental health section.

Working round the clock

% of HR professionals who saw ____ as their top challenge managing global teams.

Challenges	%
Collaborating across time zones	49
Different international labour and business laws	44
Dealing with cultural differences	33
Managing remote teams	29
Language barriers	27
Unequal access to resources	24

Source: Society for Human Resource Management (2019)

Conflicts due to physical proximity have been a particular problem during Covid-19. In the EIU survey of people who have worked from home during this period, one-quarter of respondents said distractions in surroundings was their top issue while working from home.

This problem was particularly evident for young people, who are less likely to have an office or personal space where they can work. In a recent study from Cushman & Wakefield into generational differences while working from home, 70% of Generation Z and 69% of Millennials reported challenges, compared to 55% of Baby Boomers. Within these difficulties, Gen Z and Millennials are most likely to have inadequate home workspaces, unable to find space for focused work without distractions.[123, 124]

Parents were also disproportionately impacted, especially mothers, many of whom have had to deal with children being at home while schools were closed. In our survey, over a quarter of respondents with children highlighted that caring responsibilities were the hardest aspect of working from home during the pandemic, compared to 13% of respondents without children. This challenge appears to have impacted mothers more than fathers. A recent study from the BBC found that

for every hour of uninterrupted work that mothers could do in similar work-from-home situations during lockdown, fathers were able to do three – citing that mothers were more often responsible for more childcare and more housework.[125]

These challenges present a clear business risk for employers, especially if people continue to work from home more in the long term. Although most people are more productive when given more flexibility, many also appear to be struggling with the current dominance of remote working. One-in-three people still do not feel their team is as productive working from home, which could translate into a significant fall in overall output[126] As we discuss in Section 3, the answer is not to install a blanket policy in favour of or against working from home, but to identify the people who are struggling either way and tailor support that works for their situation.

Women (not) at work

Female participation in the workforce still lags behind that of males in many countries

Key

(% of women in the workforce)

- 0–10
- 10–20
- 20–30
- 30–40
- 40–50
- 50–60
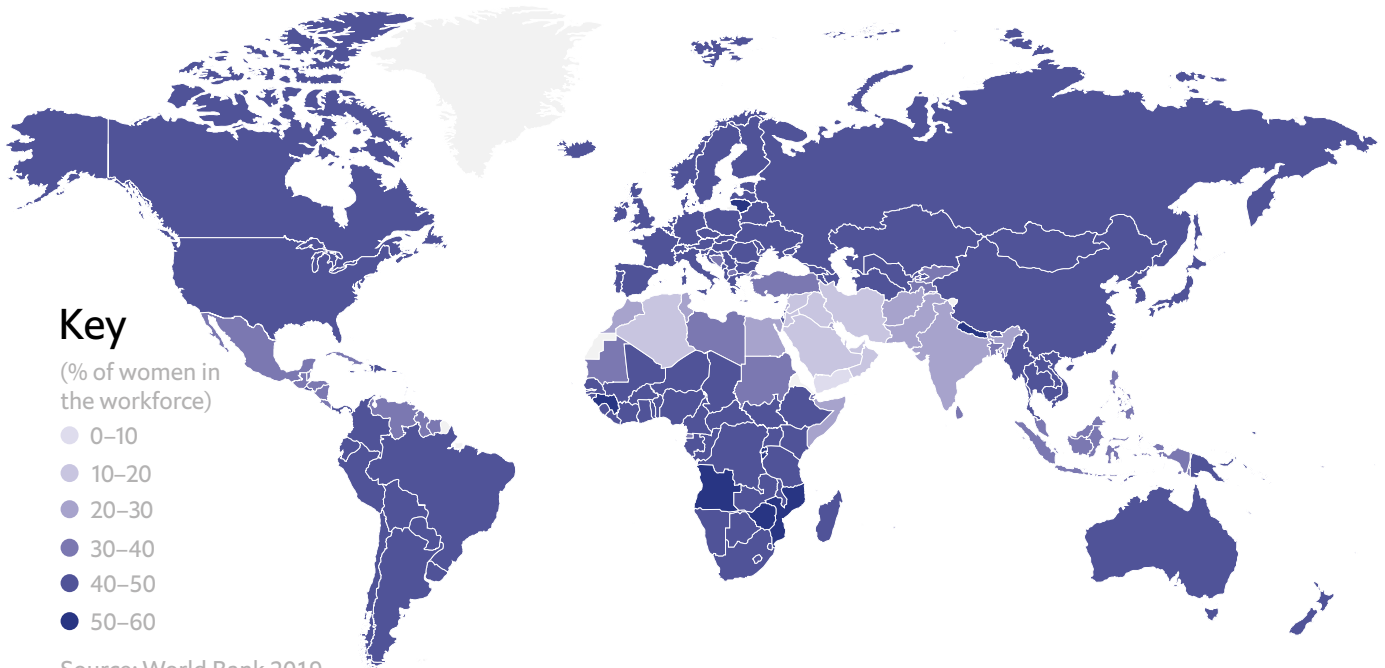
Source: World Bank 2019

123 Future of Workplace: How will COVID-19 and data shape the new workplace ecosystem?, Cushman & Wakefield (2020)
124 Future of Workplace: How will COVID-19 and data shape the new workplace ecosystem?, Cushman & Wakefield (2020)
125 Mums 'do most childcare and chores in lockdown', BBC (2020)
126 Future of Work post the COVID-19 pandemic , EIU Survey (2020)

The future of work and digital wellbeing

Expert Advice:

Ashley Nixon, Associate Professor of Human Resource Management and Organisational Behaviour at Willamette University

Use software to help employees mediate work-home conflicts: "Organisations can offer or design applications to help mediate work-home life for their employees. Potential functionality should include reminders for employees to briefly disengage after a couple hours of work, perhaps through a reminder to take a five-minute walk. Further, they should facilitate scheduling or muting of notifications during certain times – and allow a team to coordinate these activities on a common platform. The disengagement allows employees to recover, re-energising them for future work and higher productivity over time."

2.2.2 Difficulties in communication

The data collected from the pandemic has highlighted that many people still struggle to communicate effectively using digital tools. Although increased familiarity with these tools during the pandemic has helped some people, problems persist.[127] Almost half (48% of respondents in the EIU survey) said they still struggle with aspects of their jobs involving engaging with others online. These included difficulty coordinating multiple people's inputs (48%), reading personal cues (38%) and building rapport (32%). One-in-five respondents still do not feel comfortable conducting external or client meetings online and a similar proportion struggle to onboard new joiners remotely.

These challenges are likely to impact some business areas more than others. A recent study found that previously office-based salespeople that relied on face-to-face interaction are the ones most struggling with online communication.[128] They also found that research and development teams struggle to maintain dynamic collaboration and brainstorming; our survey supports this finding – 20% of respondents reported struggling with problem-solving and troubleshooting during lockdown.

Business leaders concerned about this issue might want to ensure their companies are using digital tools designed for collaborative and easy communications. A study undertaken during lockdown found that remote workers who use instant messaging (IM) are more likely than non-users to report that their productivity improved when working from home, and are less likely to experience feelings of loneliness, isolation and disconnection while working remotely.[129] This feeling of connectedness may be linked to IM's functionality: allowing for a quick back and forth that is more conversational and allows people to respond to colleagues in close to real time.

127 Future of Work post the COVID-19 pandemic , EIU Survey (2020)
128 Future of Workplace: How will COVID-19 and data shape the new workplace ecosystem?, Cushman & Wakefield (2020)
129 Report: Remote work in the age of Covid-19, Slack (2020)

The future of work and digital wellbeing

2.2.3 Exacerbating inequalities

For employees to benefit from the flexibility of digitalisation, they need to have access to the internet outside their workplace and be comfortable using digital tools. Employers should not assume that everyone has these. In the US alone, 21m people lack access to the internet according to the Federal Communications Commission,[130] and one-in-five respondents in the EIU's survey stated connectivity and technology issues were a key challenge for them during lockdown. Further, a recent Pew Research study found that 40% of Americans could not answer basic questions used to test digital literacy.[131] Moreover, confidence using digital tools varies considerably among school leavers in different countries.[132]

Older employees are more likely to struggle with work-related digital transitions. Over one-quarter (27%) of our survey respondents over 45 years of age highlighted technology and connectivity issues as their greatest struggle while working from home, compared with just 16% of respondents aged 18–24. And over one-third of respondents over 45 years of age mentioned that the digital tools available to them were not sufficient to do their job effectively, compared to less than one-fifth of young people. Most concerning, over one-quarter (26%) of people aged 45 and older wanted access to IT support from their employer during lockdown, but were not offered it.[133]

Digital transformations can also cause problems for people from lower socio-economic backgrounds. "When college campuses and coffee shops shut down, many more disadvantaged people lost access to free WiFi," says Dr Shelton Goode, CEO and President of Icarus Consulting. "This is likely to be why Covid-19 has been so damaging to lower socioeconomic groups, who then can't access work or job opportunities online in the same way."

Furthermore, between sectors, the ability to work from home is dominant in professional and managerial jobs, while those working in services or the caring sector find it more difficult.[134]

1-in-4

respondents aged above 45 said technology and connectivity issues is their greatest struggle while working from home

EIU Survey (2020)

"The opportunity to work from home before the pandemic was skewed towards the most privileged," said Alan Felstead, Research Professor at the University of Cardiff. "They were among the higher-paid occupational groups and had the privilege to work at home whether they took it up or not." This divergence has led to both more cases and deaths from Covid-19 among lower socioeconomic groups as well as more job losses. Nearly half of the 20 million jobs cut in the United States during April were in retail, restaurants, and hotels.[135, 136]

130 How the coronavirus pandemic will impact the future of work, CNBC (2020)
131 A visual representation of America's digital literacy, World Economic Forum (2019)
132 International Computer and Information Literacy Study 2018, IEA (2018)
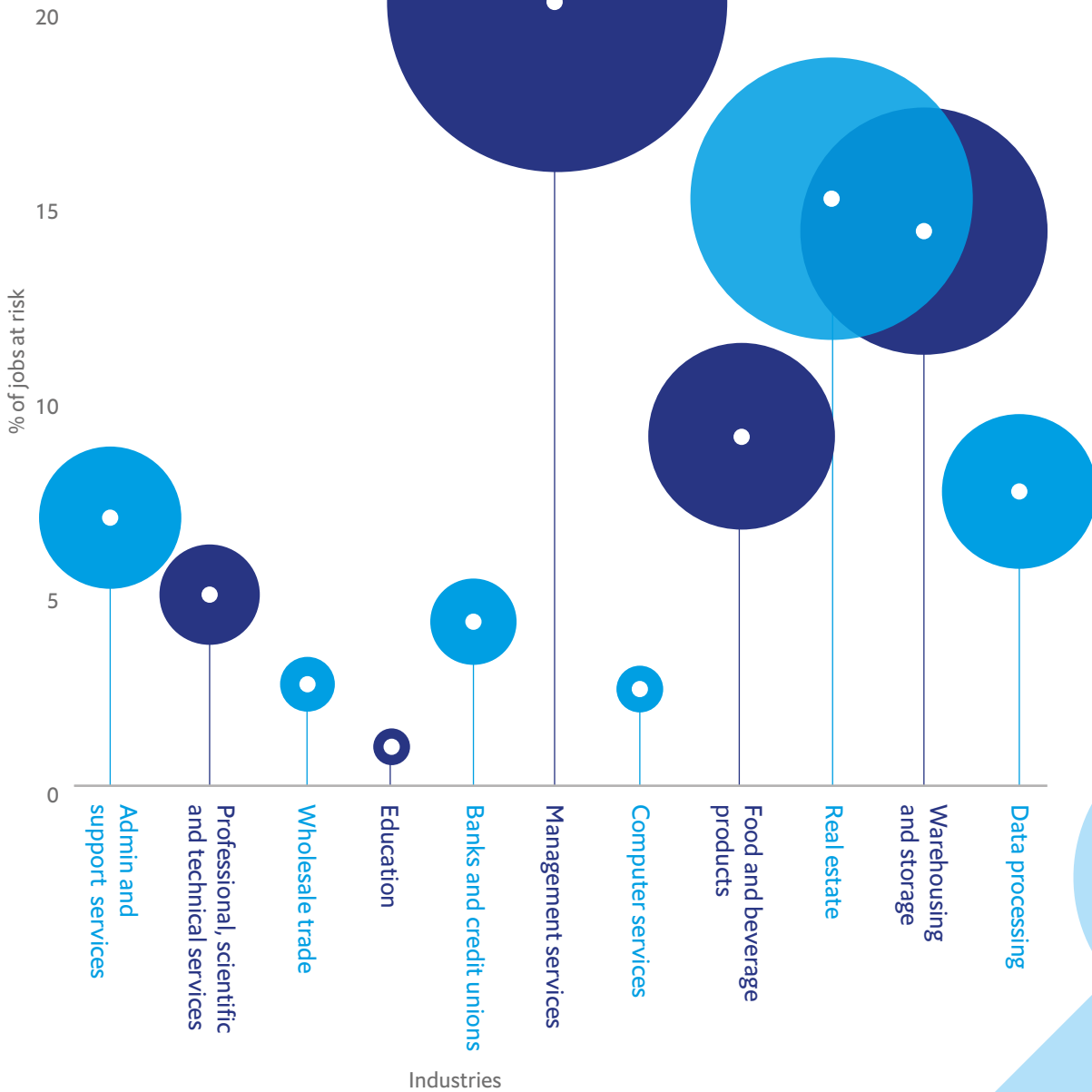133 Future of Work post the COVID-19 pandemic , EIU Survey (2020)
134 Which jobs can be done from home?, ONS (2020)
135 Interview with Alan Felstead, Research Professor at the University of Cardiff
136 Up to 6 million white-collar workers could lose their jobs in another wave of cuts as coronavirus fallout spreads to other parts of the economy, Business Insider (2020)

Covid cuts

Non-service sector
industries most exposed to
a second wave of job losses

% of jobs at risk

20

15

10

5

0

Industries

Admin and
support services

Professional, scientific
and technical services

Wholesale trade

Education

Banks and credit unions

Management services

Computer services

Food and beverage
products

Real estate

Warehousing
and storage

Data processing

Source: Bloomberg Economics (2020)

The future of work and digital wellbeing

Expert Advice:

Dr Shelton Goode, CEO and President of Icarus Consulting

Make sure you're offering flexibility wherever it can be given, not just for people in office-based roles: "Flexible working should not only be available for people whose jobs can be done remotely. For people who have to be on-site, business leaders need to focus on where they can be given more flexibility despite this. For example, more control over shift times, doing certain parts of their job, where possible, from home or promoting other options such as job shares. It's critical that these people still feel part of the conversation around transitions and are not overlooked."

4 / 10

people had not been offered employer support to purchase home office equipment

EIU Survey (2020)

2.2.4 Physical health risks

The digitalisation of the way we work can also have negative consequences for physical health, as research links increased use of digital technology to a lack of physical activity.[137] Prolonged sitting without appropriate breaks is linked to a wide range of health complications, including poor posture, back and neck pain, stiff and weak muscles, poor cardiovascular health and increased risk of diabetes.[138] This risk has been exacerbated during the pandemic. Studies showed an increase in musculoskeletal issues even within the first two weeks of mandated lockdown in the UK.

More than half of respondents in a survey conducted by the Institute for Employment Studies reported new aches and pains, especially in the neck (58%), shoulders (56%) and back (55%), compared to their normal physical condition.[139] A study found that these issues could get worse if unchecked as the prevalence of remote working increases, including additional problems like increased strain on the eyes and injuries to hands and wrists due to repetitive typing.[140]

These issues are likely driven by the fact that few people will have an equivalent dedicated, ergonomically tailored work space at home, as they do in the office. A study conducted in the US found that 41% of respondents did not have the right equipment to work effectively from home, and 31% said they were not confident that their home internet was robust enough.[141] Further, many companies are not doing enough to support their workers – in our recent survey four-in-ten people had not been offered employer support to purchase home office equipment.[142]

To promote good employee health, companies need to focus on both physical health and mental wellbeing (see Section 2.3). To encourage physical health best practices, employers need to create new structures that offer support independent of where people work, making it easy for employees to remain fit and well. For example, Boston Consulting Group has created wellness challenges for employees and highlighted winners in the company newsletter, and is offering online fitness classes and health webinars.[143]

137 How much does technology mess with your physical health?, Medium (2018)
138 How does WFH affect the body? Digital model paints a dark picture, Inverse (2020)
139 Working from home creates significant physical and mental challenges, Workplace Insight (2020)
140 The future of the remote worker, Directly Apply (2020)
141 COVID-19: Making remote work productive and secure, PwC (2020)
142 Future of Work post the COVID-19 pandemic , EIU Survey (2020)
143 What 12,000 Employees Have to Say About the Future of Remote Work, BCG (2020)

The future of work and digital wellbeing

2.3 Digitalisation and mental wellbeing

Protecting mental health in the workplace is becoming a major business priority for company leaders. This focus is not only driven by a sense of duty to their workforce, but also a pressing commercial incentive. Depression and anxiety disorders alone cost the global economy US$1trn each year in lost productivity,[144] and for every US$1 invested in treatment for common mental health disorder, there is a return of US$4 in improved health and productivity.[145]

Digitalisation is a significant risk factor for employee mental health, through increased stress from an 'always-on' culture and increased isolation from remote working. In this section we explore the research around these two trends, considering the early findings of the impact of Covid-19 on this area. In Section 3, we look at how digital tools might themselves provide some of the answers to these challenges.

