Winning the "war for talent" in the post-pandemic world

Investing in a flexible, inclusive and connected workforce

June 2021

future forum
by slack

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Introduction

It's been over a year since we've watched organizations make the biggest shift in how they operate in the age of knowledge work. With the end of the pandemic nearly in sight, companies are being asked: What's the plan? Are they reverting back to the way work was done in February 2020 or transforming how they operate on all levels? Our research over the past year provides the insights needed to help executives learn what is—and isn't—working for knowledge workers around the world as workplaces are redesigned.

We know insights aren't enough; that companies aren't just rethinking where and when work gets done but reinventing how. So in addition to publishing our research findings, the Future Forum partnered with Slack, Boston Consulting Group, Herman Miller, and Management Leadership for Tomorrow and hosted working groups of CEOs, CHROs, CIOs and more from over two dozen companies to produce hands-on playbooks: practical guidelines that companies can use to build their own roadmap to the future.

Introducing the Future Forum Pulse

Over the past two quarters, the Future Forum released insights from the Remote Employee Experience Index. The REEI was launched to better understand how the shift to remote work affected perceptions of work, experiences across different groups, and the impact of executive decisions. As employees have returned to work—and, frankly, as employee experience has fundamentally changed—we wanted to shift our research to a more well-rounded view of work as a whole.

With the new Future Forum Pulse, the five original elements of the index remain intact, with five recent additions relating to productivity at work, including the ability to focus; access to people, tools and information; and the flexibility offered at work. With these additions, the Future Forum Pulse can provide better insight into the practices and tools that drive flexibility, inclusion and connectedness in the workplace.

The previous index was focused on comparing employee experience between working remotely versus the office; the Future Forum Pulse is now measuring absolute values of employee experience across all of these elements.

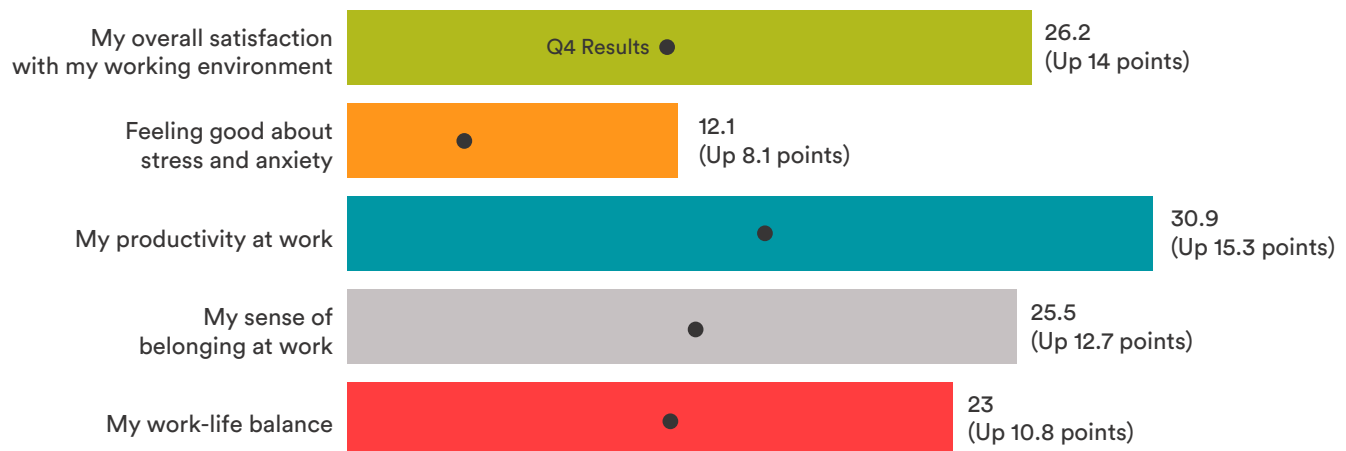future forum

June 2021: Where we are today

As we look to what's next, we want to take a moment and pause on where employees around the world stand today:

While the past year has been tumultuous and unpredictable, many employees have seen the bright spots in the way that they're working. Across many elements of the index, global knowledge workers have felt good or very good about their work life balance (64%), productivity (76%), flexibility (70%), and ability to focus (73%).

But the past 15 months were not just "flexible work": Our employees were forced to work during a pandemic, with few social, community or religious outlets; increased caregiving responsibilities; and general malaise. Over half of respondents were either negative or neutral when it came to stress about work. With stress and burnout top of mind, the investments that leaders have made in bridging social connection, creating more balance for employees, and providing mental health resources have shown positive changes over time.

As employees have settled into their adjusted routines, we saw positive movement quarter over quarter across sentiments. Across both mental and professional aspects, employees reported feeling much better over the past quarter. Above all, we saw significant movement when it came to productivity and sense of belonging, reflecting the digital and team-building investments that leaders made in the past six months.

Future Forum Pulse scores

My overall satisfaction with my working environment	Q4 Results ● ████████████ 26.2 (Up 14 points)
Feeling good about stress and anxiety	██████ 12.1 (Up 8.1 points)
My productivity at work	██████████████ 30.9 (Up 15.3 points)
My sense of belonging at work	██████████ 25.5 (Up 12.7 points)
My work-life balance	█████████ 23 (Up 10.8 points)

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,541

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A look into the future could be the data from Australia, the only market where we've seen consistent drops in sentiment. The market was quicker in its "return to the office" relative to the other markets surveyed, and we've seen a slight decline in work-life balance and productivity, and a sharp decline in the ability to manage stress and anxiety, across respondents.

Future Forum Pulse scores for Australia

	Q4 Results ●	Score
My overall satisfaction with my working environment		26.7 (Up 0.9 points)
Feeling good about stress and anxiety		11.3 (Down 5.9 points)
My productivity at work		30.6 (Down 0.6 points)
My sense of belonging at work		26.4 (Up 0.5 points)
My work-life balance		22.3 (Down 1.6 points)
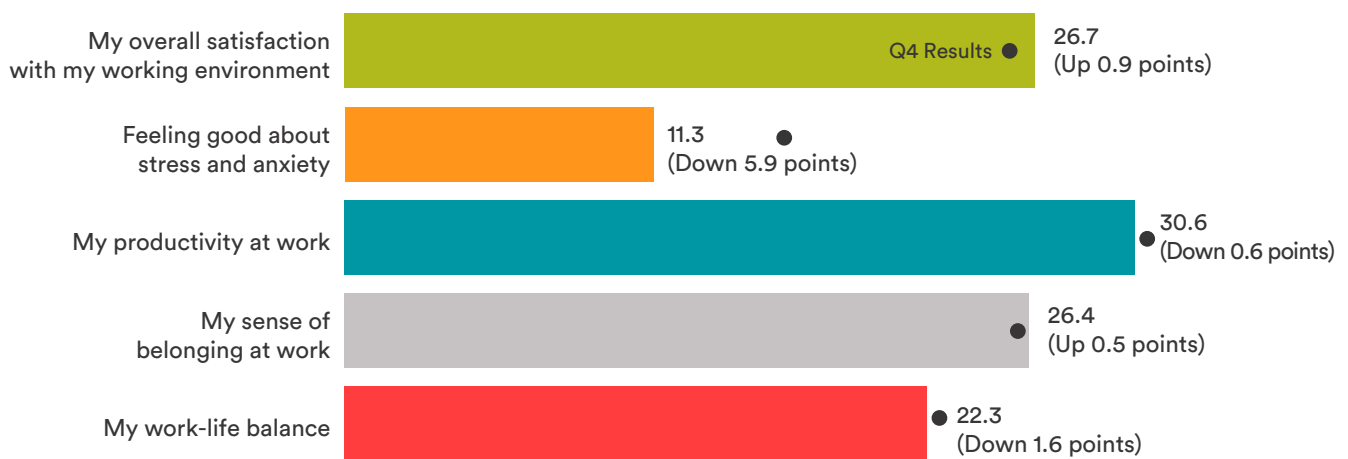
Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

The data above could serve as a reminder of the importance of responding to the needs of our employees for the longer term, rather than optimizing for short-term fixes or a return-to-normal mindset.

