



Global HR Pulse Survey: Europe **Preparing For the Future: How COVID-19 is** **Changing How and Where People Work Forever**

Dynamic Survey Reporting Tool – Published May 4, 2021

**Global HR Pulse Survey:
Preparing For the Future: How COVID-19 is
Changing How and Where People Work Forever**

Study Overview

As the humanitarian and economic impact of the COVID-19 pandemic continues to unfold, we once again turned to leaders in the global HR community to understand how companies are adjusting their workforce strategies in response to the current environment.

The design of this study reflects a broad partnership between clients—many of whom submitted questions to us in advance of this project—and numerous teams at Aon, including the firm's benefits, employee communications, health, human capital strategy, retirement, rewards and talent assessment practices, among others.

We thank our clients, colleagues, and all of our study participants for their contributions to this project at a time when we all continue to face personal and professional challenges.

On an overall basis, this global study, conducted from April 20 to April 28, 2021, Garnered submissions from a total of 1,451 organizations. Depending on the filters you select, your dynamic report will include a subset of these participants.



When interpreting study results, we ask all readers to consider the following:

The COVID-19 pandemic continues to evolve on a daily basis, with varying levels of impact by geography and industry. This pulse survey reflects a point-in-time snapshot of HR and workforce practices reported between April 20 and April 28, 2021. We remind readers that experiences will vary widely within any given country or from one organization to another. For these reasons, we continue to pulse the market to monitor changing practices.

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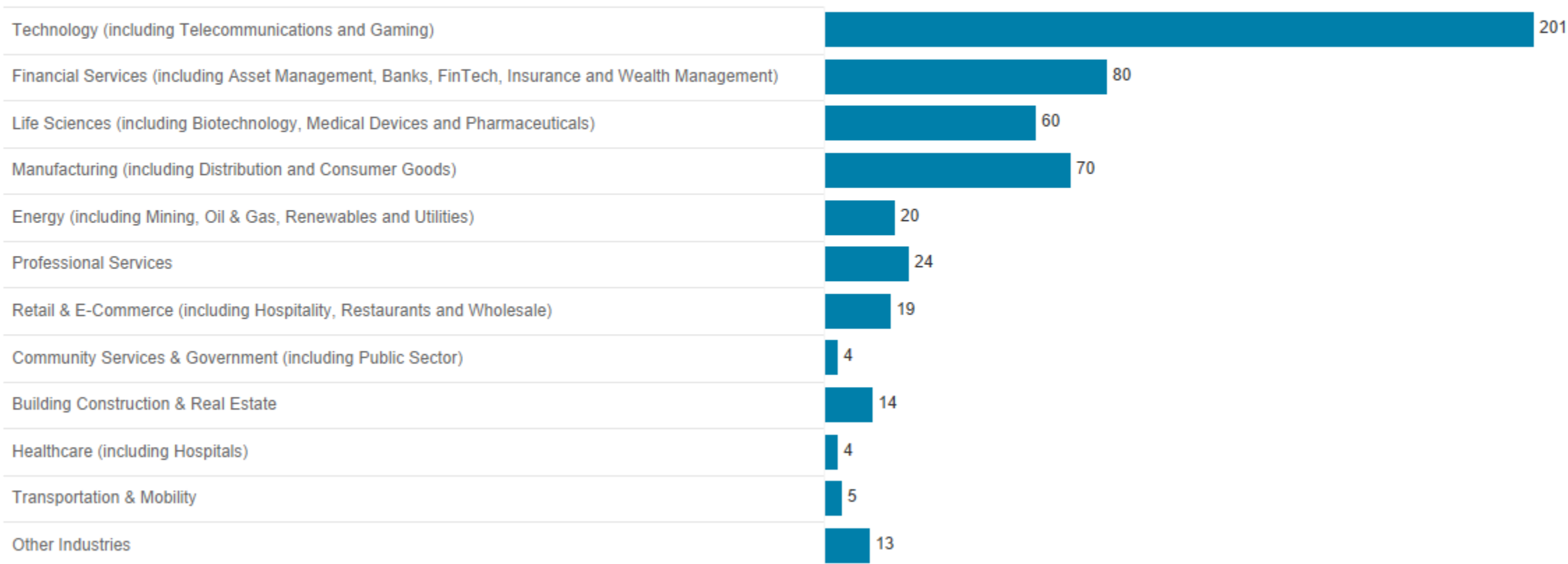
Participant Demographics

Participant Demographics



Industry Distribution:

All study participants were asked to self-select their primary industry from the following options. Additional information on sub-industries was collected and can be used to create more targeted reports upon request. (514 respondents)

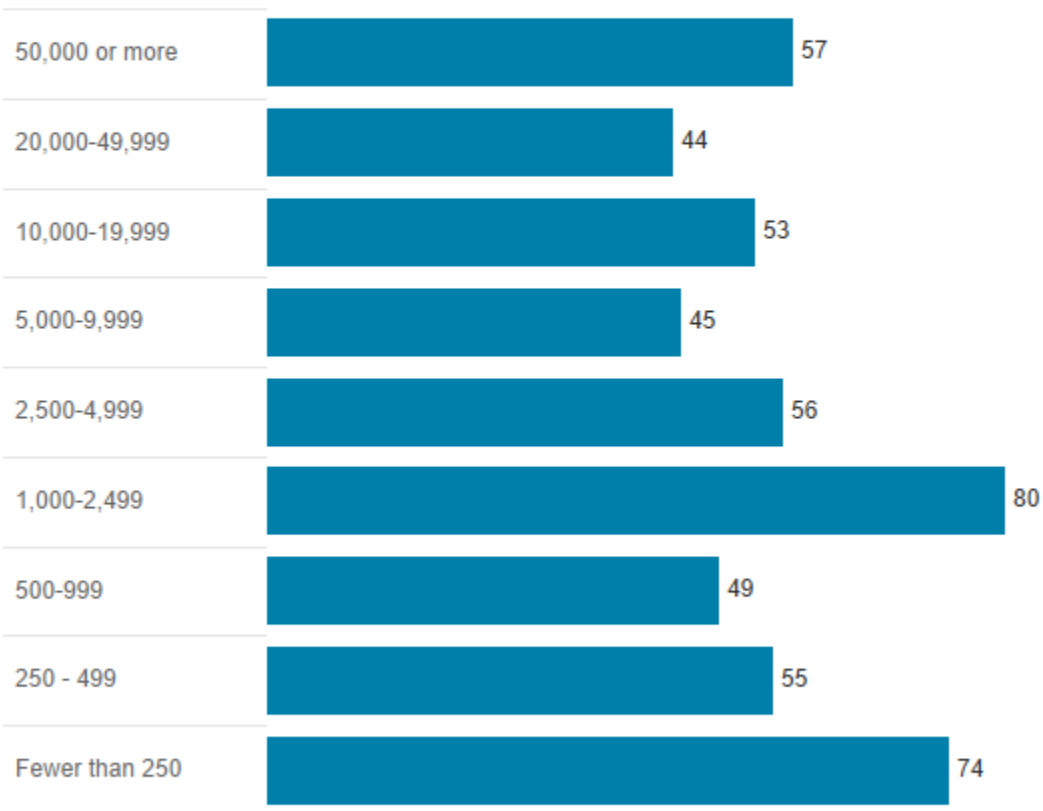


Participant Demographics



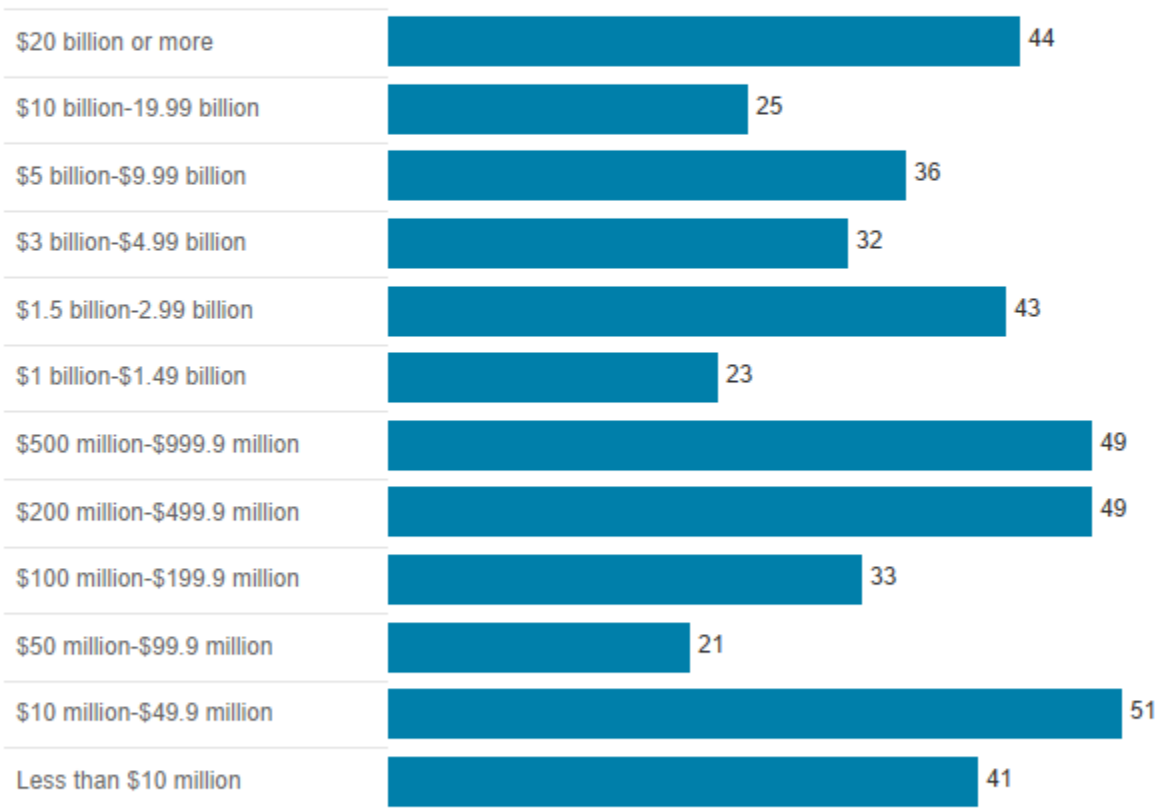
Company Headcount:

All study participants were asked to provide their global headcount according to the categories below. (513 respondents)



Company Revenues:

All study participants were asked to provide their global revenues according to the categories below. (447 respondents)



**Global HR Pulse Survey:
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Key Highlights

Key Highlights



79% **Exploring a Return Onsite**
of organizations already have a tentative date to return workers onsite



89% **Remote Working**
of organizations are creating or considering updating their remote work policy



38% **Location-Based Pay Strategies**
of organizations have adjusted, or are considering adjusting, geographic differentials in light of the pandemic



37% **Vaccine Considerations**
of organizations will provide, or are considering providing, incentives to employees who get a vaccine



86% **Defining the Future of Work**
of organizations have a clear and consistent definition for the future of work, or will have one within the next 6 months



83% **Enhancing Diversity, Equity and Inclusion (DEI) Strategies**
of organizations have created, or are planning to create, DEI metrics or goals



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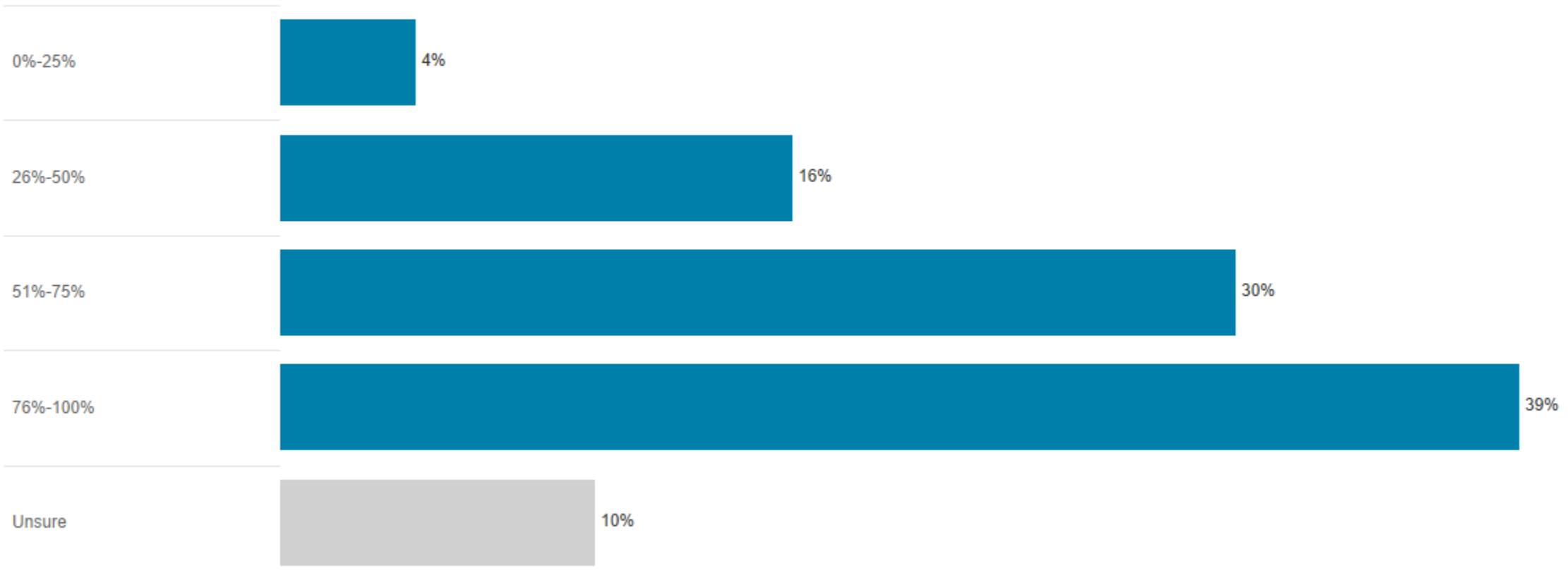
Creating a Safe Plan to Return Workers Onsite

Creating a Safe Plan to Return Workers Onsite



Question:

At your organization, what percentage of employees do you expect to return to an office setting (full-time or part-time) once the pandemic is over?
(512 respondents)

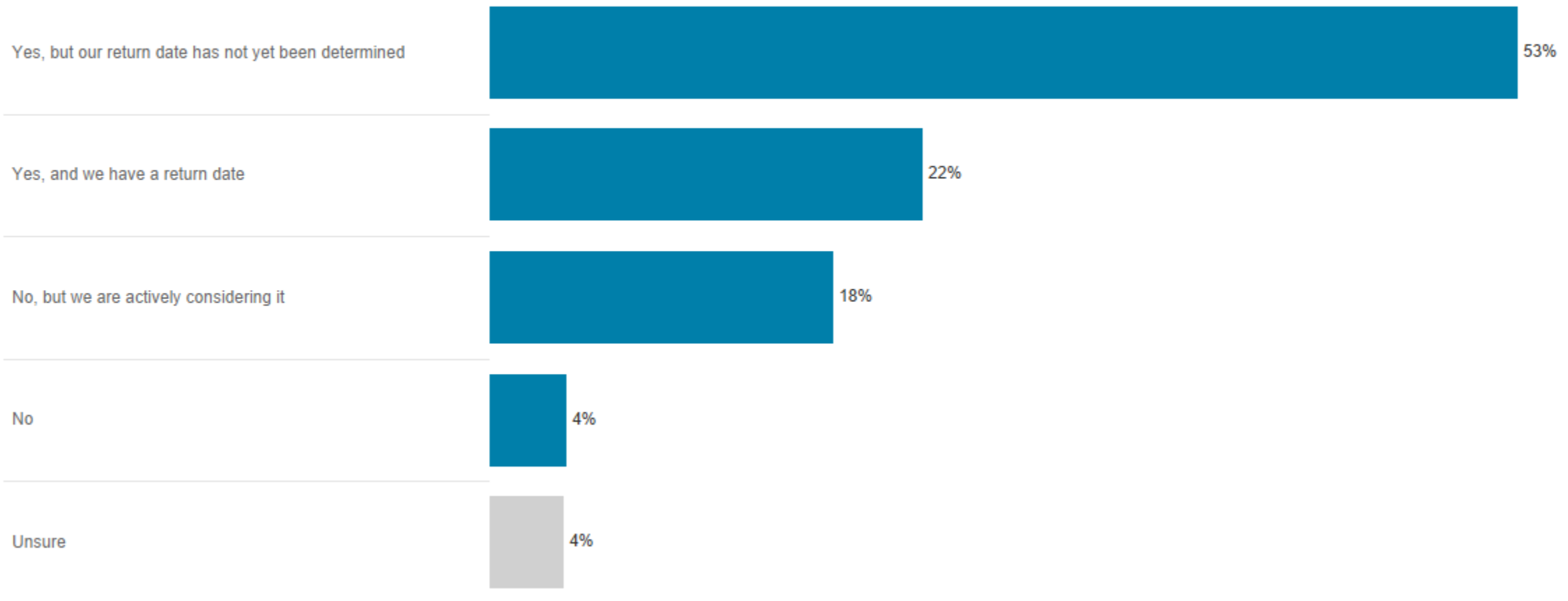


Creating a Safe Plan to Return Workers Onsite



Question:

