



# **Global HR Pulse Survey: Manufacturing** **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

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## 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. (174 respondents)

Manufacturing (including Distribution and Consumer Goods)



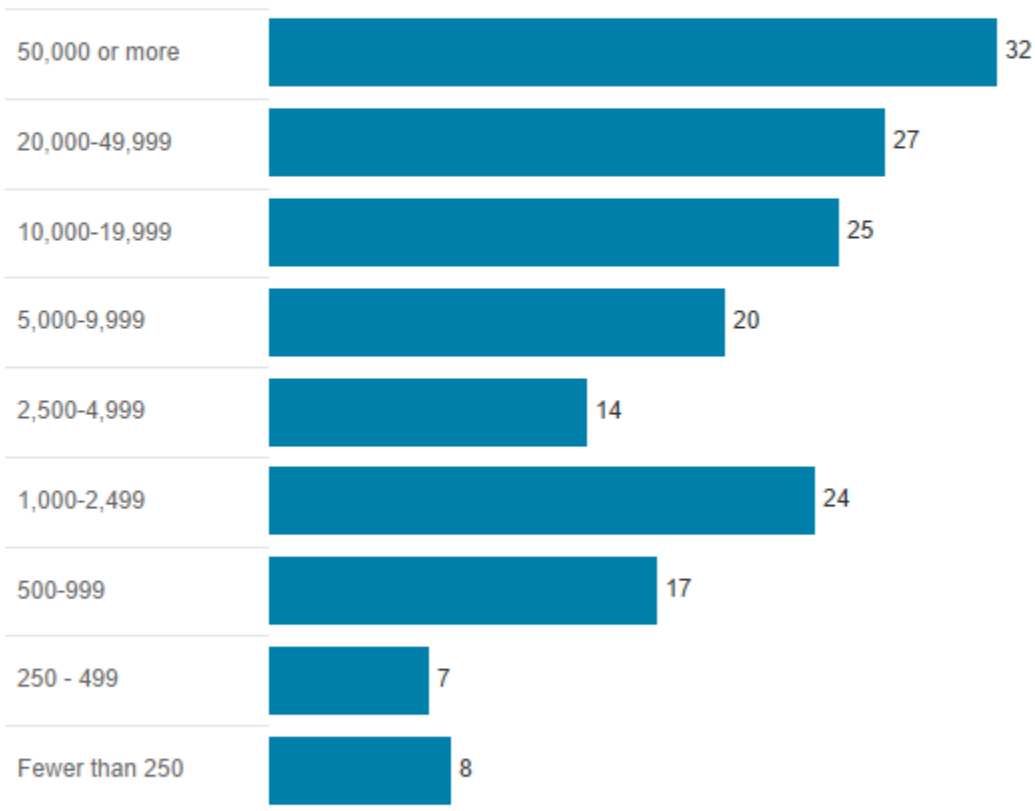
174

# Participant Demographics



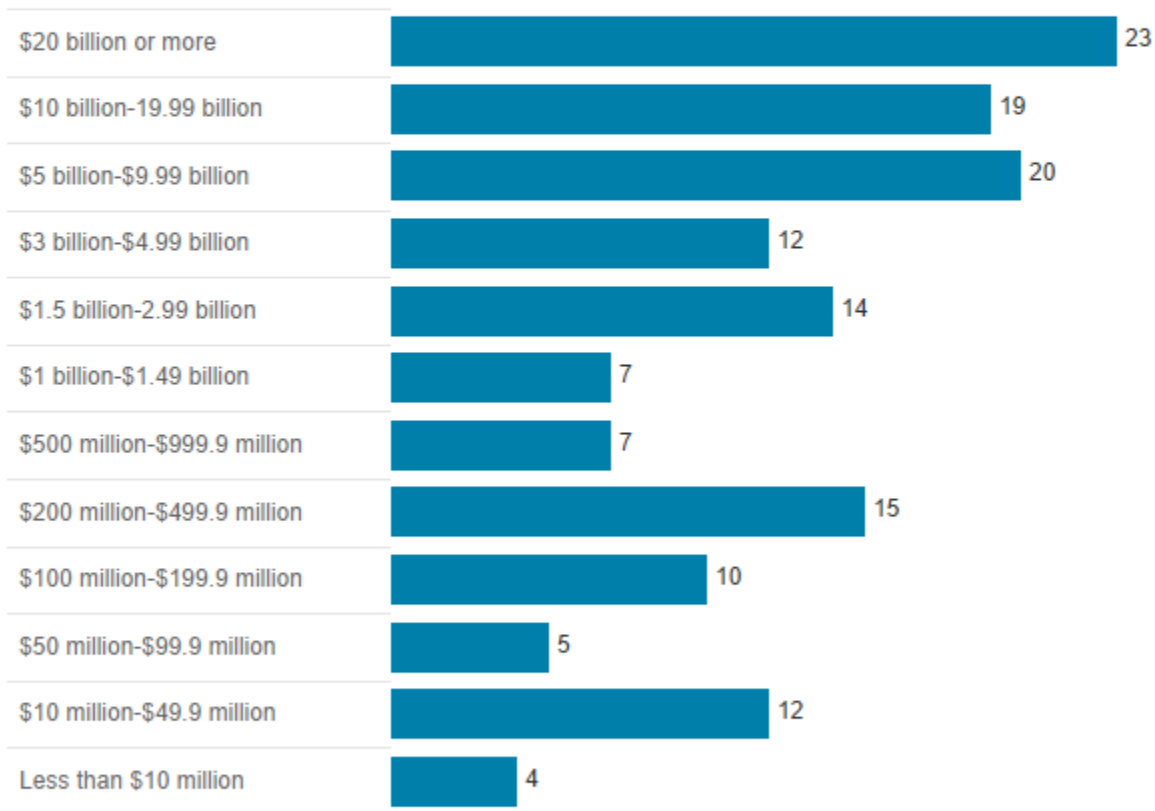
## Company Headcount:

All study participants were asked to provide their global headcount according to the categories below. (174 respondents)



## Company Revenues:

All study participants were asked to provide their global revenues according to the categories below. (148 respondents)



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# Key Highlights



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**69%** **Exploring a Return Onsite**  
of organizations already have a tentative date to return workers onsite



**80%** **Remote Working**  
of organizations are creating or considering updating their remote work policy



**24%** **Location-Based Pay Strategies**  
of organizations have adjusted, or are considering adjusting, geographic differentials in light of the pandemic



**41%** **Vaccine Considerations**  
of organizations will provide, or are considering providing, incentives to employees who get a vaccine



**76%** **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



**72%** **Enhancing Diversity, Equity and Inclusion (DEI) Strategies**  
of organizations have created, or are planning to create, DEI metrics or goals



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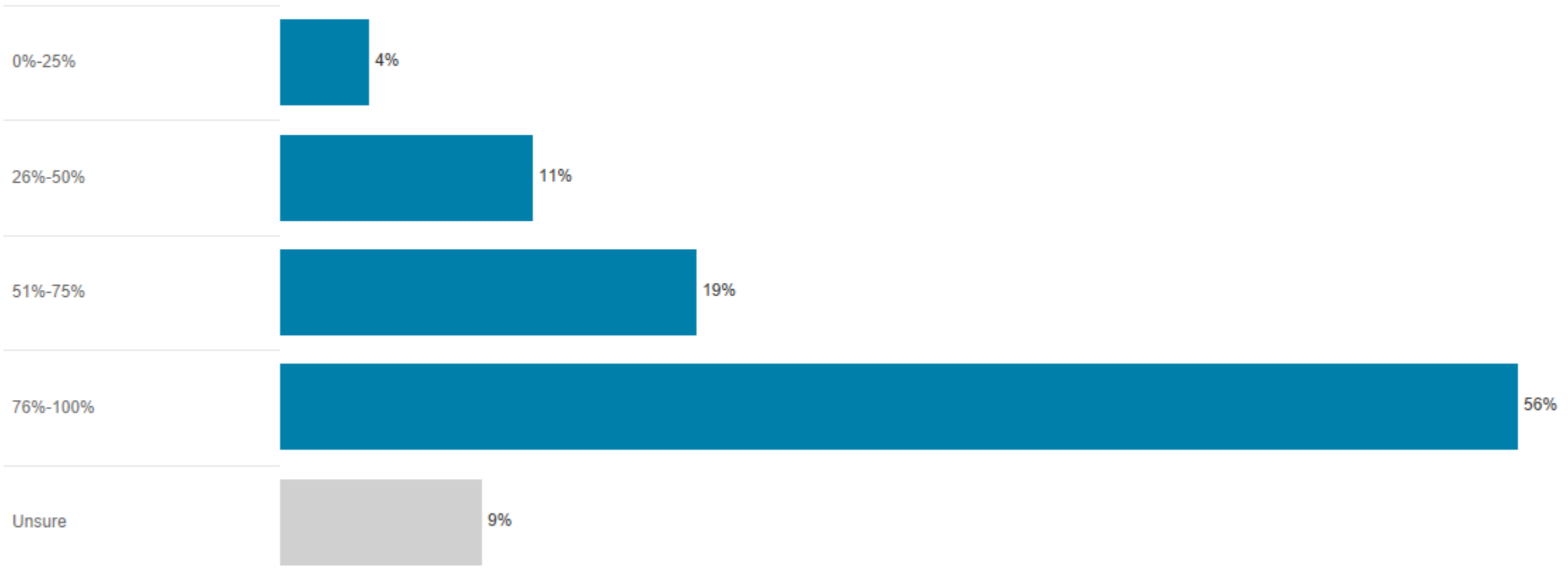
# **Creating a Safe Plan to Return Workers Onsite**

# 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?  
(174 respondents)

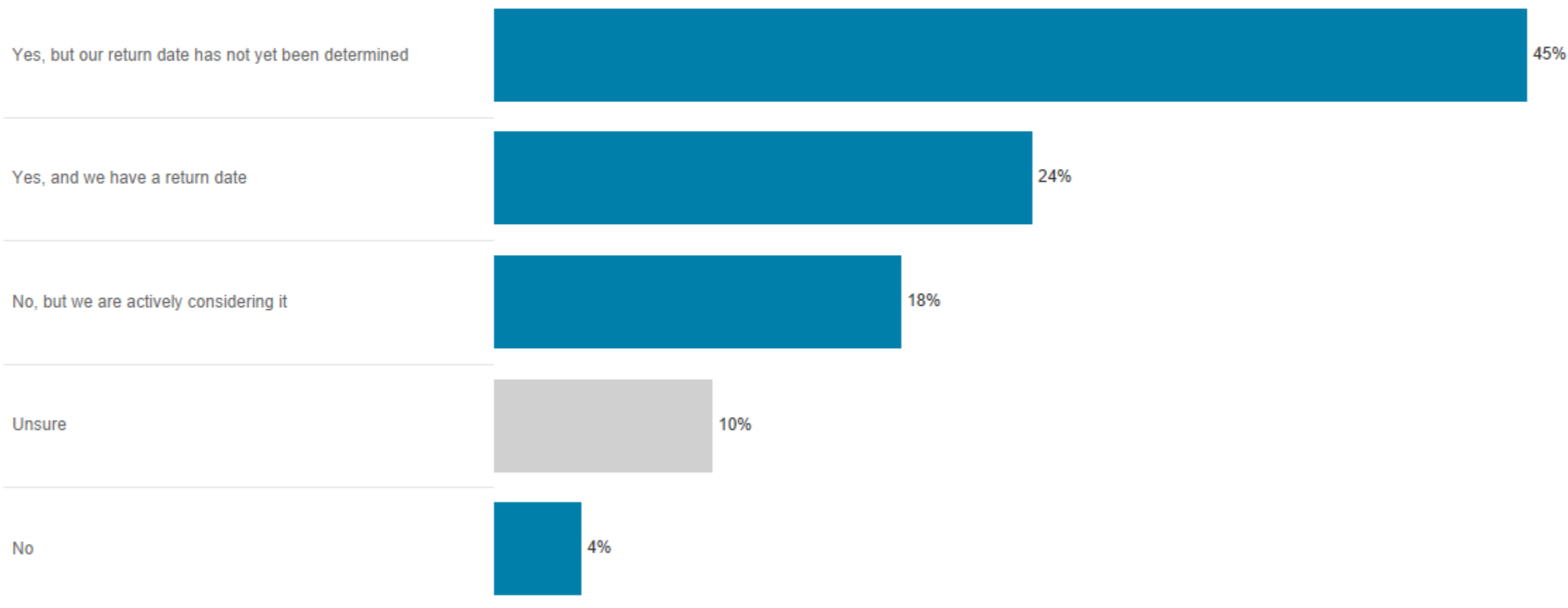


# Creating a Safe Plan to Return Workers Onsite



## Question:

Has your organization made decisions about when to return employees to onsite locations? (157 respondents)