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Flexibility

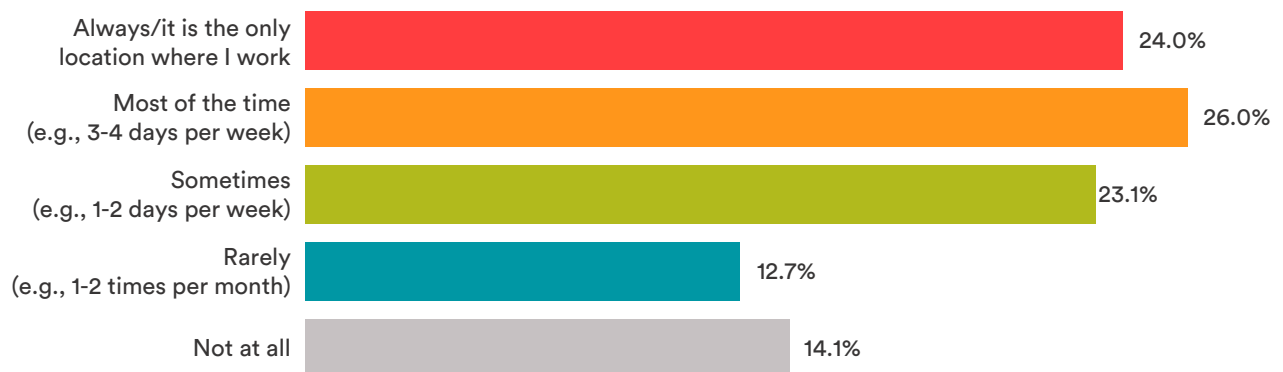**Flexibility is now table stakes in the war for talent.**

It's the responsibility of leaders to provide the appropriate guardrails to make it work, while offering teams choice.

In the coming months, **more than 63%** of companies are planning some form of "hybrid" model, with 27% still TBD. But only 33% of those surveyed feel prepared to navigate this new way of working—their policies don't mirror the complexity of this new context. "Hybrid" is more than the number of days your employees are expected to come into the office. It's about time, place, and offering choice.

WFH is no longer a perk

In our research, 76% of global employees surveyed want some form of flexibility in where they work, a trend that has stayed largely consistent quarter over quarter.

Responses to the question "In an ideal world, how much of your workweek would you prefer to spend in a company/client location (e.g., your company's office)?"

Response	Percentage
Always/it is the only location where I work	24.0%
Most of the time (e.g., 3-4 days per week)	26.0%
Sometimes (e.g., 1-2 days per week)	23.1%
Rarely (e.g., 1-2 times per month)	12.7%
Not at all	14.1%

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

The flexibility stigma has run rampant since the birth of the office, with "first at work, last to leave" behavior and the always-on nature of presenteeism lauded in performance evaluations. But the past year has shown us that people can both be productive and feel a strong sense of belonging in any model, from fully remote to fully in-person.

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Future Forum Pulse scores by current working location

	My work-life balance	My sense of belonging at work	My productivity at work	Feeling good about stress and anxiety
Fully Remote	31.3	27.3	35.5	18.3
Hybrid	23.3	24.9	24.9	12.2
Fully-Inperson	17.2	26	31.2	8.2

	My level of access to relevant people, files and resources at work	The flexibility I have at work	My ability to focus on my work	My overall satisfaction with my working environment
Fully Remote	33.7	37	34.1	33/1
Hybrid	27	28.2	28	26.5
Fully-Inperson	28.3	21.5	28.1	22.1

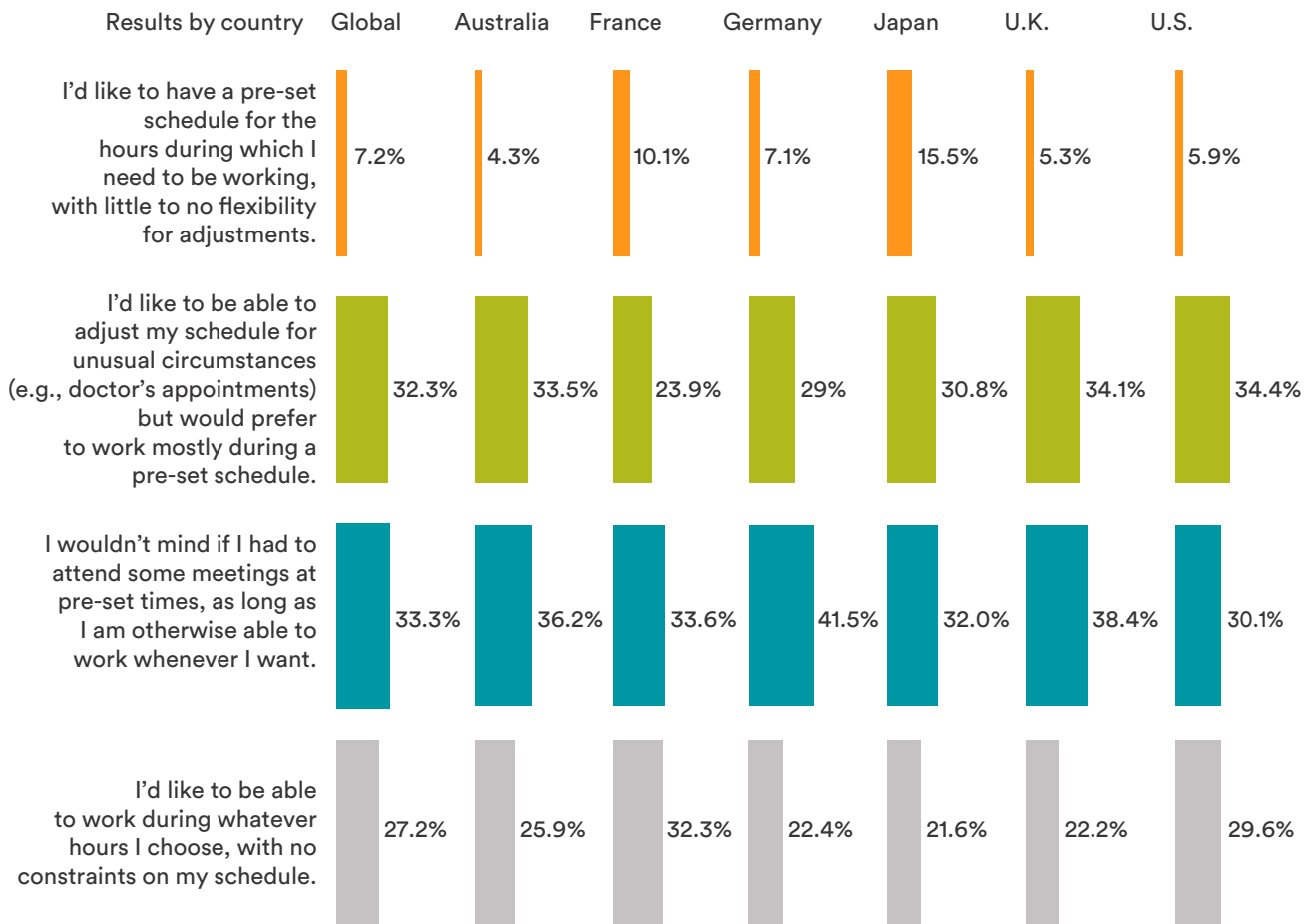Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,541

Unsurprisingly, location flexibility had dramatic and positive impacts on people's ability to manage stress (58% higher for those working fully remote, and 17% higher for those working "hybrid" vs. full-time in-office), their work-life balance (45% higher for fully remote) and their overall satisfaction at work (30% higher fully remote). Surprisingly, fully remote employees felt better about access to people, files and information, with hybrid employees about on par with fully in-person employees. The traditional argument against flexibility—that the office is where work happens—is no longer relevant.