2.3.1 Digitalisation and stress

According to Dr Goode, Chief Executive Officer and President of Icarus Consulting, digital tools can pressure employees into feeling that they have to be constantly visible online to prove that work is getting done.[146] A survey in 2017 found that almost one-third of employees felt there was pressure to check emails on weekends and over half mentioned struggling to switch off from work "at least sometimes".[147]

This pressure to be 'always-on' has been linked to higher employee stress. A study of two Europe-based global corporations showed that constant connectivity reduces employees' ability to psychologically detach from work, deteriorating their wellbeing.[148] Similarly, a 2019 study found that people who access work emails and calls outside of work hours are more engaged with their jobs, but more stressed. Over one-quarter of people (28%) could not switch off from work mentally; 26% experienced interference with family or personal life; and 20% reported mental exhaustion. Conversely,

26%

employees experienced interference from family or personal life while trying to work from home

Myers-Briggs Company (2019)

people who worked in an organisational culture that allowed people to mentally switch off from work reported being less stressed.[149]

In extreme cases, increased stress can lead to a phenomenon called 'burnout' – defined as a "state of exhaustion in which one is cynical about the value of one's occupation and doubtful of one's capacity to perform".[150] A Gallup survey indicated that one-in-four employees feel burned out at work very often or always[151], and the trend is particularly prevalent among young workers. Deloitte found that 84% of Millennials in the US have experienced burnout in their current job.[152] Women are more likely to suffer than men.[153]

Covid-19 has added to this problem. Added concerns over the pandemic are affecting overall levels of anxiety, which is compounded by more people working from home. Without a daily commute, there is no natural break at the start and end of the working day to allow people to switch off, making it easier for work to spill over into home life. Even prior to the pandemic, over one-fifth of remote workers cited unplugging after work as the biggest struggle with working remotely.[154]

144 Mental health in the workplace, WHO (2019)
145 Mental health in the workplace, WHO (2019)
146 Interview with Dr Shelton Goode, CEO and President of Icarus Consulting
147 Employees sacrifice wellbeing for company productivity, HR Magazine (2017)
148 Büchler, N., ter Hoeven, C. L., & van Zoonen, W. (2020). Understanding constant connectivity to work: How and for whom is constant connectivity related to employee well-being?. Information and Organization, 30(3), 100302.
149 Type and the always-on culture, Myers-Briggs Company (2019)
150 Bakker, A. B., & Costa, P.L. (2014). Chronic job burnout and daily functioning: A theoretical analysis. Burnout Research, 1, 112–119.
151 Employee Burnout, Part 1: The 5 Main Causes, Gallup (2018)
152 Workplace Burnout Survey, Deloitte (2015)
153 Women are more likely to suffer work burnout than men, study finds, Independent (2018)
154 State of Remote Work 2019, Buffer (2019)

Further, according to Alan Felstead, Research Professor at the University of Cardiff, "with movement restricted during the pandemic and a number of downtime activity options cancelled, societal structures such as weekends were taken away".[155] This lack of alternatives puts the onus back on the workers to be able to set their own boundaries around when work should end.

Business leaders should be concerned about the rise in stress, as it may lead to significant additional business costs. The annual cost of stress-induced burnout to the global economy has been estimated at £255bn (approximately US$315 billion).[156] In the US, as many as one million workers miss work each day due to stress, which translates into an annual loss of US$150–300bn for employers.[157] These costs are mostly incurred through lost work days – employees who say they feel 'burnt-out' are 63% more likely to take a sick day.[158]

Expert Advice:

Sara Maude, a workplace wellbeing specialist

Invest in Management Mental Health Awareness Training "Managers themselves have been under tremendous pressure to cope and support their team during this time of change and uncertainty. The impact of Covid-19 has seen people's resilience pushed to its limits. Now is the time to invest in equipping managers with the knowledge and skills on how to spot signs of mental health issues among their team members and have confident and effective conversations that will help get an employee to a better place. The greatest fear in managers when it comes to managing mental health in the workplace is of getting things wrong or making things worse. Management Mental Health Awareness training can dispel that fear, enabling managers to be proactive in tackling mental health in the workplace and supporting their teams in the best way possible."
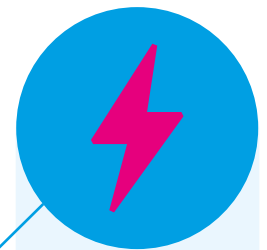
US$315bn

is the estimated annual cost of stress-induced burnout globally

World Economic Forum (2016)

155 Interview with Alan Felstead, Research Professor at the University of Cardiff 156 It's costing the global economy £255 billion, so what can we do to stop workplace burnout?, World Economic Forum (2018)
157 Here's What Burnout Costs You, Forbes (2016)
158 Employee Burnout, Part 1: The 5 Main Causes, Gallup (2018)

2.3.2. Digitalisation and isolation

One of the big side effects of increased digitalisation is more people working away from the office. This change can mean people experience fewer personal interactions during the day, especially for those who live alone or not with friends and family – leading to feelings of isolation. In Buffer's 2020 State of Remote Work survey, 20% of remote workers surveyed highlighted loneliness as their biggest struggle while working remotely.[159] Loneliness can stem from employees lacking communication with others and feeling unplugged or disconnected from the workplace.[160]

The number of people working solely from home for the first time during Covid-19 has accelerated this trend. According to a survey by Opinium in April 2020, 46% of respondents working from home during Covid-19 felt isolated and a further 36% were concerned about the long-term effects on their mental health.[161] In the EIU survey, a quarter of respondents wanted access to team building or other social activities, which were not being offered by their employer, and one-in-eight people saw isolation as their biggest problem while working from home.

Business leaders need to focus on this issue, as studies show that social isolation is correlated with mental health problems. Chronic loneliness costs UK employers around US$3bn a year through effects on health, productivity and staff turnover.[162] Studies have shown that loneliness can be associated with severe health risks such as depression and compromised immunity, and additionally, the mental and physical effects of social isolation lead to higher costs for sick leave and health insurance claims.[163] If people are going to work from home post-pandemic, employers need to have strategies in place to combat isolation – in similar ways as they have recently engaged with issues such as stress and depression.

Expert Advice:

Dr Ella Hafermalz, Assistant Professor at the KIN Centre for Digital Innovation

Establishing communication channels:
"All employees lead a front-stage life, our day-to-day work, and a back-stage life, where we interact with colleagues. Digital communication channels can support running back-stage communications in parallel to everyday tasks, where employees can discuss their performances, trouble-shoot problems, and have informal discussions. Maintaining the informal spirit of these backstage communication channels is important. Managers should not try to control these channels, but should promote responsible use. Having informal communication channels available builds competence and confidence in remote workers, while enabling a sense of belonging in them, both professionally and socially (to the team)."[164]

164 Hafermalz. E. and Riemer, K. In Press. "What client-facing remote workers can learn from tele-nurses about 'belonging through technology.'" European Journal of Information Systems. (upcoming)

Annually chronic loneliness costs UK employers

US$3bn

New Economics Foundation (2017)

159 A Guide to Conquering Remote Work Loneliness From Remote Workers, Buffer (2018)
160 How to Combat The Isolation Between Co-Workers During Forced Remote Work – Forthright (2020)
161 34% of employees struggle with mental health when working from home, Employee Benefits (2020)
162 The cost of loneliness to UK employers, New Economics (2017)
163 Loneliness in the Workplace Can Be a High Cost For Employers, Workplace Mental Health (2018)

SECTION 3

What should companies be doing to support their employees?

Companies need to actively manage the transition to digitalised working to ensure they maximise the positive impacts for their employees and minimise the risks. Companies that create new online systems without considering how they are impacting their employees, or see changes happening organically and do not intervene, risk decreasing productivity, lowering employee retention and increasing healthcare costs. Business leaders need to be ready to make changes, from high-level cultural shifts to new policies and re-examining the specific programmes and tools teams are using. According to Dr Almuth McDowall, Professor of Organisational Psychology at the University of London, organisations need to build their digital leadership capacity to not only focus on productivity and efficiency, but also on providing support to employees. In this section, we explore how companies can best manage cultural, policy and support services transitions.

Levelling up

Organisations need to support employees throughout their organisations

Removing stigmas from accessing support

Leading by example is critical, as leaders are key players in making people feel comfortable accessing support. They can show they are aware and empathetic by talking directly to teams whose employees are not accessing support.

According to Sara Maude, a workplace wellbeing specialist , "the companies with the best culture around mental health are those where the leadership themselves have been honest about how they're feeling and create the sense that everyone in the company is in it together".

Turning policies into practice

Companies and governments alike have introduced new policies around digital wellbeing. Policy mandates should focus on areas like training, to instil the fundamental skills people need to be able support their colleagues and develop good practices themselves.

In 2019, Bank of America launched a manager-training programme focused on resilience and stress management, as well as signs of anxiety or stress to watch for in their direct reports.
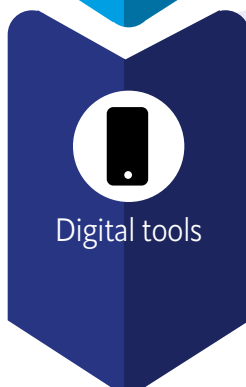
Digital tools

Employers need to create digital mirrors of existing processes and support services, and think about how digital tools may help expand their offering. Additionally, they can offer home office stipends to help create a productive work environment.

During the pandemic, Google is offering its employees exercise classes; cooking and nutrition lessons; and entertainment options for the children of employees.

Source: EIU (2020), TIME (2020), Google (2020)

The future of work and digital wellbeing

3.1 Removing stigmas about accessing support

Employees will need support to access the benefits of more digital ways of working; however, many still do not feel comfortable using the support offered by their employers. When it comes to remote working, a culture of 'presenteeism' has historically held many people back. In the UK, 39% of 18–26 year-olds believe working away from the office could damage their career progression, while nearly half (41%) feel their bosses favour staff that work more than the contracted number of hours.[165] Further, according to the EIU survey, one-in-five people still feels uncomfortable talking about mental health with their manager. This gap means people may be suffering from some of the mental health risks associated with increased digitalisation without being able to ask for help.

Leadership are key players in making people feel comfortable accessing support around digital transitions. According to Dr Almuth McDowall, organisations need to envision and strategise what kind of leaders they need in a digital realm where change is the only constant. "Leaders will need to pair a focus on productivity and efficiency with an authentic focus on creating supportive climates and building genuine inclusion and involvement. The need for human connection will not go away." Leading by example is critical. According to Dr Goode, CEO and President of Icarus Consulting, "If the policy is no emails after 10pm but the CEO is online at 11pm, then people aren't going to listen to the policy." The same is true for mental wellbeing, says Sara Maude, a workplace wellbeing specialist: "The companies who are paving the way with mental health and wellbeing in the workplace are those where the leaders are walking the talk and are open to sharing their own vulnerabilities". Clearly not all leaders will be comfortable talking about their personal experiences, but they can find other ways to show they are aware and empathetic, such as talking about the mental health support on offer in company newsletters or talking directly to teams with employees who are not accessing support.

In some ways, being more open about how people feel about working conditions could be a silver lining to the Covid-19 period. "A stigma around a certain policy is more likely to exist if a certain group of people are mostly seen to be using it – for example remote working mothers or caregivers" says Eliot Sherman, Assistant Professor of Organisational Behaviour at the London Business School. "During Covid-19 many people have had to work from home and will see that, in many ways, you can be just as productive".

If the policy is no emails after 10pm but the CEO is online at 11pm, then people aren't going to listen to the policy
Dr Shelton Goode, CEO and President of Icarus Consulting

3.2 Turning policies into practice

In recent years, companies and governments alike have introduced new policies around digital wellbeing. For example, France adopted a 'Right to Disconnect' policy in 2017 to address rising stress levels. The law mandates employers with at least 50 workers negotiate agreements allowing employees to disconnect from technology after work.[166] Companies have taken different approaches to comply with the policy: some encourage employees not to answer emails after work hours, while others hold emails sent after hours within their system until the following morning.[167] A study on the impact of the law showed a gap between the law and actual implementation in practice between and within organisations, highlighting that the role of line managers was key, as they are the ones in direct contact with the workers.[168]

Hence, while it is important to have a company policy in place, it is also crucial to ensure that managers are trained and aware of their key role in managing employee wellbeing. In 2019, Bank of America launched a 15-month manager-training programme focused on resilience and stress

165 Overhauling a culture of 'presenteeism' at work, Ricoh Ireland
166 France and Spain: Right to Disconnect Spreads, SHRM (2019)
167 Right to Disconnect Adopted in Other Countries, National Law Review (2019)
168 Pansu, L.(2018), "Evaluation of 'Right to Disconnect' Legislation and Its Impact on Employee's Productivity ", International Journal of Management and Applied Research, Vol. 5, No. 3, pp. 99–119.

management, as well as signs of anxiety or stress to watch for in their direct reports. The aim of the programme was not to turn managers into clinical professionals, but to enable their understanding of the programmes and resources available for broader employee wellbeing.[169]

Policy shifts, however, must be designed so they do not obscure the flexibility that technology brings, says Monideepa Tarafdar, Professor of Information Systems at Lancaster University. "People have very different ways of working and will feel more comfortable the more control they have. Installing a one-size-fits-all approach through a restrictive policy can end up being counterproductive". Personal preferences may mean it makes sense to set policy at a team, rather than company, level, says Kristine Dery, a research scientist at MIT Sloan School of Management in the Centre for Information Systems Research. "Empowering people to build boundaries that work for them is a really important way of going forward, and that might happen through agreements that teams come up with together about what works for them."

To support flexibility, business leaders should focus their policy mandates on areas like training, so they can instil the fundamental skills people need to be able support their colleagues and develop good practices themselves. One area where there is a clear need for this approach is around mental health and wellbeing. As mentioned above, a significant number of people still feel uncomfortable talking about mental health with their managers and, according to the EIU survey, 60% of people had either not been able to open up in a conversation about their mental wellbeing with a colleague or had not had such a conversation at all during lockdown.

According to Dr Goode, CEO and President of Icarus Consulting, companies cannot expect their managers to be able to talk to people about such a sensitive topic, especially online: "People need to be trained to have what I like to call 'courageous conversations' about issues such as mental health, race and diversity and inclusion. Especially for people who come from a more traditional working background, this is going to be a new skill they need to learn."

This process of training is now complicated by the fact that it will increasingly occur online; however, companies are already adapting to deliver courses effectively, even on tougher topics like mental health. According to Sara Maude, a workplace wellbeing specialist who founded the Mind Solution and created the Digital Employee Wellbeing Portal, "we have had to adapt how we deliver our management mental health training so that it lands effectively when delivered online. People don't have the brain capacity to stay engaged all day on a digital training session, so we have cut the training into blocks of two hours. You don't have the same non-verbal cues as you do face-to-face, so it's a case of ensuring active engagement such as using the chat function, having cameras on, using polls and breakout rooms. Done well, it's just as effective as face-to-face training"
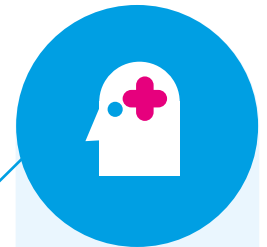
6/10

respondents had either not discussed mental wellbeing with their manager or felt they could not be honest in their conversation

EIU Survey (2020)

169 How Millennials Are Making Companies Rethink Mental Health, Time (2020)

3.3. Creating digital solutions to digital challenges

Even with the right policies and culture, employees also need to access more concrete forms of help to transition to a digitalised way of working. A complete digital workplace encompasses everything that employees use to get work done, ranging from HR and core business applications to team bonding and brainstorming sessions.[170] As more people shift to working from home, employers need to create digital mirrors of existing processes, including mental and physical support services – as well as thinking about how digital tools may help them expand their offering. For example, during the pandemic, Google is offering its employees exercise classes with 'gFit instructors'; cooking and nutrition lessons from 'Google chefs'; and Kids@Home Storytime to entertain the children of employees.[171]

Beyond recreational offerings, some companies are also offering home office stipends to help employees create a productive work environment. Both Shopify and Google[172] gave workers a US$1,000 stipend for necessary equipment and home office furniture, while Twitter gave employees reimbursements for home office equipment.[173] The EIU survey suggests there is significant appetite for such support across sectors. Four-in-ten people plan or are planning to use company support to improve their work-from-home environment, and a further 30% would use this type of support if it were available.