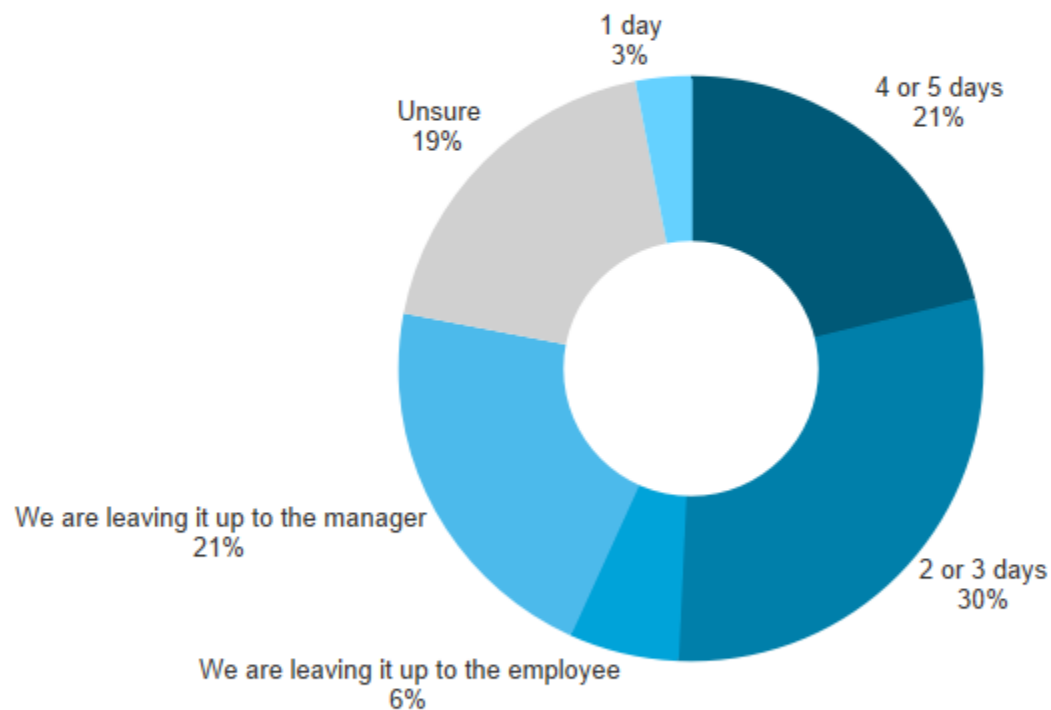


# Creating a Safe Plan to Return Workers Onsite



## 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. (132 respondents)

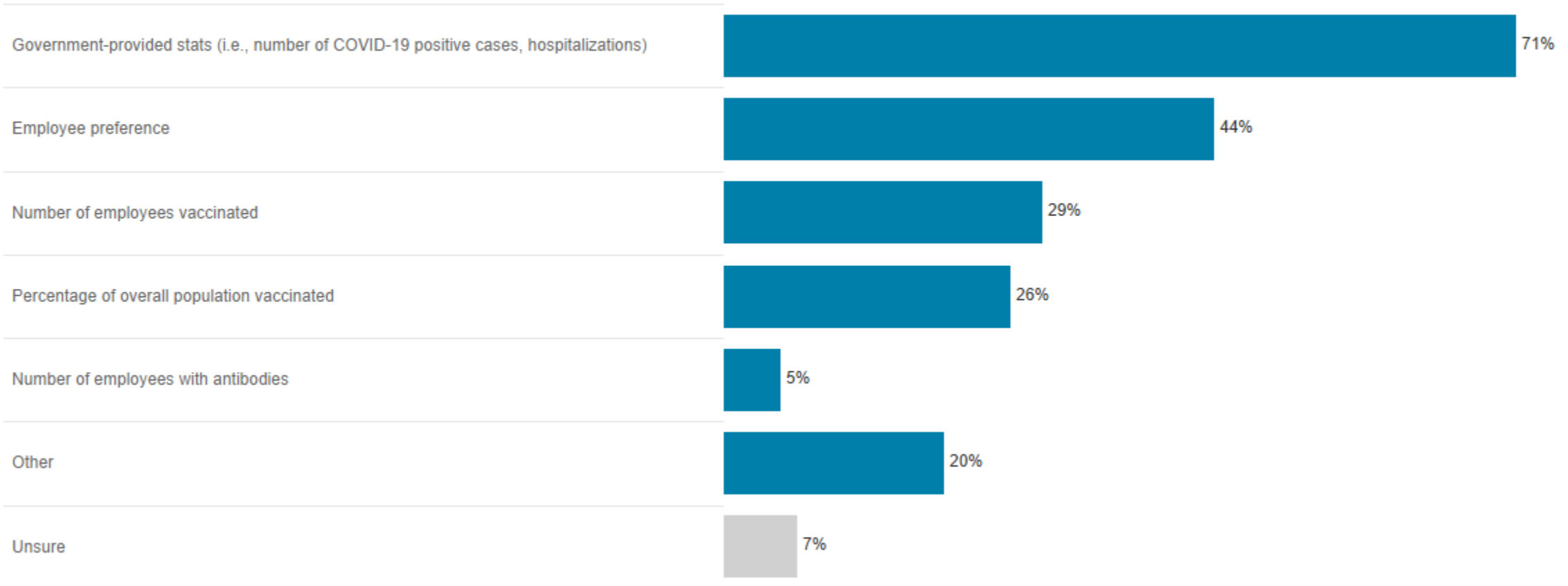


# Creating a Safe Plan to Return Workers Onsite



## Question:

What are the determining factors that influence your decision(s) to return workers onsite? (136 respondents)

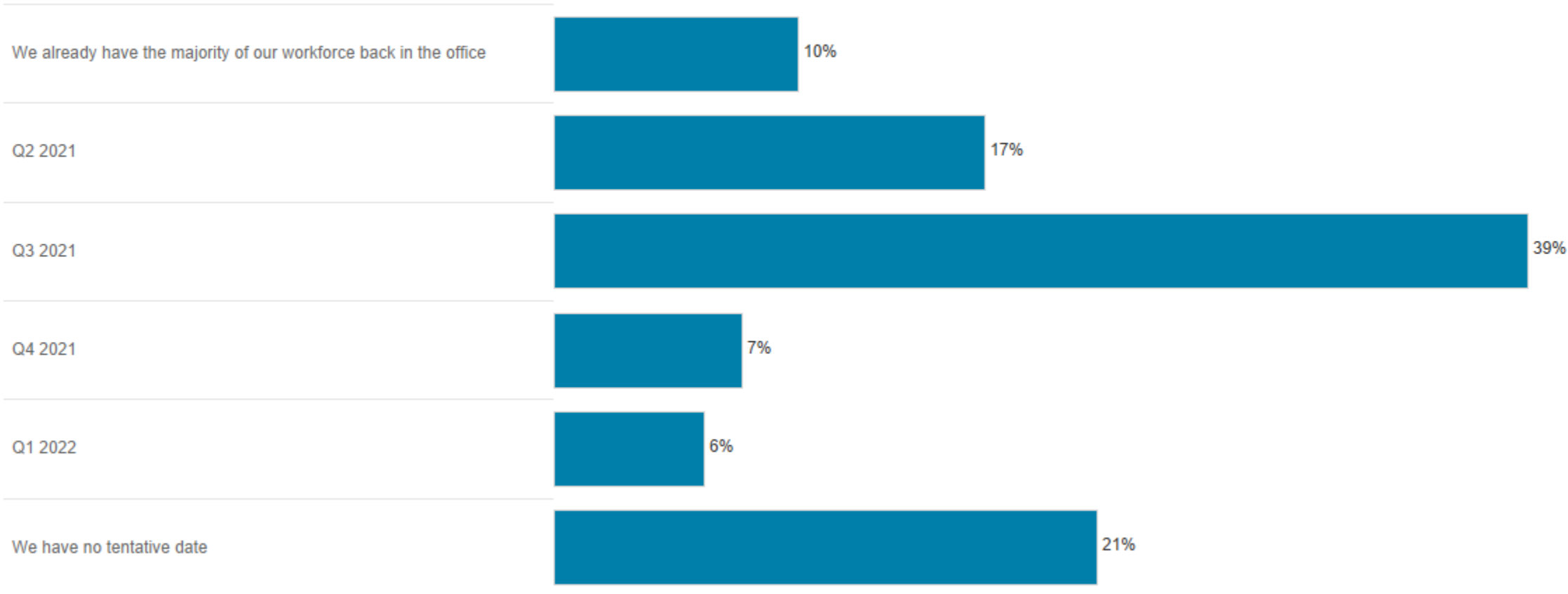


# Creating a Safe Plan to Return Workers Onsite



## Question:

What timeframe are you expecting workers to begin returning to the workplace? (135 respondents)

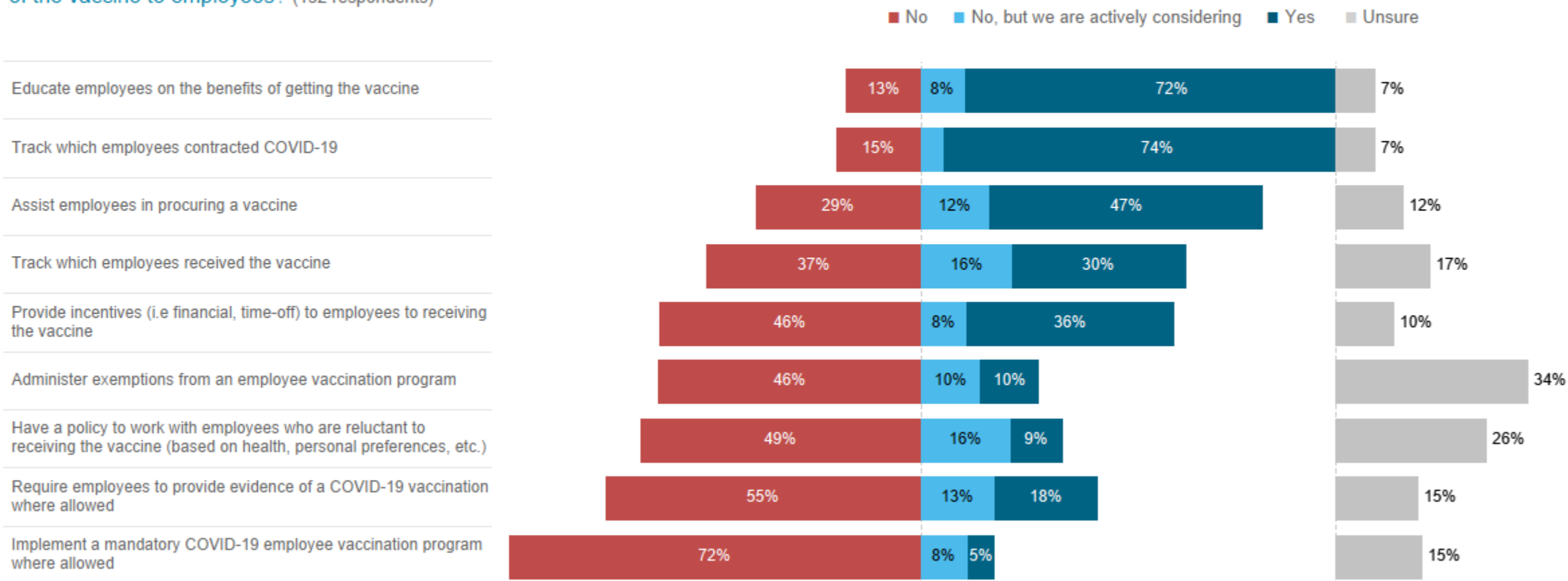


# Creating a Safe Plan to Return Workers Onsite



## 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? (132 respondents)





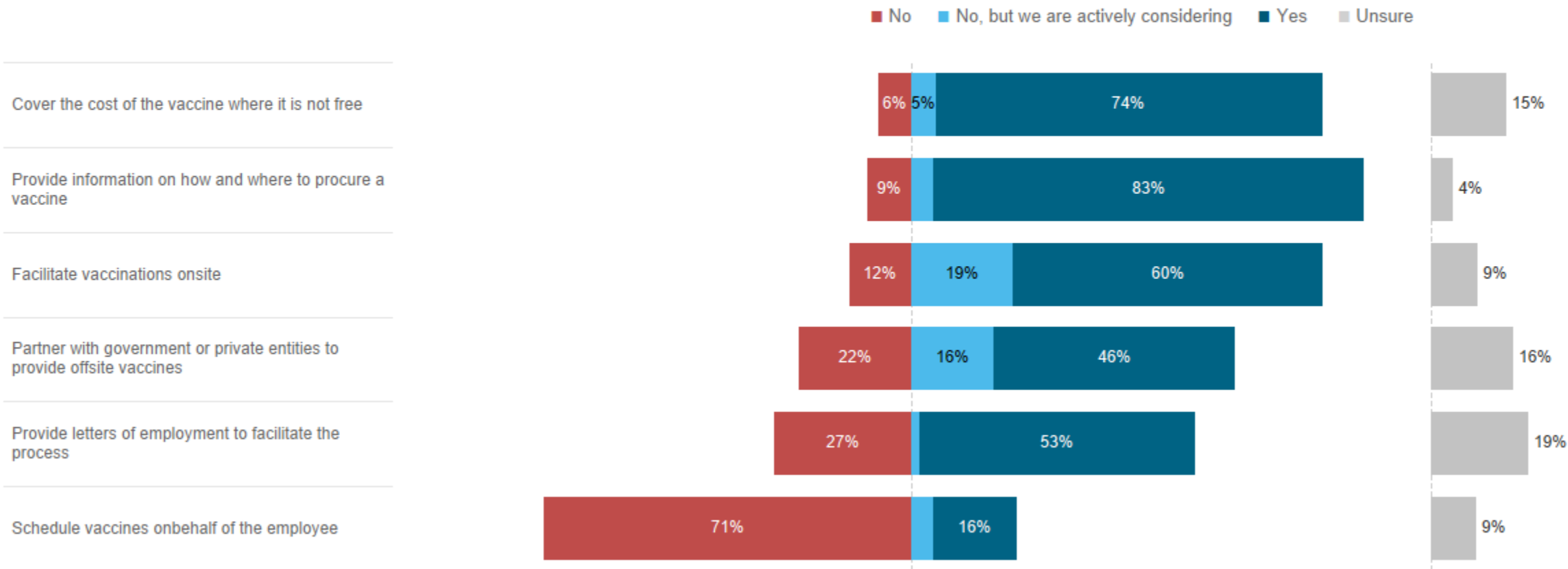
# Creating a Safe Plan to Return Workers Onsite