Has your organization made decisions about when to return employees to onsite locations? (506 respondents)

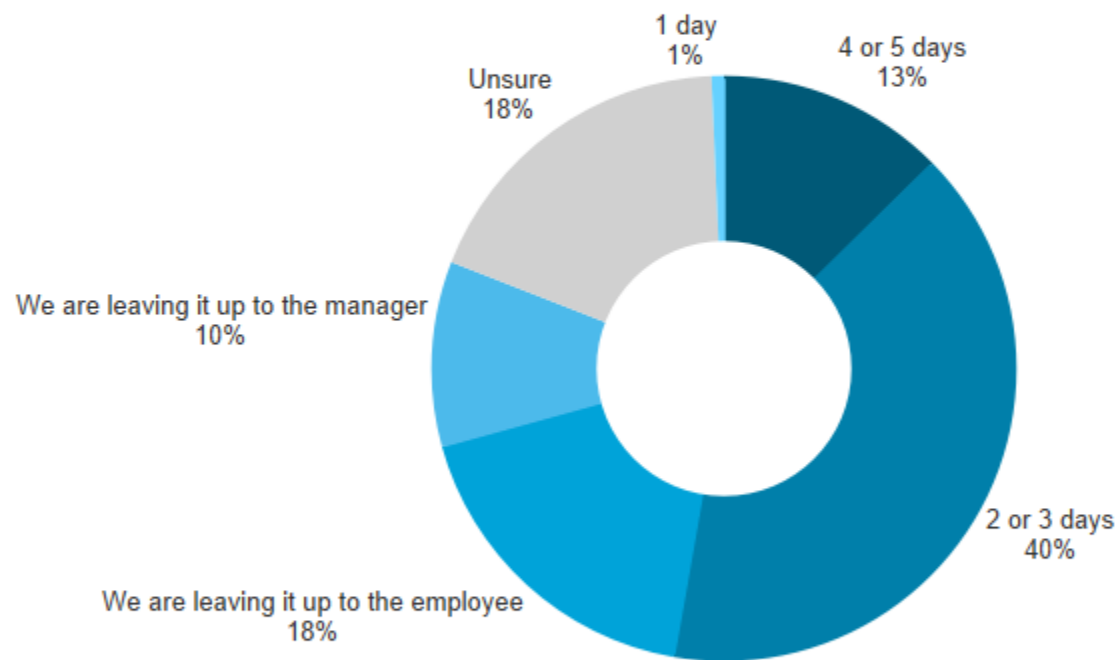


Creating a Safe Plan to Return Workers Onsite



Question:

If you have decided to return employees to onsite locations, or are considering it, how many days a week would you expect workers to be onsite? Responses are based on organizations that made or plan to make decisions about when to return employees to onsite locations. (451 respondents)

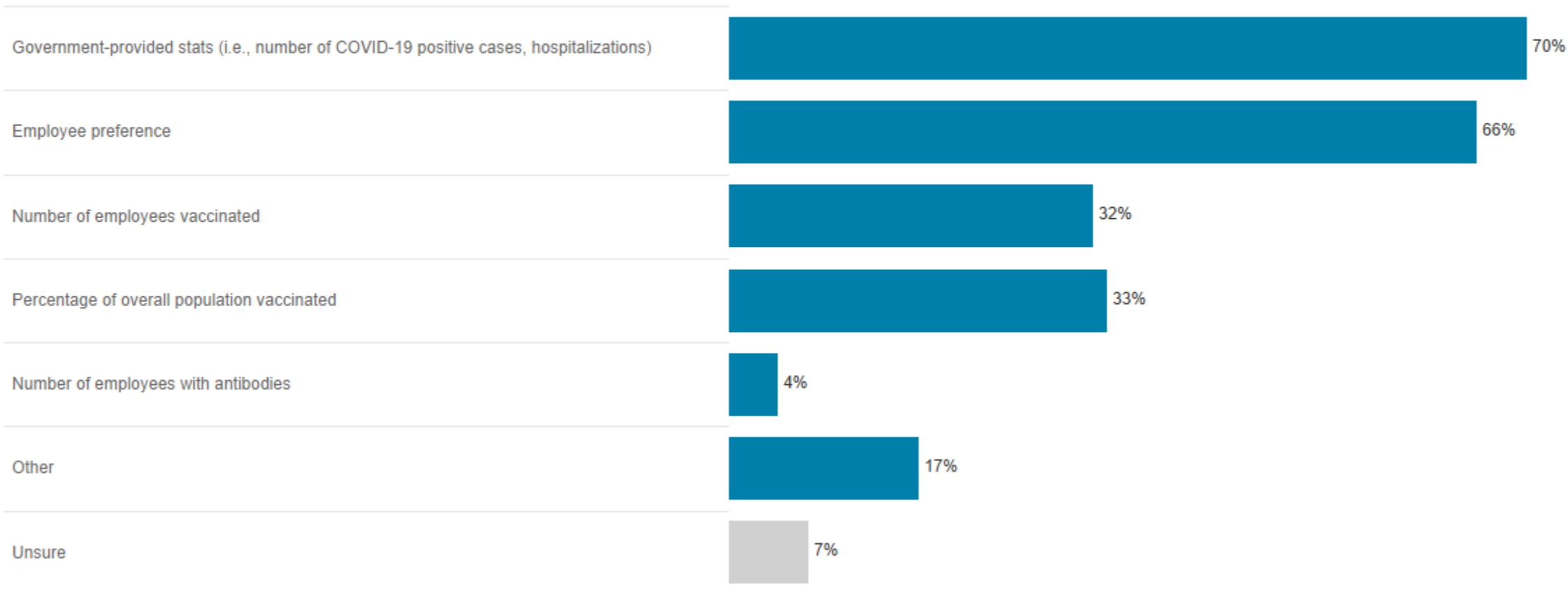


Creating a Safe Plan to Return Workers Onsite



Question:

What are the determining factors that influence your decision(s) to return workers onsite? (467 respondents)

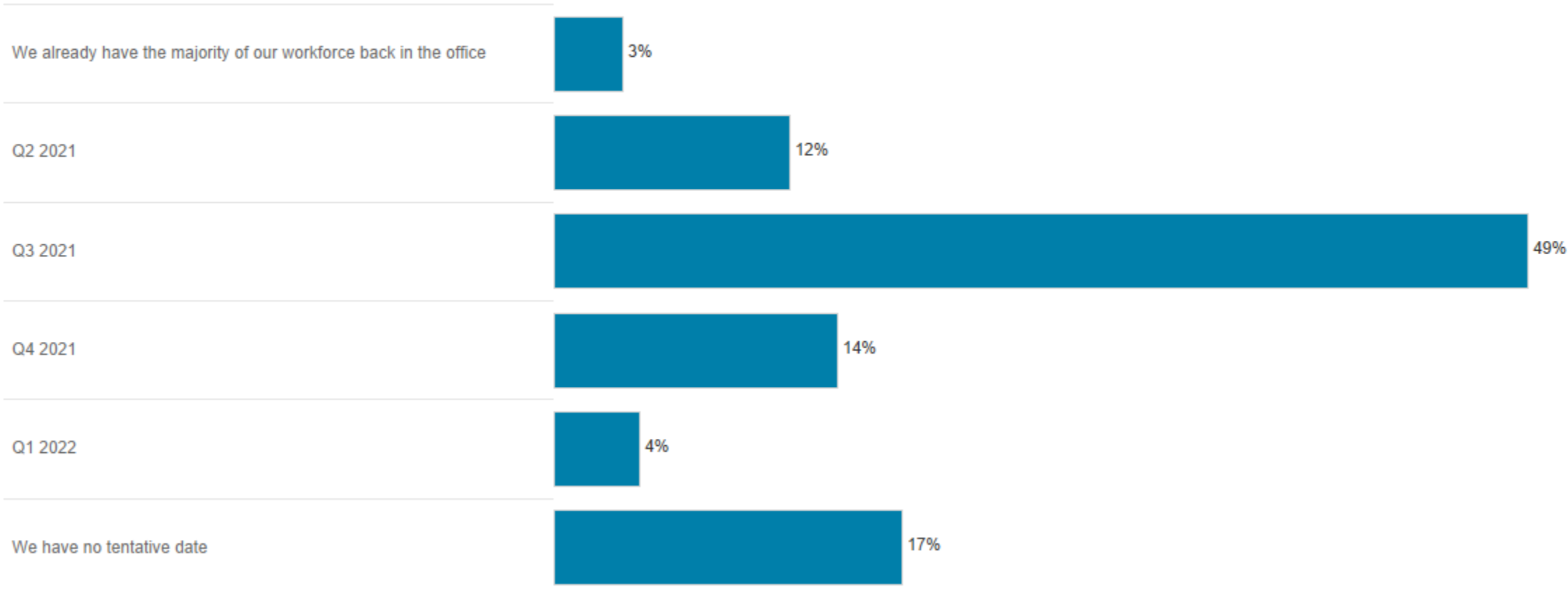


Creating a Safe Plan to Return Workers Onsite



Question:

What timeframe are you expecting workers to begin returning to the workplace? (465 respondents)

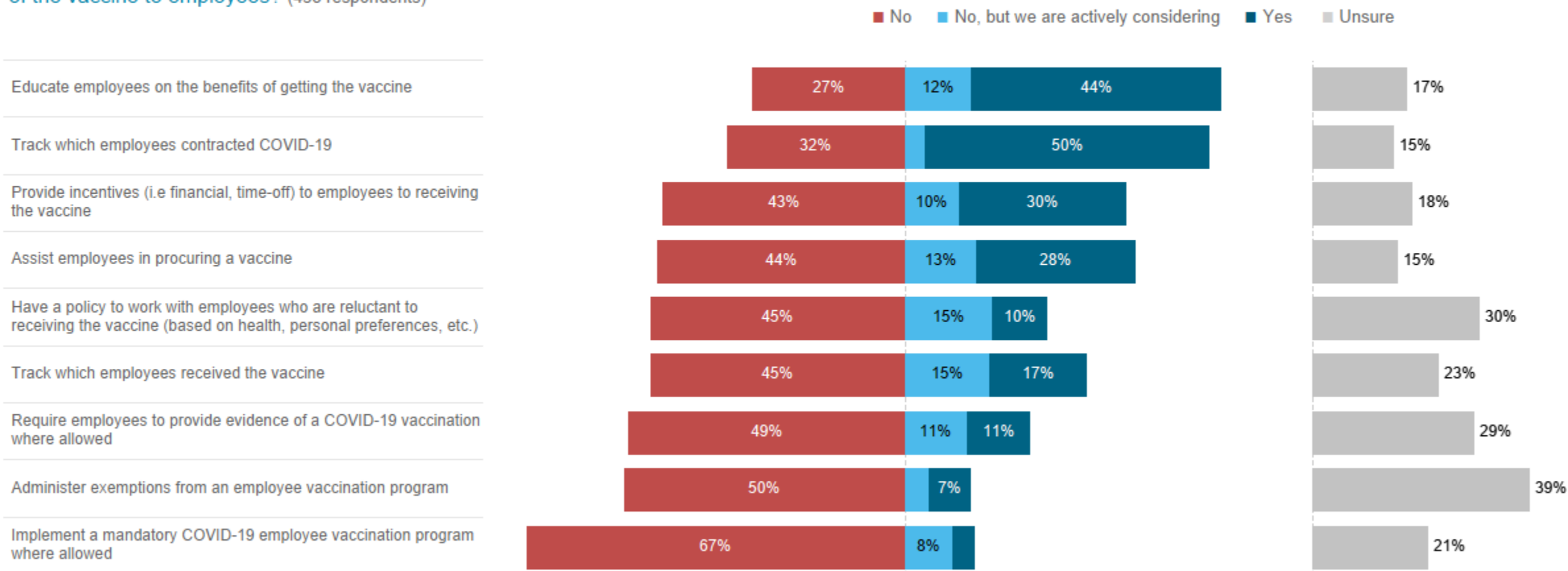


Creating a Safe Plan to Return Workers Onsite



Question:

In light of vaccines becoming more widely accessible, what is your organization's overall philosophy related to the management/distribution/administration/tracking of the vaccine to employees? (458 respondents)



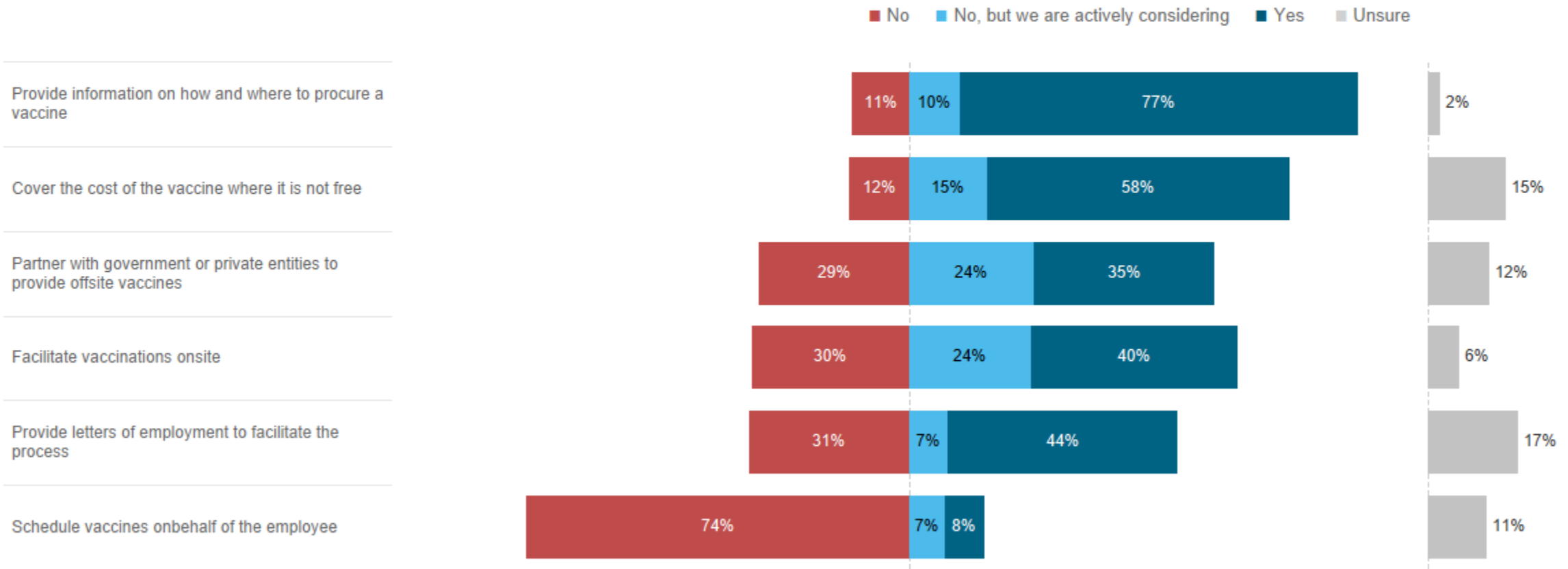
Creating a Safe Plan to Return Workers Onsite



Question:

What type of assistance will you offer to employees looking to procure a vaccine?