At a company level, digital monitoring techniques can help keep track of how teams are functioning and where extra support might be needed. This data can be useful to inform decision-making about support; however, it is crucial that companies use this data in a way that is transparent and not seen to be linked to performance or hours monitoring. Misuse and messaging around such data collection can be perceived as checking up on employees and can create an atmosphere of distrust: in February 2020, Barclays Bank had to remove such a system from staff computers after a backlash and, in 2018, Google staff took their concerns about the company's monitoring practice to the media.[174,175]

According to Dr Ella Hafermalz, Assistant Professor at the KIN Centre for Digital Innovation, these surveillance technologies are destructive for trust and belonging, and do not actually lead to better work. "Building relationships is the main thing one should focus on, rather than spending time investing in these technologies as a manager."[176]

Moreover, technology and digital tools introduced without accounting for the needs of the organisation's employees do not bring the transformation they intend, according to Andrew Young, Financial Services Talent & Organisation Lead at Accenture. "The real gains from digital transformation occur when we take a people-first approach and new tools are co-created with people. We can create a change in mindsets, behaviours and skills, and use an experimental cycle to improve new ways of working. A great example of this is collaboration and digital workplace technologies – where we design these to enhance how a team works, the adoption and benefits are much greater. This is particularly important following Covid-19, as many organisations have accelerated implementation and now need to optimise their digital and physical workplaces."

4/10

respondents plan or are planning to use company support to improve their remote working environment

EIU Survey (2020)
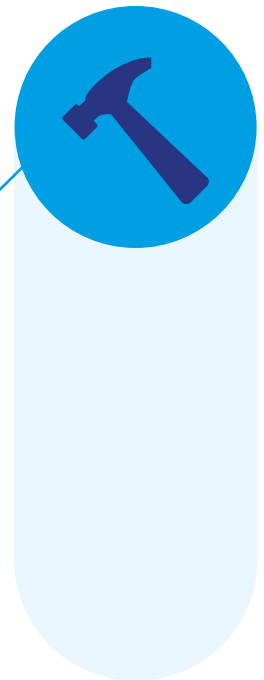
170 The digital workplace: Think, share, do Transform your employee experience, Deloitte
171 Working from home and the office, Google (2020)
172 Working from home and the office, Google (2020)
173 How the coronavirus pandemic will impact the future of work, CNBC (2020)
174 Barclays scraps 'Big Brother' staff tracking system, BBC (2020)
175 How to Monitor Your Employees — While Respecting Their Privacy, Harvard Business Review (2020)
176 Hafermalz, E. (2020). "Out of the Panopticon and into Exile: Visibility and Control in Distributed New Culture Organizations." Organization Studies,

SECTION 4
Conclusion

To reduce the risks and maximise the benefits of digitalisation, companies need to put employees' physical and mental wellbeing at the heart of technological transitions. This requires more than simply asking the question, "how will changes affect my workforce?" Instead, it necessitates continuous, meaningful engagement with diverse stakeholders in an organisation. This collaboration needs to take place at the design, implementation and management phases of new operations.

Throughout the report, we have highlighted potential activities companies should consider to successfully manage this transition; however, at the core of our recommendation is that each company needs to develop a comprehensive approach that covers culture, policies and tools. Only by responding to each of these areas can business leaders ensure that the vision of the 'future of work' in their company becomes a salient and inclusive path forward.

In many cases, this might involve a re-think of what the company's overall responsibilities are. In August 2019, The Economist ran an issue focused on the question "What are Companies For?" It argues that businesses are now not only accountable to their shareholders but also their customers and employees. The leader argued that "bright young workers of the sort businesses most desire expect to work in a place that reflects their values much more than their parents' generation did" and that businesses should consider "devising a framework that would allow companies and bosses to state clearly that they want to do more besides make a profit".

This broadening of responsibilities includes protecting employee wellbeing during digital transitions. The business argument is strong: making sure that employee wellbeing is at the centre of digital transitions will help keep staff happy in the future. Businesses whose employees note higher job satisfaction tend to be more productive and are less likely to leave their job.

The rationale moves beyond business, though. Companies have a duty of care to their employees. Stress-related high blood pressure or carpal tunnel from a laptop mouse pad may be the modern equivalents of pulmonary disease in miners or asbestos exposure in construction. Business leaders have a responsibility to take these risks just as seriously, and use digitalisation to help make employees healthier and happier, rather than being a bystander as risks of improper, unhealthy digitalisation arise.

Acknowledging this responsibility might be daunting for some business leaders, but it is central to ensuring the future of how we work is an improvement for people as well as for profits.

SECTION 5
Country profiles

In this section, we provide further, country-specific, information on the EIU's 2020 survey results

5.1 Canada: A positive work-from-home experience can be further enhanced with additional business support

Key Findings

- 78% of employees want to work from home more often when restrictions are lifted, signifying a positive experience. Almost one-third of employees had not worked from home before Covid-19.

- Employees are often not comfortable discussing mental wellbeing and businesses should work towards creating an enabling culture to foster these discussions.

- Additional support from businesses, including policy manuals, training and support materials, can further enhance productivity and effectiveness.

78%
of employees in Canada want to work from home more often when restrictions are lifted

EIU Survey (2020)
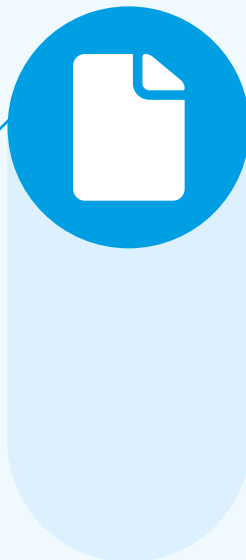
5.1.1 How has Covid-19 changed how people work in Canada?

Remote working has been limited in Canada over the past two decades: 10% of employees worked from home in 2000, 11% in 2008 and 13% in 2018.[177] This suggests that there was unused remote working capacity before the pandemic. Almost half of employees who work for companies without remote working policies felt frustrated, 33% had considered looking for a job at a company that offers remote working, and 14% were actively looking, according to a study conducted in 2018.[178]

This landscape completely changed during Covid-19, and Statistics Canada states that the labour market increased the prevalence of teleworking to its maximum capacity in quick response to the pandemic. Approximately four-in-ten (39%) Canadian workers are in jobs that can plausibly be carried out from home and a survey series conducted by Statistics Canada found that as many workers (39%) were teleworking in the last week of March.[179]

There are early signs that Canadian employees have taken positively to working from home during the Covid-19 pandemic. In a recent EIU survey, 78% of employees want to work from home more often when restrictions are lifted and 70% feel their team is just as productive while working from home.

Canadian companies played an active role in managing this shift. 83% of people reported using or planning to use support offered by their employer during this time. These services are likely to have contributed to high levels of general satisfaction amongst Canadian workers. Over two-thirds of respondents (67%) felt 'sufficiently supported' by their employer during this time, higher than respondents in France (58%), the UK (64%) and Singapore (62%).

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177 Running the economy remotely: Potential for working from home during and after COVID-19, Statistics Canada (2020)
178 Report: 65% of Employers Think Employees Are More Productive When They Work Remotely, Indeed (2018)
179 Running the economy remotely: Potential for working from home during and after COVID-19, Statistics Canada (2020)

Notably, 28% of employees in Canada — the highest percentage of respondents among the countries considered — have not been offered specific training on working from home, but would have welcomed it.

### 5.1.2 What challenges persist around remote working?

Despite this positive experience, 55% of employees in Canada still felt uncomfortable doing at least one part of their job remotely. People appear to be struggling in two key areas: client or external meetings and new joiner onboarding. This is, in part, a result of challenges around coordinating multiple people's inputs. Over half of employees surveyed said this was their biggest challenge while working from home, compared to an average of 47% in the four other high-income economies considered (UK, France, UAE and Singapore).

Isolation, and its impact on mental wellbeing, has been one of the biggest non-work-related challenges during the pandemic. Half of employees in Canada reported a worsening of their mental health during the lockdown restrictions.[180] The EIU survey highlights that employers in Canada offered effective support for mental wellbeing: 67% of respondents received support from their employers in mental and physical health aspects.

However, almost one-third of people feel they have not received sufficient support — a significant gap. Almost half (45%) of the 42% of respondents that had not spoken about their mental wellbeing with their manager during lockdown would have welcomed such a conversation. This is an area of underperformance: in France, UAE, UK and Singapore, over 60% of respondents had discussed their mental health with their boss during the pandemic.

Over half of the employees in Canada are struggling to coordinate with colleagues

% of respondents struggling due to __ while working from home
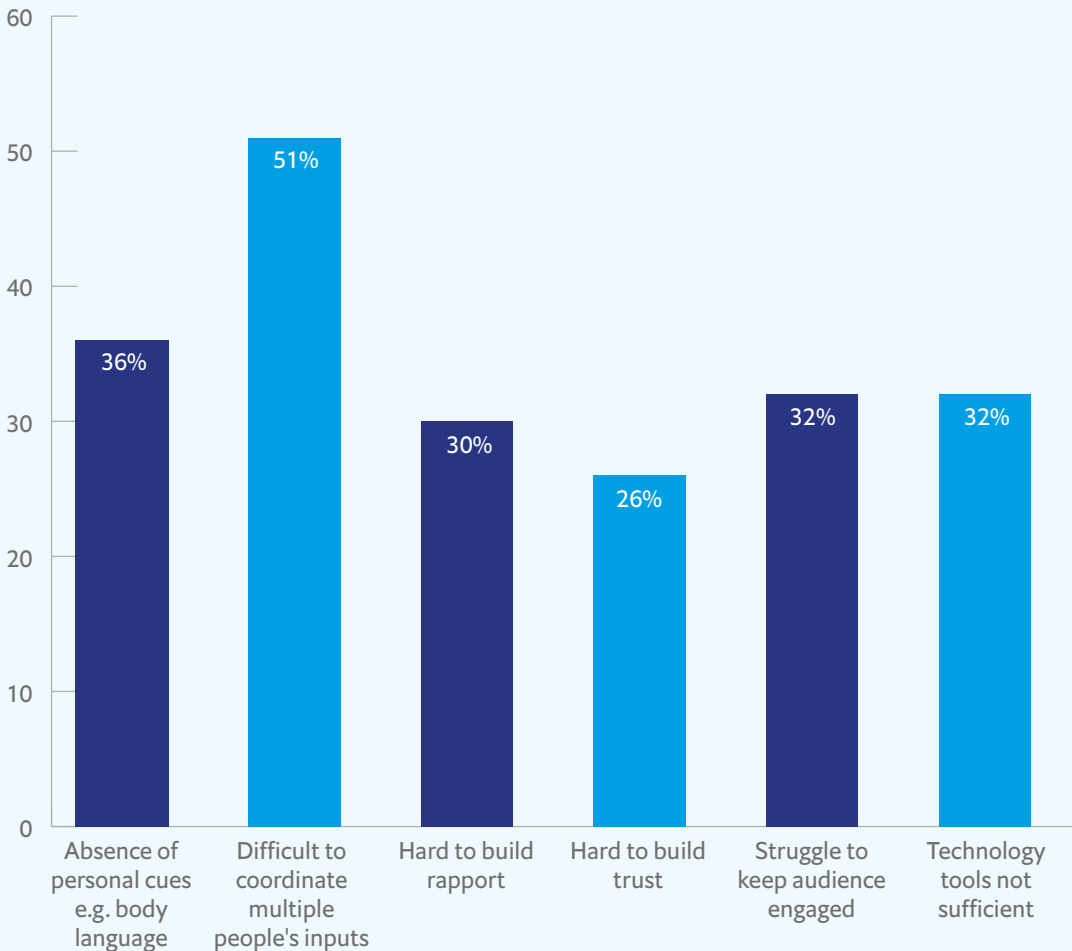
Source: EIU Survey

180 The Workplace Mental Health Pandemic: Your Employees Are Not as Healthy as They May Seem, Starling Minds (2020)

The future of work and digital wellbeing

Canadian employers have provided support for mental and physical wellbeing of employees

% of respondents who feel sufficiently supported in __ by their employers, by country

● Mental Health   ● Physical Health
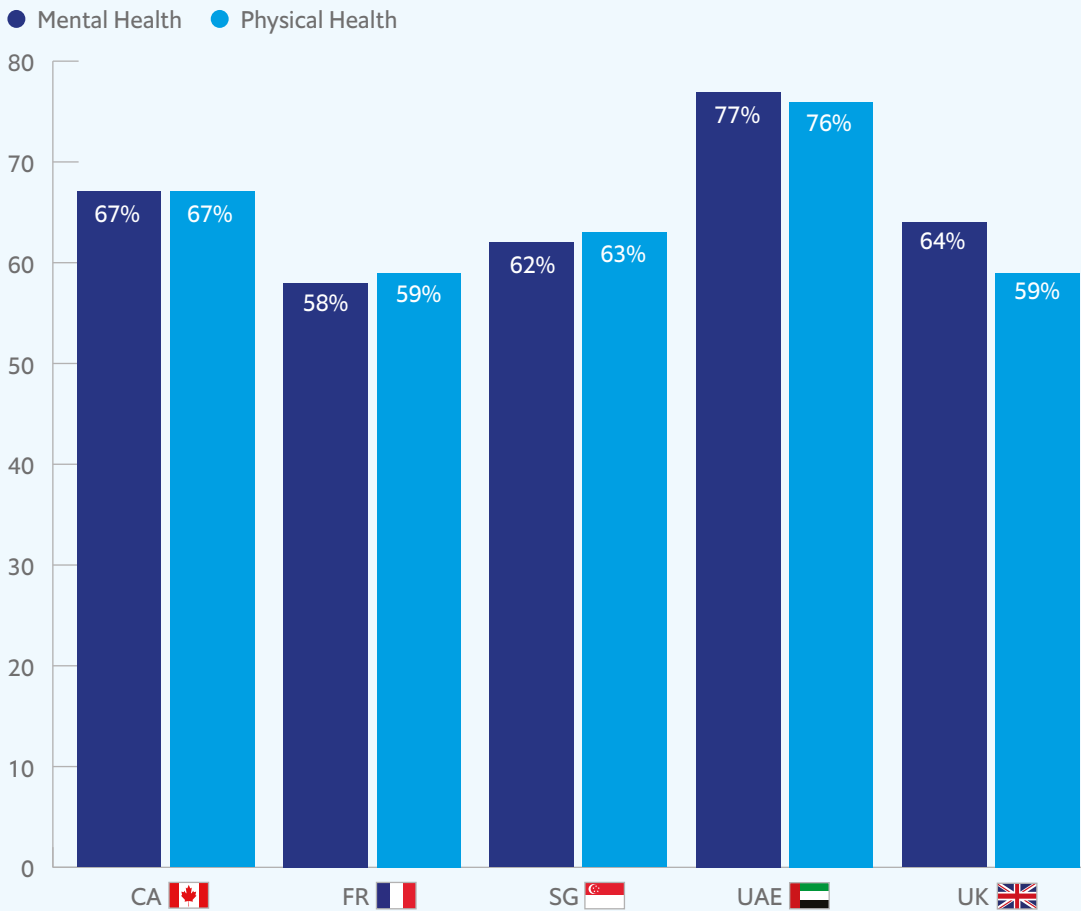
Source: EIU Survey

This is particularly worrying, because employees in general do not feel comfortable accessing mental health support at work. One-in-two people surveyed in Canada do not want access to counselling services or are not using the ones available from their employer.