## 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. (70 respondents)



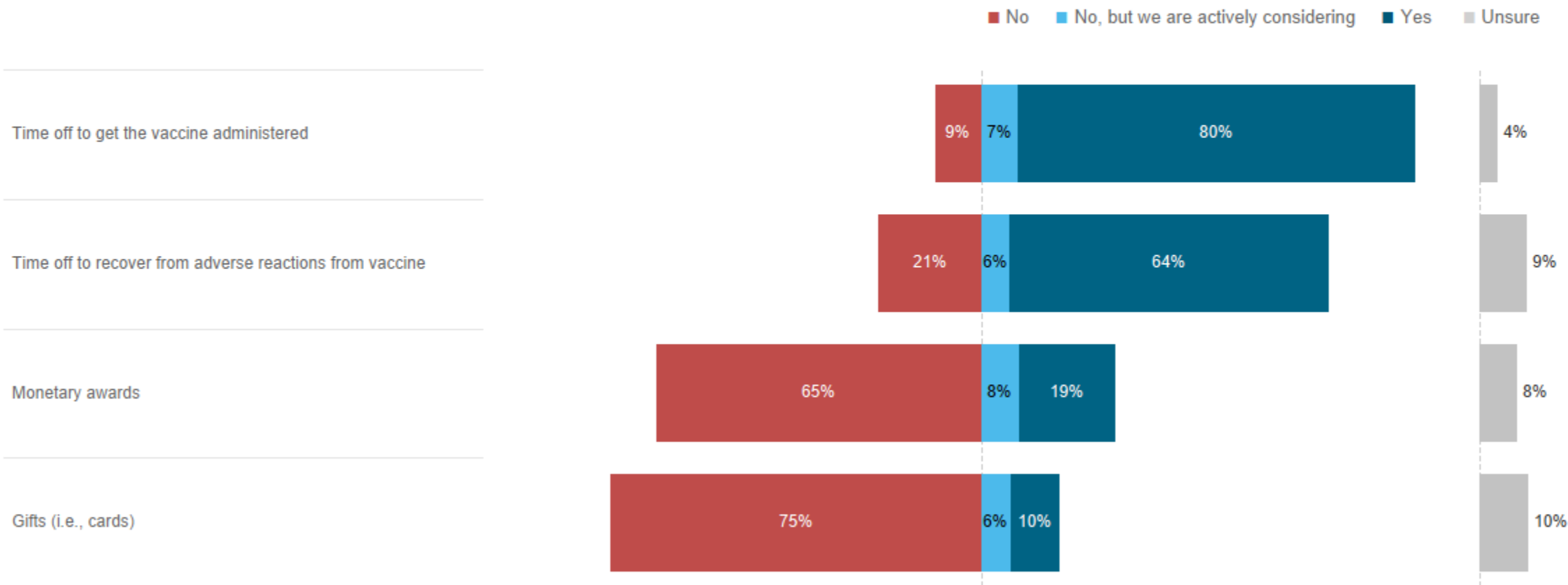
# Creating a Safe Plan to Return Workers Onsite



## 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. (55 respondents)



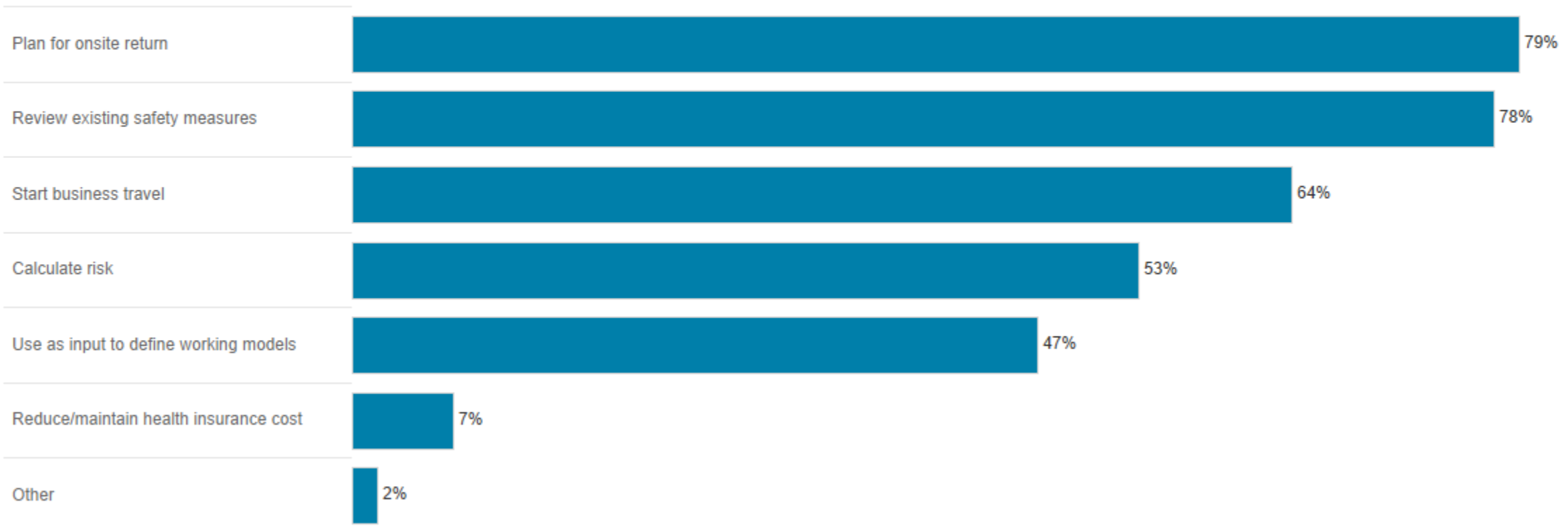
# Creating a Safe Plan to Return Workers Onsite



## 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. (58 respondents)

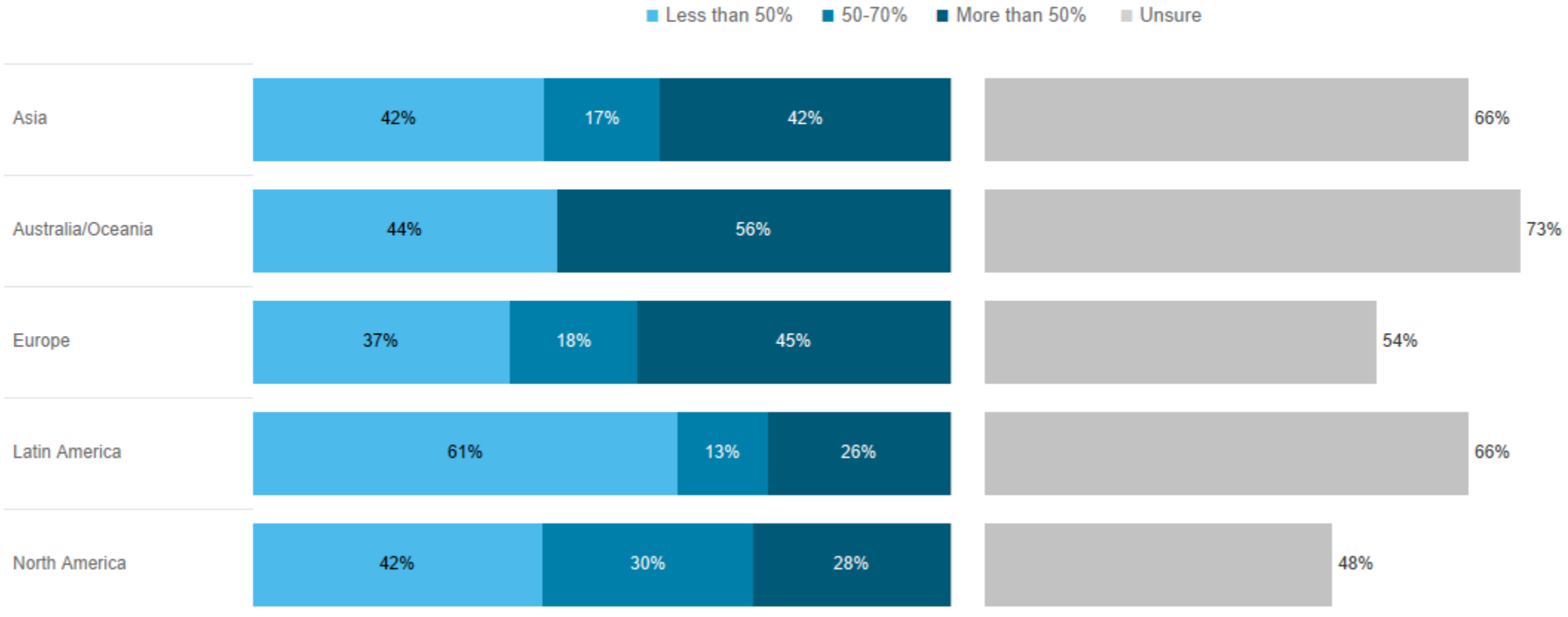


# Creating a Safe Plan to Return Workers Onsite



## 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? (129 respondents)

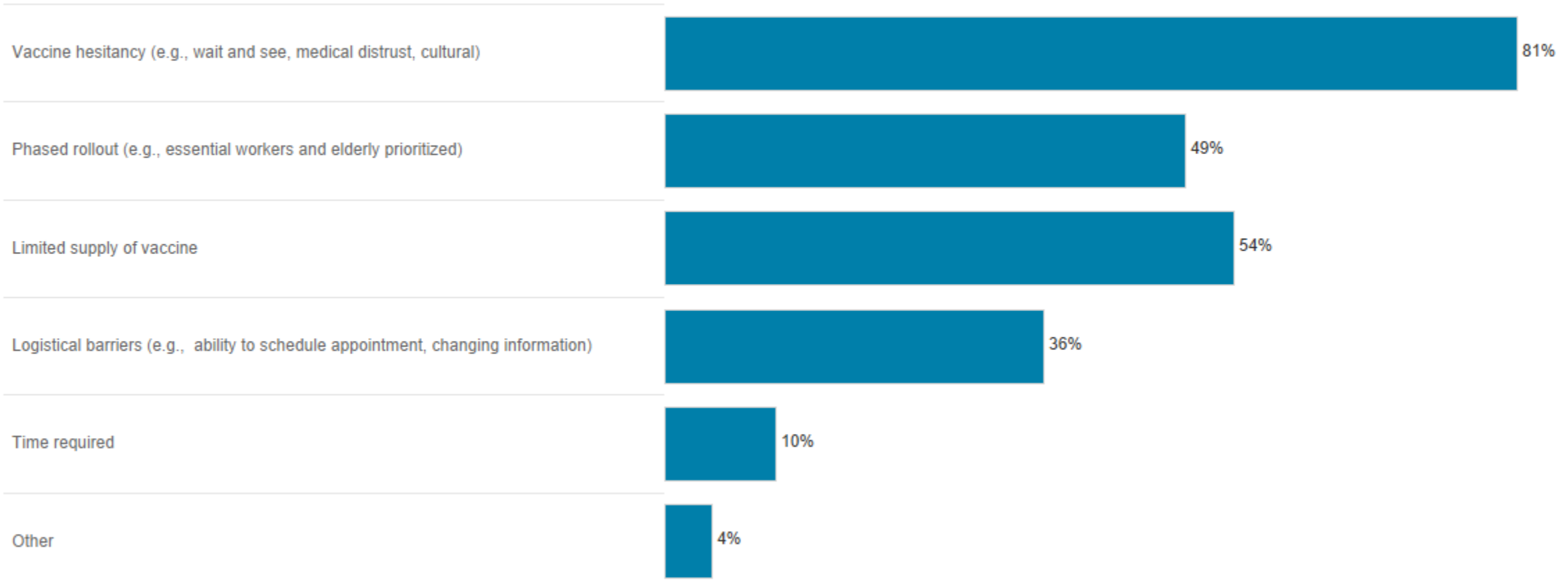


# Creating a Safe Plan to Return Workers Onsite



## Question:

What do you believe are the barriers for employees to get vaccinated? (134 respondents)



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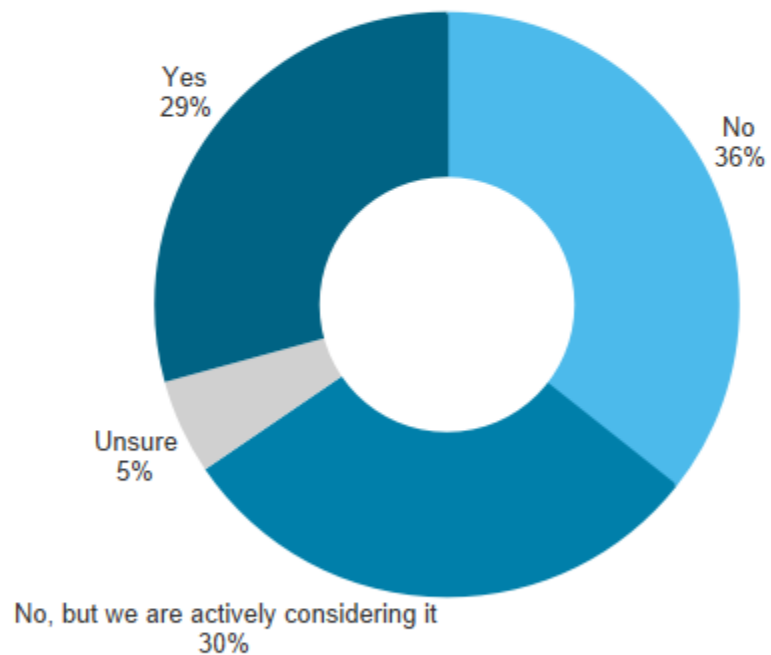
# **Managing Remote and Flexible Working Options**