The percentage of employees who want to return to the office full-time steadily increased quarter over quarter, from 17% to 24%. As we enter the fifth quarter of the pandemic, it's understandable that many people's desire for in-person connection has grown. But companies that are considering a five-day-a-week model (instead of a more flexible one) should take note of the difference between groups. In our research, those who currently work in the office skew the results: 52% of them want to remain committed to the five-day-a-week model. But of employees who are already operating in hybrid mode, only 9.4% want to move to five days a week. Employees who have demonstrated success in remote or hybrid settings are far less likely to be enthusiastic about a dictate to return full-time.

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Embrace the non-linear workday

Quarter over quarter, we've seen that flexibility in when people work has an even bigger impact than location flexibility on a number of dimensions. Offering people more freedom to set their own schedules had a dramatic impact on every dimension in our survey, and 93% of employees want it.

Responses to the question "In an ideal world, how much flexibility would you like when it comes to when you work?"

Results by country	Global	Australia	France	Germany	Japan	U.K.	U.S.
I'd like to have a pre-set schedule for the hours during which I need to be working, with little to no flexibility for adjustments.	7.2%	4.3%	10.1%	7.1%	15.5%	5.3%	5.9%
I'd like to be able to adjust my schedule for unusual circumstances (e.g., doctor's appointments) but would prefer to work mostly during a pre-set schedule.	32.3%	33.5%	23.9%	29%	30.8%	34.1%	34.4%
I wouldn't mind if I had to attend some meetings at pre-set times, as long as I am otherwise able to work whenever I want.	33.3%	36.2%	33.6%	41.5%	32.0%	38.4%	30.1%
I'd like to be able to work during whatever hours I choose, with no constraints on my schedule.	27.2%	25.9%	32.3%	22.4%	21.6%	22.2%	29.6%

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

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But on a global scale, people aren't looking for complete freedom from structure. While there are obvious nuances between countries, about two-thirds of those surveyed want freedom within a framework. A non-linear workday—giving people flexibility outside of some required meetings at pre-set times—includes set core collaboration hours and flexible focus time. When we compare the group with structured flexibility against those without flexibility, they have greater ability to focus (+7%), higher sense of belonging (+36%), far higher ability to manage stress at work and better work-life balance (both 140% higher), and are overall more satisfied (+50%).

Companies like Dropbox have embraced the **non-linear workday:** setting team-level agreements about a limited set of "core team collaboration hours" (e.g., 10 a.m.–2 p.m., tied to time zones) for meetings, conversations, and getting into work mode, while allowing individual flexibility at other times.

Build a model that works for you, and avoid false flexibility

Across many of our Future Forum executive members was the shared concern of creating "faux flexibility," or a remote "second class"—that those coming into the office might revert back to norms of rooms dominating meetings, and physical facetime impacting career mobility. These concerns grow if those returning are more senior, male and white, while historically discriminated-against groups may lack access and visibility if they choose to work flexibly.

Hybrid gone wrong would create faux flexibility and a second-class citizen experience for your remote employees. As leaders, it's critical to establish org-wide principles, ensuring that your executives model them and provide guardrails at the team level.

Flexibility

Example of core collaboration hours, Dropbox

■ Regional Core Collaboration Hours   ▨ Potential Flex Hours

SF Bay Area (PST)	New York	Dublin (GMT)	Tel Aviv	Tokyo (GMT + 9)	Sydney
—	—	8	11	4	5
—	—	9	Noon	5	6
—	—	**10**	1	6	7
—	—	**11**	2	7	—
—	7	**Noon**	3	—	—
—	8	1	4	—	—
—	9	2	5	—	—
7	10	3	6	—	—
8	11	**4**	7	—	—
9	**Noon**	**5**	—	—	—
10	**1**	**6**	—	—	—
11	**2**	7	—	—	—
Noon	**3**	—	—	—	—
1	**4**	—	—	—	—
2	5	—	—	—	7
3	6	—	—	7	8
4	7	—	—	8	9
5	—	—	—	9	**10**
6	—	—	—	**10**	**11**
7	—	—	—	**11**	**Noon**
—	—	—	7	**Noon**	**1**
—	—	—	8	**1**	**2**
—	—	—	9	2	3
—	—	7	10	3	4
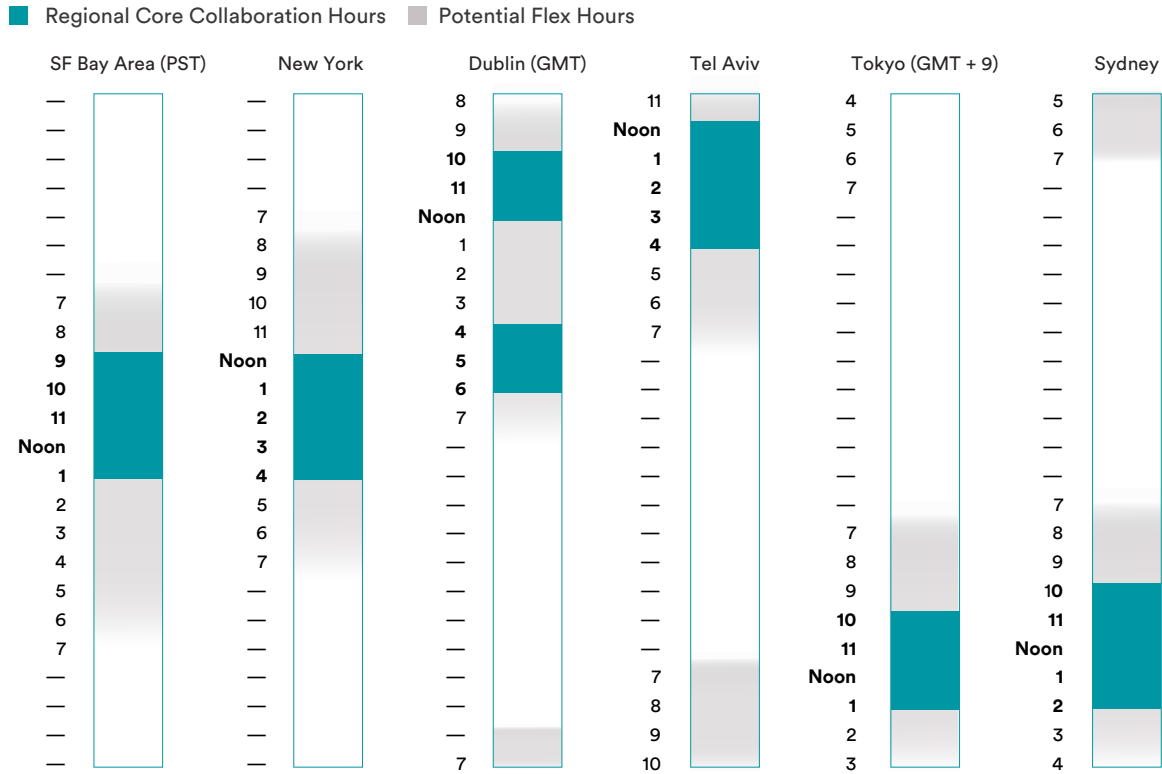
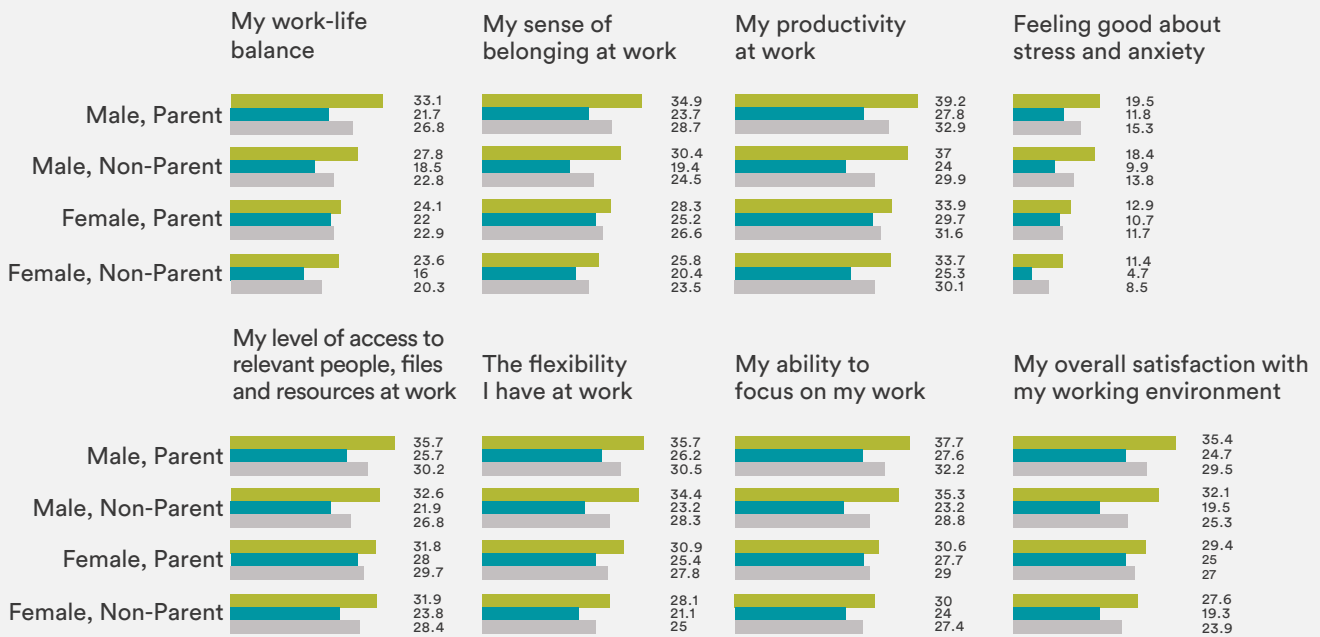The featured locations in this infographic are examples and not a comprehensive list