5.1.3 What does this mean for businesses and policy makers?

The Government of Canada has actively addressed the foreseeable issues that can arise during remote working, and has developed a list of suggestions and best practices that businesses and employees are encouraged to follow for a better work-from-home experience.[181] In light of these suggestions, and our findings, businesses can take these immediate next steps:

Take active steps to ensure employees feel comfortable talking about their mental health

Poor employee mental wellbeing can be a serious business risk. On average, mental health issues cost businesses almost C$1,500 per employee, per year in Canada.[182] Given the disruptions of Covid-19 to work and personal lives, it is important that employers acknowledge these impacts and engage in an open dialogue, including ways to maintain and support mental health.[183] Businesses can also design guidelines and tips to maintain mental wellbeing while working remotely, similar to those released by the government.[184]

181 Coronavirus disease (COVID-19): Working remotely, Government of Canada (2020)
182 Working Towards Mental Wellness, Ontario Chamber of Commerce (2017)
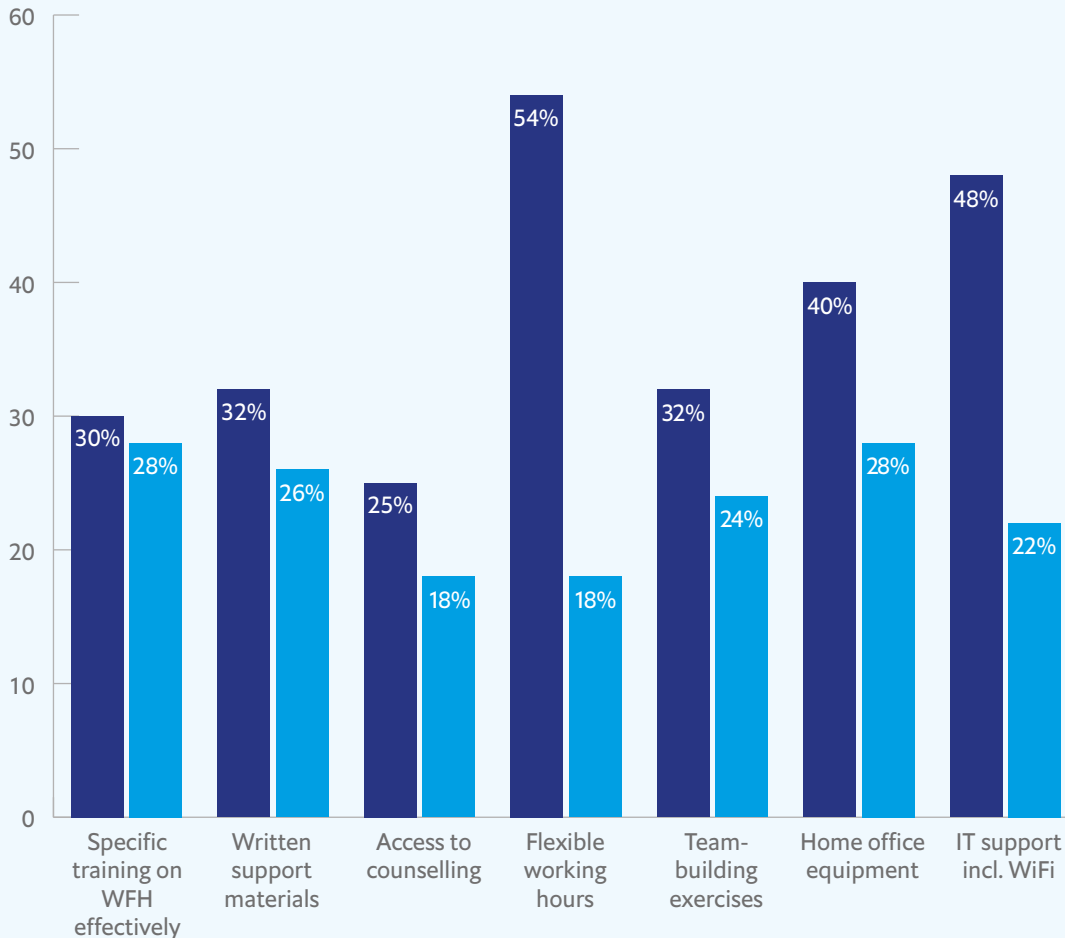183 COVID-19 and Mental Health @ Work, Government of Canada (2020)
184 Mental health tips for working from home, Government of Canada (2020)

Employees in Canada would be open to more support from their employers

% of employees who were (not) supported in __ by their employers

- ● Support offered by employer and planning to use
- ● No support offered and would use if available

	Specific training on WFH effectively	Written support materials	Access to counselling	Flexible working hours	Team-building exercises	Home office equipment	IT support incl. WiFi
Support offered	30%	32%	25%	54%	32%	40%	48%
No support offered	28%	26%	18%	18%	24%	28%	22%

Source: EIU Survey

Access to mental wellbeing alone is not sufficient: social acceptance is also key. Workplaces with a mental health support culture in addition to a policy have a higher percentage of employees who use such support systems.[185] According to Michael Whitmore, Research Leader at RAND Europe, "Organisations should look at two aspects — supporting individuals and their lifestyles, but also having an overall healthy culture in the workplace. With this culture, the employees will get support both from their managers (vertical support) and colleagues (horizontal support)". He further adds that it is important to have a personalised approach rather than a one-size-fits-all policy.

## Address the gap between perceived and actual work-from-home effectiveness

Though 70% of people feel their team is just as productive working from home, only 38% of people also said they feel comfortable doing all aspects of their job remotely. This gap suggests people may be struggling more to be productive while working from home than they appear. Companies should be clear that people can continue working from home, so that people feel more comfortable expressing where they are finding challenges. Then, businesses can broaden their support offering to target specific areas.

185 Why Mental Health in the Workplace is Culture Change, Thrive Global (2019)

The future of work and digital wellbeing

80%

respondents in
Canada believe
there is a need for
guidance and rules
around working
from home
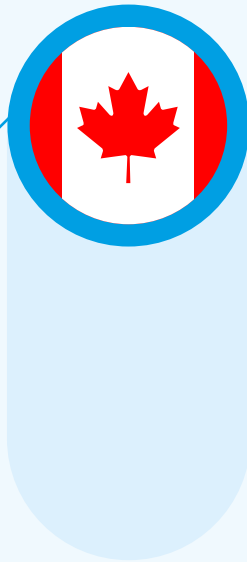
EIU Survey (2020)

The EIU survey indicates this support may be
needed. Almost one-third of people have not been
offered specific training on working from home, but
would be interested in it and 80% believe there is a
need for guidance and rules around working from
home. Additionally, one-quarter would use support
materials if they were offered.

For a smoother work-from-home experience,
businesses should offer a learning course on how
to stay productive when working remotely. This
can help employees manage their tasks, stay
engaged and provide a broad overview of tools
and strategies to enable a good work-from-home
experience.[186]

Company Case Study:
Shopify - Using new digital tools to help promote wellbeing and learning

In many ways, Canadian e-commerce
company Shopify has been ahead of the curve
when it comes to supporting colleagues who
are working remotely. In 2017, the company
shut their offices for a month in order to build
empathy with colleagues who worked from
home managers of remote employees had a
dedicated weekly check-in to ask about their
juniors' mental wellbeing.[187,188]

Even with these structures already in place,
when Covid-19 hit Canada, the company was
not complacent: they offered dedicated
support in the form of a US$1,000 stipend to
help employees buy office equipment and
created a slew of online resources for both
their employees and the wider public.[189]

Most importantly, Shopify was one of the first
Canadian companies to offer its employees
clarity about what the future of work looks
like in the organisation. As early as May 2020,
CEO Tobi Lutke announced that any Shopify
employee who wanted to was allowed to
work from home indefinitely and has been a
vocal supporter of those who want to do so.

As a Director at Shopify noted during the
pandemic: "if you lead with the mental
and physical health of your employees, you're
really going to get rewarded".[190] This
statement has certainly been true in terms of
commercial success during the pandemic,
with their share price reaching record highs
and sales overtaking rival eBay for the first
time.[191]

187 Why working remotely is the future with John Riordan of Shopify, WiX
Answers (2020)
188 Coronavirus prompts Shopify to tell employees to work from home
starting March 16, Yahoo Finance (2020)
189 Tobi Lutke announcement on Twitter on Shopify (2020)
190 Why working remotely is the future with John Riordan of Shopify, WiX
Answers (2020)
191 Shopify Overtakes eBay, Marketplace Pulse (2020)

186 Training Employees to Effectively Work from Home, HR Daily Advisor (2020)

5.2 France: Employees struggling to work effectively in the absence of company support

Key Findings

- Workers in France reported higher than average discomfort performing their job remotely.

- Common challenges included clashes with caring responsibilities and distractions in the home — as well as struggling to communicate effectively with colleagues.

- A lack of sufficient support, especially around mental wellbeing, may be a driver of this discomfort and French firms need to do more to help all employees — especially carers and parents.

- Support does not have to be in the form of high-capital investments: instead, skilling middle managers to be able to speak to their reports about mental health and help them create a culture where flexible working is not only permissible, but actively encouraged can be effective.

5.2.1 How has Covid-19 changed how people work in France?

For many people in France, Covid-19 was a continuation of a period of disruption to their normal working lives. Since the start of 2020, yellow vest protests and public transport strikes have meant many people were visiting their offices less due to disruptions in their normal routes to work.[192] In a recent EIU survey of remote workers during lockdown, over 80% had worked from home at some point before the pandemic restrictions were imposed and 61% did so once or more a week.

However, though French workers may be familiar with working from home, they are less happy with a continuation of the practice post-Covid-19 than other countries. Though 69% of respondents would like to work from home more after lockdown, this is lower than the 77% average across Canada, Singapore, the UK and UAE — the other countries in the EIU's study.

French workers were also the most uncomfortable with junior people in their team working from home. Only 60% of people were happy for their direct reports to work remotely more after the pandemic, compared to an average of 67% in the other countries.

French workers are relatively less comfortable with their juniors working from home more post pandemic

% of people who want to work from home more vs. happy for a junior to do so, by country

● I want to work from home more often following the lifting of restrictions
● I will be more open to a junior member of my team working from home frequently
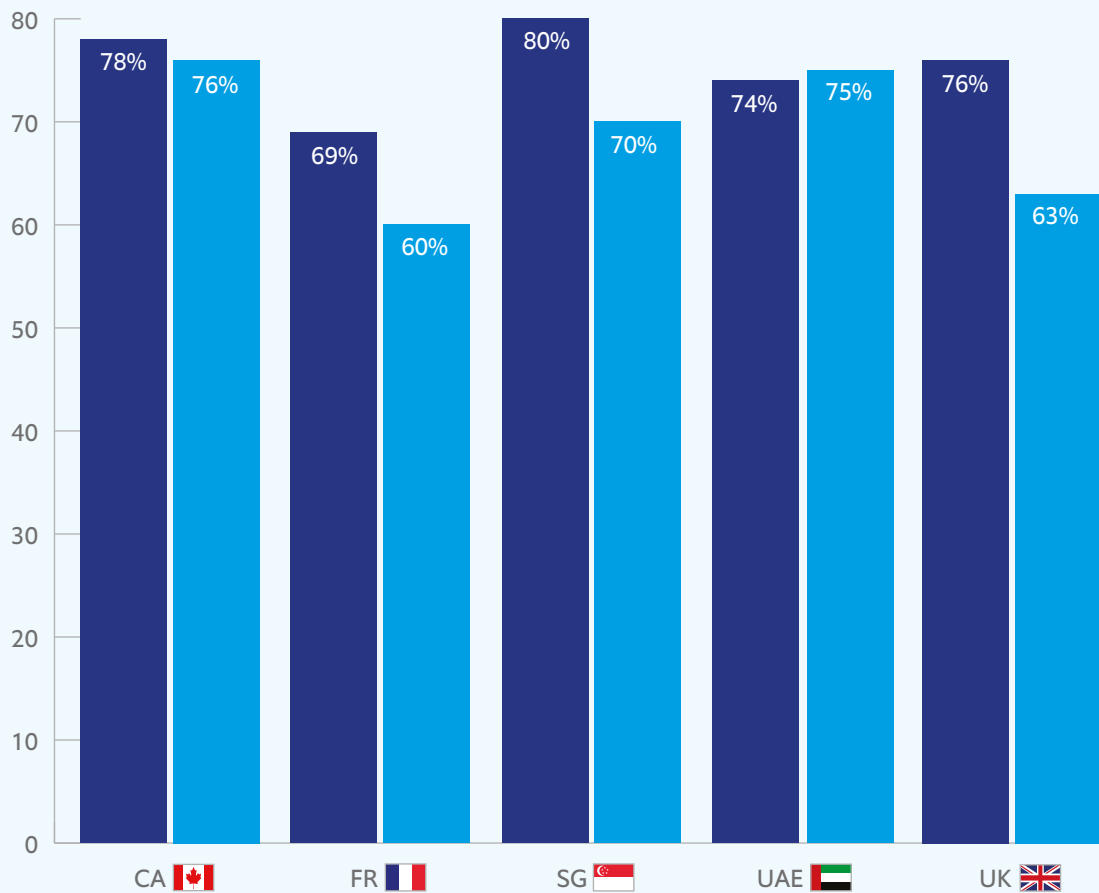
Source: EIU Survey

## 5.2.2 What challenges persist around remote working?

Data from the EIU survey makes it clear that workers in France's relatively lower willingness to work from home post-Covid 19 is not because employees had already found the right balance between remote and in-office work before the lockdown. Instead, responses show that people have a persistent problem being effective while working remotely. Over two-thirds of respondents reported finding at least one part of their job difficult to do from home, compared to an average of 56% in other countries. People have the highest levels of discomfort with tasks that involve working with others, including team meetings (23% of people are still uncomfortable doing them from home), client meetings (25%) and new joiner onboarding (22%).

Collaboration was also cited as a major challenge. Almost half (49%) of respondents said the struggled to coordinate multiple people's inputs while working remotely and a further 36% cited absence of personal cues as a barrier to effective communication.

Aside from task-specific challenges, French workers also reported high levels of general challenges working from home. These included work-home conflicts and inadequate work spaces. Caring responsibilities in and out of the home were people's most commonly reported challenge (32% of respondents saw this as their top challenge) alongside distractions such as noise from friends and family (25%). These challenges appear to create a less productive working environment – 44% of people felt their team was not as productive working from home as in the office.