# Managing Remote and Flexible Working Options



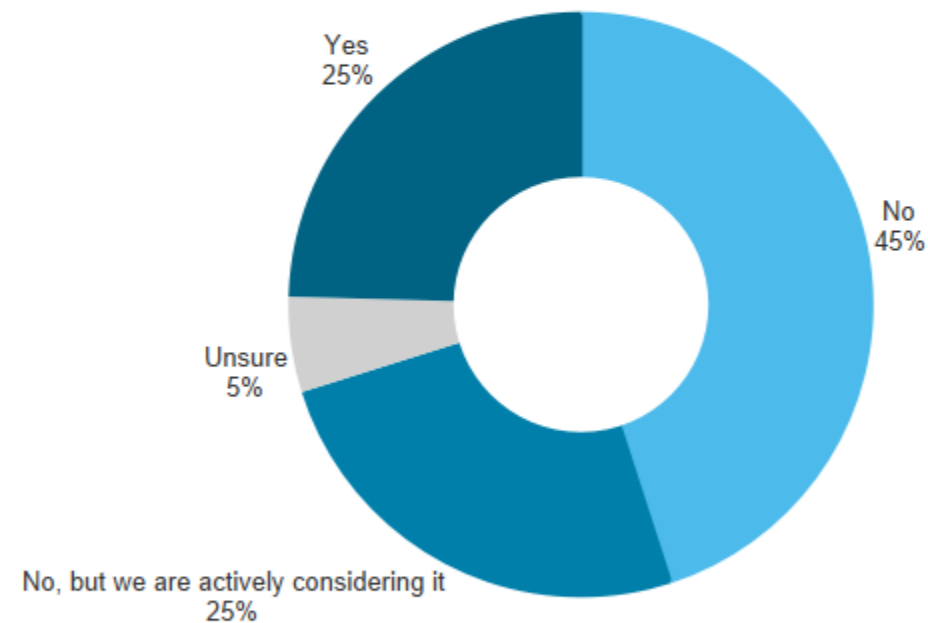
## Question:

Has your organization completed a formal assessment of **job/role** types that can be performed remotely on a permanent basis? (171 respondents)



## Question:

Has your organization completed a formal assessment of **employees** who can perform their work remotely on a permanent basis? (171 respondents)

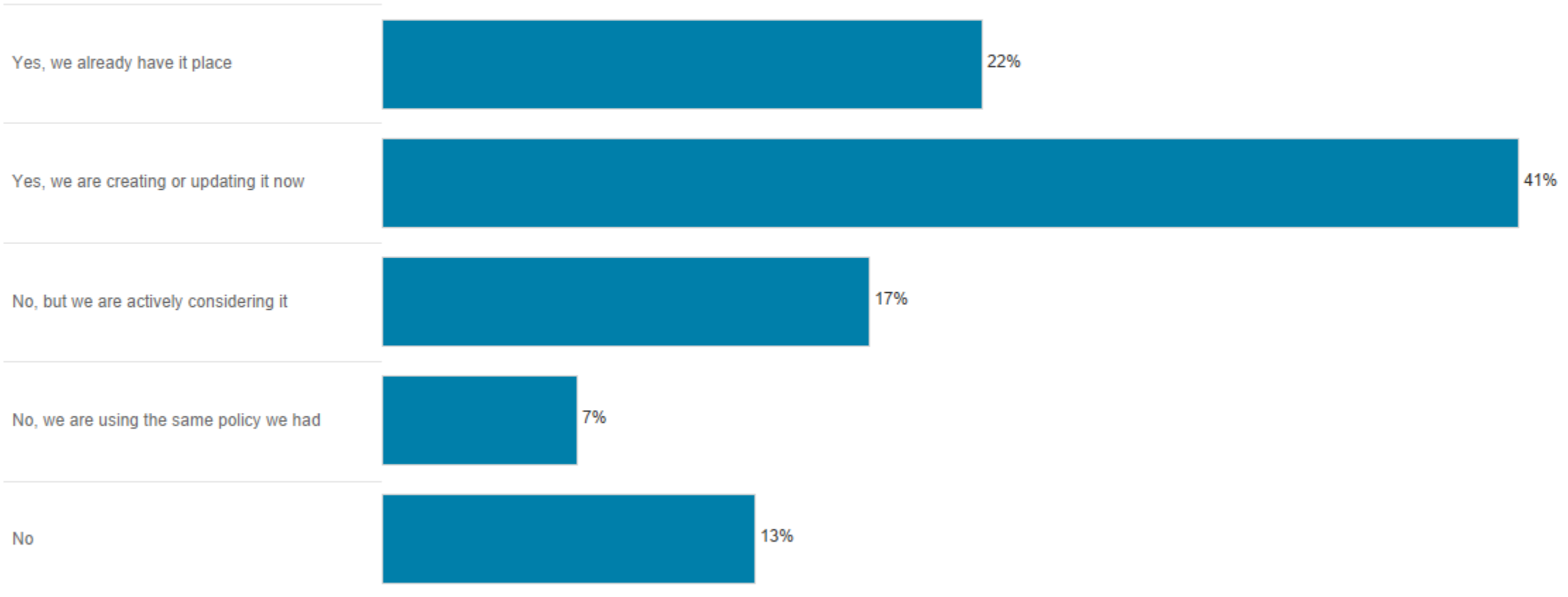


# Managing Remote and Flexible Working Options



## Question:

Is your organization creating or updating a formal/informal working remote policy? (172 respondents)





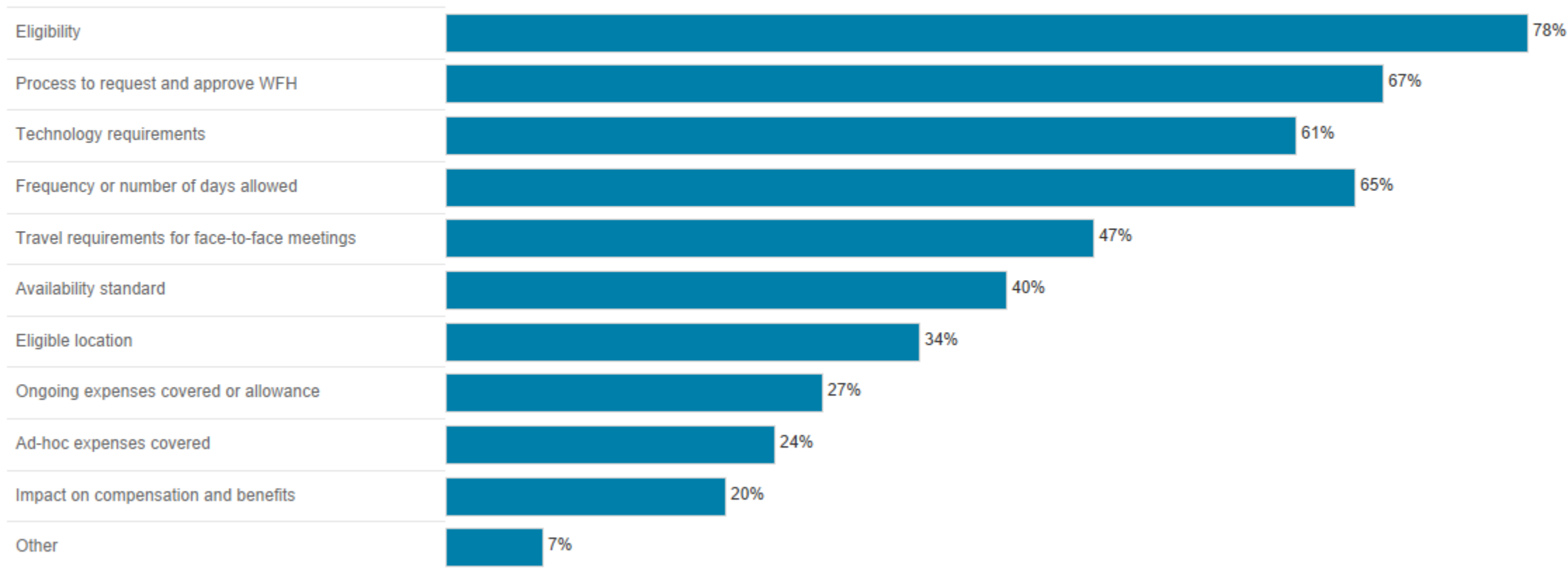
# Managing Remote and Flexible Working Options



## Question:

What elements does the working remote policy include?

Responses are based on those organizations that are updating or considering updating working remote policies. (144 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. (39 respondents)

	Yes, on a temporary basis	Yes, on a permanent basis	No, but we are actively considering it	No
Cell phone expenses	3%	47%	9%	41%
Expenses paid on a case-by-case basis	34%	21%	10%	34%
Internet expenses	19%	22%	19%	39%
Landline phone expenses	3%	3%	3%	90%
Monthly allowance for general expenses	3%	12%	15%	71%
One-time allowance for home office setup, with a pre-defined limit	19%	14%	16%	51%
One-time allowance for home office setup, without a pre-defined limit	3%		9%	88%
Organization-provided equipment and supplies	37%	45%	8%	11%
Reimbursement for ongoing home office equipment and supplies	12%	9%	18%	62%

# Managing Remote and Flexible Working Options



## Question:

With more employees expressing a desire to work remotely, how is your organization adjusting its relocation policies? (161 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	10%	8%	3%	12%	44%	23%
Suspend the ability for remote employees to choose a new work location inside of their current country	4%	3%	1%	5%	56%	32%
Allow remote employees to choose a new work location outside of their current country	3%	3%	1%	6%	65%	23%
Suspend the ability for remote employees to choose a new work location outside of their current country	2%	3%	2%	2%	57%	34%
Expand eligibility for executives to apply for relocation with company approval	4%	3%	3%	3%	58%	30%
Expand eligibility for non-executives to apply for relocation with company approval	5%	3%	4%	3%	57%	28%
Reduce eligibility for executives to apply for relocation with company approval	2%	1%	1%	1%	66%	30%
Reduce eligibility for non-executives to apply for relocation with company approval	1%	1%	2%	1%	65%	30%

# 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? (167 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	9%	4%	1%	5%	63%	18%
Additional part-time workers	8%	5%	3%	7%	58%	19%
Hybrid (remote and office) based on company choice	17%	19%	19%	20%	16%	8%
Hybrid (remote and office) based on employee choice	15%	15%	21%	22%	20%	8%
Office only based on company choice	30%	6%	13%	4%	33%	13%
Office only based on employee choice	20%	3%	7%	8%	46%	16%
Remote only based on company choice	16%	12%	10%	13%	35%	14%
Remote only based on employee choice	9%	6%	4%	16%	50%	15%

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# **Creating or Enhancing Evolving Location-Based Pay Strategies**

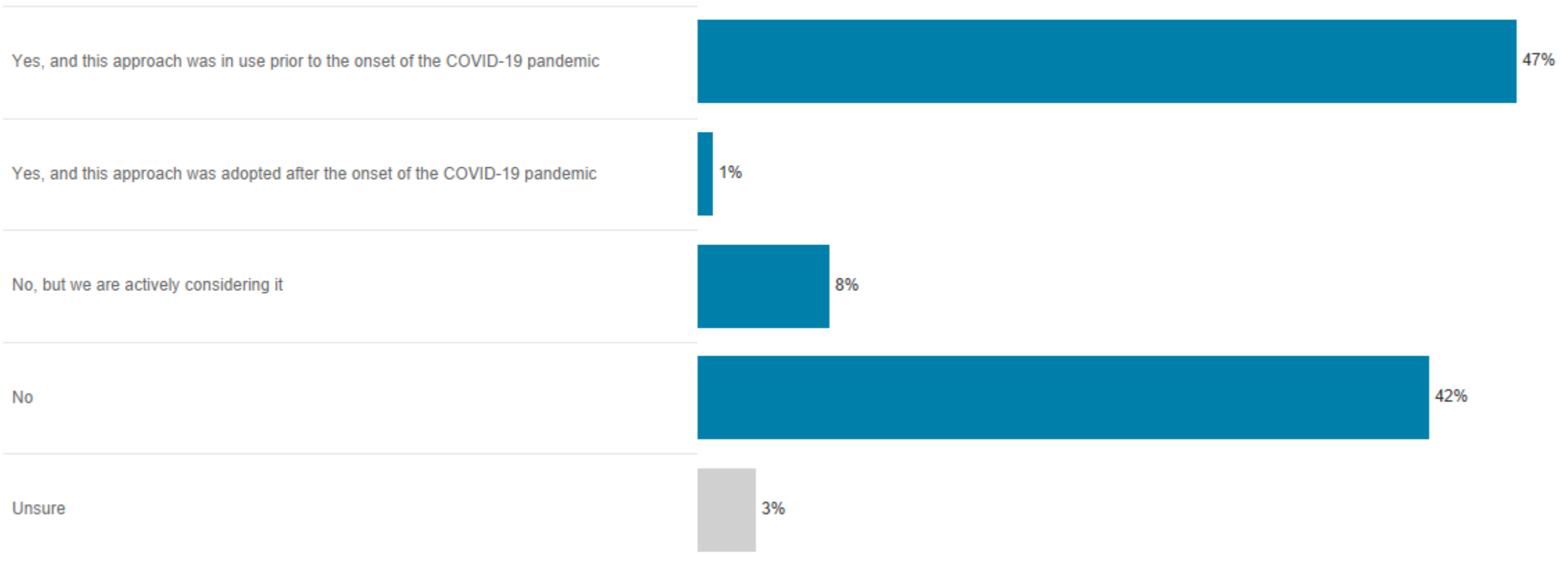
# Creating or Enhancing Evolving Location-Based Pay Strategies