Responses are based on the organizations that will offer or are considering offering assistance to employees. (167 respondents)



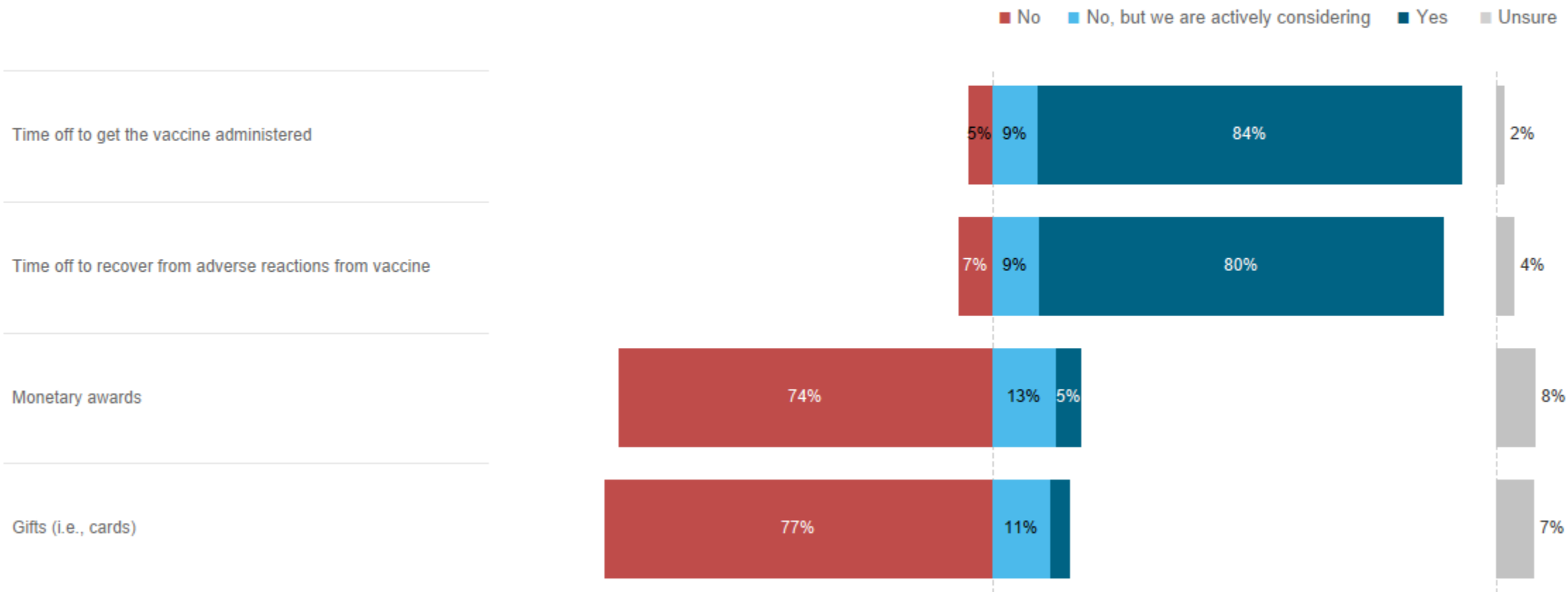
Creating a Safe Plan to Return Workers Onsite



Question:

What type of incentives will you offer to motivate employees to get the vaccine?

Responses are based on the organizations that will offer or are considering offering incentives to motivate employees to get the vaccine. (168 respondents)



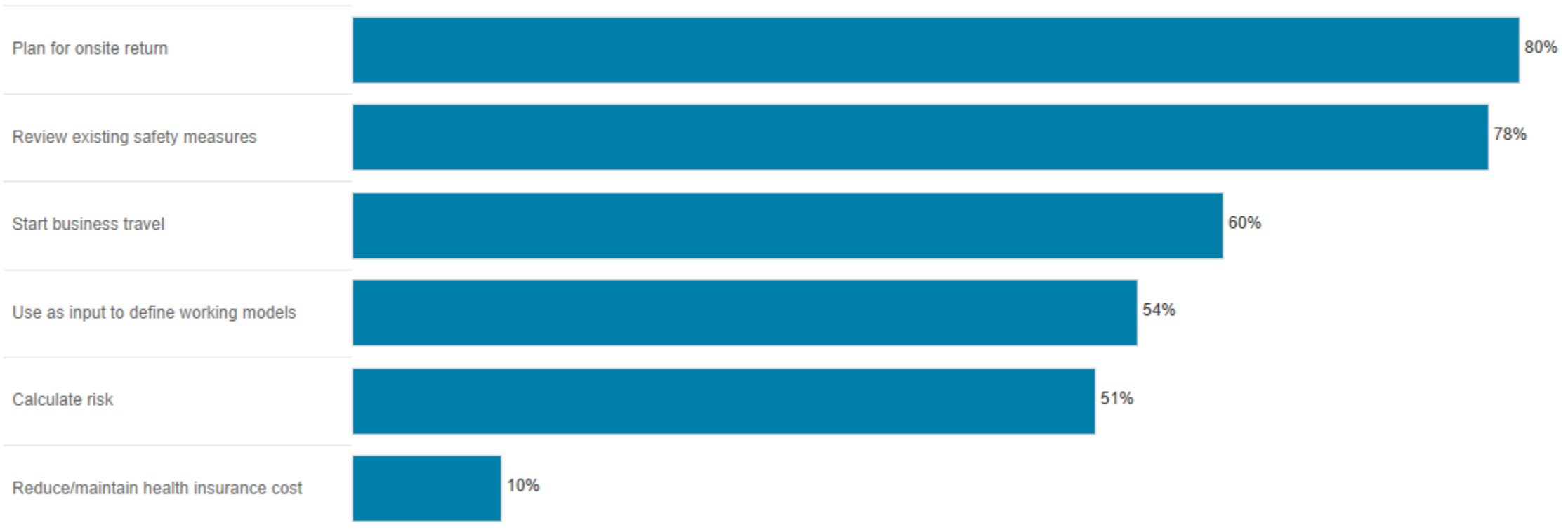
Creating a Safe Plan to Return Workers Onsite



Question:

What decisions will you make based on the information on the percentage of employees vaccinated?

Responses are based on the organizations that track or are considering tracking which employees received the vaccine. (137 respondents)

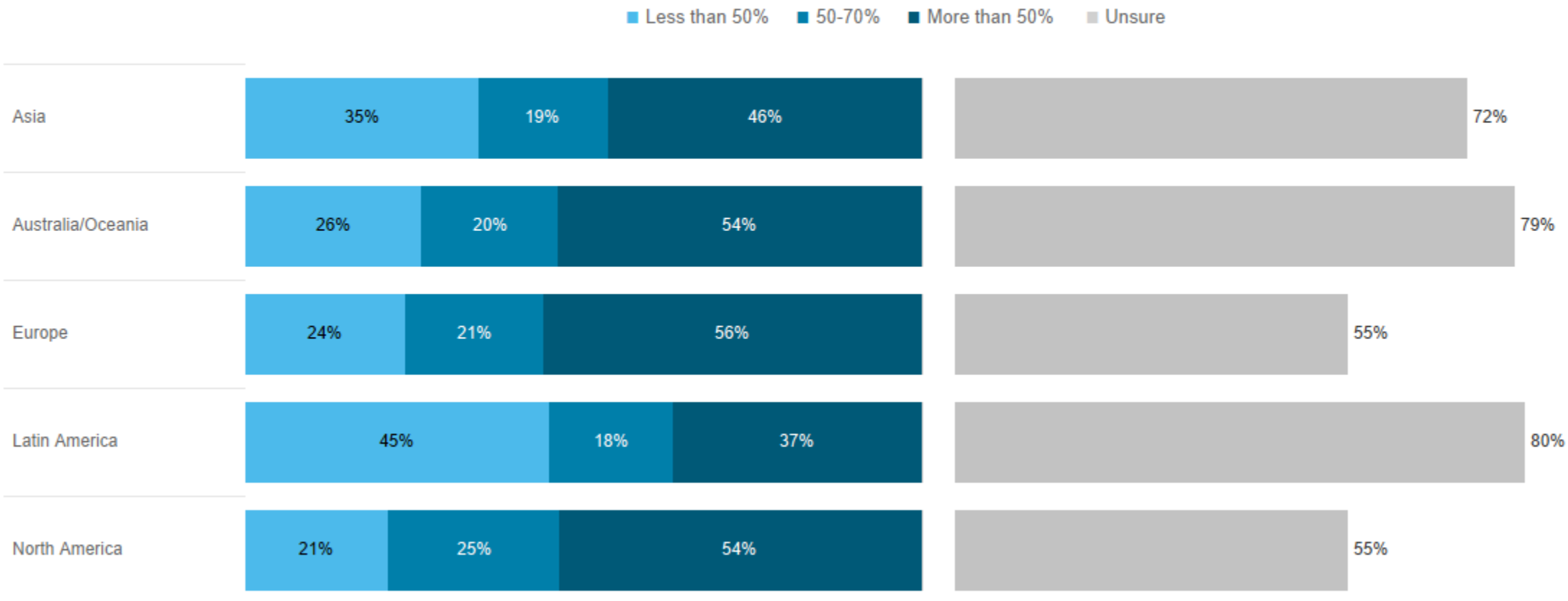


Creating a Safe Plan to Return Workers Onsite



Question:

Based on your knowledge, approximately what percentage of your employees have received or will receive the vaccine in each of the following regions when available? (443 respondents)

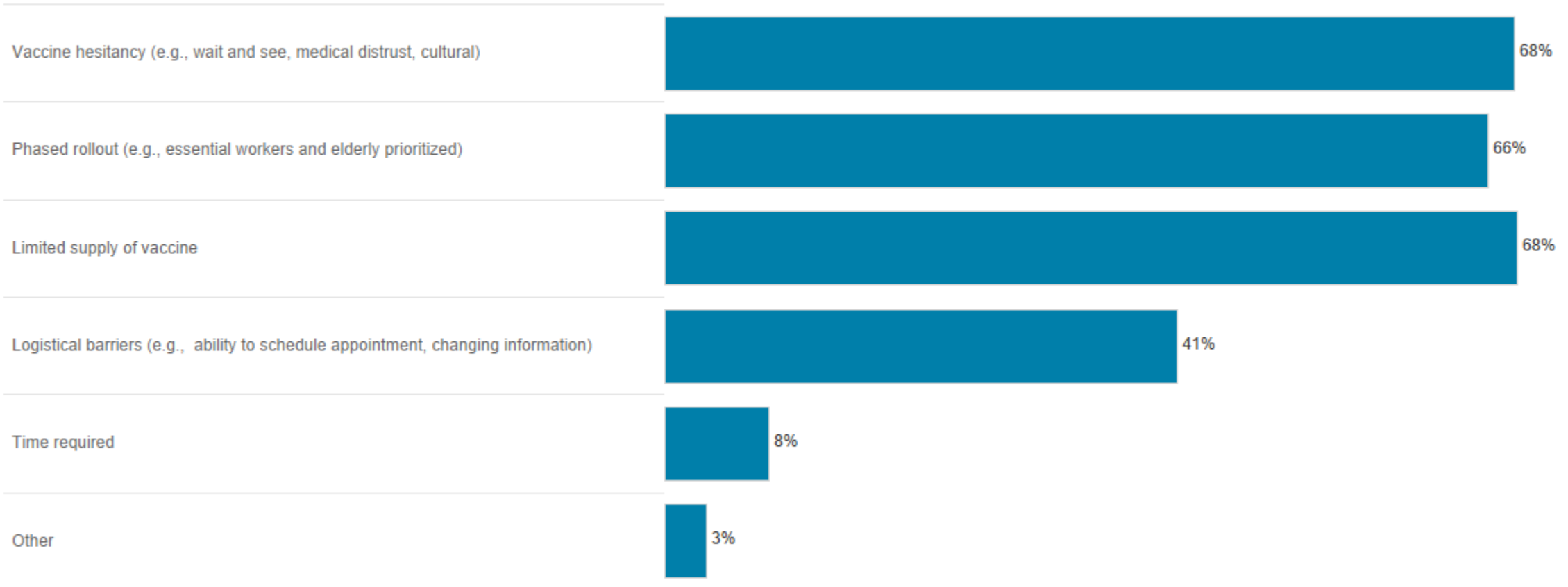


Creating a Safe Plan to Return Workers Onsite



Question:

What do you believe are the barriers for employees to get vaccinated? (456 respondents)



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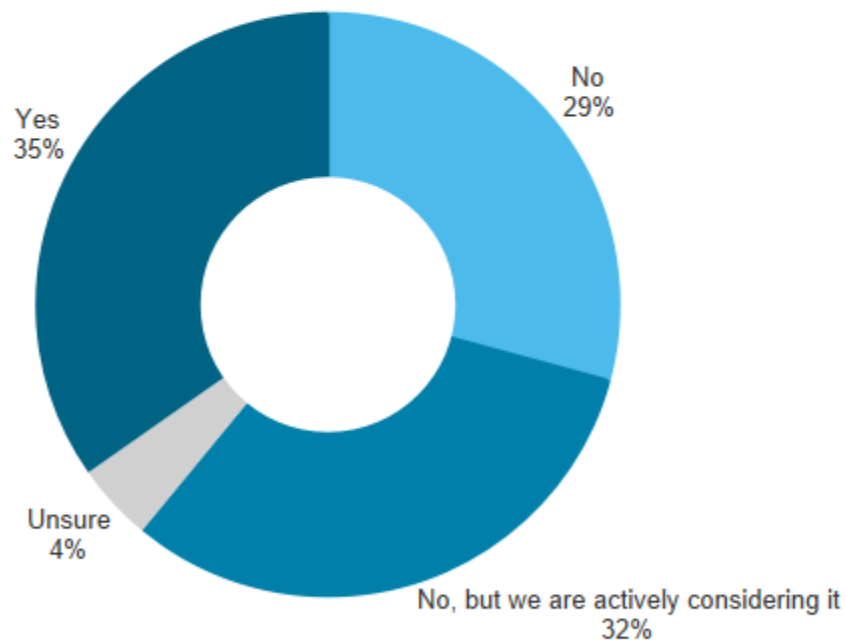
Managing Remote and Flexible Working Options

Managing Remote and Flexible Working Options



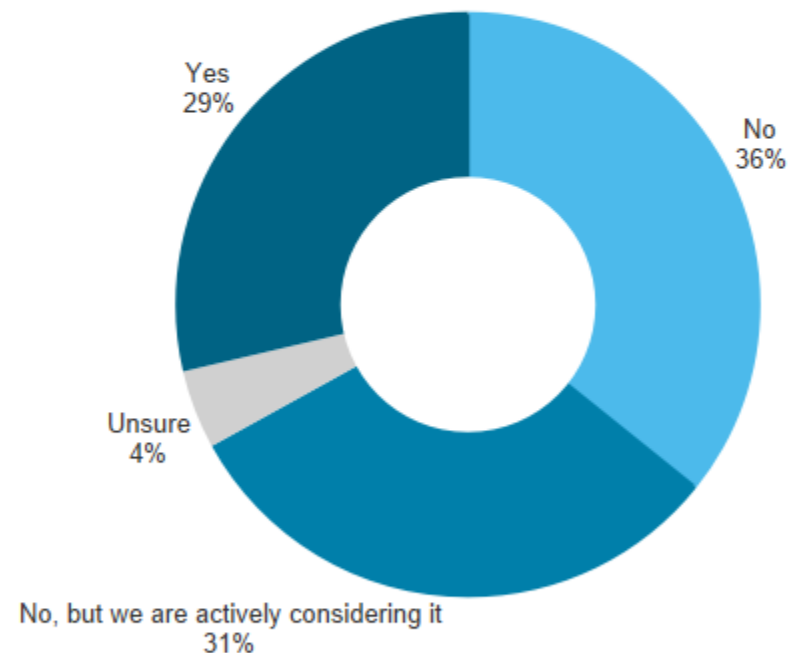
Question:

Has your organization completed a formal assessment of **job/role** types that can be performed remotely on a permanent basis? (510 respondents)



Question:

Has your organization completed a formal assessment of **employees** who can perform their work remotely on a permanent basis? (506 respondents)

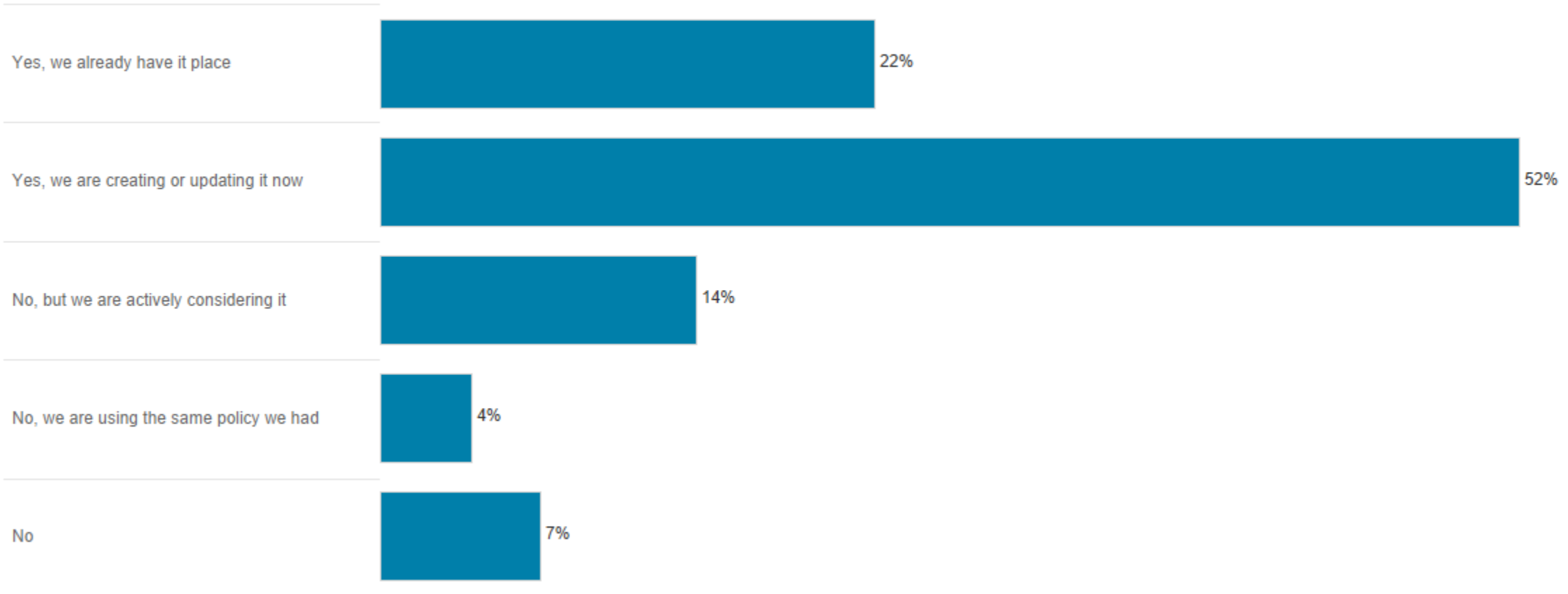


Managing Remote and Flexible Working Options



Question:

Is your organization creating or updating a formal/informal working remote policy? (508 respondents)



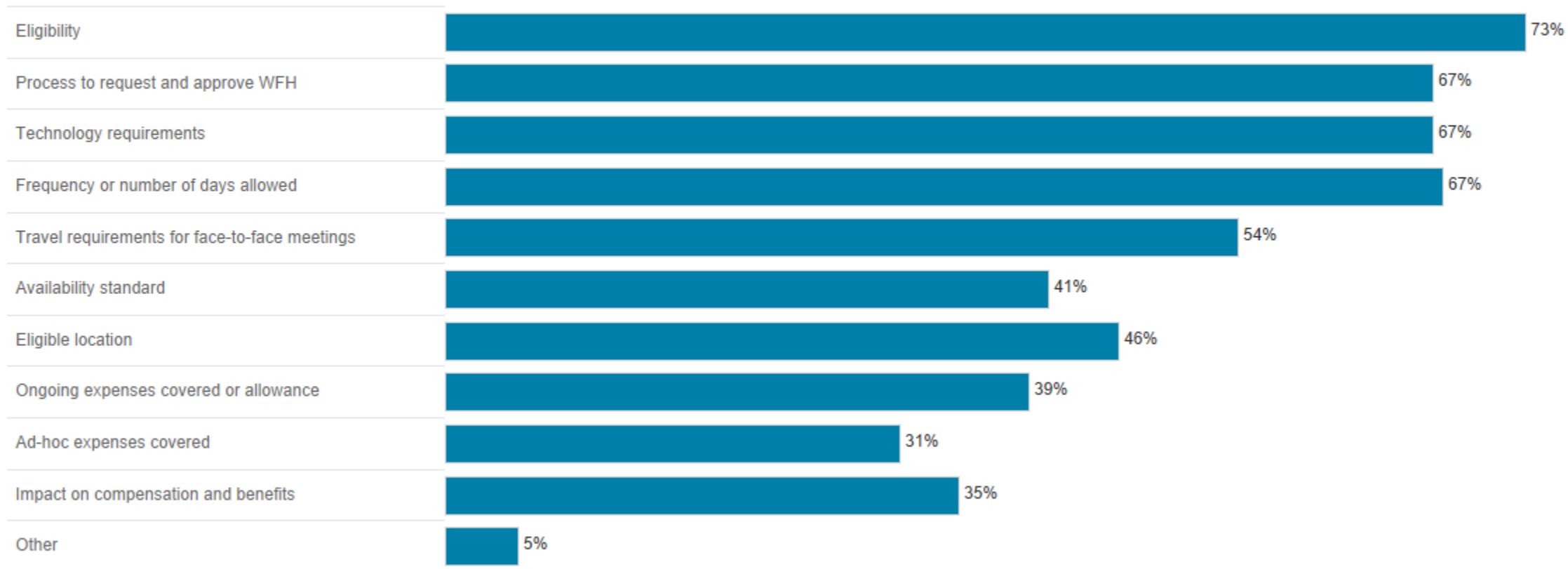
Managing Remote and Flexible Working Options



Question:

What elements does the working remote policy include?

Responses are based on those organizations that are updating or considering updating working remote policies. (446 respondents)



Managing Remote and Flexible Working Options



Question:

What allowance or reimbursement policies has your organization enhanced to support employees working remotely since the onset of the COVID-19 pandemic? Responses are based on organizations that enhanced or considering enhancing allowances or reimbursements. (174 respondents)

	Yes, on a temporary basis	Yes, on a permanent basis	No, but we are actively considering it	No
Cell phone expenses	8%	42%	3%	47%
Expenses paid on a case-by-case basis	35%	23%	4%	38%
Internet expenses	25%	18%	8%	50%
Landline phone expenses	3%	3%	2%	92%
Monthly allowance for general expenses	11%	11%	8%	71%
One-time allowance for home office setup, with a pre-defined limit	36%	23%	9%	33%
One-time allowance for home office setup, without a pre-defined limit	5%	3%	6%	85%
Organization-provided equipment and supplies	36%	55%	2%	8%
Reimbursement for ongoing home office equipment and supplies	24%	21%	9%	46%

Managing Remote and Flexible Working Options



Question:

With more employees expressing a desire to work remotely, how is your organization adjusting its relocation policies? (492 respondents)

	Already offered pre-pandemic	Yes, added on a temporary basis	Yes, added on a permanent basis	No, but we are actively considering it	No	Unsure
Allow remote employees to choose a new work location inside of their current country	15%	16%	15%	13%	28%	13%
Suspend the ability for remote employees to choose a new work location inside of their current country	3%	5%	2%	6%	65%	20%
Allow remote employees to choose a new work location outside of their current country	4%	9%	4%	10%	59%	14%
Suspend the ability for remote employees to choose a new work location outside of their current country	2%	3%	5%	5%	65%	20%
Expand eligibility for executives to apply for relocation with company approval	9%	4%	5%	6%	56%	19%
Expand eligibility for non-executives to apply for relocation with company approval	8%	5%	9%	8%	52%	18%
Reduce eligibility for executives to apply for relocation with company approval	1%	1%	1%	3%	74%	21%
Reduce eligibility for non-executives to apply for relocation with company approval	0%	1%	2%	3%	74%	20%

Managing Remote and Flexible Working Options



Question:

What working models does your organization currently provide, or plan to provide, to employees who qualify to work remotely? (501 respondents)

	Already offered pre-pandemic	Yes, added on a temporary basis	Yes, added on a permanent basis	No, but we are actively considering it	No	Unsure
Additional contractors/freelancers	18%	4%	2%	4%	55%	16%
Additional part-time workers	13%	4%	2%	6%	60%	15%
Hybrid (remote and office) based on company choice	20%	12%	29%	17%	15%	6%
Hybrid (remote and office) based on employee choice	19%	13%	29%	19%	14%	6%
Office only based on company choice	28%	4%	11%	7%	41%	8%
Office only based on employee choice	21%	5%	17%	9%	37%	10%
Remote only based on company choice	19%	9%	13%	12%	38%	9%
Remote only based on employee choice	13%	9%	14%	16%	39%	10%

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Creating or Enhancing Evolving Location-Based Pay Strategies

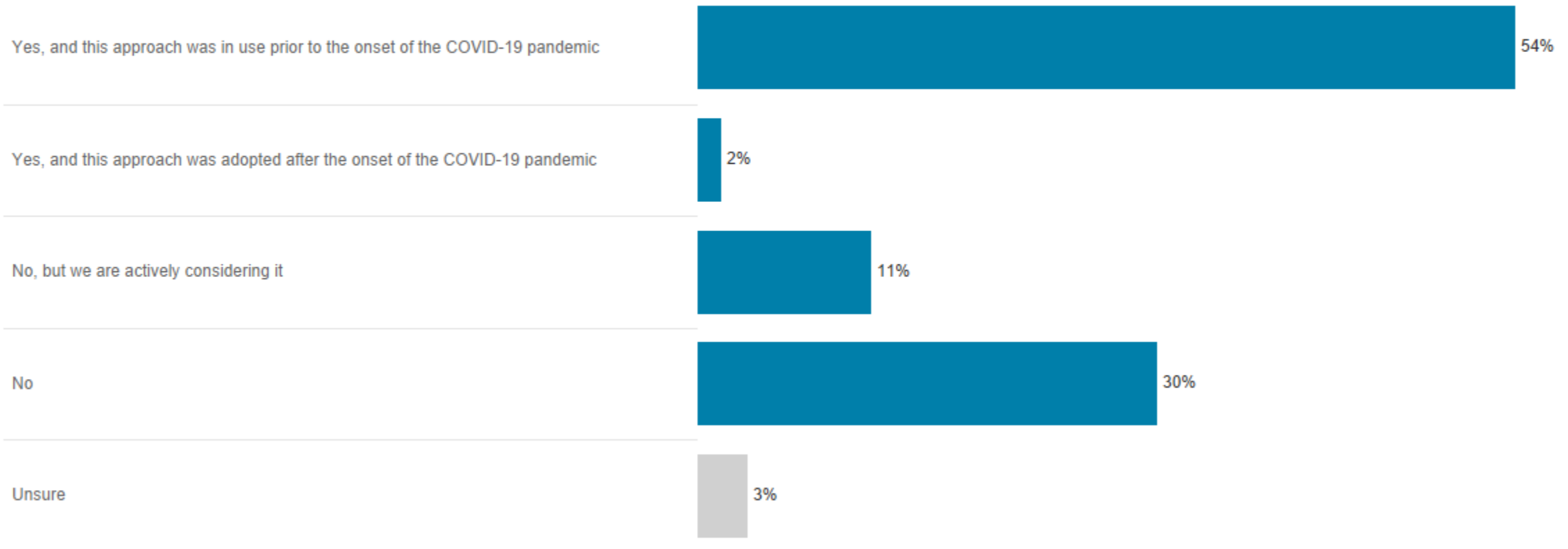
Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

Does your organization use geographic differentials to adjust pay levels based on an employee's location?

Responses based on those organizations with more than one location. (395 respondents)



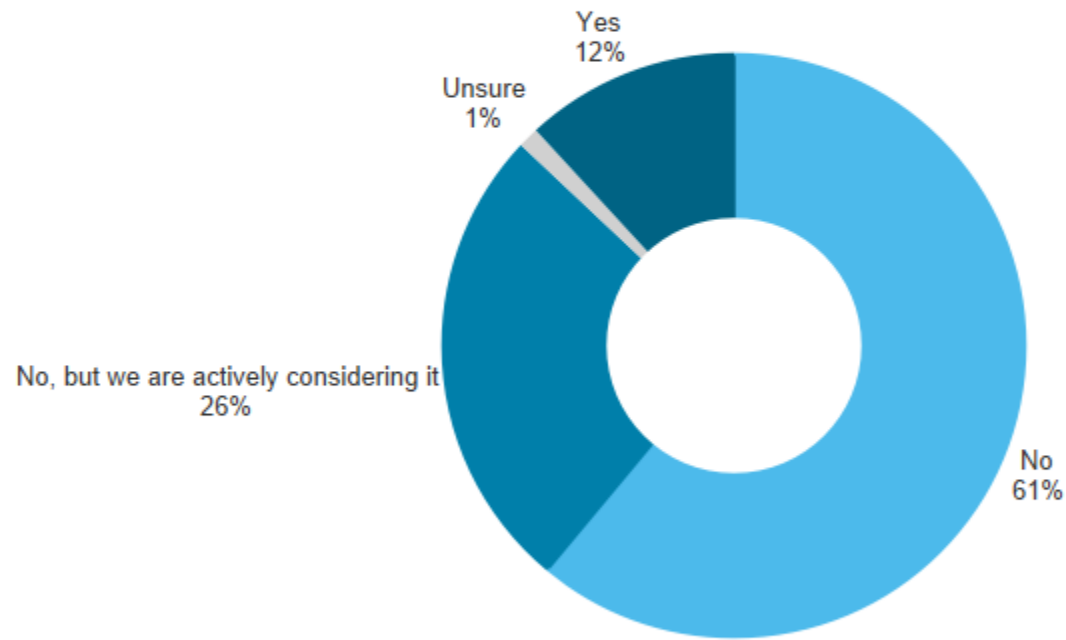
Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

Following the onset of the COVID-19 pandemic, has your organization adjusted its geographic differentials?

Responses based on organizations that use geographic differentials or are considering to adjust pay level bases on employee's locations. (262 respondents)



Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

Following the onset of the COVID-19 pandemic, what changes has your organization made to its geographic differentials?

Responses based on organizations that have adjusted or are considering adjusting their geographic differentials. (97 respondents)

	Yes, on a temporary basis	Yes, on a permanent basis	No, but we are actively considering it	No	Unsure
We re-examined geographic differential rates using new market data	6%	39%	44%	9%	1%
We added more geographic zones	1%	28%	27%	43%	1%
We narrowed geographic zones (i.e., more granular)	1%	7%	19%	69%	3%
We broadened geographic zones (i.e., less granular)	1%	15%	30%	50%	4%

Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

Which of the following employee levels are, or will be, covered by your organization's use of geographic differentials?