The future of work and digital wellbeing

Employees in France feel their teams are not as productive when working remotely

% of people who feel their team is just as productive working from home, by country
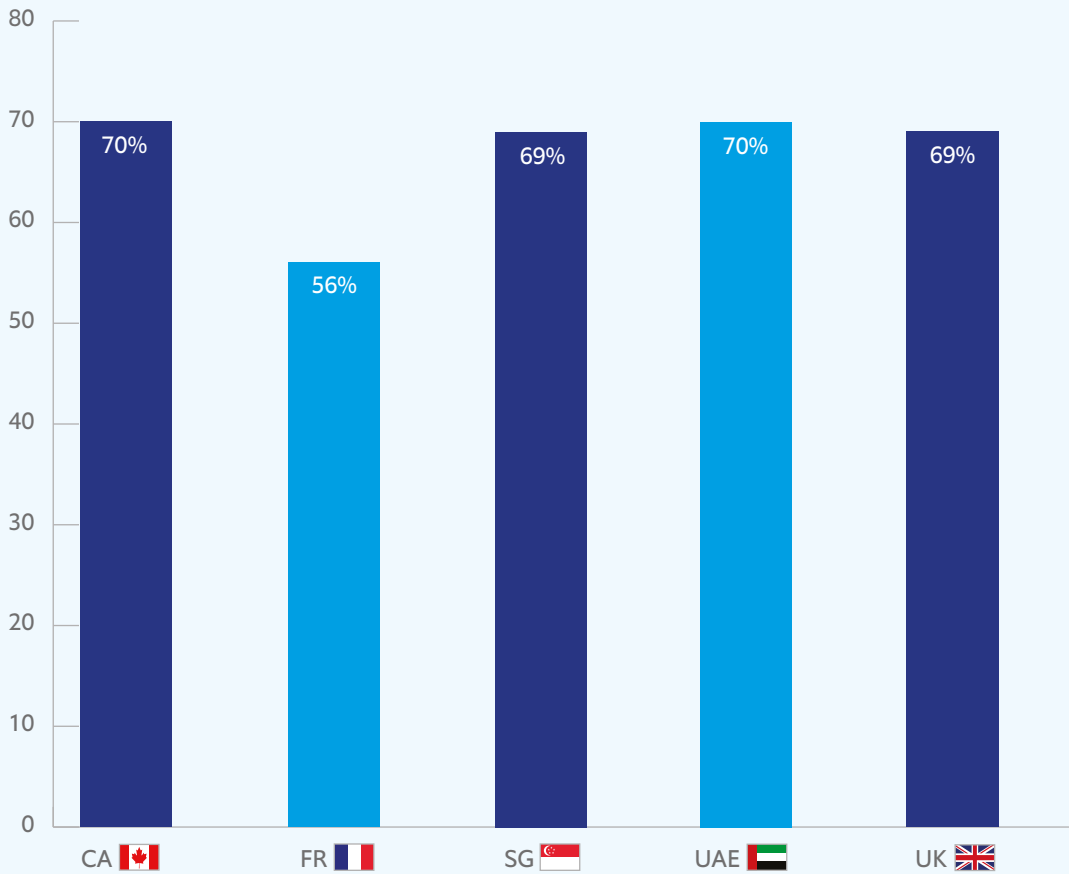
Source: EIU Survey

5.2.3 What does this mean for businesses and policy makers?

The data suggests that companies in France need to seriously rethink their current policies and support on offer to their employees. Below are some high-level recommendations they should consider:

Create a culture where parents and carers are more comfortable taking advantage of flexibility

For parents and carers, Covid-19 represents a unique situation of trying to provide childcare while working remotely. However, even as schools reopen, caring for non-school-age children, as well as school-age children, in the afternoon and evening when classes are over continues to create challenges for remote working.
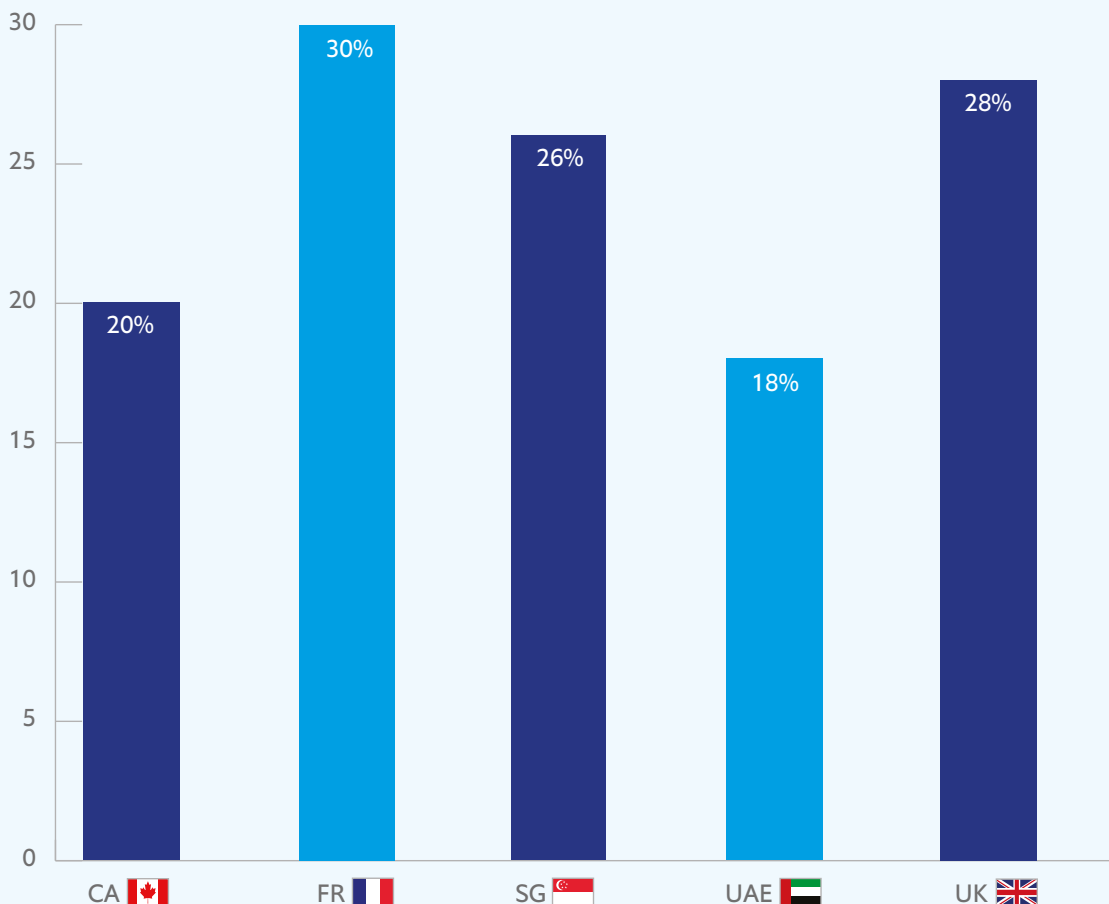
44%

of respondents in France felt their team was not as productive working from home as in the office

EIU Survey (2020)

French workers are keen to access support for mental wellbeing

% of people who would like access to counselling services but it's not on offer from their employer, by country

Giving parents more control around when during the day they work is shown to bring major benefits. A study by Eliot Sherman, an expert from London Business School interviewed for this project, found that giving working mothers more flexibility around when they work makes them more productive without making colleagues less productive.[193] However, creating a culture where parents feel comfortable to work flexible hours is critical for driving uptake. Shifting corporate culture has historically been an issue for French firms: 69% of businesses in the 2019 IWG Global Workspace Survey reported that "shifting the culture in a company with a long-standing, non-flexible working policy is a major obstacle."

According to Sherman, Covid-19 may represent an opportunity to challenge long-held views about remote working. As senior employees and managers struggle to create new work-life systems themselves, they may become more open to conversations about new policies and processes.

But this will not happen automatically; French firms need to take a more active role in managing the transition to remote working to help minimise employee challenges.

Upskilling managers to close gaps in support around remote working, including employee mental wellbeing

In France, there is a clear gap between demand for support around mental wellbeing and supply of services by employers: 42% of people working from home felt their employer did not provide sufficient support around wellbeing, compared with an average of 33% for the other four markets. Further, 30% of respondents wanted access to counselling through their job, but the service was not offered.

193 Sherman E (2020) Discretionary Remote Working Helps Mothers Without Harming Non-mothers: Evidence from a Field Experiment, Management Science 66(3), pp 1351-1374

Creating a support network for mental wellbeing does not require huge investment levels. Almost two-thirds of respondents who had not discussed mental wellbeing at work would be happy to do so with their manager. Closing the support gap might be as simple as upskilling an existing team lead to be able to have conversations about mental health in a productive way.

Company Case Study:
L'Oréal - Enhancing inclusivity and diversity at work in France

In the past, L'Oréal was seen as a bastion for traditional work practices that detract from employee satisfaction in France.[194] In 2016, they launched a dedicated programme to address this — 'The Simplicity programme'. It sought to create a less top-down business environment and enable more collaborative teamwork and management, including giving junior line managers more flexibility around how they managed their teams and promoting co-development through cross-department projects.'[195]

L'Oréal also launched an annual Ethics Day, when employees send questions directly to the Chairman and CEO, who answer them via a live web chat. In 2019, over 70% of employees across the globe took part in the exchanges.[196] Furthermore, 42,000 employees across the company have been trained in diversity and inclusion practices, including challenging unconscious bias.

These initiatives have shown results: the number of women on the executive committee has increased to 30%, from 10% in 2010. Women now make up 53% of the board, up from 21% in 2010. The hiring of employees with disabilities has also increased, rising by 64% from 2014, and over 168 nationalities are represented across their 73 subsidiaries.[197] L'Oréal has also set a new 2030 vision for Human Relations to build on these gains and progress further in these areas.

194 Brandon, R.(2011). Ugly Beauty: Helena Rubinstein, L'Oréal and the Blemished History of Looking Good. McClelland & Stewart.
195 L'Oréal 2017: Fostering a new mindset at L'Oréal, L'Oréal (2017)
196 2019 Annual Report, L'Oreal (2019)
197 Diversity & Inclusion Key Figures, L'Oréal (2019)

5.3 Singapore: Prior flexible work arrangements can be further enhanced with policy support from businesses

Key Findings

- The transition to fully remote working in Singapore has been easier than in other countries, as many people already worked from home at least one day a week prior to the pandemic.

- The pandemic is likely to boost levels of remote working even further. 80% of respondents from Singapore want to work from home more often following the lifting of restrictions.

- However, companies need to take an active role in managing this transition: 80% of people feel there is a need for guidance and rules around working from home in their organisation.

5.3.1 How has Covid-19 changed how people work in Singapore?

Prior to the Covid-19 restrictions, almost 50% of employees in Singapore worked remotely for at least half the week.[198] This high prevalence of remote working can be linked to a broader culture of flexibility present in many Singaporean companies. A 2018 survey highlighted that seven-in-ten employees in Singapore worked in companies that offered formal flexi-work arrangements, such as flexi-time or staggered hours.[199]

The government was one of the early supporters of this practice. In 2001, the Ministry of Manpower released a study in support of flexible working, documenting the benefits, key implementation considerations, and case examples of flexi-work arrangements.[200] This flexible culture may be one reason why female participation in the workforce in Singapore has improved in recent years, increasing from 52% in 2000 to 61% in 2019.[201] Women typically cite a lack of flexible work arrangements as one of the top reasons for leaving the workforce.[202]

198 Singapore employers warm up to flexi-work, HCA Mag (2018)
199 Flexi-work 'more common' in Singapore: MOM, HCA Mag (2019)
200 Flexible Work Arrangements Ministry of Manpower (2001)
201 World Bank Data (2019)
202 Why women in Singapore aren't returning to work, HCA Mag (2018)
203 Commentary: The biggest work-from-home exercise may have just begun. How ready is Singapore?, Channel News Asia (2020)
204 Which Countries Were (And Weren't) Ready for Remote Work?, Harvard Business Review (2020)

The future of work and digital wellbeing

One reason Singapore can lead the world in flexible working is that it is a hyper-connected city with advanced information communication infrastructure, cyber security and cloud technology infrastructure.[203] A recent study at Tufts University on which countries are best prepared to work from a distance, looking at robustness of internet infrastructure and resilience to traffic surges, highlighted Singapore as one of the top performers.[204]

The pandemic is set to accelerate this trend towards remote working. In a recent EIU survey, 80% of respondents in Singapore stated that they would like to work from home more often following the lifting of restrictions and 75% said they would like to work from home for three or more days in a week.

Employers themselves are likely to be a key reason behind this shift: 80% of Singaporean respondents are using or planning to use support from their company to help them work from home more effectively. The most popular area of support is flexible working hours, which almost half of people had access to and were using or planning to use.

This positive experience has also influenced employees in their attitudes going forward. For instance, three-quarters of respondents say they will be more comfortable applying for a remote position and 70% will be more open to a junior member of their team working from home frequently.

Singaporean employees are actively supported by their companies

% of employees who were offered __ as support while working from home and are using/planning to use it
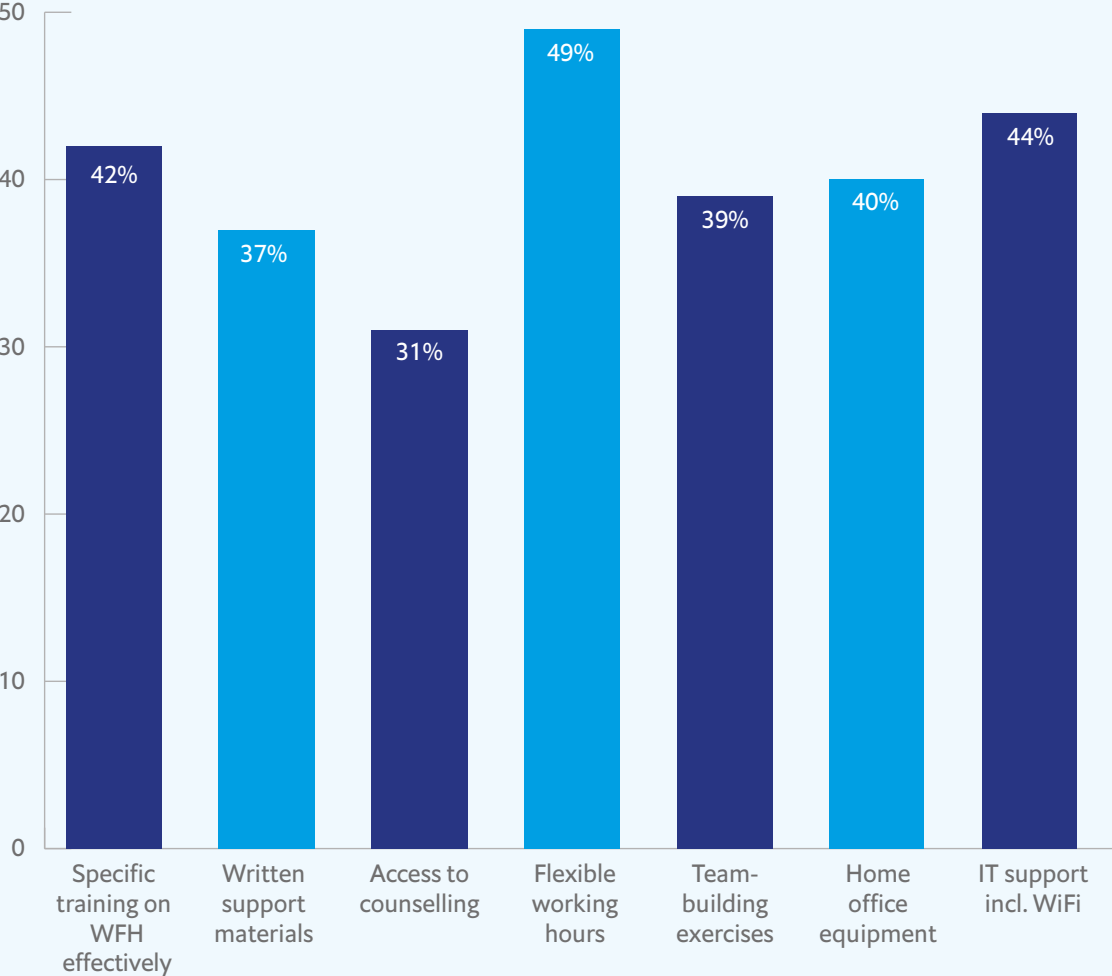
Source: EIU Survey

203 Commentary: The biggest work-from-home exercise may have just begun. How ready is Singapore?, Channel News Asia (2020)
204 Which Countries Were (And Weren't) Ready for Remote Work?, Harvard Business Review (2020)

The future of work and digital wellbeing

## 5.3.2 What challenges persist around remote working?

While most people have had a positive experience of working from home, some are still struggling to complete certain tasks remotely. Over 20% of employees are not confident running team meetings on strategy remotely; trouble shooting and problem solving alone; onboarding new joiners; and conducting client or external meetings. Employees in Singapore are relatively less comfortable working on these tasks than those in other high-income countries (UK, Canada, France, and the UAE).

Employees cite a range of reasons for struggling with these tasks. The most common being challenges coordinating multiple people's inputs (49%), followed by an absence of personal cues (43%) and a struggle to keep audience engaged (39%). However, in spite of these challenges, 69% of respondents felt their team was as productive working from home as in person.

More worrying for employers than productivity may be the overall negative impact on mental wellbeing that has been linked to restrictions and social isolation. A recent study highlighted that two-in-three employees in lockdown are suffering from a marked increase in anxiety and stress.[205] The EIU survey shows that approximately one-third of employees do not feel sufficiently supported by their employer on issues related to mental wellbeing.