## 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. (120 respondents)



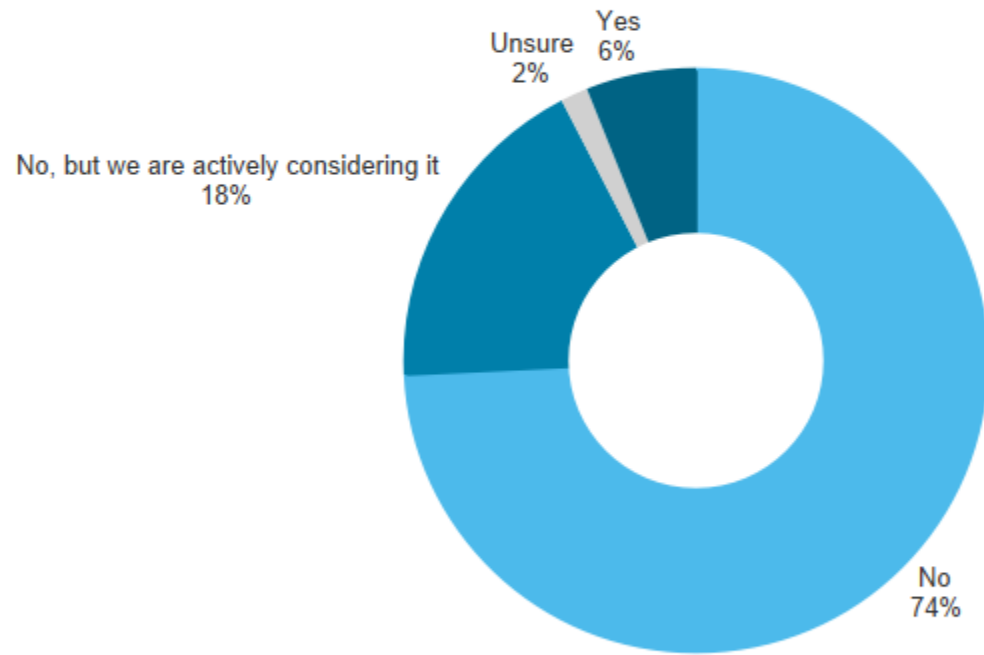
# Creating or Enhancing Evolving Location-Based Pay Strategies



## 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. (66 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. (15 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	7%	33%	40%	7%	13%
We added more geographic zones		7%	29%	50%	14%
We narrowed geographic zones (i.e., more granular)	7%	7%	20%	53%	13%
We broadened geographic zones (i.e., less granular)	7%		36%	36%	21%



# 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. (66 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	Unsure
All employees	39%	2%	11%	19%	21%	8%
Executives	26%		8%	38%	21%	8%
Managers	43%		9%	17%	21%	9%
Professionals	47%		11%	11%	23%	8%
Support	44%		11%	17%	19%	9%

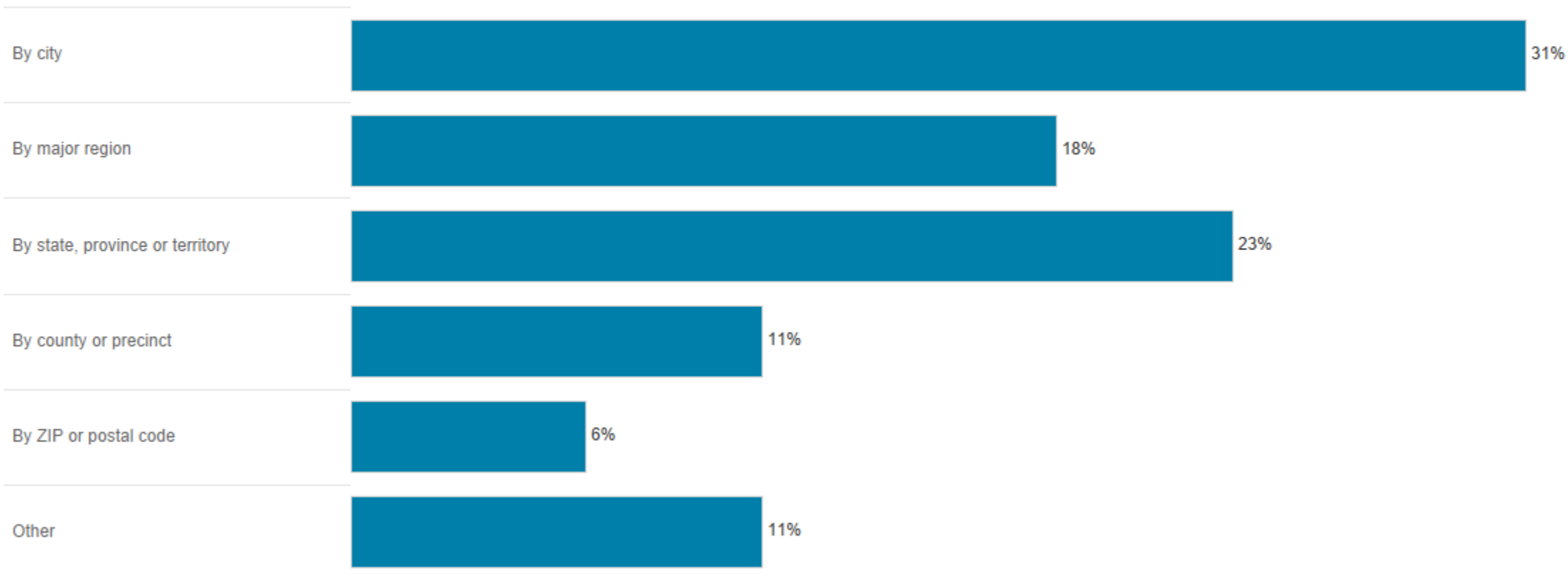
# Creating or Enhancing Evolving Location-Based Pay Strategies



## 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. (65 respondents)



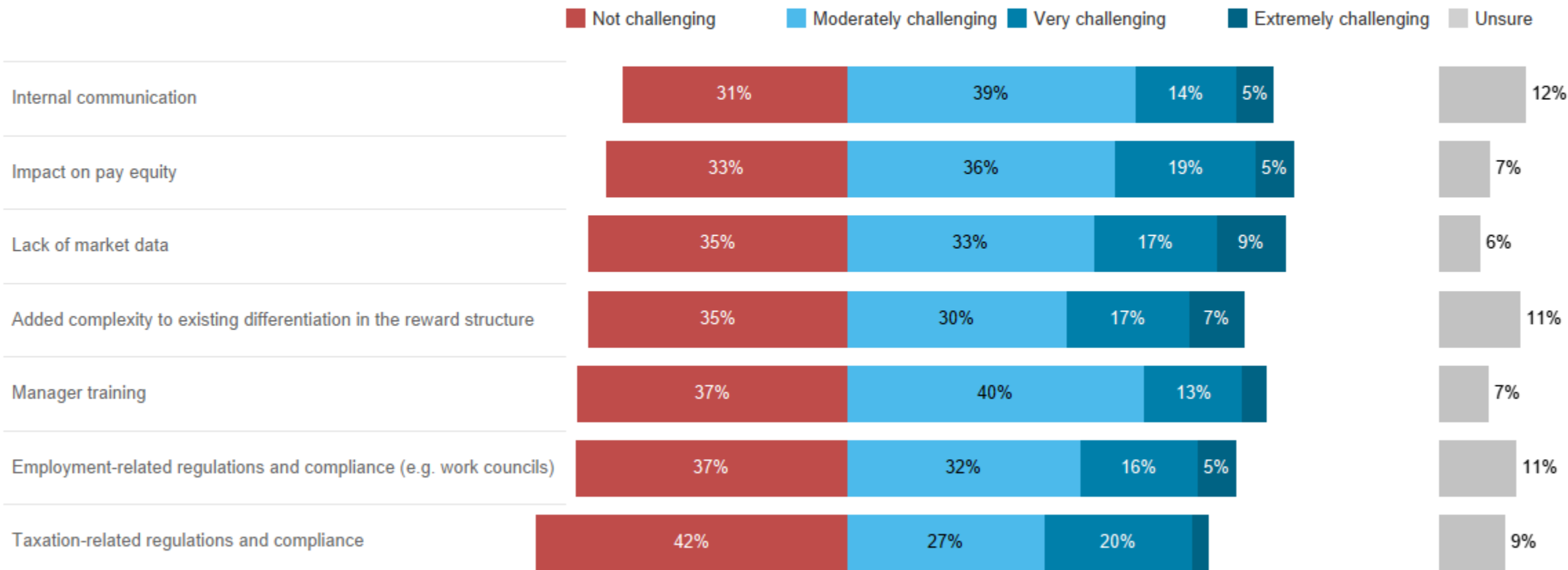
# Creating or Enhancing Evolving Location-Based Pay Strategies



## 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. (62 respondents)



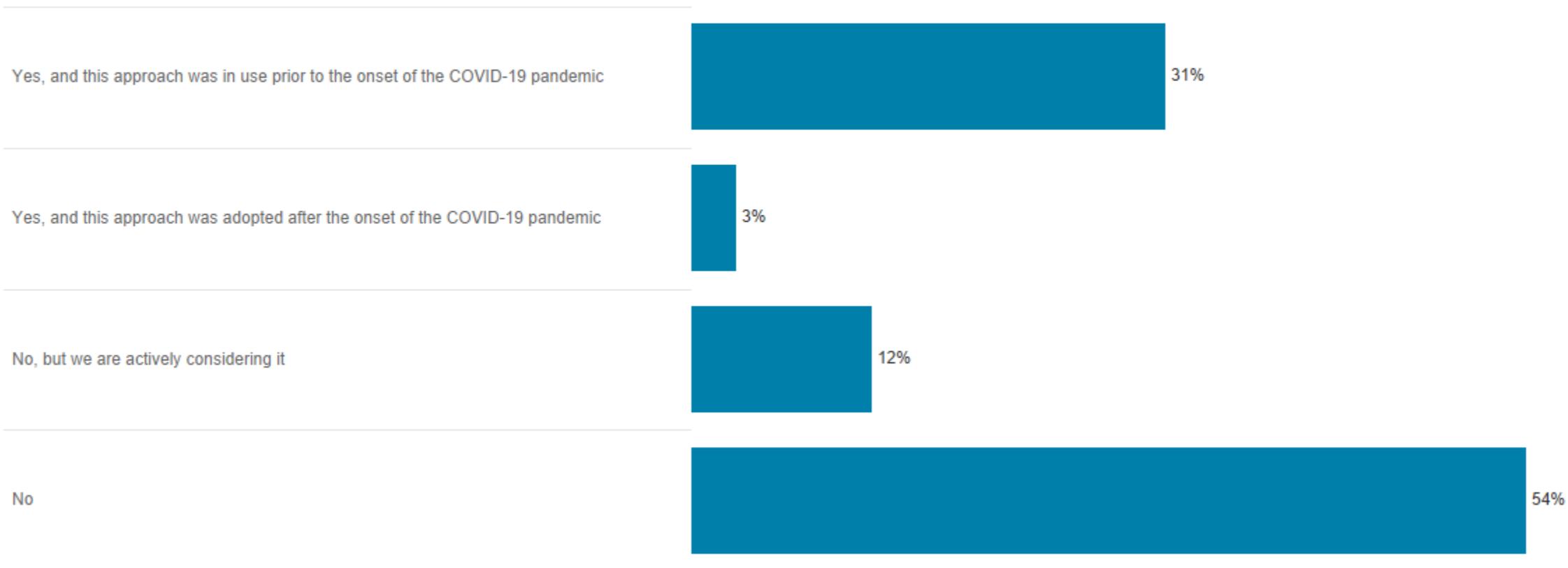
# Creating or Enhancing Evolving Location-Based Pay Strategies



## 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. (68 respondents)



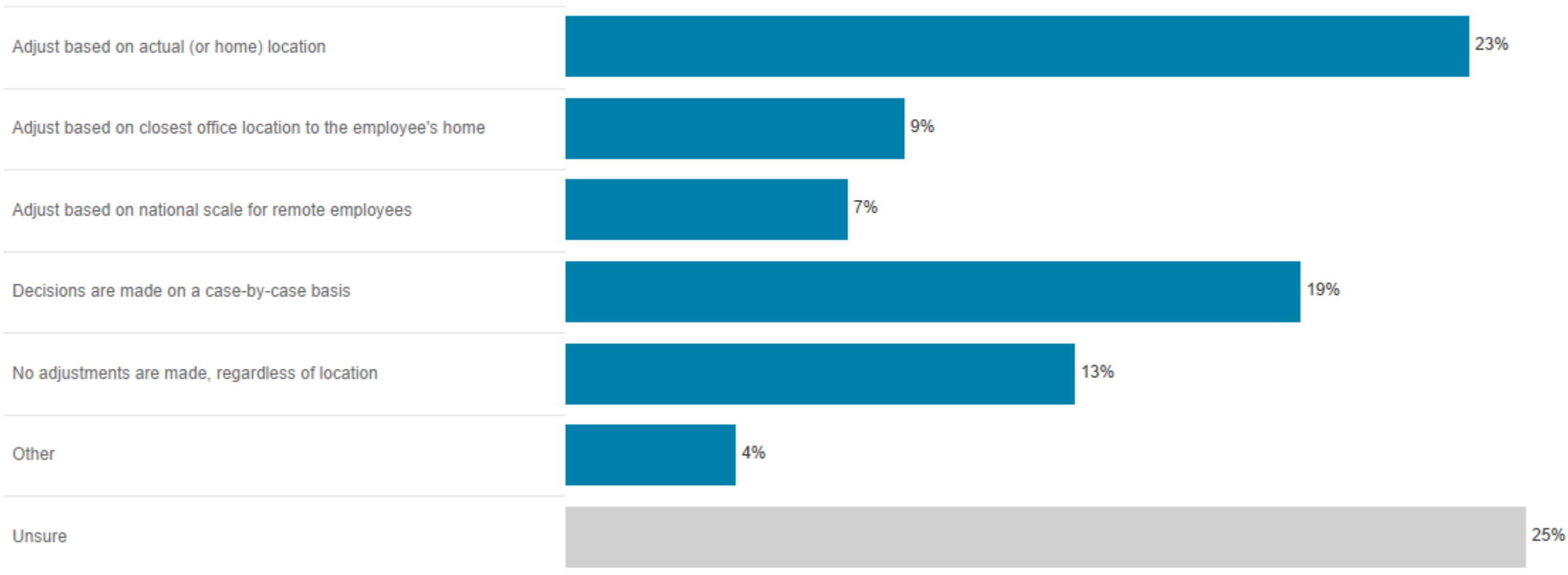
# Creating or Enhancing Evolving Location-Based Pay Strategies