Responses based on organizations that use geographic differentials or are considering to adjust pay level bases on employee's locations. (262 respondents)

	Yes, and this approach was in use prior to the onset of the COVID-19 pandemic	Yes, and this approach was adopted after the onset of the COVID-19 pandemic	No, but we are actively considering it	No	Yes, on a permanent basis	Yes, on a temporary basis	Unsure
All employees	41%	4%	12%	13%	25%	1%	4%
Executives	29%	1%	12%	32%	18%	0%	6%
Managers	43%	3%	13%	8%	25%	1%	5%
Professionals	44%	3%	14%	6%	26%	1%	4%
Support	44%	3%	12%	8%	27%	0%	5%

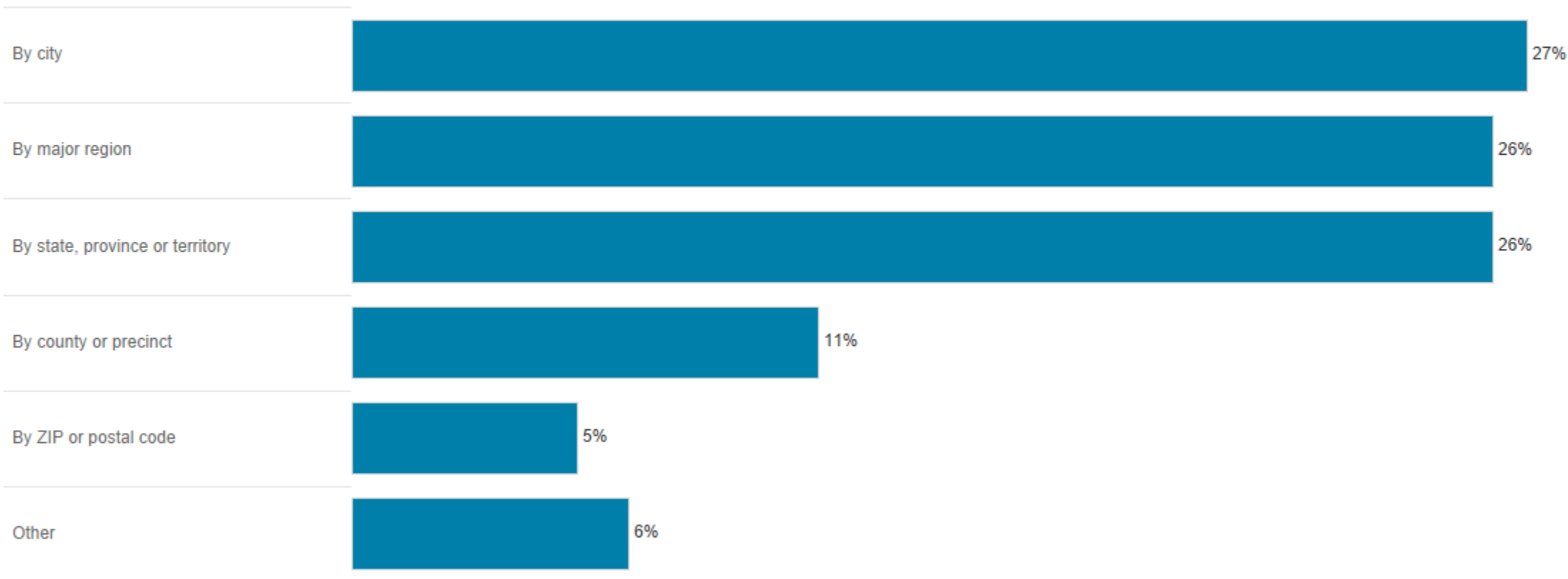
Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

To what level of granularity does, or will, your organization manage geographic differentials?

Responses based on organizations that use geographic differentials or are considering to adjust pay level bases on employee's locations. (256 respondents)



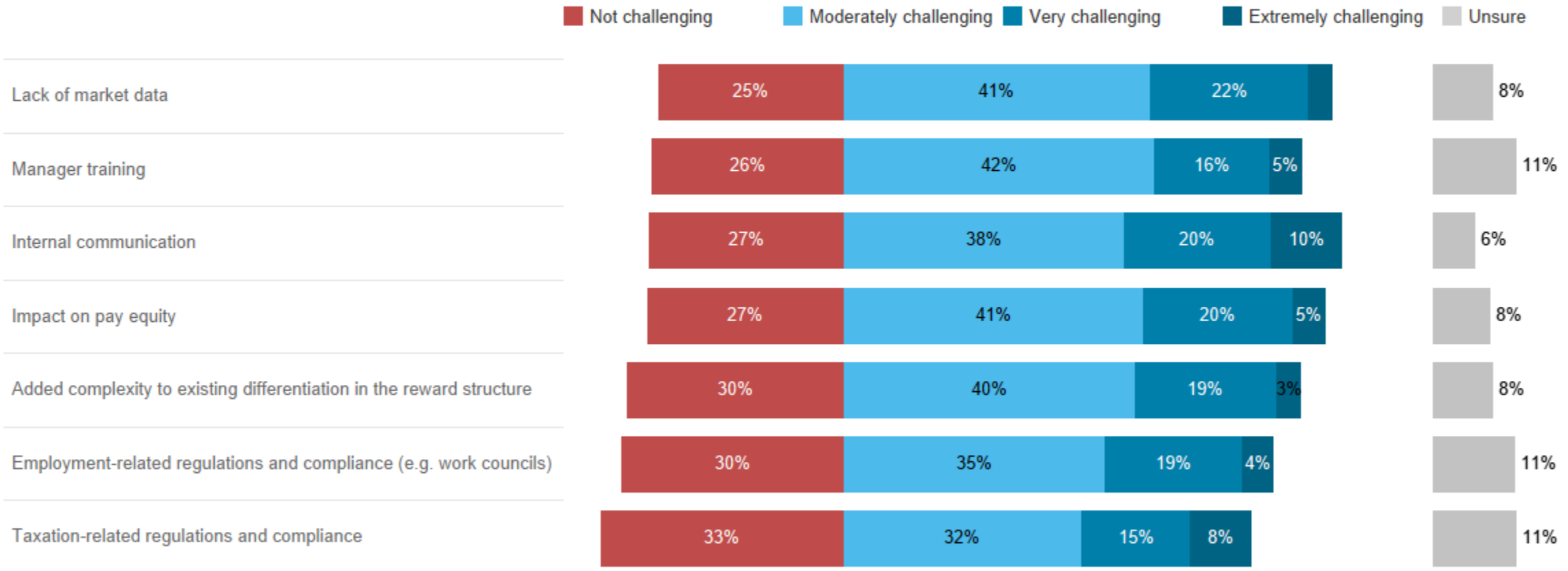
Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

When adopting, maintaining or modifying geographic differentials, how challenging are each of the factors below?

Responses based on organizations that use geographic differentials or are considering to adjust pay level bases on employee's locations. (252 respondents)



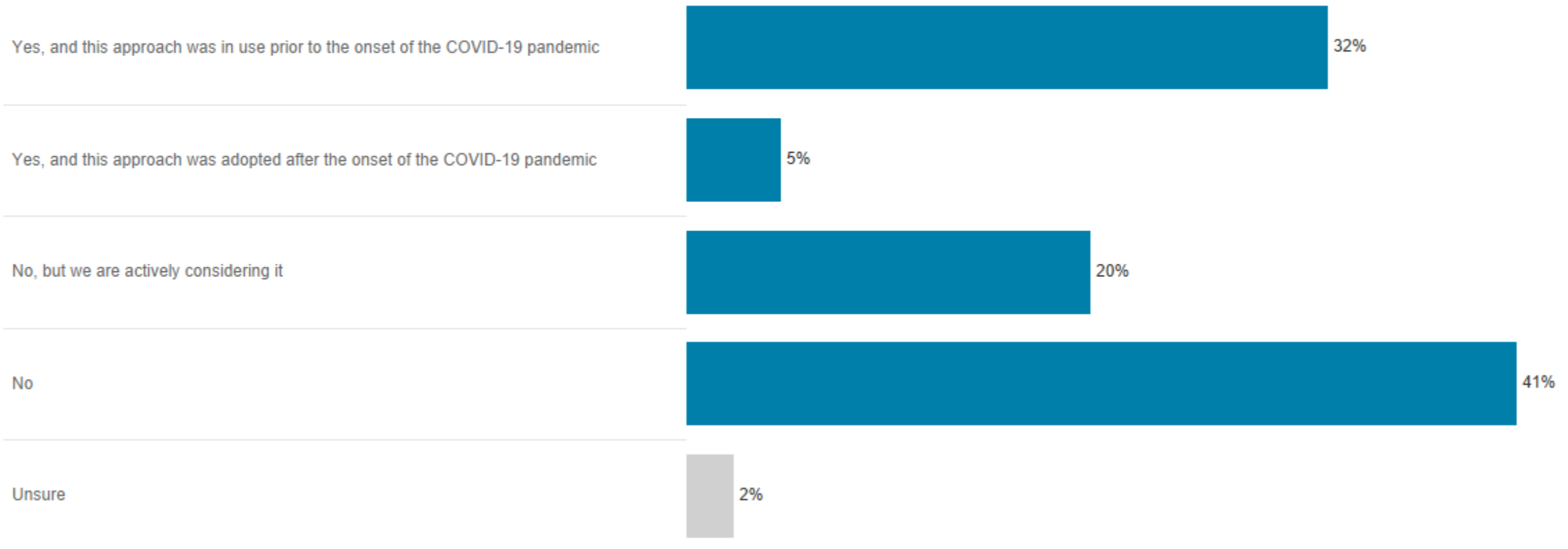
Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

Does your organization have specific geographic differentials for remote employees?

Responses based on organizations that use geographic differentials or are considering to adjust pay level bases on employee's locations. (255 respondents)



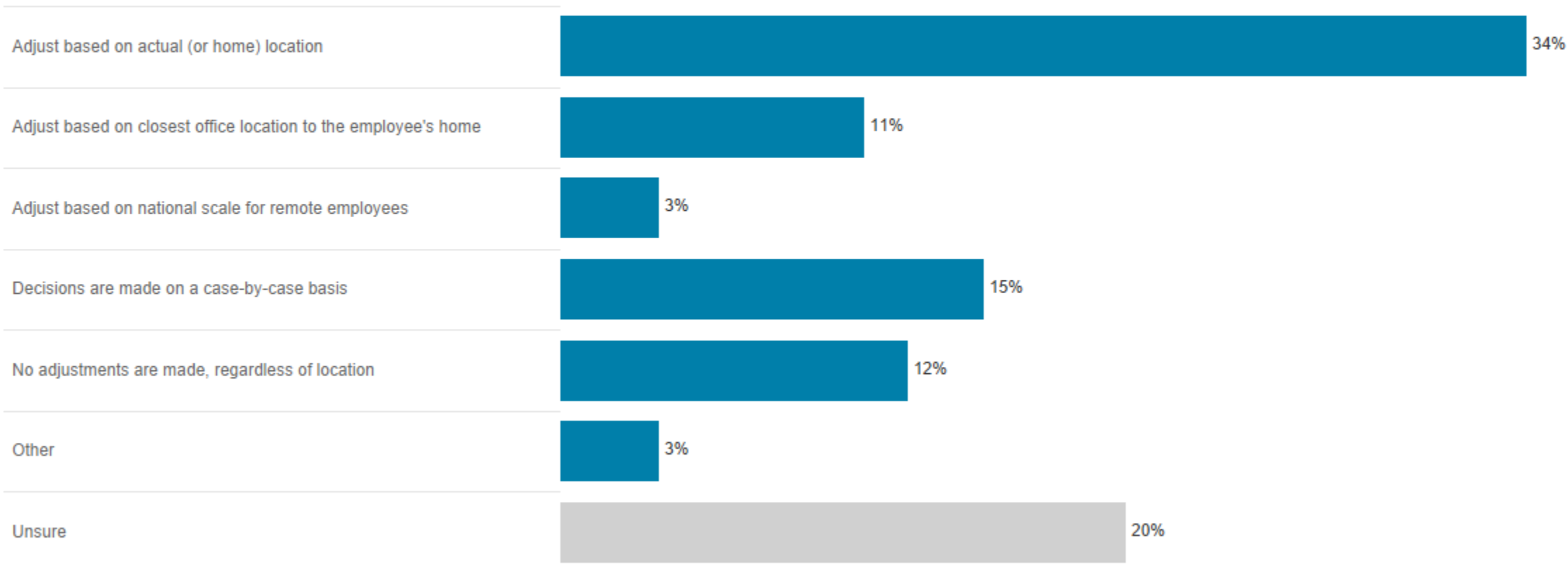
Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

What is, or will be, your geographic differential approach for remote employees?

Responses based on organizations that use geographic differentials or are considering to adjust pay level bases on employee's locations. (258 respondents)

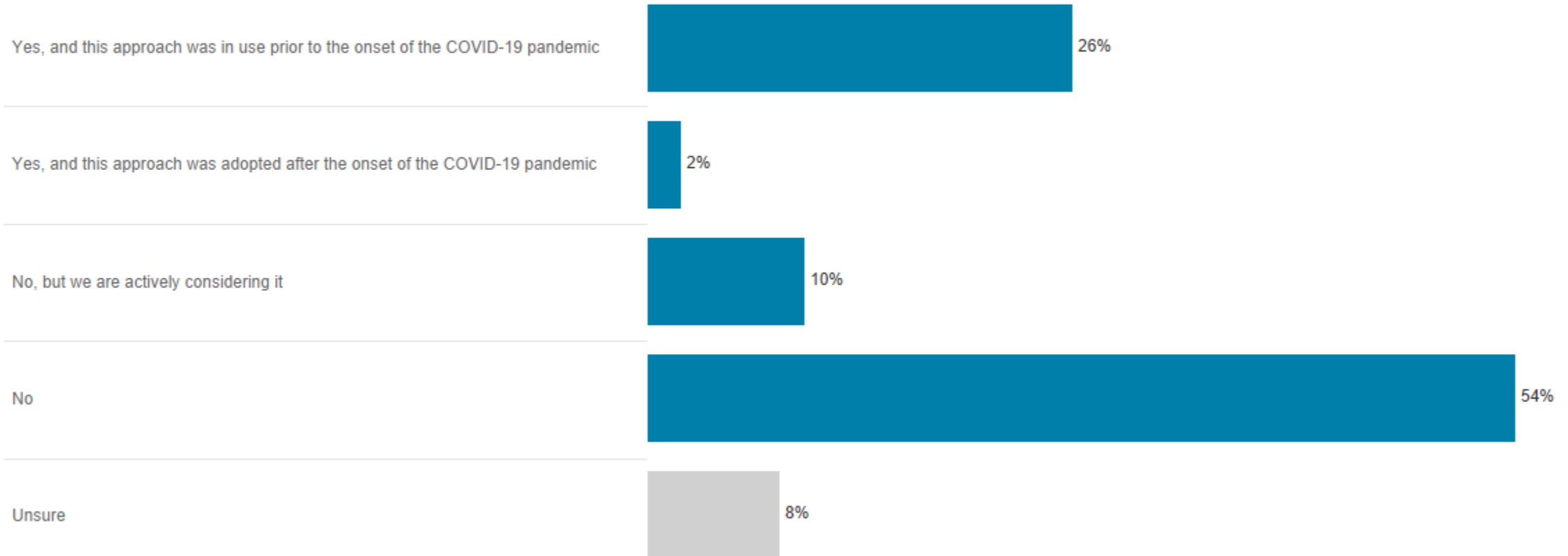


Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

Does your organization differentiate pay adjustments for company- vs. employee-initiated relocations? (380 respondents)



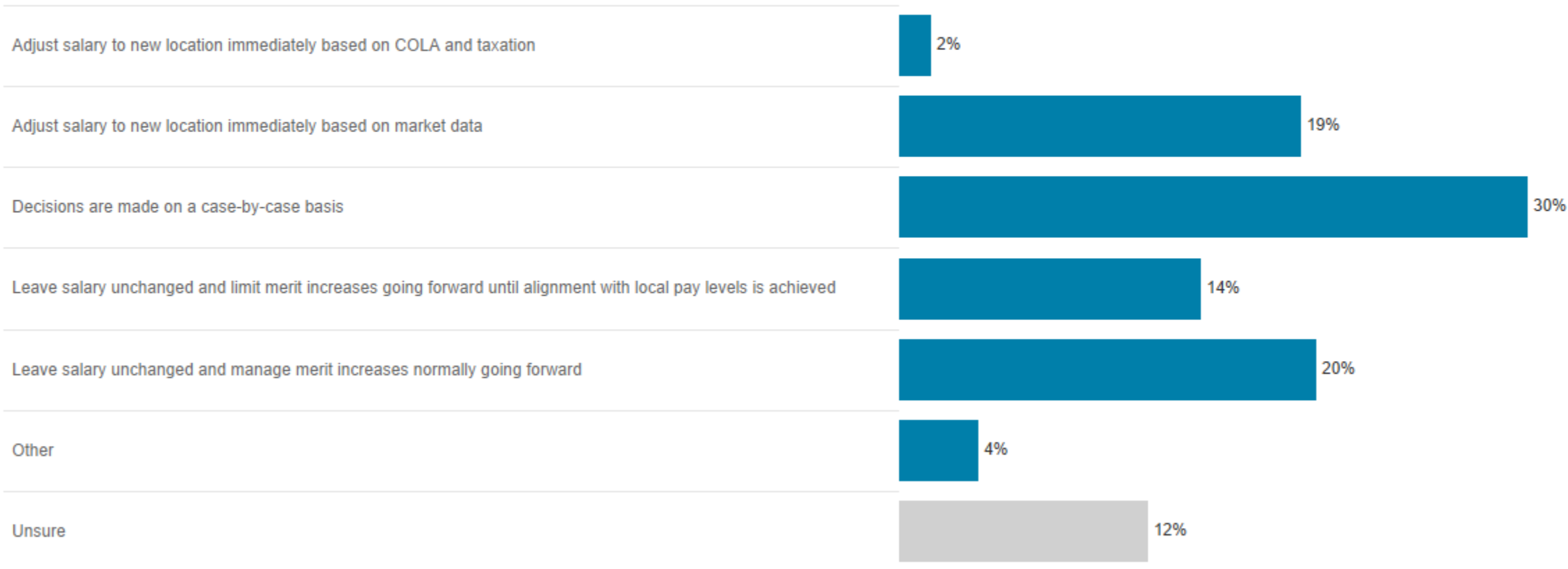
Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

Currently, if an employee chooses to relocate to a different office or remote location in a lower labor-cost market, how do you manage or adjust their base salary?