Employees in Singapore still struggle with some tasks while working from home

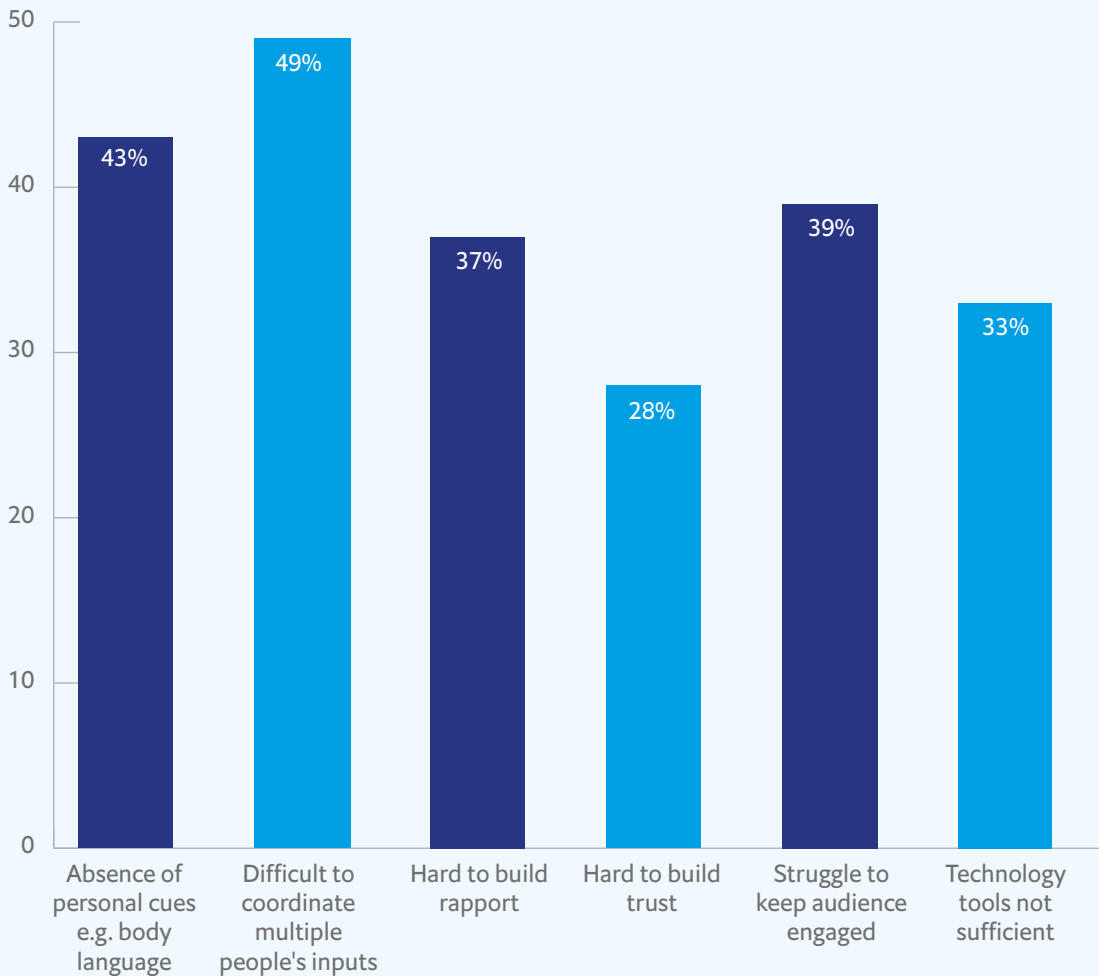% of employees in Singapore not comfortable doing __ vs average score for other countries
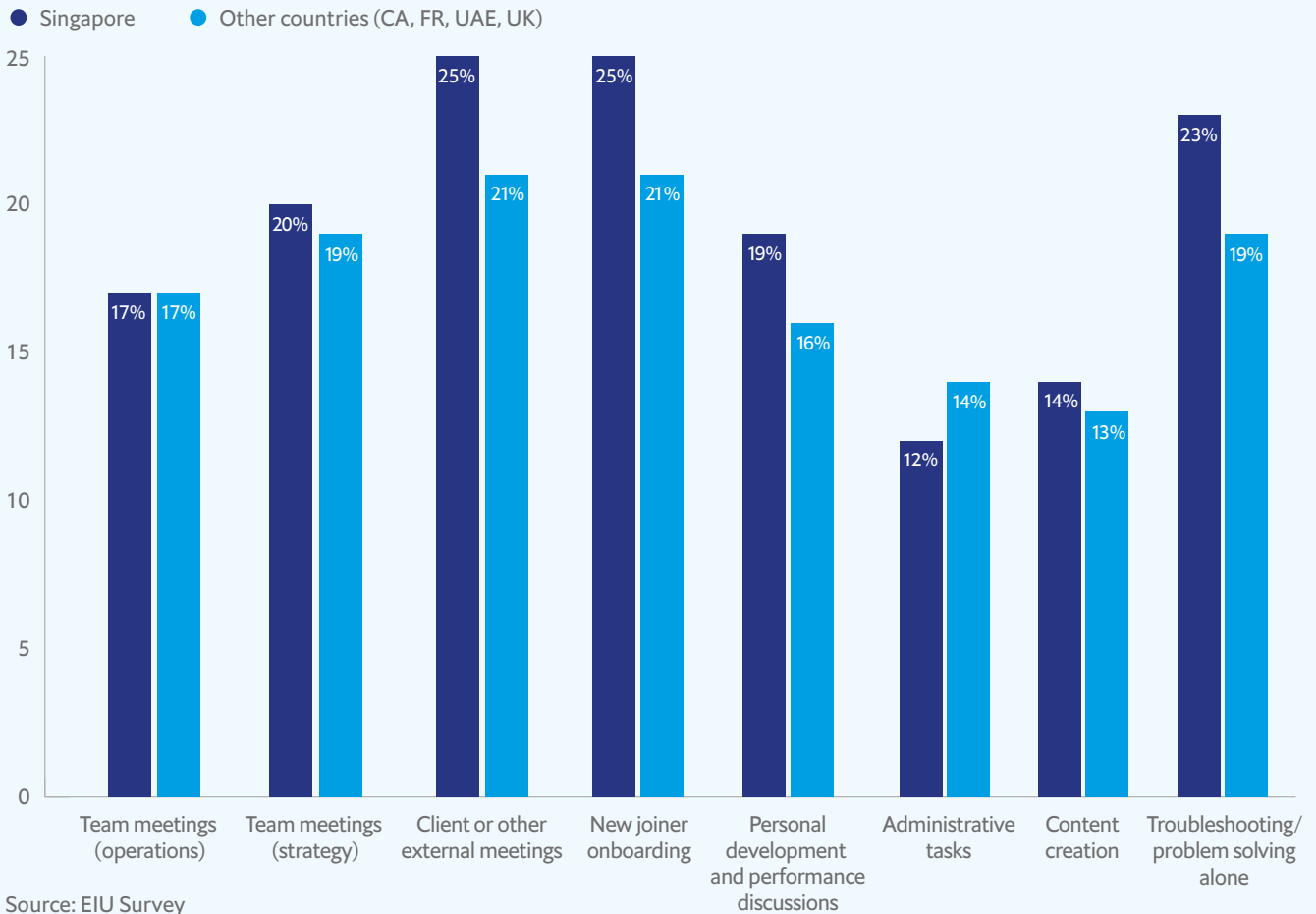
● Singapore   ● Other countries (CA, FR, UAE, UK)

Source: EIU Survey

The future of work and digital wellbeing

Singaporean workers struggle coordinating people and keeping an audience engaged while working from home

% of employees who believe __ is a struggle when working from home

Source: EIU Survey

To fix this gap, companies may need to focus on upskilling their middle managers: two-thirds of respondents either had not discussed their mental wellbeing with their manager during lockdown or had not been able to be completely open up in such a discussion if it did take place. What is clear is that companies need to address this urgently. Stress-related illness costs Singapore's health system almost US$2.3 billion per year, which equates to 18% of the country's health expenditure.[206]

Interestingly, despite the robust IT infrastructure in Singapore, close to a quarter of respondents (24%) cited technology and connectivity issues as one of the challenges of working from home (following distractions in the home, e.g. noises from family or roommates). This may have been driven by two widespread incidents of outage in broadband services in April and May 2020, which created major disruptions for all employees working from home.[207,208]

206 Asia Care Report, CIGNA (2018)
207 StarHub Internet service fully restored at 8.20pm; telco to conduct detailed analysis of outage, Straits Times (2020)
208 Fibre Internet outage hits some M1 users in western, central and eastern Singapore, Straits Times (2020)

Employees in Singapore are relatively less supported in aspects around wellbeing

% of employees who feel sufficiently supported in ___ by their employers, by country

● Mental Health ● Physical Health
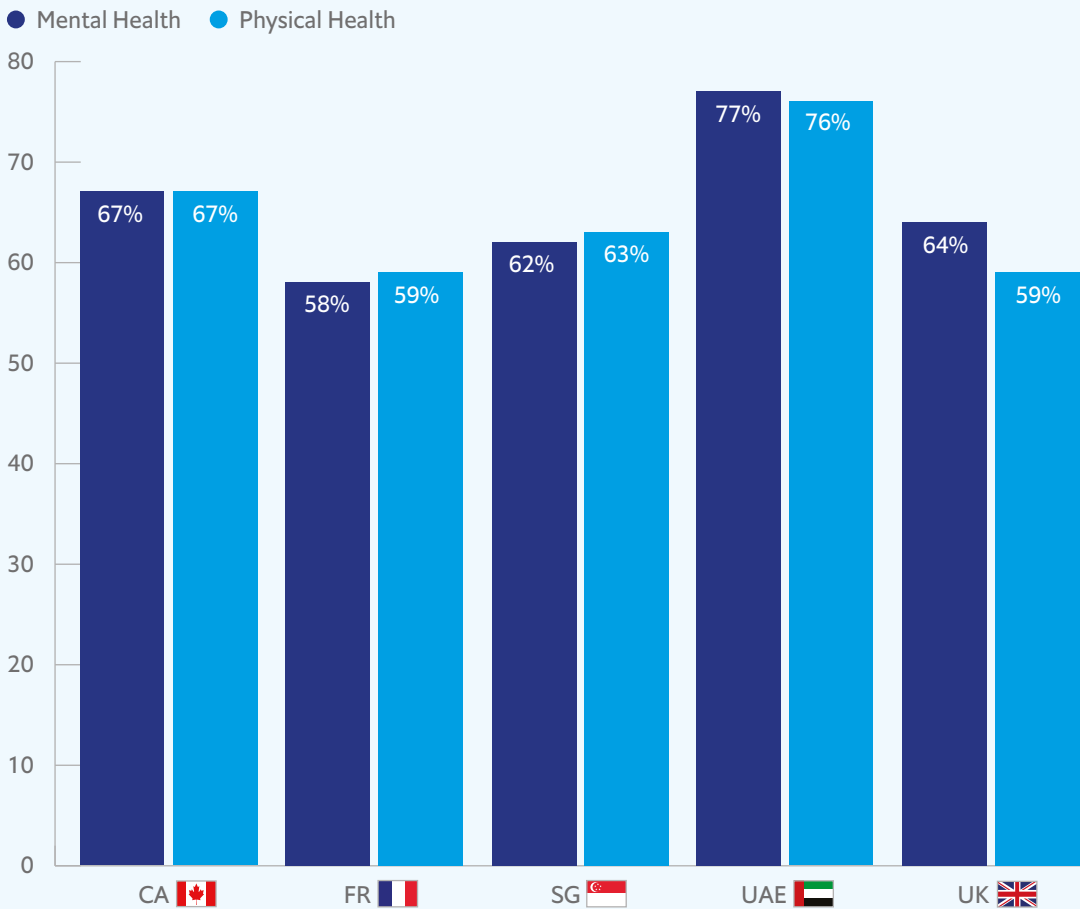
Source: EIU Survey

5.3.3 What does this mean for businesses and policy makers?

Companies in Singapore have supported a successful transition to more remote working for the majority of their employees in the short term. However, to make this shift sustainable in the long term, they need to:

Ensure mental wellbeing support is accessible and useful to all employees

The gap in mental wellbeing support provision mentioned above is a serious problem for companies in Singapore. Though many businesses appear to be doing some work in this space, it is a concern that such a large group is still slipping through the cracks. Companies need to make sure they have complete visibility on who is at risk and where support is not being taken up.

When approaching this challenge, employers can adapt the HR tools already used to measure other areas of employee experience. Training for people getting promoted, for example, often includes managing people effectively. Ensuring this upskilling includes how to create a good culture for talking about mental health can create a cohort of people ready to have conversations on the topic confidently with their reports.

Data gathering can be expanded from traditional metrics, such as employee retention and revenue performance, to include statistics on the number of people accessing mental wellbeing support resources (e.g. guides on working effectively and staff days off due to stress). Crucial here is to set up a system where a team whose members use available resources is seen as best practice — rather than classifying it as a cost that the team is incurring.

Clarify workplace policies and support materials for remote working

Four-in-five employees in Singapore believe there is a need for guidance and rules around working from home in their organisation. Additionally, almost one-third of employees were not offered support, such as handbooks on working from home, but would have used such materials if they were provided.

The future of work and digital wellbeing

When considering how to create these policies and communicate them to staff, it is important that companies are transparent and that grey areas are clarified. Companies should focus on elaborating on employer expectations for employees during their remote working tenures and include details on IT support and technology manuals. A good resource in Singapore is the four-step implementation model for a work-life strategy designed by the Tripartite Alliance for Fair & Progressive Employment Practices.[209]

Studies highlight that investing resources to prepare management and employees via a clear policy or process helps ensure positive outcomes and success while transitioning to a remote environment.[210]

4-in-5

employees in Singapore believe there is a need for guidance and rules around working from home in their organisation

EIU Survey (2020)

Company Case Study:
RedDooz — Tailoring mental health solutions to local needs in Singapore

The travel and hospitality industry was one of the hardest-hit sectors during the Covid-19 pandemic, with some employees left without clarity on their future. RedDoorz, a growing online hotel management and booking platform in Southeast Asia, has had to put many of its 1,200 staff on temporary furlough. However, they have maintained communication with these employees throughout, to get insights on how to support them best. This listening exercise resulted in the launch of a 'Hope Hotline' in May 2020, a mental wellbeing programme for all staff including those who were furloughed.[211]

The programme provides information on the mental and emotional stressors that could arise from the Covid-19 pandemic, offers practical resources to support the mental wellbeing of its employees, and offers free counselling sessions in partnership with certified counsellors and psychologists. Importantly, local partners lead the counselling sessions in the native language where an employee using this service is based. By providing local and company-wide resources, RedDoorz has been able to adjust its support to employees' local situations while fostering a company-wide solidarity network. Their aim is that the 'Hope Hotline' will play an active role in helping staff embrace the new normal.

211 Reddoorz Launches Hope Hotline CSR initiative, Manila Times (2020)

209 About Work-Life Harmony Tripartite Alliance for Fair & Progressive Employment Practices
210 Remote Work Advocates Warn Companies About COVID-19 Work-From-Home Strategies, Forbes (2020)

5.4 United Arab Emirates: a positive experience in favour of offering remote working

Key Findings

- The majority of people in the UAE have responded positively to working from home during the Covid-19 pandemic and are now more open to remote working for both themselves and their teams.

- This positive transition can be linked to employers in UAE, who have been offering their workforce comprehensive support; however, companies need to make sure these changes are offered in the long term.

- Policymakers also need to update regulations to make sure companies feel the commercial benefits of their employees working from home.

5.4.1 How has Covid-19 changed how people work in the United Arab Emirates?

Employees working from home in the UAE during Covid-19 have seen more benefits and adapted better to the new situation than those in other high-income economies —according to a recent EIU survey. Though pre-pandemic levels of remote working were similar to those in other high-income economies, people in the UAE reported greater gains in terms of ability to do work-related tasks from home and preferences for working from home more in the future. For example, 74% of people who had started working from home more in this period want to continue to do so once restrictions have been lifted and 90% of people feel more comfortable doing at least one of their work-related tasks remotely since the lockdown.