## 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. (69 respondents)

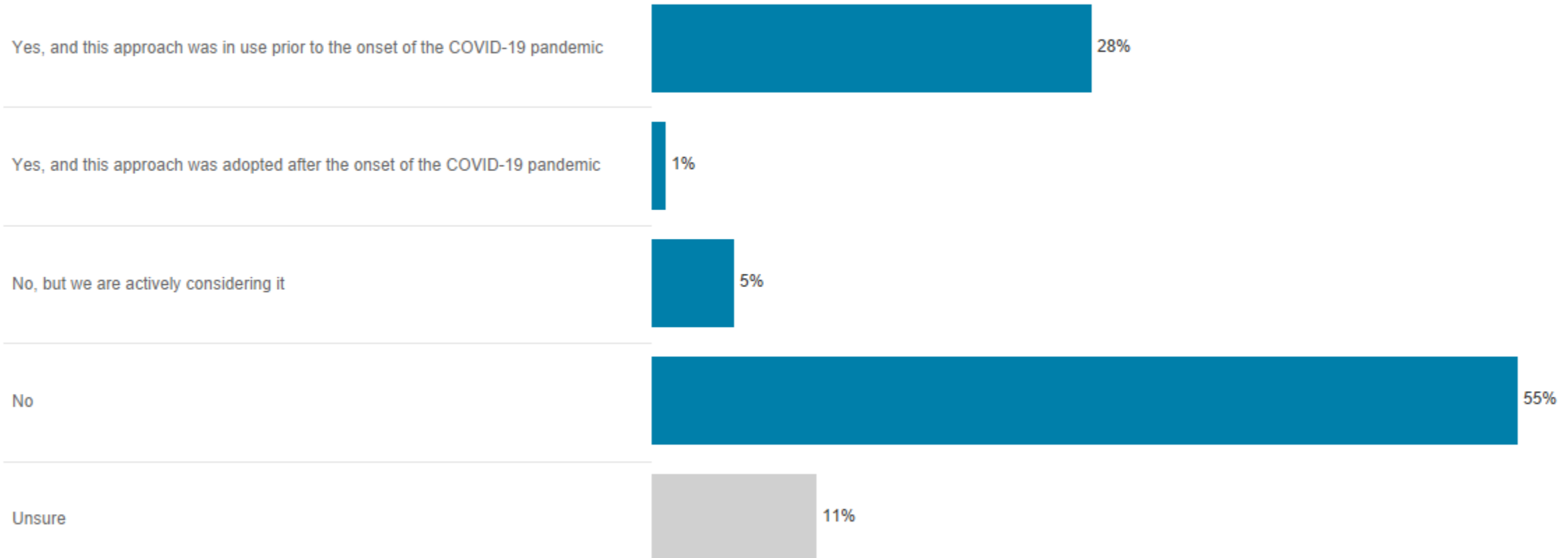


# Creating or Enhancing Evolving Location-Based Pay Strategies



## Question:

Does your organization differentiate pay adjustments for company- vs. employee-initiated relocations? (114 respondents)



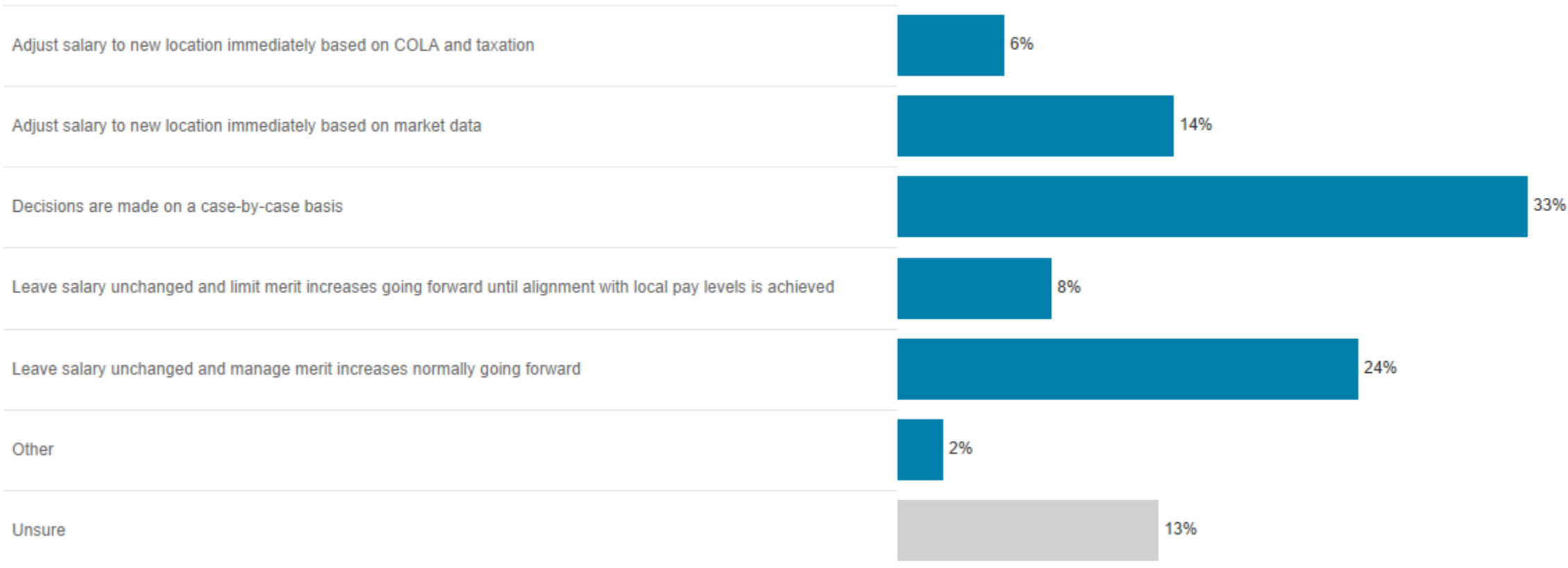
# Creating or Enhancing Evolving Location-Based Pay Strategies



## 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?

(126 respondents)

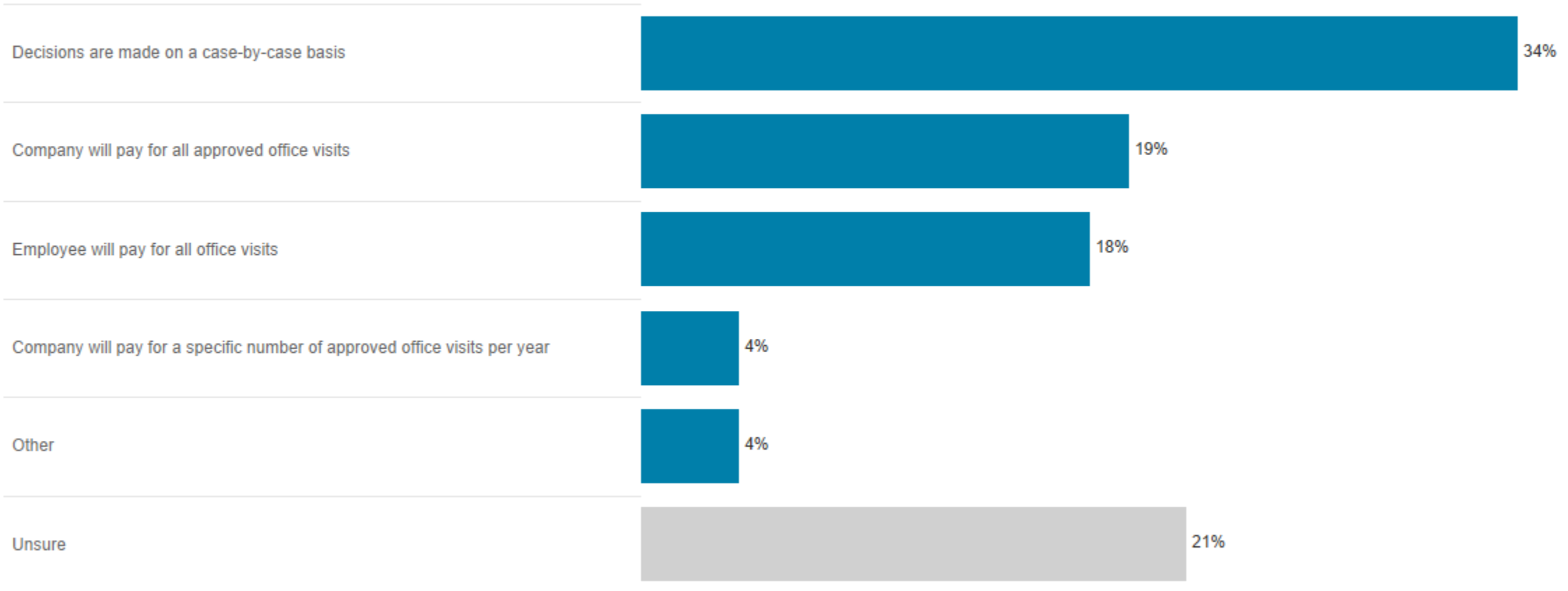


# Creating or Enhancing Evolving Location-Based Pay Strategies



## Question:

Currently, if an employee chooses to relocate to a remote location how do you manage business travel to office locations? (131 respondents)





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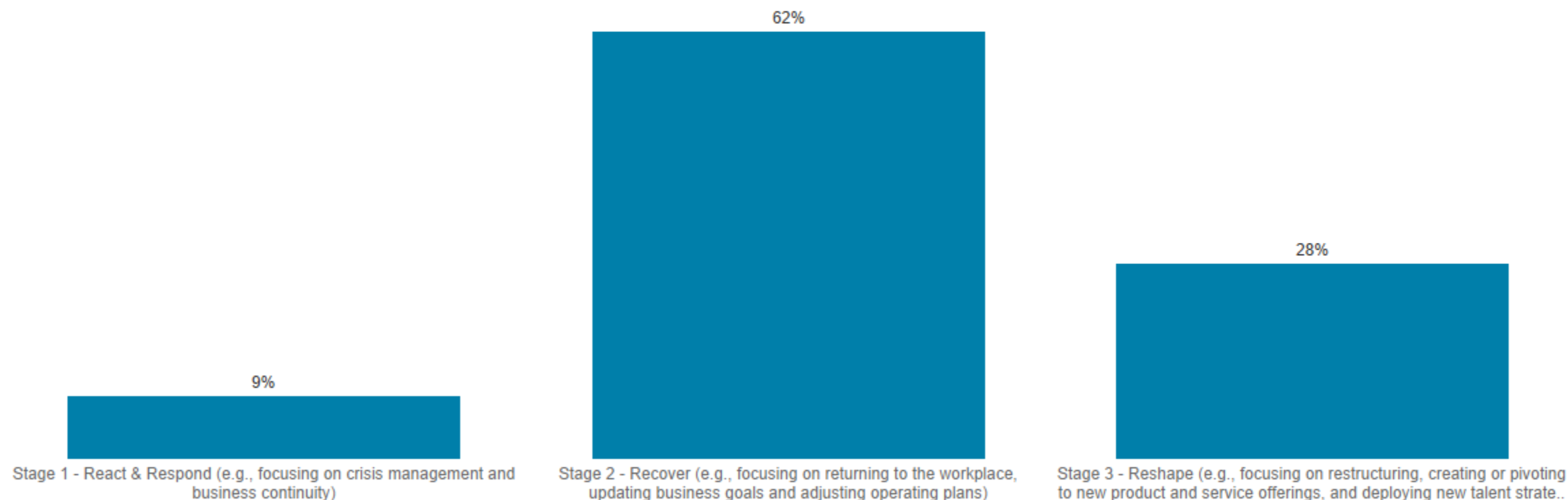
# **Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond**