(399 respondents)

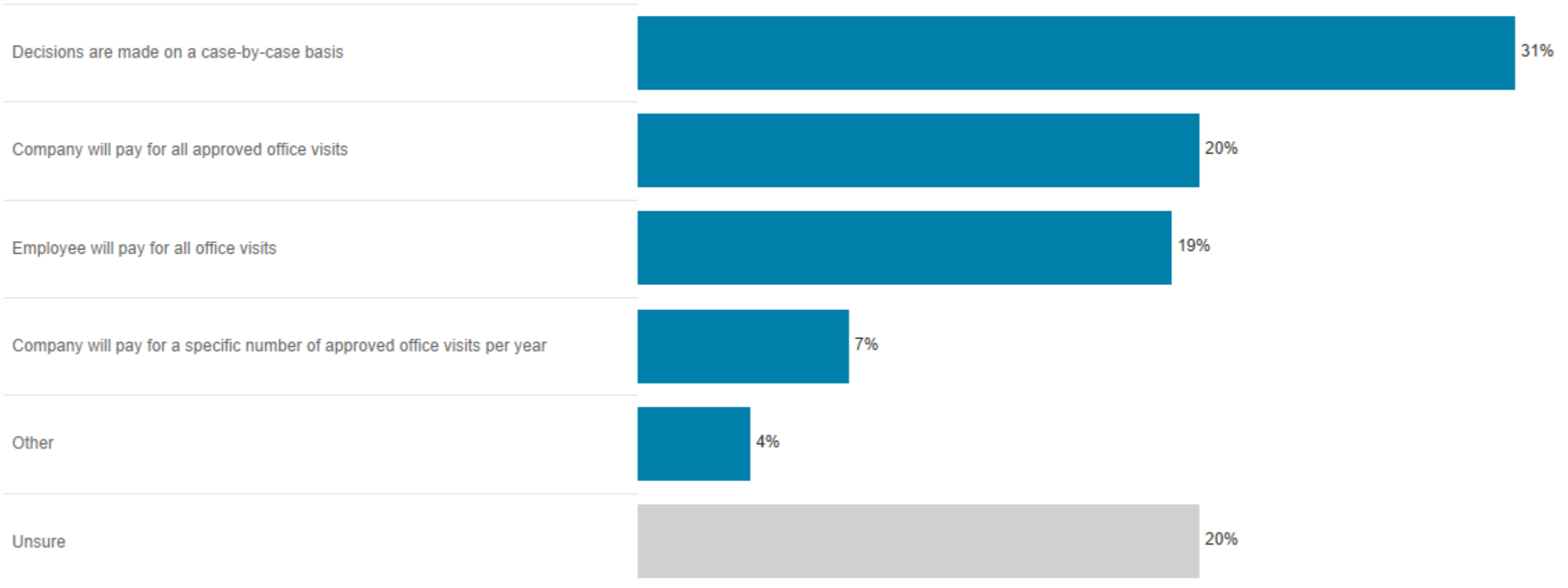


Creating or Enhancing Evolving Location-Based Pay Strategies



Question:

Currently, if an employee chooses to relocate to a remote location how do you manage business travel to office locations? (407 respondents)



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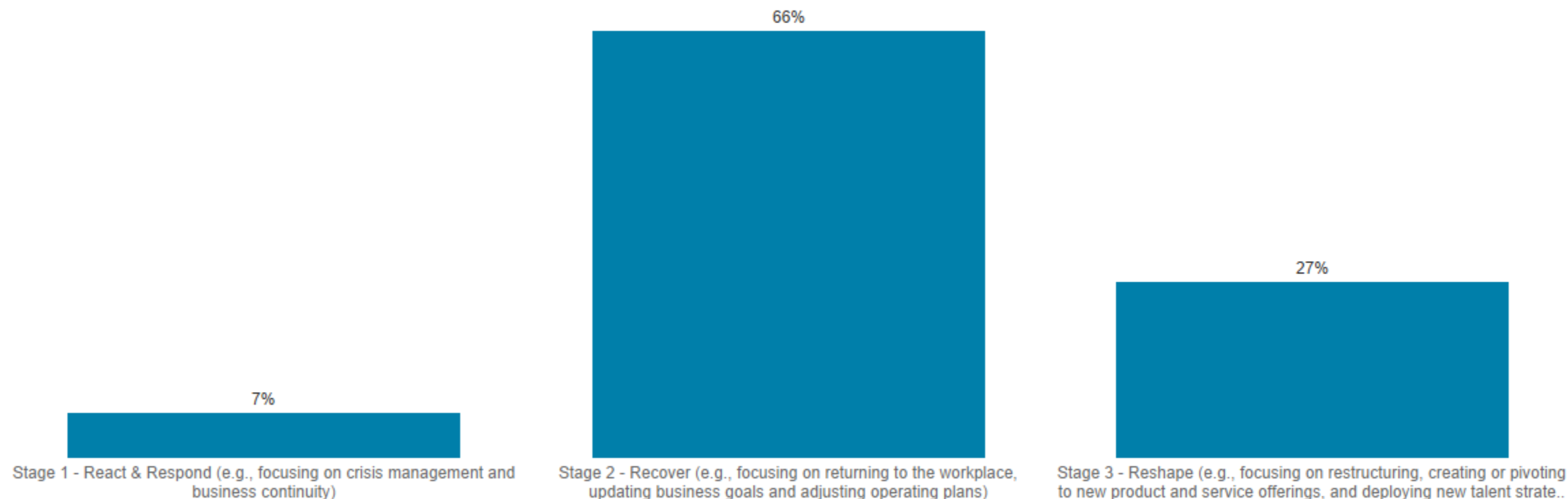
Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond

Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

Aon's COVID-19 Response Framework is divided into the three stages listed below. While we recognize the impact of the pandemic varies by location, and that some parts of your organization may be dealing with different challenges at different times, in your opinion, which of the following stages best reflects your overall organization at this time? (482 respondents)

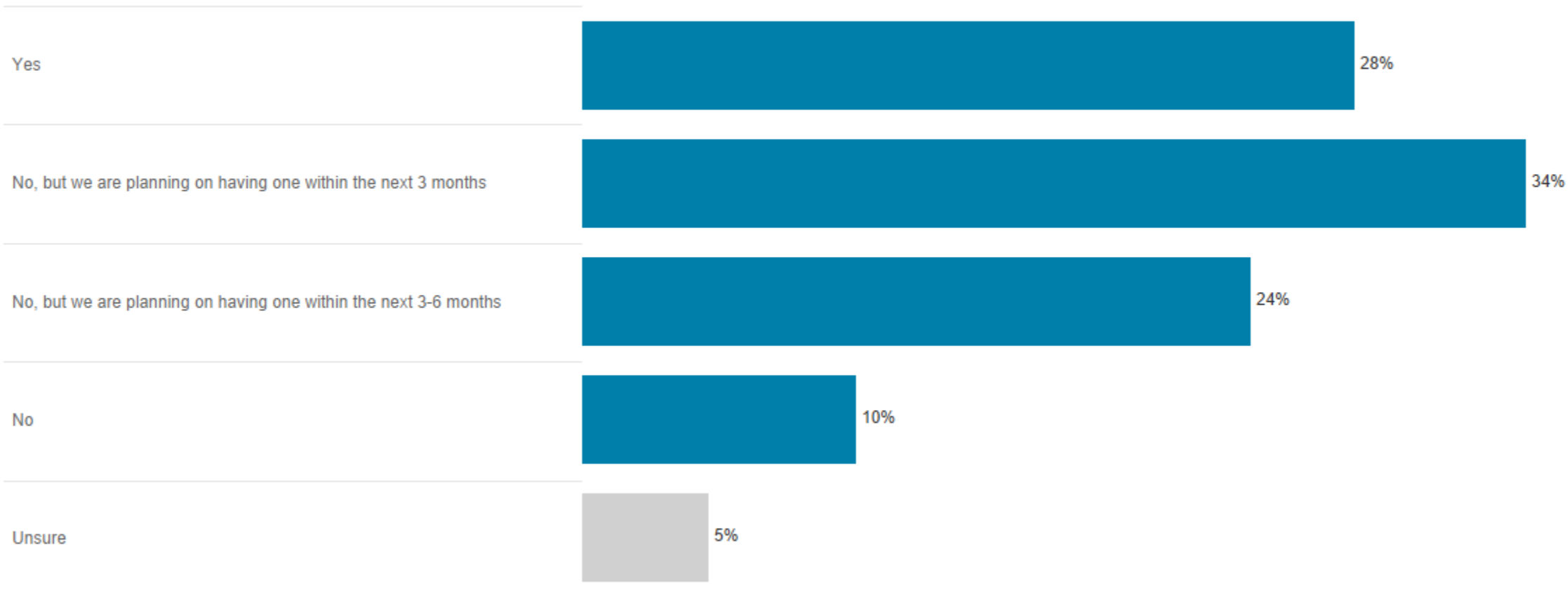


Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

Does your organization have a clear and consistent definition for the future of work? (487 respondents)

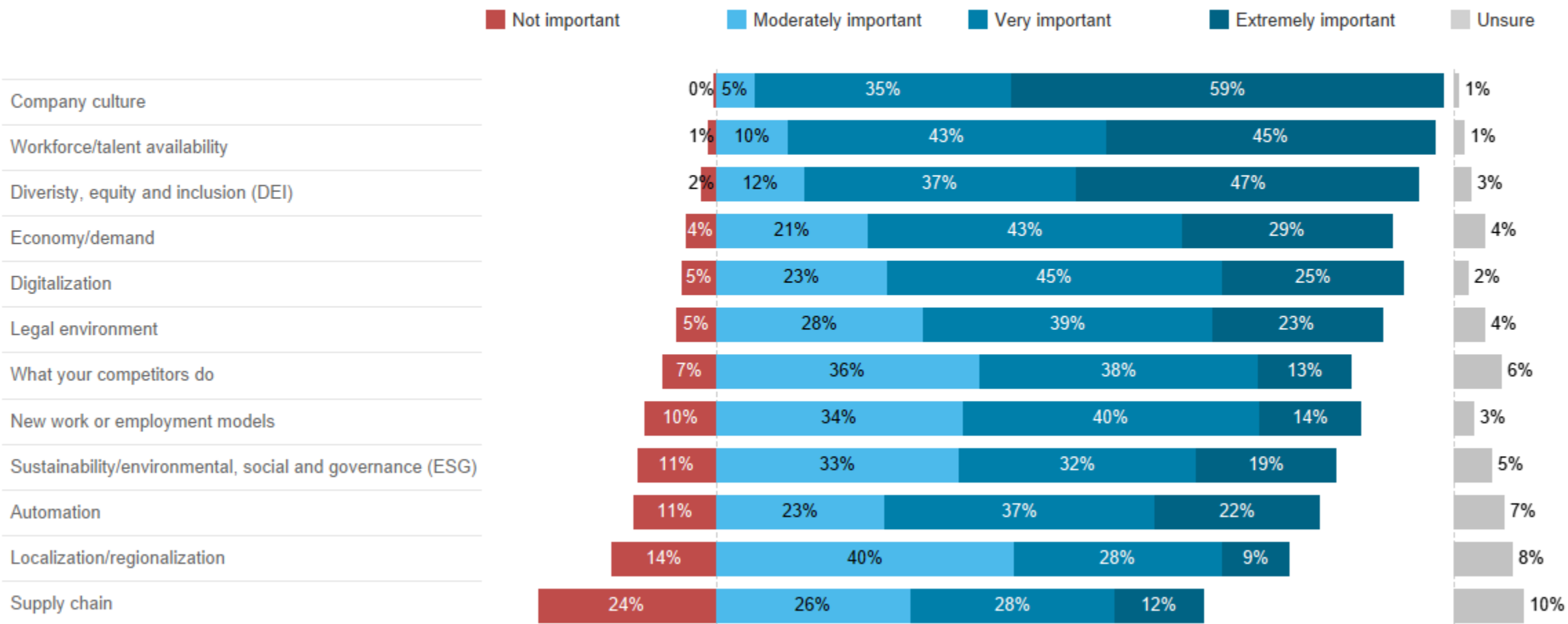


Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

How important are the following factors to your organization when creating a definition for the future of work? (481 respondents)



Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

How are the following functions contributing to shaping your organization's definition of the future of work? (457 respondents)

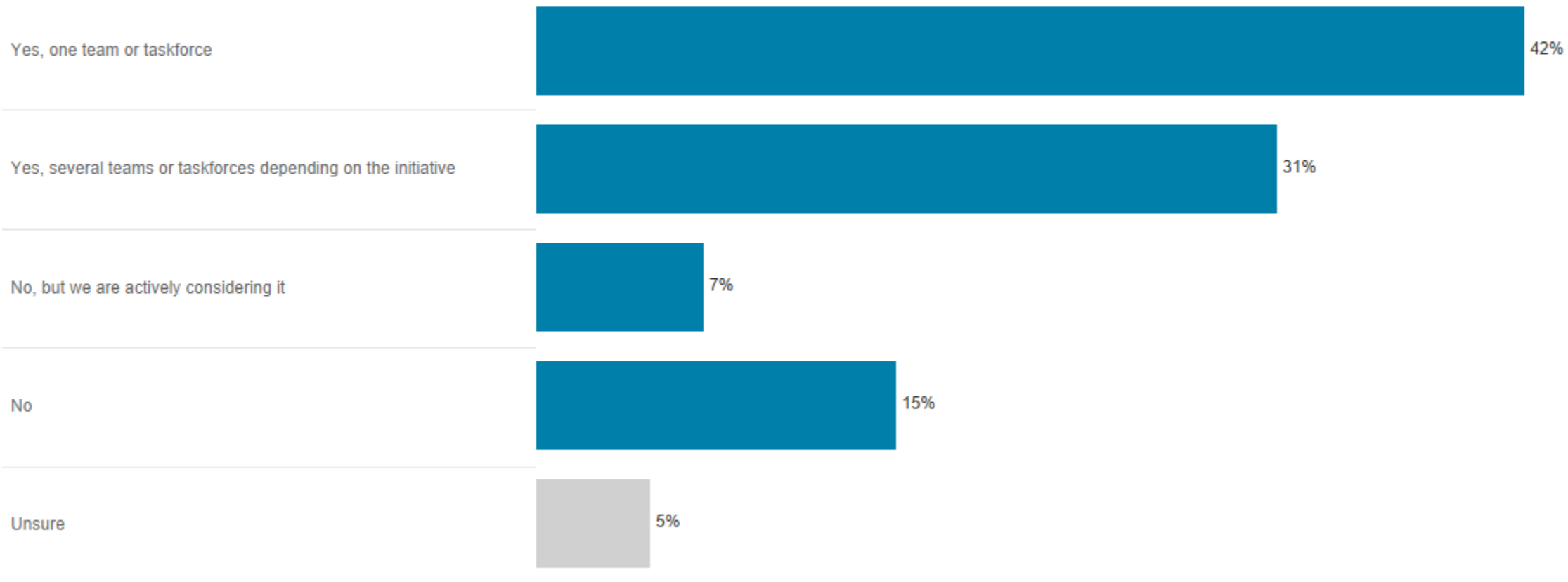
	Defining	Leading	Managing	Tracking
Business lines/teams	19%	30%	43%	9%
Executive leadership (i.e., C-suite)	61%	29%	8%	2%
Finance	8%	24%	44%	23%
Human resources	38%	44%	17%	2%
Manufacturing	9%	18%	56%	17%
Operations	10%	20%	53%	17%
Product development (i.e., R&D)	13%	25%	47%	14%
Sales and marketing	11%	24%	48%	17%
Strategic planning	27%	33%	29%	10%
Technology (i.e., IT)	15%	31%	42%	12%

Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

Does your organization have a specific team or taskforce working on defining, managing and implementing the future of work? (480 respondents)



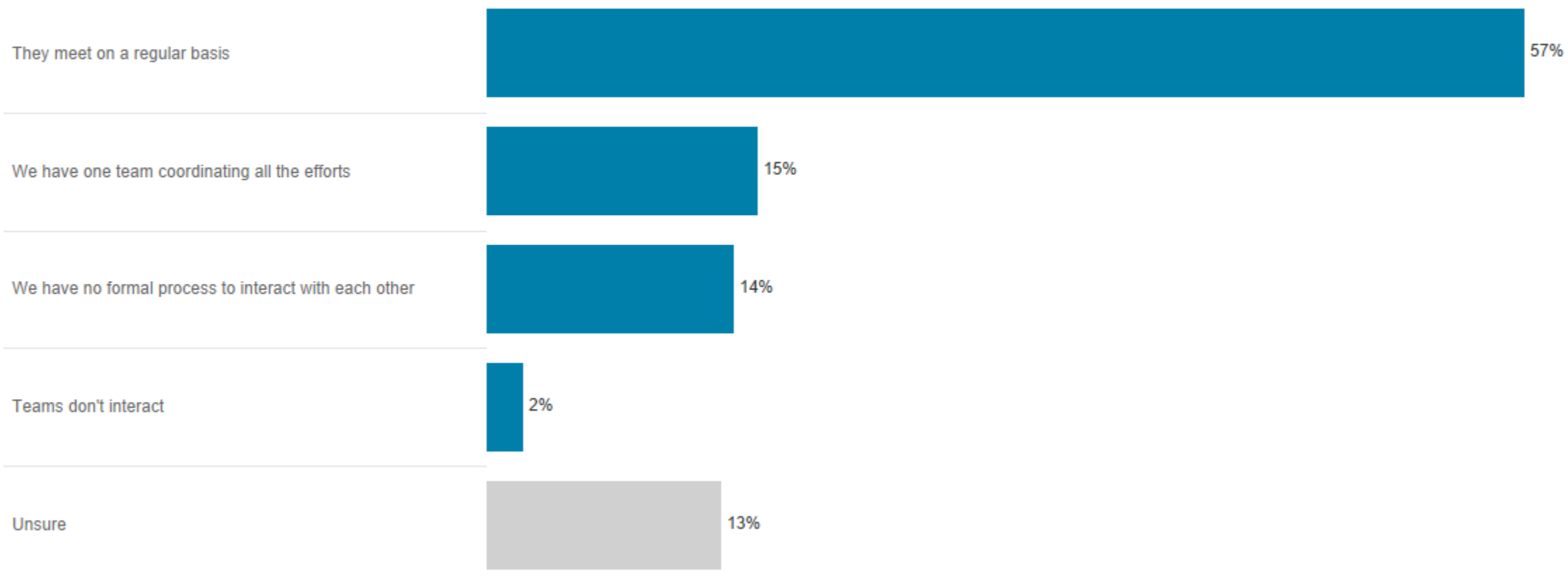
Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

How do teams or taskforces interact?

Responses based on organizations that have several teams working on defining, managing and implementing the future of work. (148 respondents)



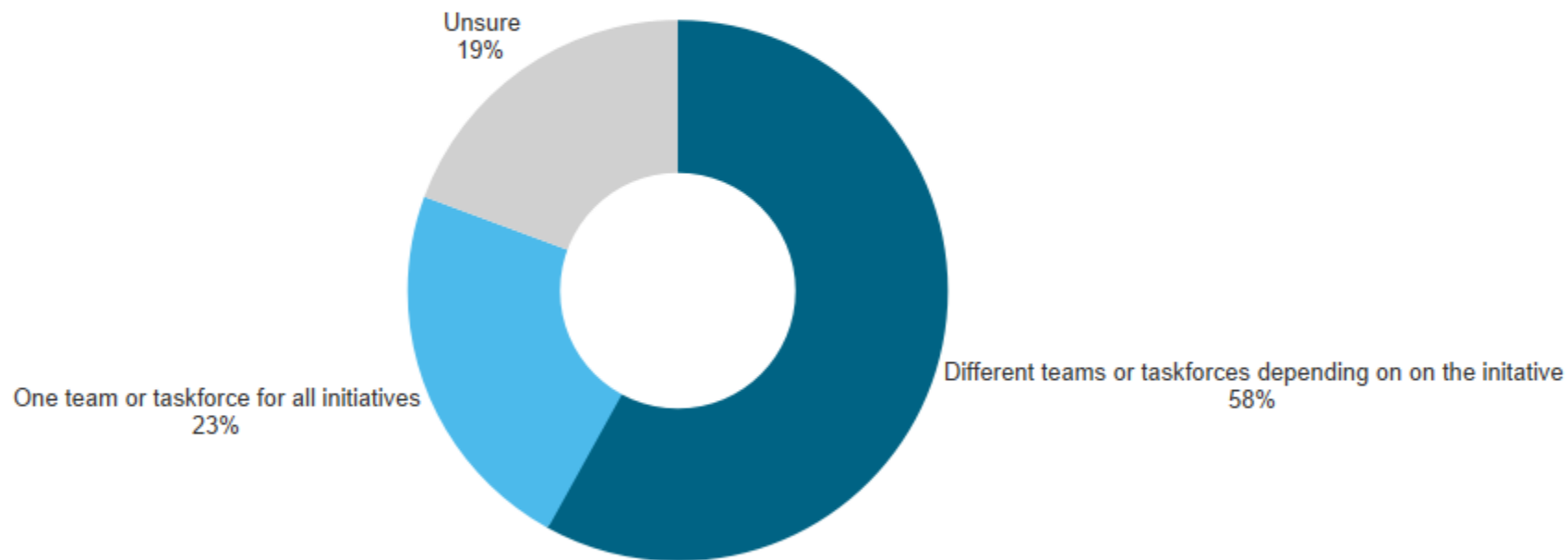
Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

What type of taskforce or team are you considering?

Responses based on organizations that do not have teams currently working on defining, managing and implementing the future of work, but are actively considering it. (31 respondents)



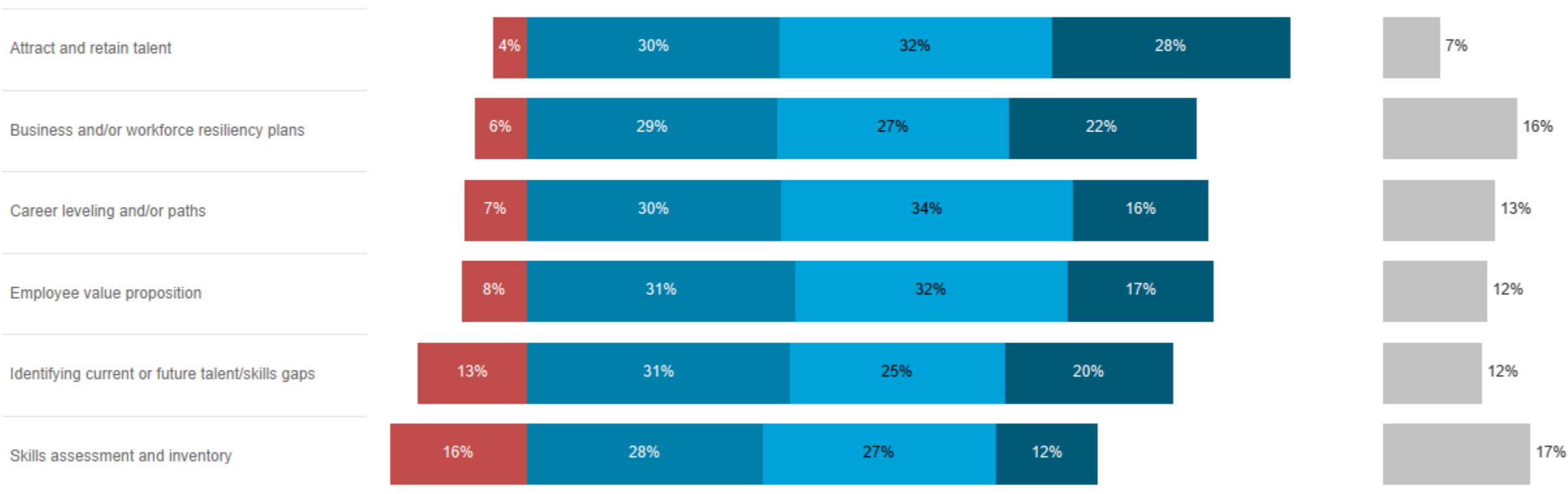
Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

As your organization prepares to implement future-of-work strategies, which of the following **people risk** issues or programs are you or will you re-evaluate or update in light of the pandemic? (476 respondents)

■ None ■ Improving existing initiatives only ■ Primarily planning for new initiatives now ■ Already implementing new initiatives now ■ Unsure

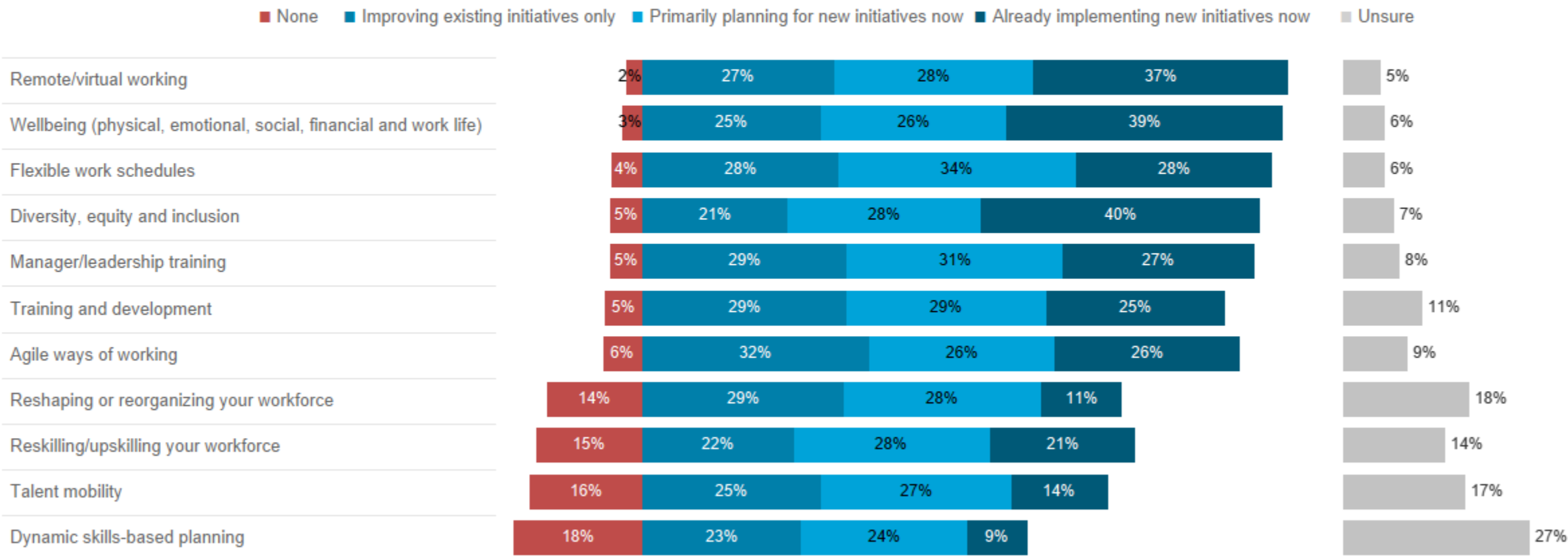


Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

As your organization prepares to implement future-of-work strategies, which of the following issues or programs related to **agility and resilience** are you or will you re-evaluate or update in light of the pandemic? (468 respondents)



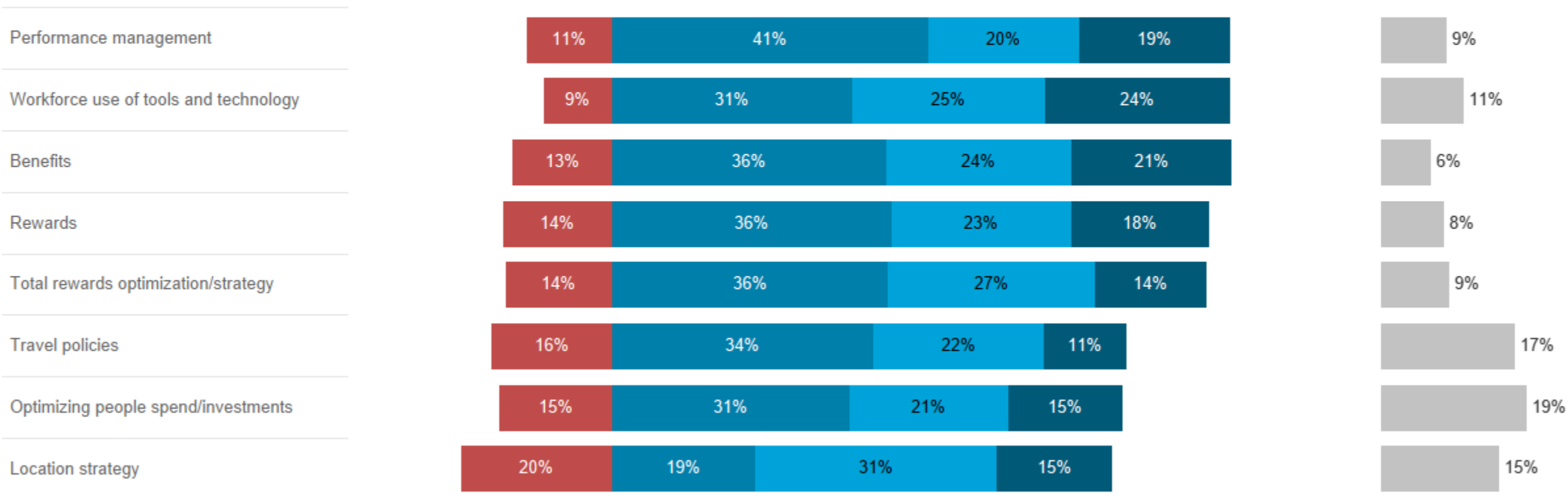
Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

As your organization prepares to implement future-of-work strategies, which of the following **people investment** issues or programs are you or will you re-evaluate or update in light of the pandemic? (469 respondents)

■ None ■ Improving existing initiatives only ■ Primarily planning for new initiatives now ■ Already implementing new initiatives now ■ Unsure