See our suggested guardrails and more hands-on tips for creating a model that works for your organization in the playbook "**More Than Just Hybrid**", written in partnership with Boston Consulting Group and Future Forum executive members.

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Spotlight on flexibility: Normalize flexible working for all

Working mothers are the frequent victims of the flexibility stigma. Working fathers scored higher than working mothers across the board, particularly in work-life balance (38% higher scores), stress/anxiety (50% higher) and sense of belonging (23% higher).

Future Forum Pulse scores by parental status and gender

■ U.S. ■ Rest of World ■ Global

	My work-life balance	My sense of belonging at work	My productivity at work	Feeling good about stress and anxiety
Male, Parent	33.1 / 21.7 / 26.8	34.9 / 23.7 / 28.7	39.2 / 27.8 / 32.9	19.5 / 11.8 / 15.3
Male, Non-Parent	27.8 / 18.5 / 22.8	30.4 / 19.4 / 24.5	37 / 24 / 29.9	18.4 / 9.9 / 13.8
Female, Parent	24.1 / 22 / 22.9	28.3 / 25.2 / 26.6	33.9 / 29.7 / 31.6	12.9 / 10.7 / 11.7
Female, Non-Parent	23.6 / 16 / 20.3	25.8 / 20.4 / 23.5	33.7 / 25.3 / 30.1	11.4 / 4.7 / 8.5

	My level of access to relevant people, files and resources at work	The flexibility I have at work	My ability to focus on my work	My overall satisfaction with my working environment
Male, Parent	35.7 / 25.7 / 30.2	35.7 / 26.2 / 30.5	37.7 / 27.6 / 32.2	35.4 / 24.7 / 29.5
Male, Non-Parent	32.6 / 21.9 / 26.8	34.4 / 23.2 / 28.3	35.3 / 23.2 / 28.8	32.1 / 19.5 / 25.3
Female, Parent	31.8 / 28 / 29.7	30.9 / 25.4 / 27.8	30.6 / 27.7 / 29	29.4 / 25 / 27
Female, Non-Parent	31.9 / 23.8 / 28.4	28.1 / 21.1 / 25	30 / 24 / 27.4	27.6 / 19.3 / 23.9

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

But as leaders design their post-pandemic workplaces, it's critical that they do not accidentally reinforce the motherhood penalty in their practices. In the U.S., a third of working mothers listed "being better able to take care of personal or family obligations during the day" as the leading reason for preferring flexibility, whereas working fathers indicated work-life balance (38%) as their primary reason.

Reducing the load on mothers—and reversing the "she-cession"—involves normalizing and encouraging flexibility for all employees. Additionally, offering flexibility for all employees ensures that working mothers are not the only ones impacted in their career trajectory. If done equitably, it balances the load between parents, rather than assuming that mothers will take on a bigger burden in home life while balancing their jobs.

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Connection

"People connector" is now every executive's job.

The office and digital tools are two key parts of the toolkit for building culture.

Gone are the days when connection was built merely through office happy hours or company picnics, often propagating homogeneous networks. Forging connections is no longer the role of the internal events team or HR; it's a core part of every leader's job in a distributed organization.

The nucleus of companies has shifted from the physical HQ, with satellite offices being treated as second-class, to a digital headquarters. Companies that are making investments in technology are seeing high returns in employee productivity and culture.