# 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? (162 respondents)

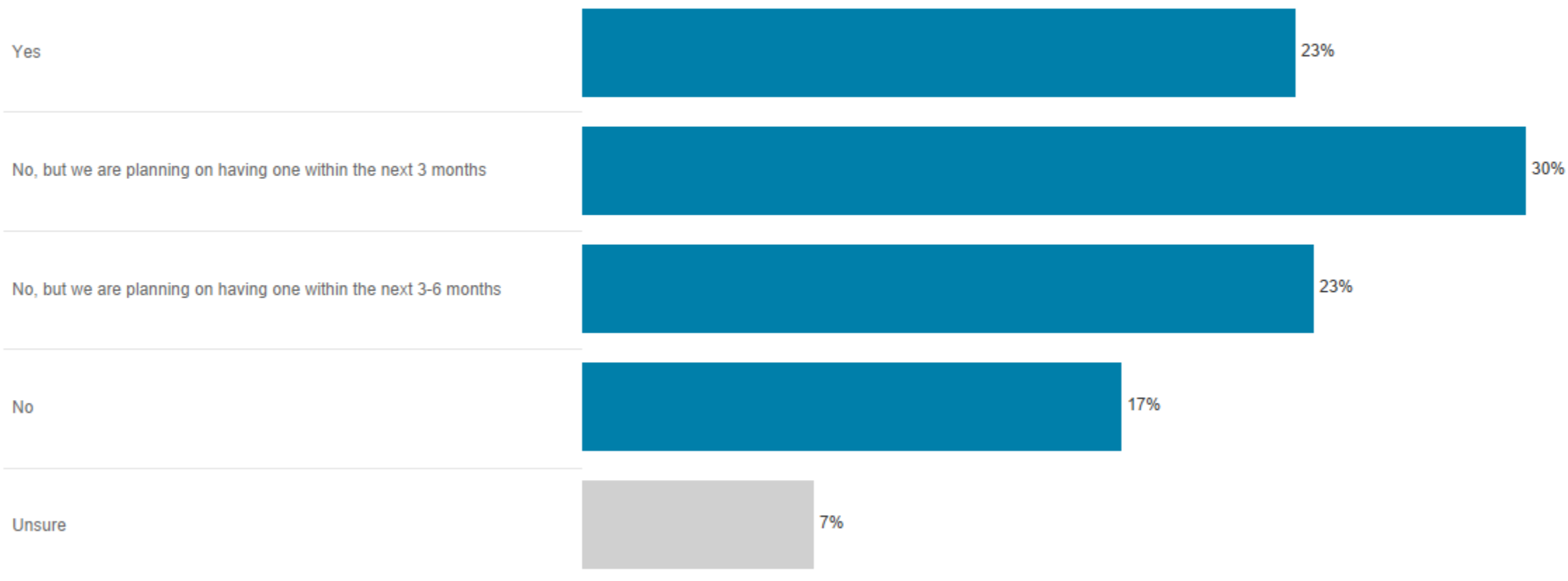


# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## Question:

Does your organization have a clear and consistent definition for the future of work? (164 respondents)

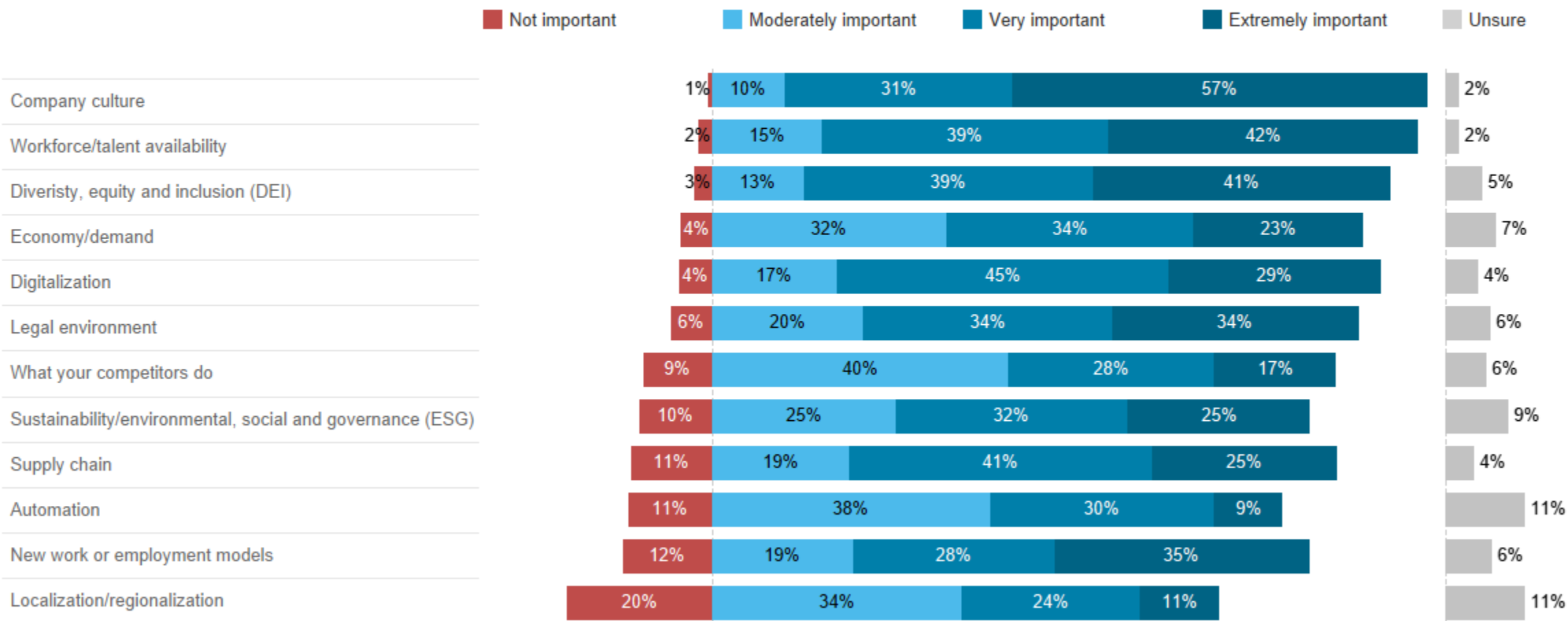


# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## Question:

How important are the following factors to your organization when creating a definition for the future of work? (161 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? (154 respondents)

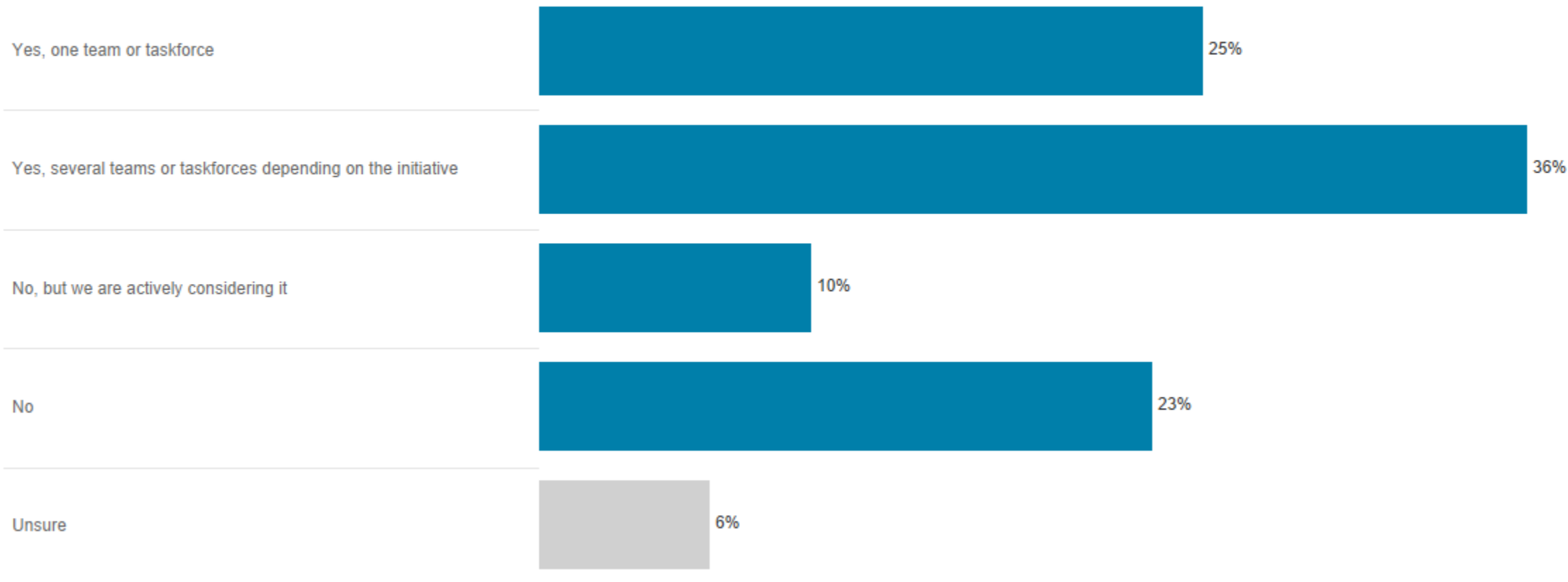
	Defining	Leading	Managing	Tracking
Business lines/teams	19%	24%	43%	14%
Executive leadership (i.e., C-suite)	57%	32%	10%	2%
Finance	7%	22%	43%	28%
Human resources	31%	41%	25%	3%
Manufacturing	11%	24%	50%	15%
Operations	11%	27%	47%	15%
Product development (i.e., R&D)	13%	33%	40%	14%
Sales and marketing	10%	26%	44%	20%
Strategic planning	30%	34%	29%	7%
Technology (i.e., IT)	13%	28%	45%	14%

# 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? (159 respondents)



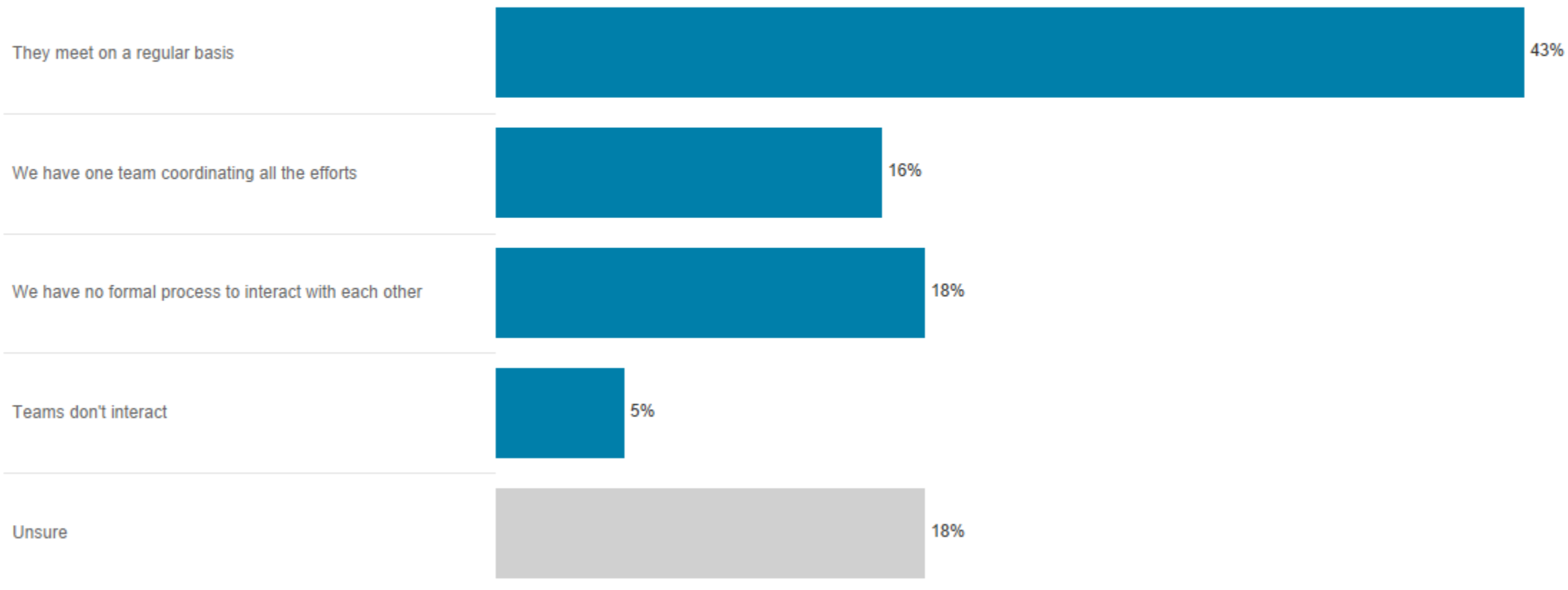
# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## 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. (56 respondents)



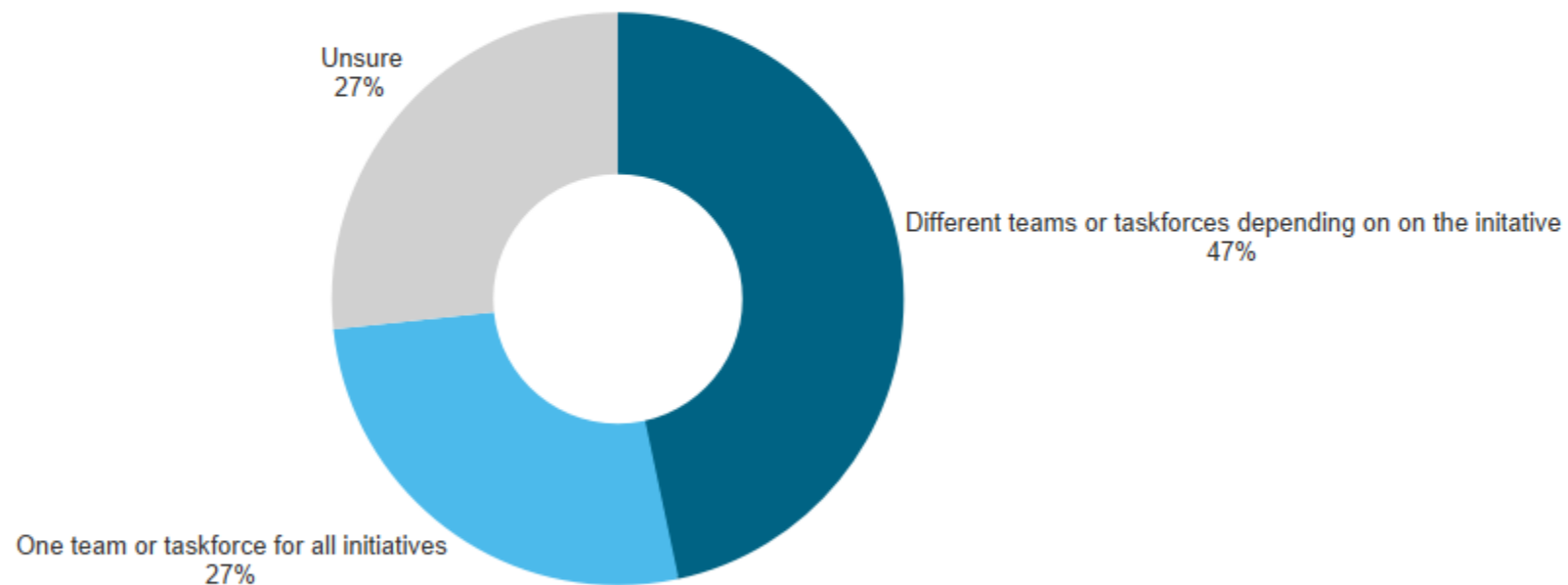
# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## 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. (15 respondents)