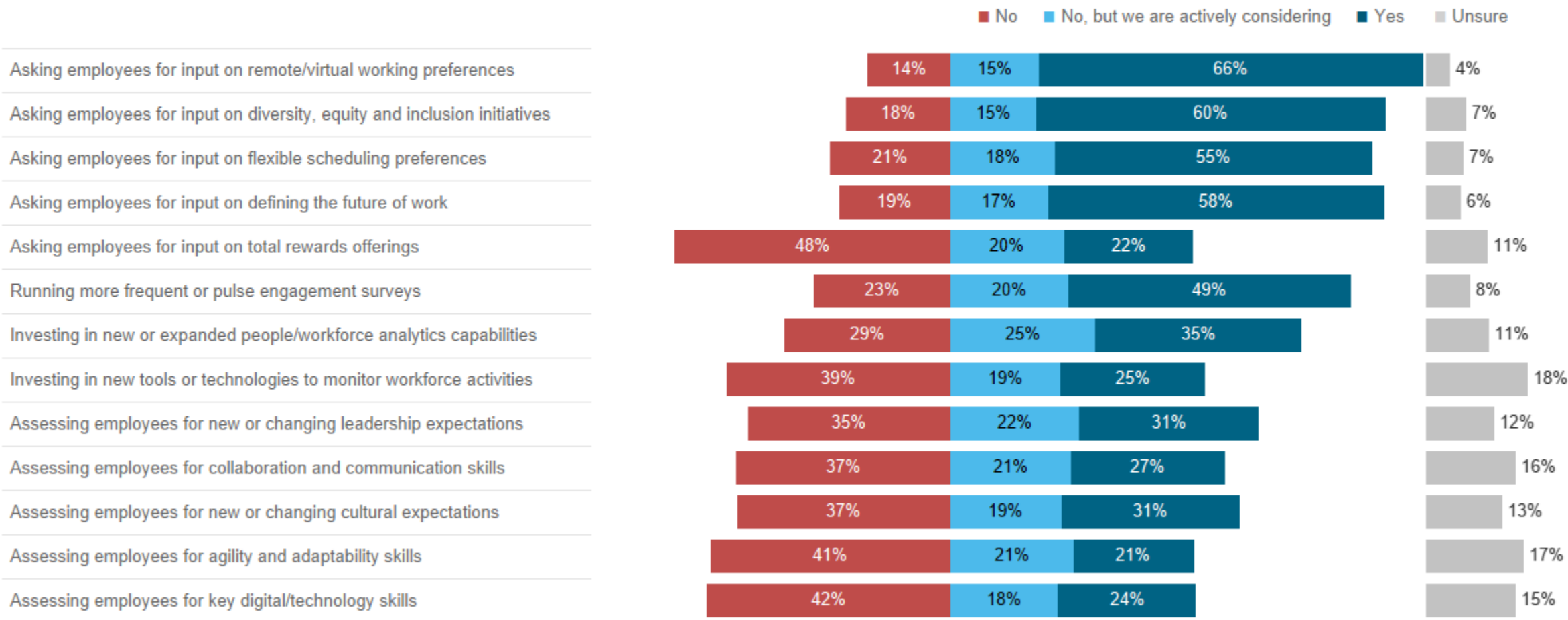


Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

What steps is your organization taking to better understand your workforce in the context of implementing future-of-work strategies? (463 respondents)



Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

What elements of your employee value proposition are you reviewing, reviewed or will review? (316 respondents)

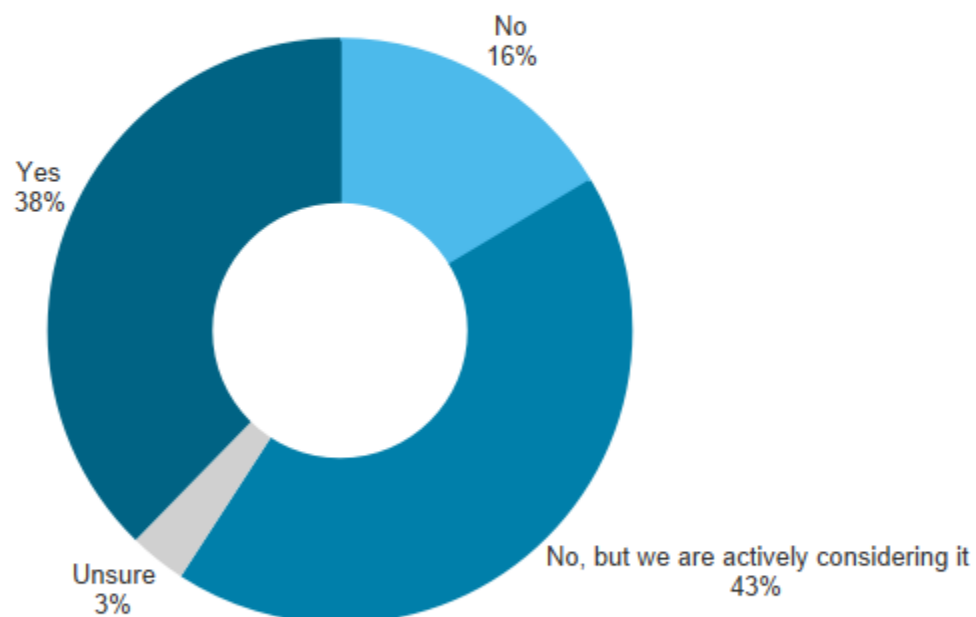


Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



Question:

Has your organization communicated specific steps it is taking to define, manage or implement future-of-work strategies to employees? (475 respondents)



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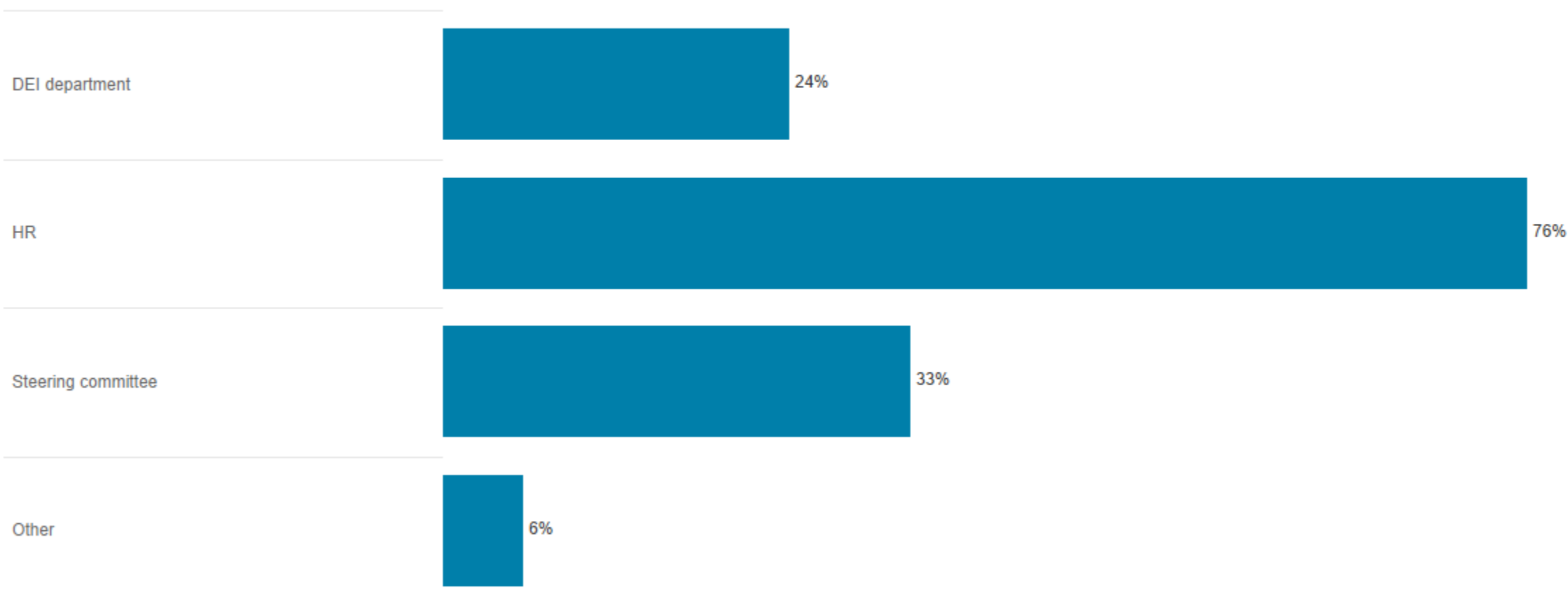
Future of Work: Enhancing Diversity, Equity and Inclusion (DEI) Strategies

Future of Work: Enhancing Diversity, Equity and Inclusion (DEI) Strategies



Question:

Which of the following serves as the governing body over DEI strategies and programs at your organization? (480 respondents)

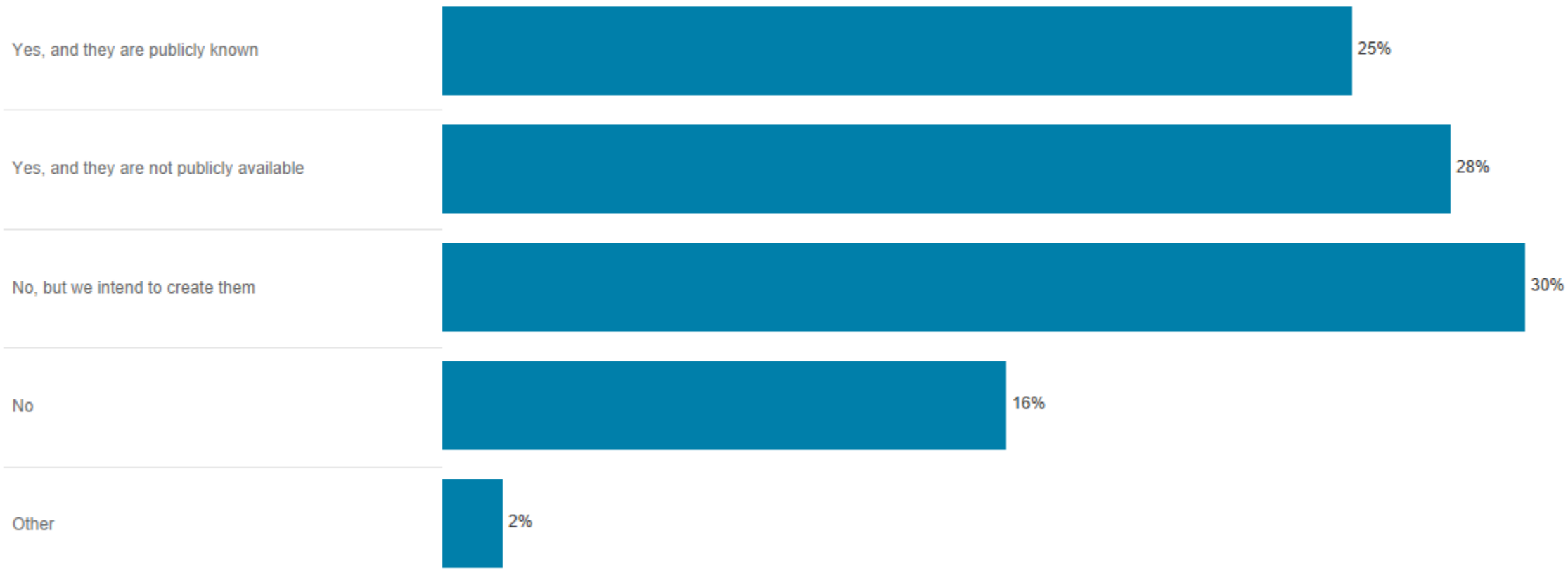


Future of Work: Enhancing Diversity, Equity and Inclusion (DEI) Strategies



Question:

Does your organization have DEI metrics or goals? (482 respondents)



Future of Work: Enhancing Diversity, Equity and Inclusion (DEI) Strategies



Question:

What changes is your organization making to strengthen diversity, equity and inclusion initiatives? (454 respondents)

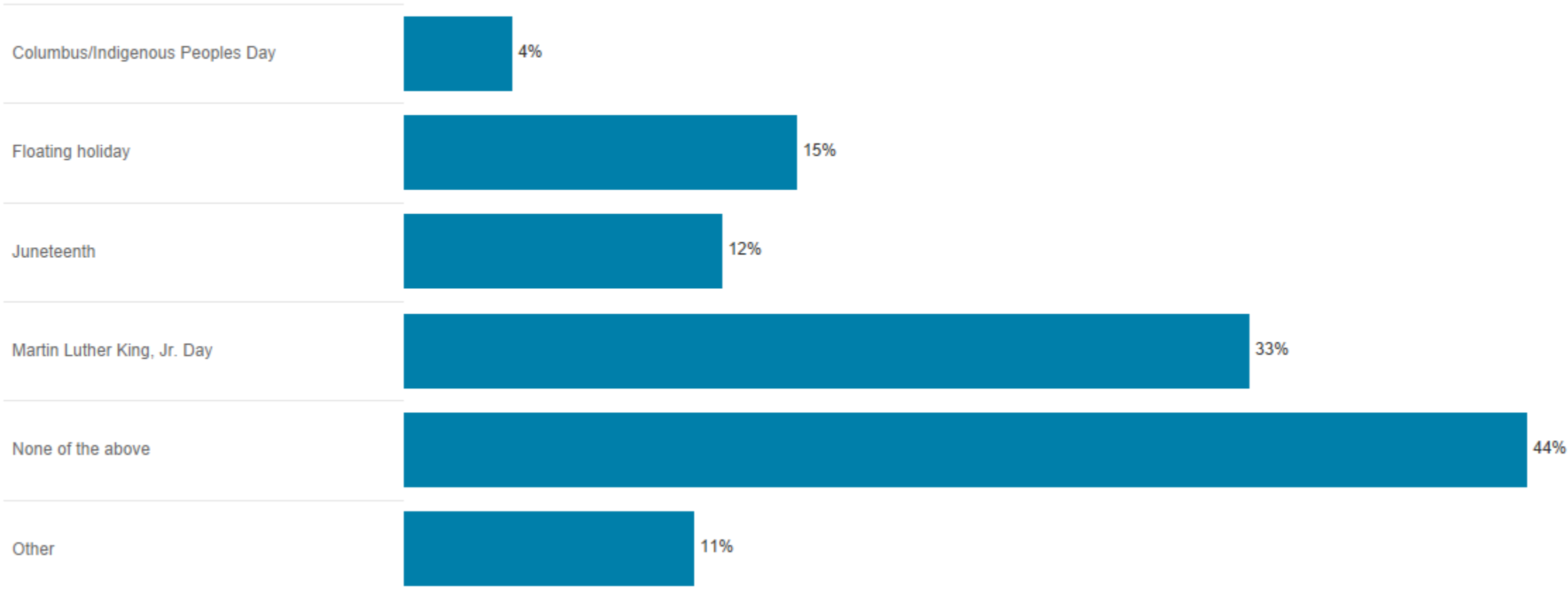


Future of Work: Enhancing Diversity, Equity and Inclusion (DEI) Strategies



Question:

For your operations in the U.S., are you adding any of the following holidays to your fixed, paid holiday schedule? (380 respondents)



**Global HR Pulse Survey:
Preparing For the Future: How COVID-19 is
Changing How and Where People Work Forever**

Additional Information

If you have questions about this study, or want to speak to a member of our team about developing new total rewards or workforce strategies in response to COVID-19, please contact our study leaders below:

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Additional Aon Resources



To learn more about Aon's complete set of COVID-19 resources and insights, including information on business continuity, communications, cyber security, healthcare, insurance, risk management and supply chain issues, among others, please visit: <https://www.aon.com/event-response/coronavirus.aspx>

We encourage all clients to bookmark Aon's COVID-19 response site to stay connected to our latest insights on addressing this pandemic at an enterprise-wide level.

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This study was produced and managed by the Rewards Solutions practice, which is part of Aon's Human Capital Solutions business.

About Rewards Solutions

The Rewards Solutions practice at Aon empowers business leaders to reimagine their approach to rewards in the digital age through a powerful mix of data, analytics and advisory capabilities. Our colleagues support clients across a full spectrum of needs, including compensation benchmarking, pay and workforce modeling, and expert insights on plan design. To learn more, visit: rewards.aon.com

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