The EIU survey also suggests that people's attitudes to others working remotely have changed during lockdown: 76% of respondents say they would now be more comfortable with their juniors working from home at least three days a week and almost seven-in-ten people feel their team achieves just as much when they are working from home as in the office.
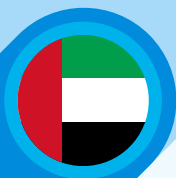
Employees in the UAE are more comfortable performing routine tasks remotely since Covid-19

% of people who feel more comfortable doing ____ since the lockdown
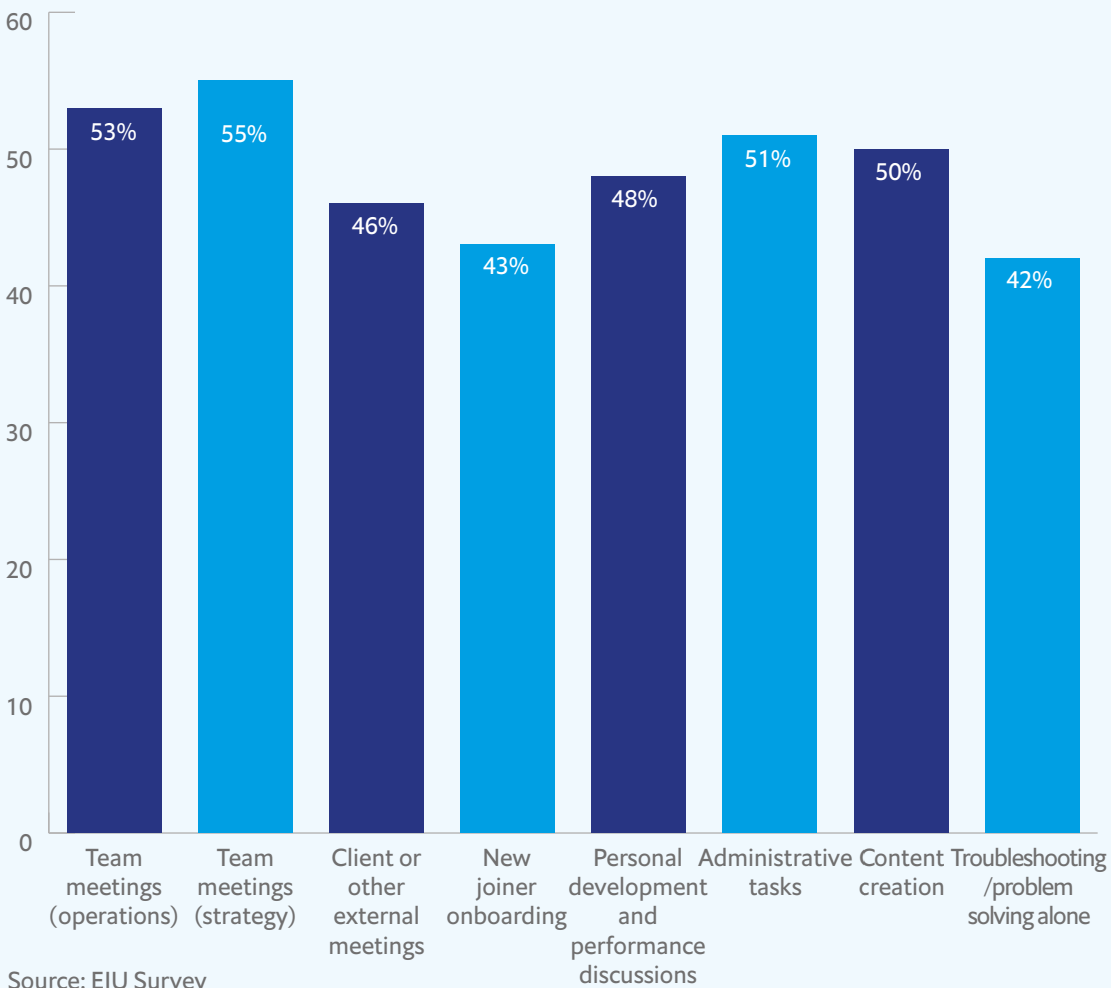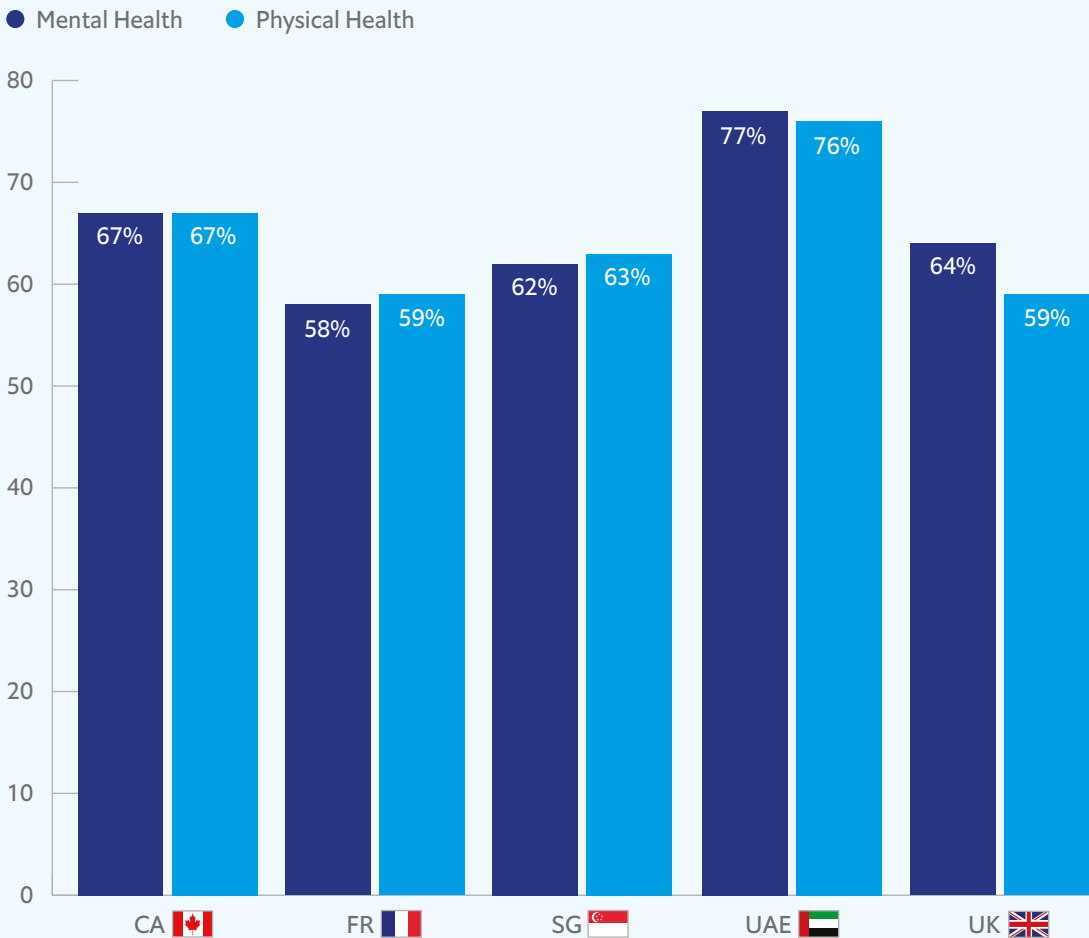

Source: EIU Survey

One reason employees are keen to keep working from home may be that employers have taken an active role in managing the transition to remote working. 97% of respondents in the EIU survey had been offered employer support to work effectively remotely and 91% of people had used, or were planning to use, that support (see below). Support and uptake levels were the highest seen in the five countries covered in the study (UK, Canada, France, Singapore and the UAE).

The UAE also had the overall highest number of people who felt sufficiently supported by their employer —77% in terms of mental wellbeing and 76% in terms of physical wellbeing — compared to an average of 63% and 62% respectively across the other four countries.

Most employees in the UAE feel they have received sufficient support in terms of wellbeing

% of employees who felt sufficiently supported in terms of mental and physical wellbeing, by country

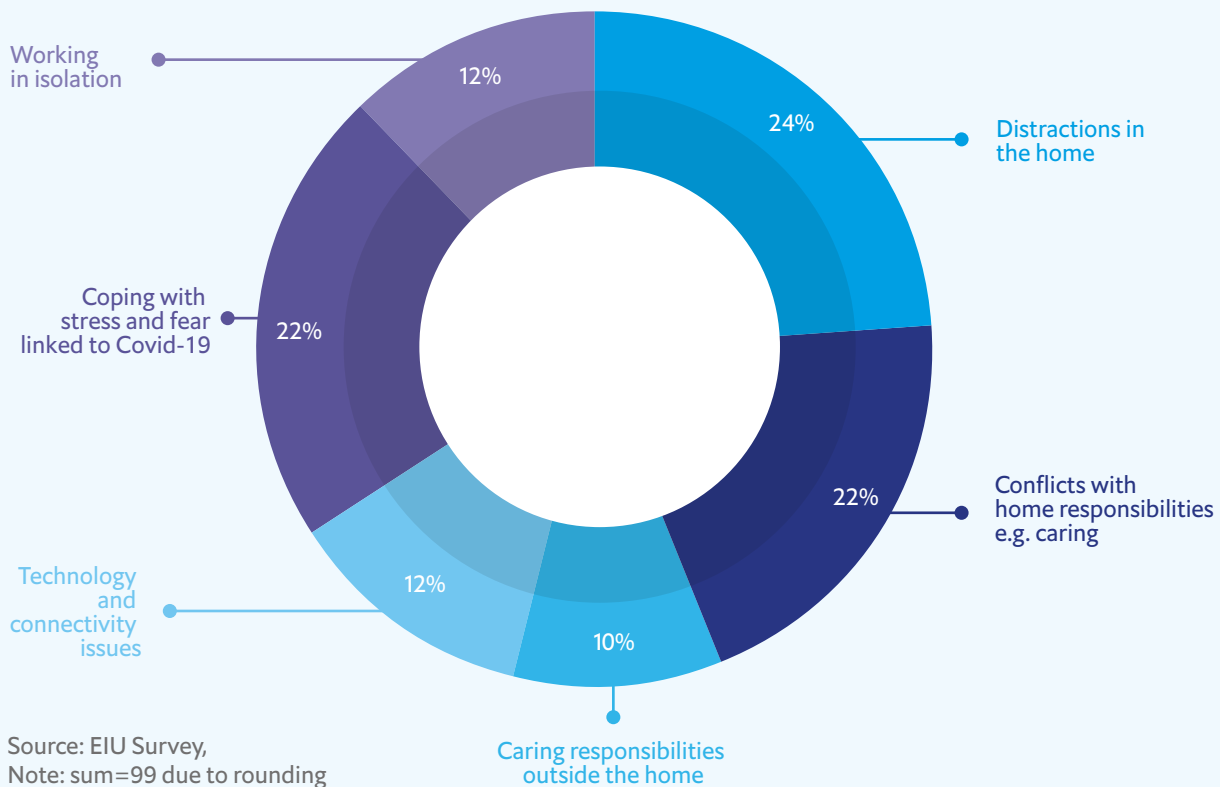● Mental Health   ● Physical Health

Source: EIU Survey

5.4.2 What challenges persist around remote working?

Though the work-from-home experience has been largely positive, employees in the UAE still reported some challenges. The most commonly reported problem (24% of respondents) was distractions in their house or flat (e.g. noises from family or roommates). Over one-fifth of respondents reported stress and fear linked to the pandemic itself was their greatest challenge in this period — the highest level among the countries considered in the study. The UAE also had the greatest share of people who reported that caring responsibilities were their biggest barrier to productivity (10% of respondents).

Beyond distractions and competing priorities, the majority of people (56%) also still struggle to do certain parts of their job remotely. Specific tasks people find difficult to do working from home included onboarding new joiners effectively and problem-solving in isolation. Respondents reported that these tasks were difficult because they struggled to coordinate multiple inputs (50%) and there was an absence of personal cues (40%).

The future of work and digital wellbeing

UAE employees face struggles with distractions in the home, Covid-19 related stress

% of respondents who see _____ as their greatest challenge working from home

Working in isolation — 12%

Coping with stress and fear linked to Covid-19 — 22%

Technology and connectivity issues — 12%

Distractions in the home — 24%

Conflicts with home responsibilities e.g. caring — 22%

Caring responsibilities outside the home — 10%

Source: EIU Survey,
Note: sum=99 due to rounding

5.4.3 What does this mean for businesses and policy makers?

Though employers have done a lot to help their workforce transition to remote working during Covid-19, there are important next steps to ensure the practice's long-term sustainability.

Update policies and communicate to employees that support systems are here to stay

One area where employers in the UAE have outperformed those in other high-income countries is in putting in place new support systems and benefits during Covid-19. Half of those surveyed said their employer had provided additional support during Covid-19, compared to an average of 44% in the other countries. If remote working is offered long-term, employers need to keep these support systems in place and communicate to employees that they should continue to use them.

Making a public commitment to remote working will also help employers attract and retain top talent. A 2019 survey by the International Workplace Group found that 80% of people, when faced with two similar employment offers, would choose the one that offered flexible working.[212]

In the longer term, the government will play an important role in making the transition to a more flexible working culture commercially viable. Currently, companies are granted visas for employees based on the amount of office space they are leasing. For companies to reap commercial gains from more of their employees working from home, this policy will need to be adjusted. These changes could include investments made in home office upgrades or residential real estate as acceptable spending to access visas.

Ensure employees have access to the technical equipment they need to work effectively

Companies that have long understood the benefits to productivity and health of creating a good working environment in their offices have been slow to help their workforce recreate this in their homes. Over one-third of UAE respondents (36%) wanted, but were not offered, IT or home office equipment. Offering to repay employees for new equipment via an existing expense process or setting up a voucher programme with a local supplier can be simple solutions, if people feel comfortable using these financial support systems. Transparency on spending limits and approved items is key. Leading by example will also help: senior team members should be vocal about the need to ensure that home working environments are taken seriously and consider asking employees in one-on-ones about what they feel they need.

Public private partnerships also work well. For example, the UK's 'Cycle to Work' scheme waives VAT on bikes used to help people get to work. Employers pay the upfront cost of the bike and then deduct the money in manageable instalments from employees' pay checks. A similar arrangement around investments in the home working environment may help stimulate consumer confidence and support recovery in the retail sector.

Over

1/3

of UAE respondents wanted, but were not offered, IT or home office equipment

EIU Survey (2020)
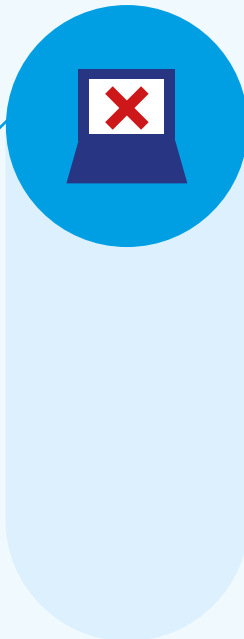
Company Case Study:
PwC Middle East — Clarity over remote work in the UAE

Remote working is a relatively new feature of the UAE corporate landscape. The Ministry of Human Resources and Emiratisation (MoHRE) gave UAE nationals the right to apply for remote working in 2017.[213] Even then, employers have had significant control over the decision and had to specify in writing the conditions in which remote work takes place. These directives were suspended during the pandemic, and it is unclear if they will return.

This lack of institutional clarity around the future of work post Covid-19 makes the role of employers even more important. PwC Middle East released its own 'Working from Home' charter in May 2020, which outlines values all employees should try to emulate during this period. It includes respect and understanding for home life given some distractions, maintaining a human connection, and fostering strong relationships with empathy and consideration for each other's wellbeing.[214]

In an interview with Arabian Business, Hani Ashkar, a senior partner at PwC Middle East, noted that this commitment would help PwC stay competitive in a tight labour market. "I don't think people want the old routine and I don't think you retain your people when you give them that kind of work. They just leave and go somewhere else. And if you're in a competitive market...you lose if you're not offering people a different working experience!"[215]

213 Developments in flexible working practices in the UAE (2019)
214 PwC Middle East releases remote working charter in support of employees, PwC (2020)
215 Covid-19 impact: Will working from home be the new norm in the UAE', Arabian Business(2020)

5.5 United Kingdom: Changing the culture around flexible working a priority to increase use by groups who need it most

Key Findings

- Though many companies in the UK give their employees the option to work from home, prior to lockdown, levels of uptake were comparatively low.

- Covid-19 might help drive more people to work from home, as many have had a positive experience and the systems are already in place.

- Isolation is a key problem for UK employees and companies will need to find new ways to integrate community cohesion if the transition to remote working becomes more permanent.

- A big step in achieving this will be to ensure companies actively create a culture where people feel they can talk about their mental wellbeing and use the support offered.