To build an organizational culture, leaders must intentionally determine the role of the office and invest in tools to empower employees to build the day-to-day norms and practices.
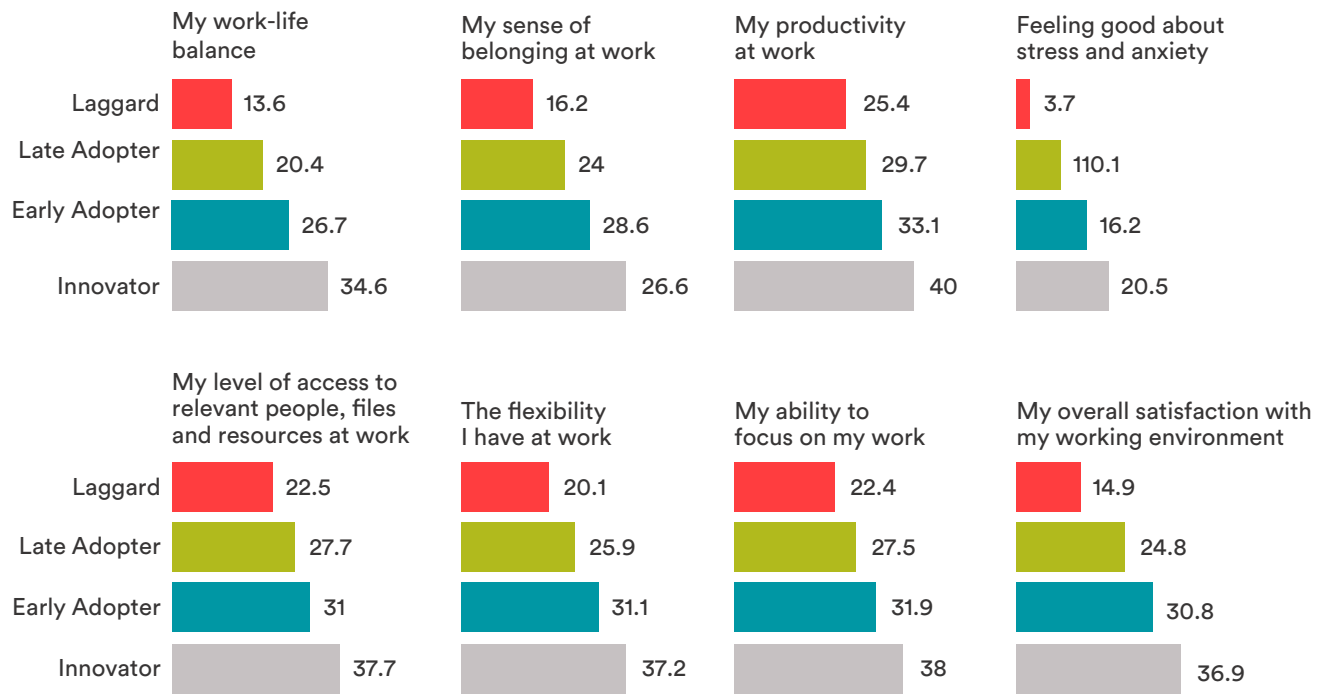
It's more than productivity: Your investments in technology drive belonging and human connection

If companies embrace flexibility with regard to time and location, then the office no longer needs to be a place to do individual, focused work.

Across the board, the biggest differences in our survey were driven by investments in innovation. To embrace a digital-first workplace, leaders need to invest in tools that connect parts of their organization together—a necessary investment for this day and age and a massive influence on overall employee engagement.

Across all elements of the Future Forum Pulse, employees at "innovator" and "early adopter" organizations scored markedly higher than their counterparts at "late adopter" or "tech laggard" companies. It wasn't just about productivity; technology adoption impacted the mental health and sense of belonging among employees. Employees at innovator companies had scores that were over twice as high for sense of belonging and more than five times as high for their ability to manage stress and anxiety. Investments impact day-to-day-work as well: These employees reported higher productivity (1.4x), focus (1.6x), and access to people and data (1.6x) scores as well.

Future Forum Pulse scores by company's approach to adopting new technology

My work-life balance

Laggard	13.6
Late Adopter	20.4
Early Adopter	26.7
Innovator	34.6

My sense of belonging at work

Laggard	16.2
Late Adopter	24
Early Adopter	28.6
Innovator	26.6

My productivity at work

Laggard	25.4
Late Adopter	29.7
Early Adopter	33.1
Innovator	40

Feeling good about stress and anxiety

Laggard	3.7
Late Adopter	110.1
Early Adopter	16.2
Innovator	20.5

My level of access to relevant people, files and resources at work

Laggard	22.5
Late Adopter	27.7
Early Adopter	31
Innovator	37.7

The flexibility I have at work

Laggard	20.1
Late Adopter	25.9
Early Adopter	31.1
Innovator	37.2

My ability to focus on my work

Laggard	22.4
Late Adopter	27.5
Early Adopter	31.9
Innovator	38

My overall satisfaction with my working environment

Laggard	14.9
Late Adopter	24.8
Early Adopter	30.8
Innovator	36.9

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

Quarter over quarter, we've seen an increasingly larger divide between types of companies on the spectrum of technology adoption. Since our first survey in September 2020, we've seen the gulf in employee engagement between those types grow rapidly, most notably with elements like work-life balance, sense of belonging, and managing stress and anxiety.

Tools are about more than just traditional work needs in this new environment; it's more than video for meetings or enterprise security. It's about using tools like Donut for strengthening cross-team ties, Mural for virtual brainstorming, Google Docs for **asynchronous "brainwriting"**, and Slack watercooler channels for fun. Building a digital HQ is about bringing the human work experience to anyone, anywhere.

"Bursty" communication for the win

Employees at early adopter or innovator organizations witnessed higher levels of access to relevant people, files and resources at work. Thanks to the range

of technology dedicated to linking people to one another and to information, the argument for going back to five days in the office for collaboration is no longer relevant.

How your collaboration tools are used matters. Frequency of communication between team members impacts experience: Employees on teams that communicate regularly hold a higher sense of belonging (nearly 3x higher scores) and better management of stress and anxiety (over 2x higher scores), as well as 50% higher scores for productivity and ability to focus.

Future Forum Pulse scores by frequency of team communication

	My work-life balance	My sense of belonging at work	My productivity at work	Feeling good about stress and anxiety
Communicate very often/constantly (many times per day), but can focus on work when needed	27.9	34.1	38.2	16.8
Communicate very often/constantly (many times per day) and have trouble focusing on work when needed	8.2	12	18.3	0.3
Communicate rarely (once per week)	15.5	11.3	22.4	5.7

	My level of access to relevant people, files and resources at work	The flexibility I have at work	My ability to focus on my work	My overall satisfaction with my working environment
Communicate very often/constantly (many times per day), but can focus on work when needed	35.3	32.4	36.3	33
Communicate very often/constantly (many times per day) and have trouble focusing on work when needed	18.6	13.7	13.8	9.8
Communicate rarely (once per week)	19.4	22.6	22.8	16.5

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,541

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"High frequency" does not equate to "always on" or synchronous communication, however. Based on the data, the most satisfied employees are those who communicate with their teams often but are also able to do focused work. If there's no room for focus time, satisfaction among employees drops dramatically. Employees who had high communication frequency and the ability to focus on their work reported productivity scores that were 2.1x those with high-frequency communication and a lack of focus, and 3.4x higher scores on work-life balance.

Academic research consistently shows that teams that do **"bursty" work** —heavy communication flow for a chunk of a few hours per day—are more productive because that enables people to carve out time for focused work. Focused time for working, at a time and place that works best for individuals, is critical for people to **get into flow**. Setting time aside for bursty work and meetings—to debate, discuss or make decisions on specific projects—offers the "freedom with a framework" that so many employees are expecting.
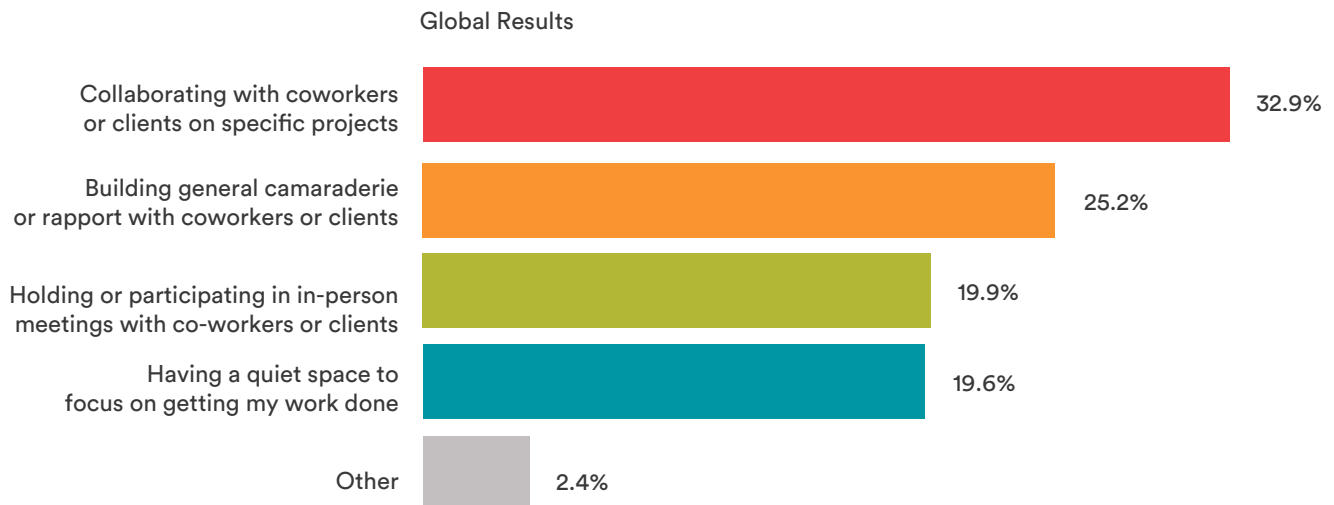
The office is no longer a default, but acts as a more intentional place for human moments