5.5.1 How has Covid-19 changed how people work in the UK?

Before Covid-19, UK employees worked from home less than those in other high-income economies. In a recent EIU survey of people who had to work remotely during the pandemic, almost one-third (32%) had never done so before and a further 20% did so less than once a week. According to a Chartered Institute of Personnel and Development (CIPD) study, this lower rate of home working may, in part, be driven by people fearing that the behaviour is looked down on by colleagues and, in some cases, by active discouragement from their managers.[216]

Almost one-third of people who worked from home during the pandemic had never done so before

% of people who had never worked from home before the Covid-19 restrictions, by country

Source: EIU Survey

The future of work and digital wellbeing
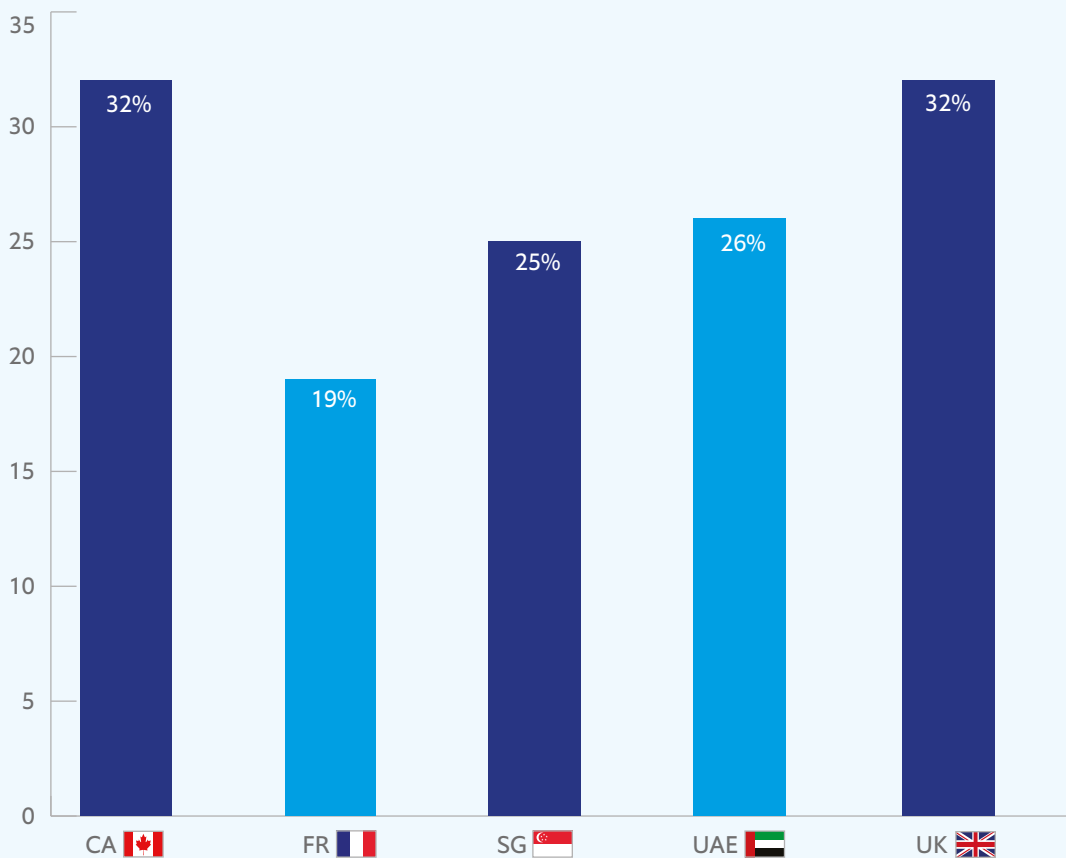
Covid-19, and the lockdown, has completely reversed this trend — with largely positive results. Over three-quarters (76%) of people want to work from home more post-Covid-19, and almost two-thirds of people want to work remotely more than three days a week. Three-in-four people also feel more comfortable applying for a remote position.

Despite the stigma attached to remote working in the pre-Covid world, employers offered substantive support during the lockdown, and employees have capitalised upon this: 75% of respondents are using or planning to use support services from their company around working from home. The most popular of these include flexible hours (47% of people planning to use), home office equipment (39%) and IT support (30%).

This high uptake suggests that the mandatory requirement to work from home is making people feel more open to accessing support systems than they may have been previously.

Employees in the UK can access support across the board
% of employees in the UK who are using or planning to use __ support
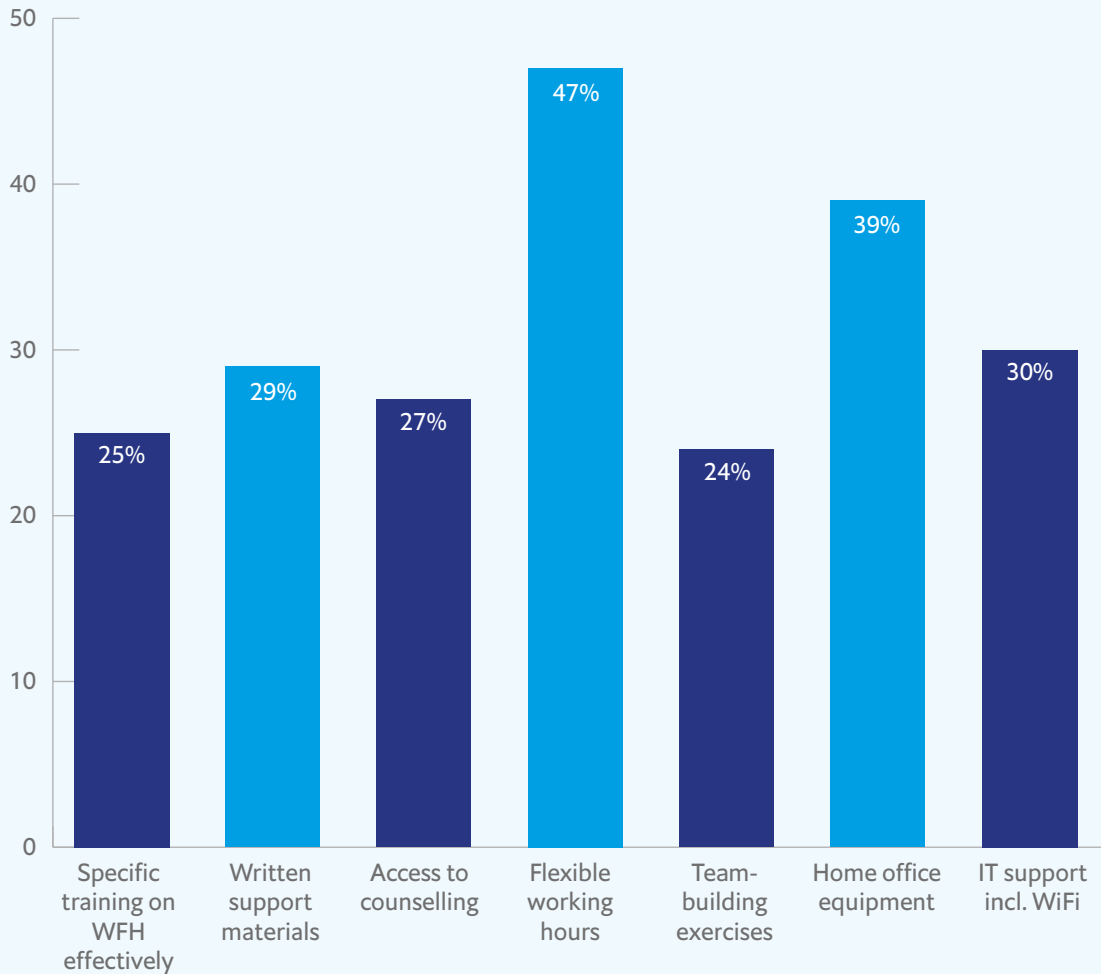
Source: EIU Survey

5.5.2 What challenges persist around remote working?

Although the experience of working from home has been positive for many people, isolation appears to be a significant problem. Just under one-fifth of respondents cited isolation as their greatest challenge while working from home, along with caring responsibilities (22%) and connectivity issues (20%).

Problems with isolation are more prevalent than in the other countries considered, 18% in the UK versus an average of 12.5% in France, Canada, UAE and Singapore. High levels of isolation may be driven by people struggling to connect with colleagues: 38% said it was hard to build rapport remotely (compared to an average of 31% for the other four countries). More research is needed to understand why this appears to be a particular problem in the UK; however, lack of familiarity with working remotely could be a driving factor.

High-levels of isolation are not only bad for wellbeing, but also for productivity. 57% of those surveyed are still uncomfortable doing at least one part of their job remotely, especially tasks involving others — 49% of respondents struggle with meetings, new joiner onboarding and other group activities, whereas only 32% struggle with tasks normally done alone.

Employees in the UK struggle more with tasks that involve other people

% of people who feel uncomfortable doing ___ from home
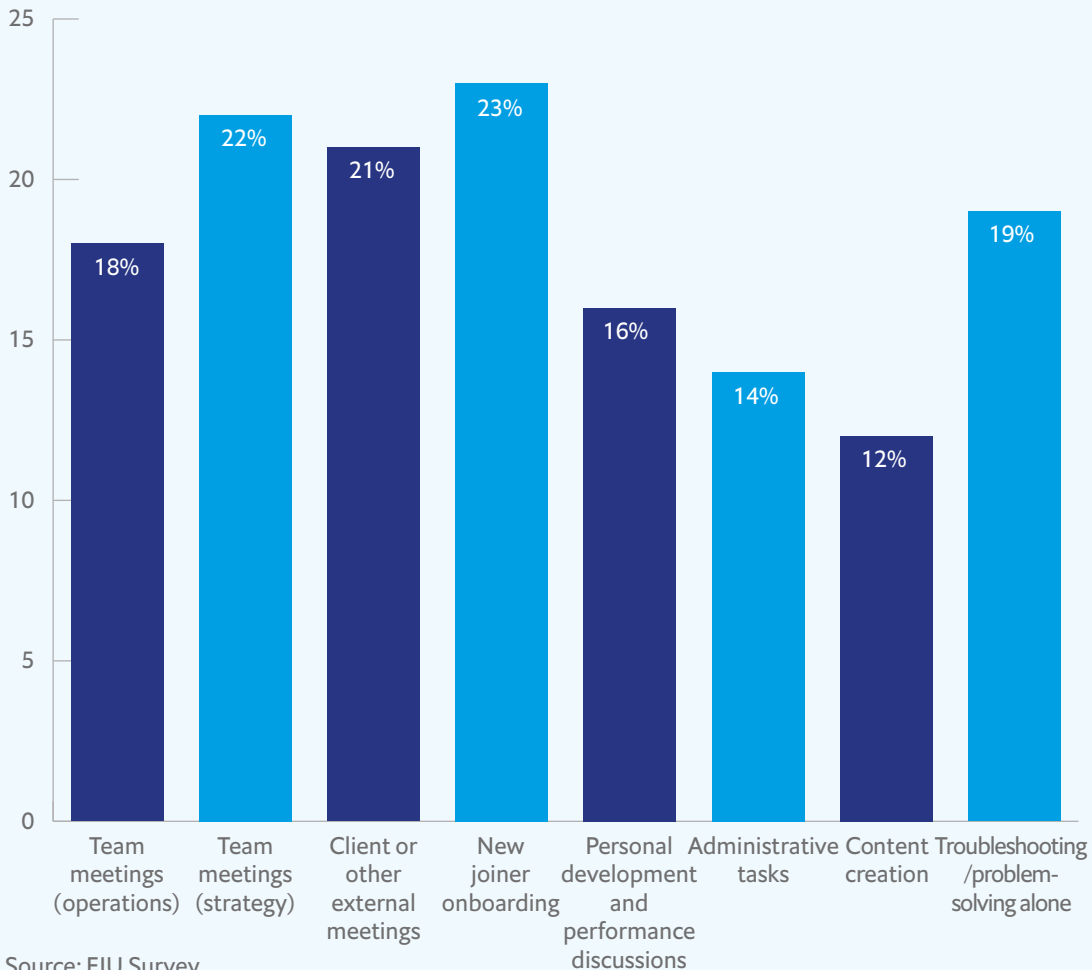
Source: EIU Survey

5.5.3 What does this mean for businesses and policy makers?

Though the majority of people have had a positive experience while working from home, companies in the UK now need to focus on how they close the gaps in support. To do this, they should:

Tackle isolation through conversations about mental wellbeing

People in the UK feel most unable to speak openly about their mental health. Over one-third of respondents had not discussed the subject with their manager at all during the lockdown and a further 30% who had a conversation did not feel able to talk honestly about how they were feeling. This is an urgent issue for companies to address — in particular, if the company intends to transition long-term to more remote working, where strains such as isolation, mentioned above, could become increasingly prevalent.

Due to the recent spotlight on mental wellbeing among high-profile figures, including the Royal Family, companies wishing to close their mental wellbeing support gap now have access to a number of resources to help them do so. For example, The Prince's Trust Responsible Business Network provides toolkits for firms to assess how well they are meeting best practice in providing wellbeing support and where gaps in their offering exist.[217] It also provides bespoke guides on subjects such as "getting senior support for your wellbeing strategy" and "talking about grief and bereavement" to help address specific challenges.

For firms in the UK, the cost of not prioritising mental wellbeing is high: The Centre for Mental Health found that poor mental health costs companies around £1,300 per employee, per year.[218]

Create a culture where everyone in a team feels comfortable accessing support

Managers in the UK are still less comfortable with junior team members working from home post-pandemic than managers elsewhere. Over one-third of respondents do not want their team members to work from home more after restrictions ease, compared to less than one-quarter who do not want to work from home more themselves. Despite respondents feeling most strongly that their teams have achieved the same level of productivity while working remotely (70%, compared to 65% on average for the other countries), the discomfort with working from home persists. Addressing this gap is critical for UK companies to ensure they can use the gains made during the pandemic to create a more flexible and, therefore, more inclusive working environment.

Over

1/3

of respondents in the UK do not want their team members to work from home more after restrictions ease

EIU Survey (2020)

217 Toolkits Archive, The Prince's Responsible Business Network
218 Mental health problems at work cost UK economy £34.9bn last year, Centre for Mental Health (2017)

Changing this discomfort will require a cultural rather than policy shift, as a significant proportion of businesses had some support in place before the pandemic. Culture shifts can be much harder than policy shifts and, according to Dr Shelton Goode, CEO and President of Icarus Consulting, require active effort. A good place to start is for leaders to set an example. This could be as simple as senior leadership and managers talking about how they use flexible or remote working policies to support their own work-life balance.

A second, harder step is to identify the teams where policies are not being used and work with them to overcome negative perceptions. This might involve asking managers to report new metrics on uptake of flexible work policies — a step which, in itself, may cause them to revaluate their approach. Leadership need to be clear that higher uptake of policies will be directly tied to assessments of managers' performances.

Company Case Study:
Lloyds Banking Group — Discussing mental health at work in the UK

In October 2019, Lloyds Banking Group became one of the founding signatories of the Mental Health at Work Commitment, an agreement aimed at overhauling the treatment of mental health in the workplace.[219] This is a part of the company's cultural transformation, with CEO Antonio Horta-Osario becoming a public advocate for workplace wellbeing after taking an eight-week leave of absence in 2011 due to work-induced stress.

Led by Horta-Osario, the company's 65,000 employees have seen a significant change in how mental health is discussed and managed. Senior executives have attended mental health awareness programmes, and employees have received training as mental health first responders.[220] The group has also set up an online portal that provides mental health resources and tips.

In 2016, the company created an internal website, where colleagues could share experiences about mental health and discuss stressors and worries present in their workplace and how to tackle them. Since 2014, the number of people who feel able to declare their mental health condition in their annual survey has doubled.[221] The company has successfully created a company culture where speaking about mental health is not only allowed, but encouraged.

219 Employers back mental health promise, The Times (2019)
220 Lloyds CEO's mental health experience led to wellbeing overhaul for 65,000 staff, Yahoo Finance (2020)
221 How Lloyds Banking Group is tackling poor mental health, Personnel Today (2019)

APPENDIX

Methodology Note on Survey

The Economist Intelligence Unit conducted a survey of 1,000 people (200 respondents each in Canada, France, Singapore, United Arab Emirates and United Kingdom) between 6th and 10th July 2020. Respondents were full-time employed and answered yes to following screening question:

"During the government restrictions imposed during Covid-19, have you had to work from home/are you still working from home for a period of over three weeks?"

Results were collected online, via the survey tool PollFish and came from the following sectors:

Sectors	% in sample
Finance and Insurance	11%
Education	9%
Information – Services and Data	7%
Construction	6%
Health Care and Social Assistance	6%
Government	5%
Manufacturing	5%
Hotel and Food Services	4%
Retail	4%
Software	4%
Computer and Electronics	4%
Telecommunications	2%
Transportation and Warehousing	2%
Scientific or Technical Services	2%
Energy/Utilities/Oil and Gas	2%
Marketing/Sales	2%
Information	2%
Wholesale	2%
Real Estate, Rental, or Leasing	1%
Agriculture, Forestry, Fishing, or Hunting	1%
Legal Services	1%
Arts, Entertainment, or Recreation	1%
Personal Services	1%
Human Resources	1%
Automotive	1%
Consulting	1%
Shipping/Distribution	1%
Other	11%

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