Advances in SaaS tools and connectivity offer so much more than even a few years ago, but investing in digital-first workplaces doesn't mean the office is dead. Even the best video call cannot replace the feeling of a face-to-face interaction. We've heard from many leaders that they can't wait to return to their office to "hug their teams," "meet their teammates" or "catch up over coffee."

As offices reopen, leaders have an opportunity to bring people together by redesigning offices around human moments or "curated collisions"—and the digital tools that connect those moments—to build your culture. We are social creatures; there's a reason why the majority of employees still want to return to the office regularly, whether a few times a week or once a quarter. The office is a tool in your culture-building toolkit—one that is especially valuable in promoting human connection and belonging.

Responses to the question "You mentioned above that, in an ideal world, you'd like to work from the office at least sometimes. Which of the following reasons would be your primary motivation for going in to work at a company/client location?"

Global Results

Collaborating with coworkers or clients on specific projects	32.9%
Building general camaraderie or rapport with coworkers or clients	25.2%
Holding or participating in in-person meetings with co-workers or clients	19.9%
Having a quiet space to focus on getting my work done	19.6%
Other	2.4%

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

With nearly a third of respondents seeing the office as a place for in-person collaboration and a quarter listing it as a place for building rapport, leaders need to build out their office space with intention and around activity, rather than a one-size-fits-all model. Building space to facilitate these activities, rather than going back to the open office plan, will further the value of your office space for your employees.
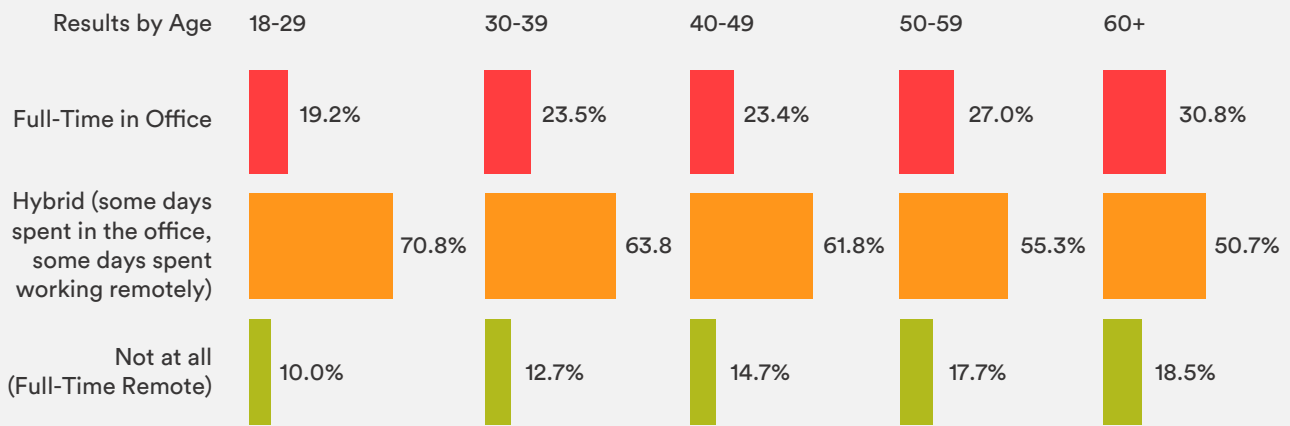
Our joint playbook with Herman Miller, "Building a Connected Organization," helps teams unlock culture by blending the best of both worlds: leveraging shared space for team building and digital tools for connectivity.

Spotlight on connection: Flexible work isn't just for millennials

While 31% of employees over the age of 60 would like to go back to the office full-time, that's only part of the story. Compared with employees ages 18-29, they are also more than twice as likely to want to work remotely full-time.

Responses to the question "In an ideal world, how much of your workweek would you prefer to spend in a company/client location (e.g., your company's office)?

Results by Age	18-29	30-39	40-49	50-59	60+
Full-Time in Office	19.2%	23.5%	23.4%	27.0%	30.8%
Hybrid (some days spent in the office, some days spent working remotely)	70.8%	63.8	61.8%	55.3%	50.7%
Not at all (Full-Time Remote)	10.0%	12.7%	14.7%	17.7%	18.5%

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

The preferences for both "full-time remote" and "full-time office" gradually grow with increasing age ranges. While the 60+ group has the strongest preference for remote (19%) and in-office work (31%), half of employees in this age group still want a mix. At 71% preference, we see the strongest sentiment for hybrid models in the 18–29 age range, reinforcing the statement that younger employees want flexibility but also see the office as a place for social connection, curated collisions, and mentorship.

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Inclusion

If you're dedicated to diversity, equity and inclusion, a hybrid model is essential

For leaders, flexibility is what our employees want, connection helps make it happen, and inclusion is why it matters. Inclusion, or sense of belonging, is about creating an environment where people feel valued and heard within their organizations. In an inclusive organization, everyone has genuine confidence that they can truly be themselves and be respected and successful within the organization.

The office was the reason people worked 9 to 5, endured long commutes, and paid a premium for real estate close to major employment hubs. **Fixed locations, like Silicon Valley, have priced out or excluded large swaths of the population.** Traditional workplace culture has reinforced code switching, homogeneous professional networks and outdated professional norms, including presenteeism.

Flexibility is valued by all employees. Across all racial groups, one's level of flexibility is the second most important factor behind rewards and pay.

But can flexibility drive inclusion?

While flexible and connected work environments are not the panacea for systemic workplace bias, flexible models can drive inclusion. What we've seen is that employees of color (Asian, Black, Hispanic) hold a higher sense of belonging when working remotely (compared with working in the office) and relative to their white counterparts.

Black respondents continue to have a higher sense of belonging when working remotely relative to working from the office, compared with a weaker sense of belonging among white respondents working remotely.

And this sentiment translates into their return-to-office preferences: 80% of Black, 78% of Hispanic, and 77% of Asian respondents want a flexible working experience, either through a hybrid or remote-only model.

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In addition to a sense of belonging, the preference for hybrid work is largely due to work-life blend: being better able to take care of family and personal obligations during the day and achieving better balance. Black and Hispanic respondents had a stronger preference for limited structure, while Asian respondents were more open to a pre-set schedule with some flexibility built in.

Responses to the question "In an ideal world, how much flexibility would you like when it comes to when you work?"

Results by racial/ethnic group	Asian	Black	Hispanic	White
I'd like to have a pre-set schedule for the hours during which I need to be working, with little to no flexibility for adjustments	4.5%	6.6%	5.4%	6.0%
I'd like to be able to adjust my schedule for unusual circumstances (e.g., doctor's appointments) but would prefer to work mostly during a pre-set schedule.	37.5%	30.0%	32.0%	35.1%
I wouldn't mind if I had to attend some meetings at pre-set times, as long as I am otherwise able to work whenever I want.	33.5%	36.3%	32.9%	28.9%
I'd like to be able to work during whatever hours I choose, with no constraints on my schedule.	24.4%	27.1%	29.8%	30.0%

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

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There's still a gap in overall experience

As Georgetown University organizational psychologist Ella F. Washington puts it, "There's a difference between 'working from home' versus 'working from home in a pandemic.' Flexibility is an advantage for all workers. But particularly with Black workers, that's been largely taken away with child care and elderly care and other home responsibilities. In this pandemic, we're not able to consider [this situation] flexible."

Future Forum Pulse scores by racial/ethnic group (U.S. only)

	My work-life balance	My sense of belonging at work	My productivity at work	Feeling good about stress and anxiety
White	27.1	30.5	36.9	15.3
Hispanic	25.6	27.3	33.2	15.3
Black	26.4	24.2	32.1	16.7
Asian	27.1	25.6	30.3	8.2

	My level of access to relevant people files and resources at work	The flexibility I have at work	My ability to focus on my work	My overall satisfaction with my working environment
White	34.2	32.8	34.2	31.5
Hispanic	28.6	29.3	30.4	28.2
Black	29.3	28	29.5	28.9
Asian	26.1	30.9	29.1	26.9

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

Across almost all elements of the Future Forum Pulse, white employees score uniformly higher than employees identifying as Black, Asian, Hispanic or Other. While Black employees may feel a stronger sense of belonging when working remotely relative to working in the office (see chart above), white employees still report 25% higher scores overall. Level of access (21% higher for white employees compared with Hispanic counterparts) is another gap that highlights the difference in experience for employees of color. Additionally, stress and anxiety about work is felt acutely among Asian respondents (whose scores were half that of white employees), who also hold the lowest overall satisfaction with their working environments.

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As leaders design their return-to-work policies, the need for guardrails is increasingly important for inclusion purposes. A model without frameworks would exacerbate these existing inequities, especially with regard to belonging and access, particularly if white, male employees return to the office full-time while other groups don't have the structures in place for sponsorship, career mobility and visibility.

Managing for inclusion

Investing in a sense of belonging and embracing flexible working models requires us to re-skill our managers to lead teams with a new sense of purpose. Gone are the days of gatekeeping; managing for inclusion requires leaders to coach, not dictate.

However, we have a ways to go on this front. Based on our data, Black, Asian and Hispanic employees have dramatically lower levels of trust in their manager and their peers. Nearly half of Hispanic (47%), Asian (46%) and Black respondents (45%) say they feel pressure to let their colleagues or manager know that they are "at work" and being productive, compared with 38% of white respondents.

- 67% of Black respondents and 72% of Asian respondents agree that they are "treated fairly at work," compared with 79% of white respondents.

- 69% of Black respondents "value the relationships [they] have with [their] coworkers," compared with 83% of white respondents.

- Across all groups, almost half of respondents feel pressure to respond to messages quickly, even if they are sent after working hours, with 52% of Hispanic and 48% of Asian respondents feeling this way.

While hybrid can offer a more equitable experience for employees of color, it can also make traditional management, trust building, and day-to-day rapport more challenging. Leaders need to invest in re-skilling their managers to operate in a distributed environment, including building trust between managers and their teams, career development, and active programs for sponsorship. Together with MLT, we've developed a playbook, "**Moving from Retrofit to Redesign**," for how to move toward a future that's not just more diverse but also more inclusive and equitable.
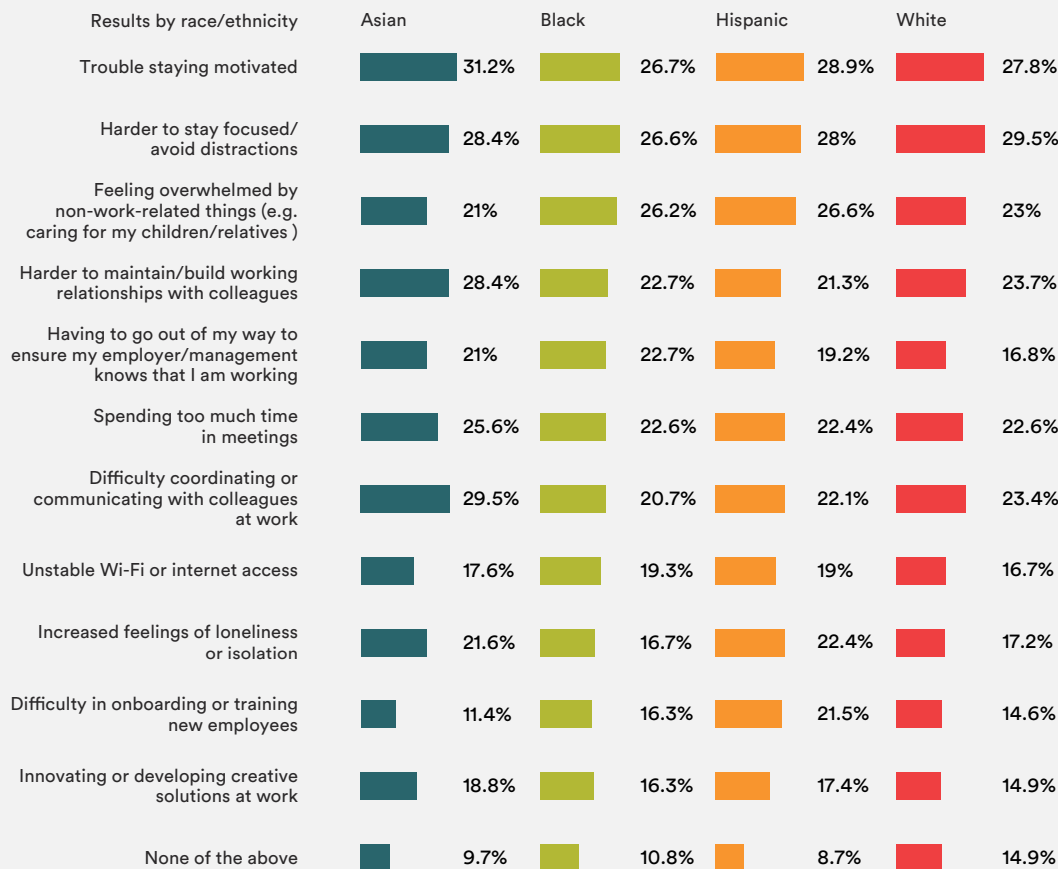
Spotlight on inclusion: Building relationships and cultures centered on trust

Across all employees, focus and motivation were top challenges experienced in the past week. Among white respondents, the three biggest challenges revolved around day-to-day work: focus (30%), motivation (28%) and relationship building (24%).

The challenges:

- Black and Hispanic employees were feeling increasingly overwhelmed by non-work-related tasks, including caregiving, with over a quarter identifying it as a top-three challenge.
- The fourth biggest challenge for Black employees was showing their managers they were working (22.7%), which was the seventh biggest challenge for white employees (16.7% of respondents).
- Nearly a third of Asian respondents were struggling with interpersonal relationships, from coordinating and communicating with colleagues (30%) to building working relationships (28%) with them.

The top challenges knowledge workers have personally experienced this week

Results by race/ethnicity	Asian	Black	Hispanic	White
Trouble staying motivated	31.2%	26.7%	28.9%	27.8%
Harder to stay focused/ avoid distractions	28.4%	26.6%	28%	29.5%
Feeling overwhelmed by non-work-related things (e.g. caring for my children/relatives)	21%	26.2%	26.6%	23%
Harder to maintain/build working relationships with colleagues	28.4%	22.7%	21.3%	23.7%
Having to go out of my way to ensure my employer/management knows that I am working	21%	22.7%	19.2%	16.8%
Spending too much time in meetings	25.6%	22.6%	22.4%	22.6%
Difficulty coordinating or communicating with colleagues at work	29.5%	20.7%	22.1%	23.4%
Unstable Wi-Fi or internet access	17.6%	19.3%	19%	16.7%
Increased feelings of loneliness or isolation	21.6%	16.7%	22.4%	17.2%
Difficulty in onboarding or training new employees	11.4%	16.3%	21.5%	14.6%
Innovating or developing creative solutions at work	18.8%	16.3%	17.4%	14.9%
None of the above	9.7%	10.8%	8.7%	14.9%

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447
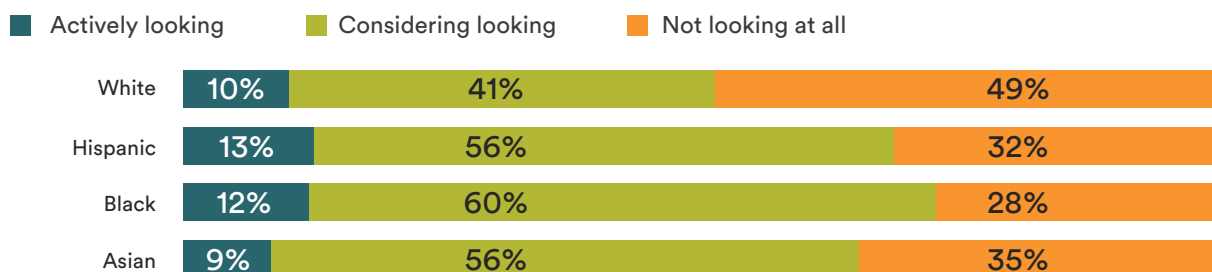
A final word

Now is not the time for hesitation

As we talk about a more diverse, inclusive and equitable future, our data shows that employees of color are in "wait and see" mode—and, based on the choices their leaders make, are more open to looking for another job within the next year: 72% of Black, 68% of Hispanic and 65% of Asian respondents are actively looking or considering looking for new opportunities in the coming year, compared with 51% of white employees surveyed.

Response to the question "How likely are you to look for another job at another company in the next 12 months?"

Results by race/ethnicity, U.S. only

■ Actively looking   ■ Considering looking   ■ Not looking at all

	Actively looking	Considering looking	Not looking at all
White	10%	41%	49%
Hispanic	13%	56%	32%
Black	12%	60%	28%
Asian	9%	56%	35%

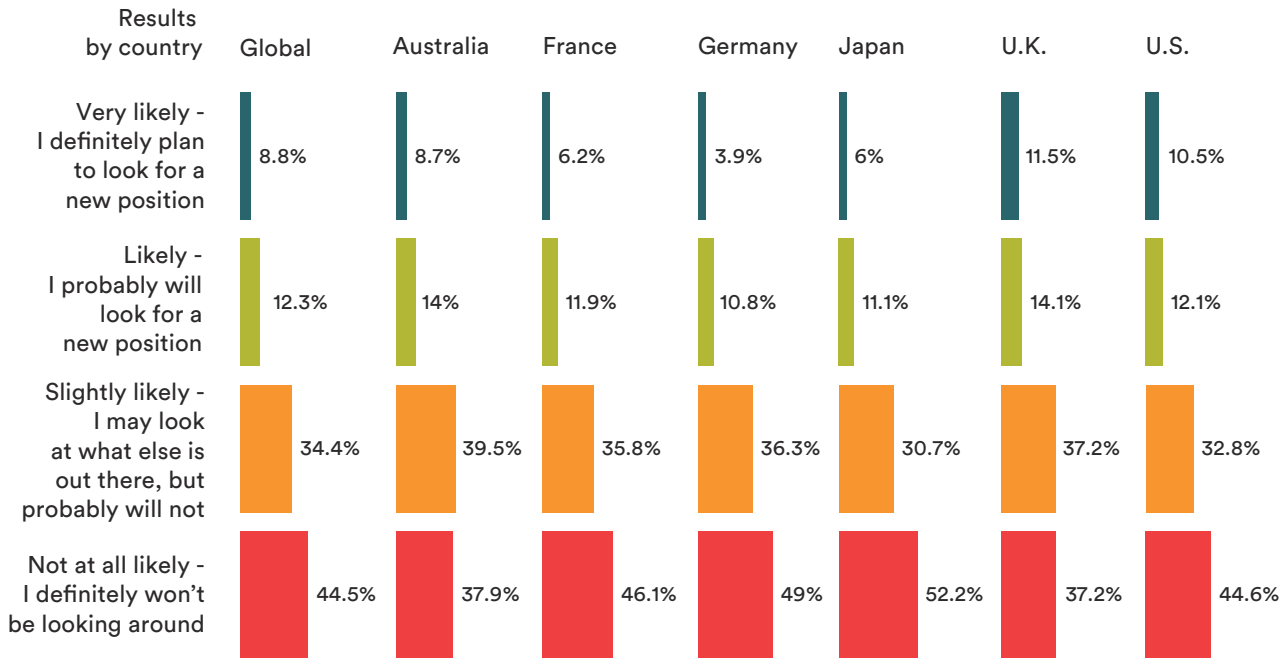Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

As leaders build their post-pandemic workplace strategy, their biggest challenge is hesitation. What if … this new working model doesn't work? What if … business suffers? What if … flexibility is more of a headache than a competitive advantage?

But based on our data, not acting or reverting back to "the old way" may have serious implications for your business.

Across respondents globally, more than half of your employees are open to looking for other positions in the next year. Depending on market and economic conditions, a quarter of employees are likely or very likely to jump ship.

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Response to the question "how likely are you to look for a job at another company within the next 12 months?"

Results by country	Global	Australia	France	Germany	Japan	U.K.	U.S.
Very likely - I definitely plan to look for a new position	8.8%	8.7%	6.2%	3.9%	6%	11.5%	10.5%
Likely - I probably will look for a new position	12.3%	14%	11.9%	10.8%	11.1%	14.1%	12.1%
Slightly likely - I may look at what else is out there, but probably will not	34.4%	39.5%	35.8%	36.3%	30.7%	37.2%	32.8%
Not at all likely - I definitely won't be looking around	44.5%	37.9%	46.1%	49%	52.2%	37.2%	44.6%

Source: Future Forum Pulse, conducted April 26-May 6, 2021. Number of respondents=10,447

With the pandemic, and now a recovering economy, employees' expectations have changed. And now's the time for leaders to build flexible, connected and inclusive workplaces that meet employees where they are, both for today and the future.

Methodology

Survey of 10,447 knowledge workers in the USA, Australia, France, Germany, Japan, and the U.K. conducted by Qualtrics April 26–May 6, 2021. Respondents were all knowledge workers, defined as employed full-time (30 or more hours per week) and either having one of the roles listed below or saying they "work with data, analyze information or think creatively": Executive Management (e.g., President/Partner, CEO, CFO, C-Suite), Senior Management (e.g., Executive VP, Senior VP), Middle Management (e.g., Department/Group Manager, VP), Junior Management (e.g., Manager, Team Leader), Senior Staff (i.e., Non-Management), Skilled Office Worker (e.g., Analyst, Graphic Designer).

The Future Forum Pulse measures how knowledge workers feel about their working lives on a five-point scale (from "very poor" to "very good") across eight dimensions on a scale from −60 (most negative) to +60 (most positive).

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