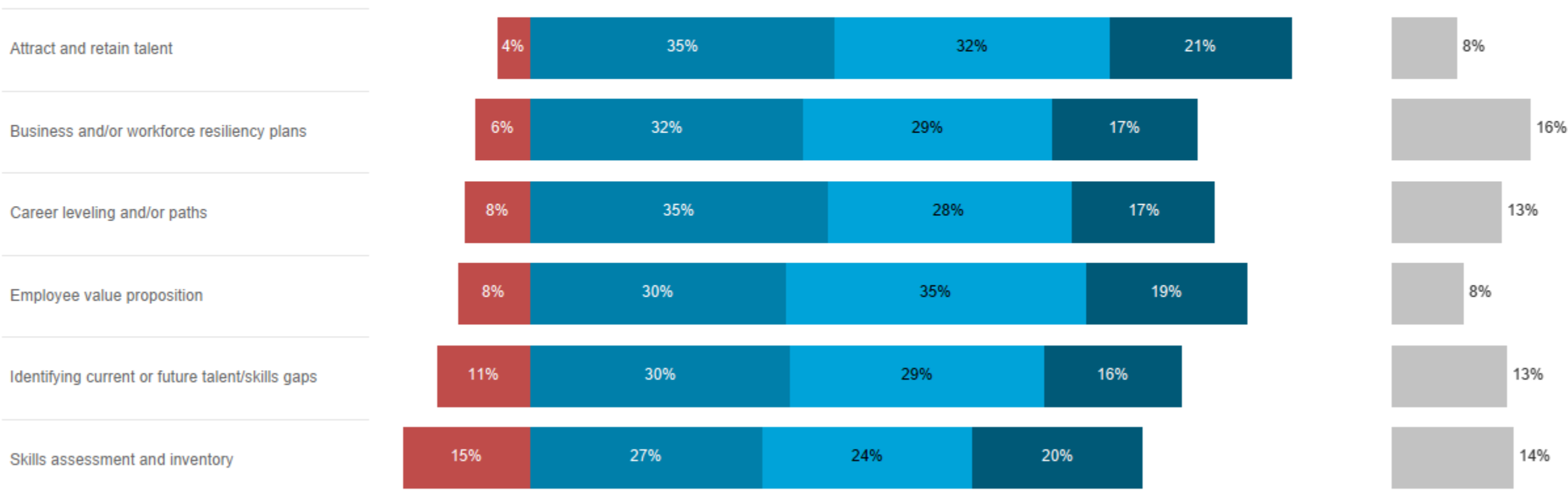
# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## 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? (156 respondents)

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

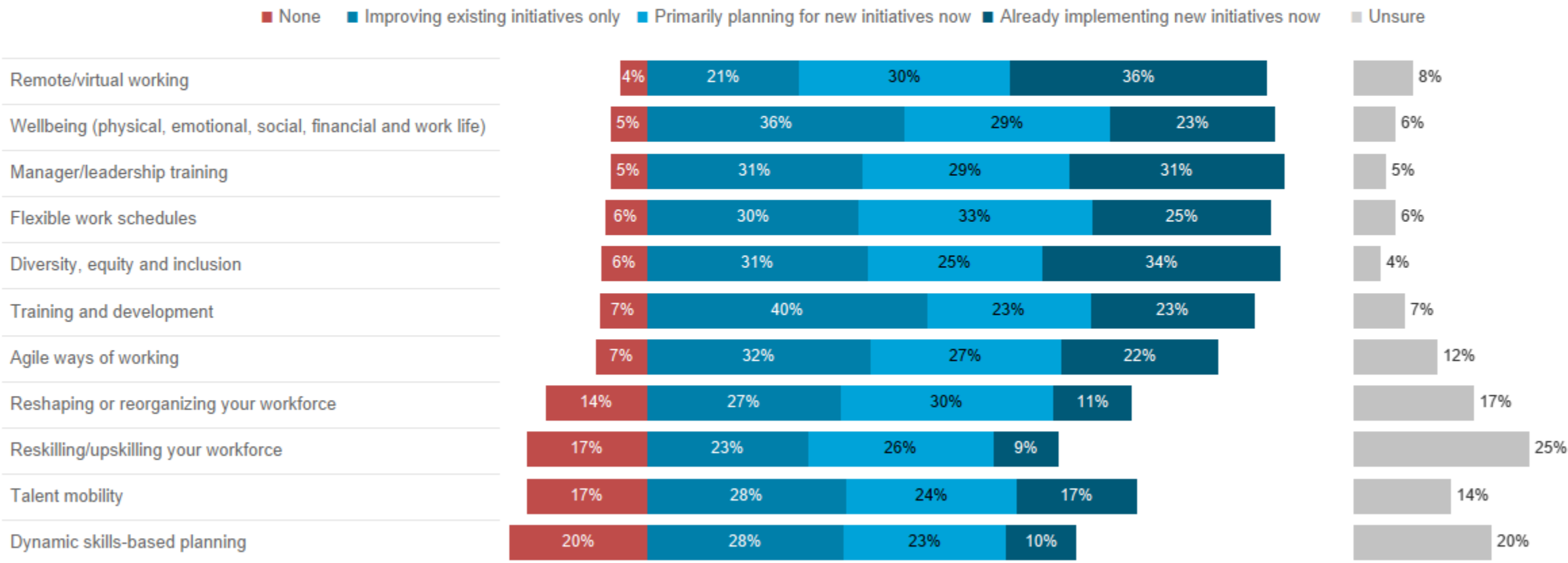


# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## 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? (155 respondents)



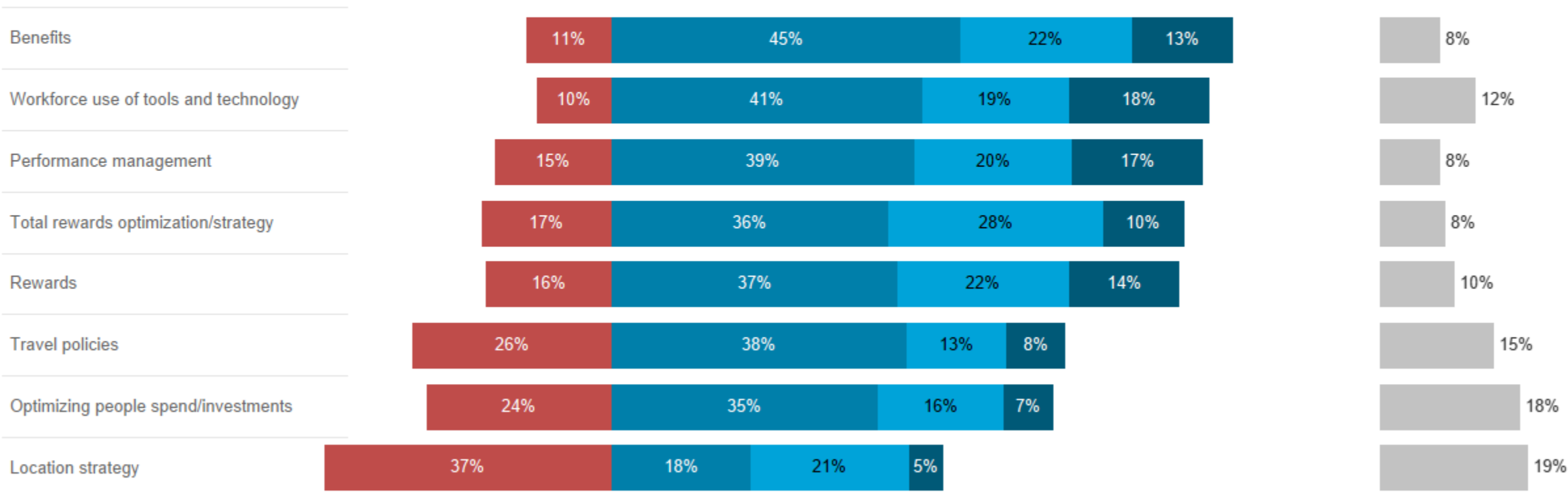
# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## 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? (155 respondents)

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

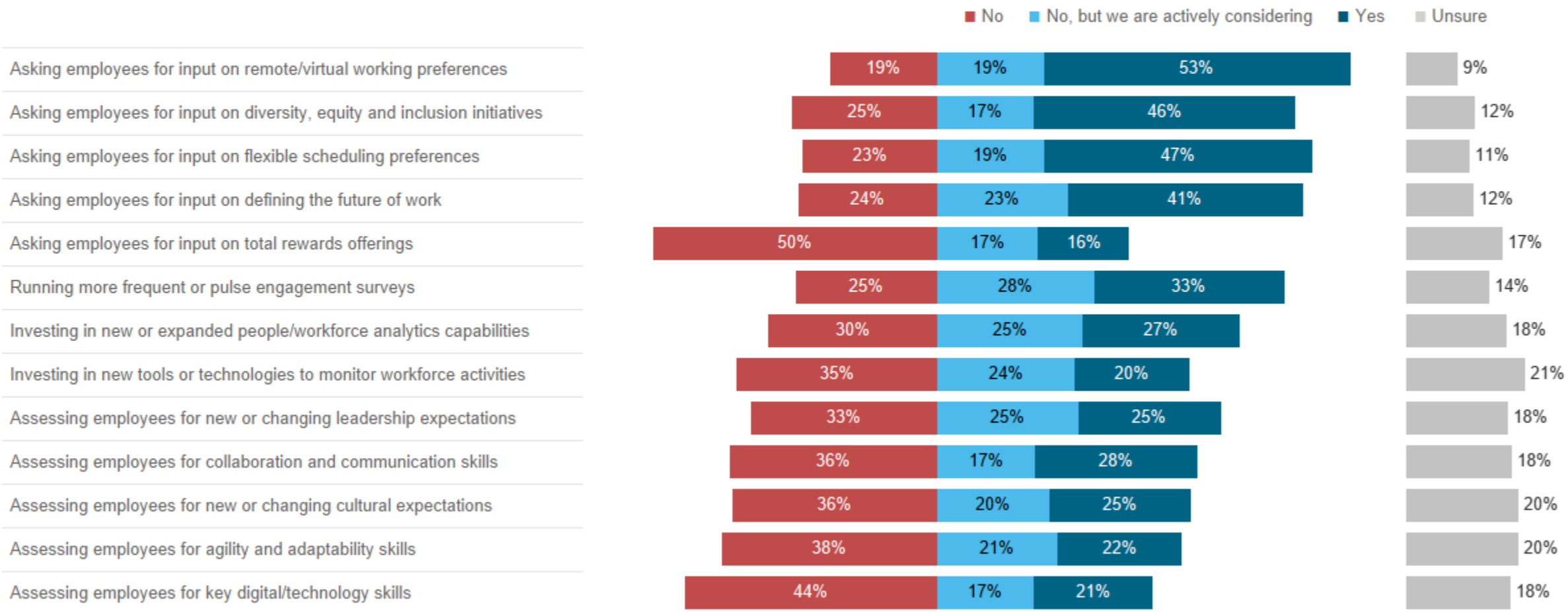


# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## Question:

What steps is your organization taking to better understand your workforce in the context of implementing future-of-work strategies? (147 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? (104 respondents)

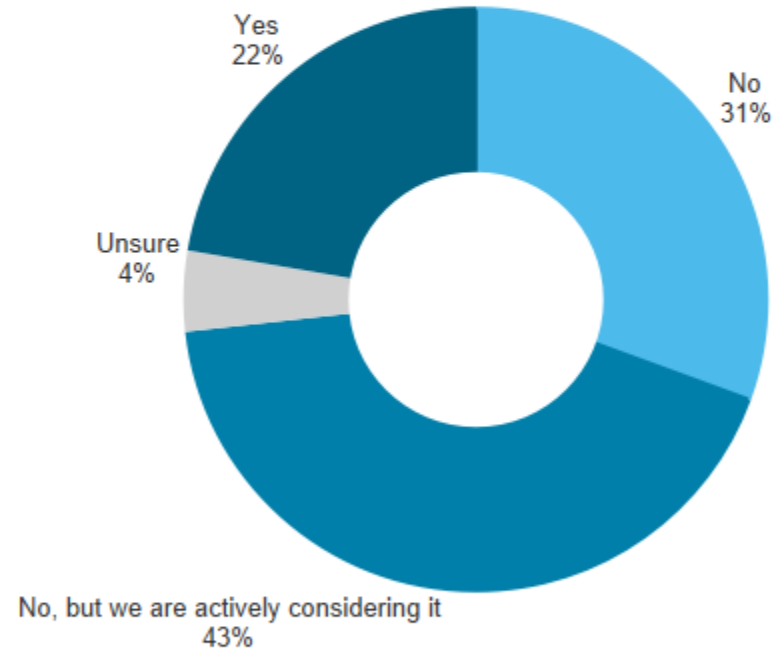


# Defining and Implementing the Future of Work: Building a Foundation For Success Post-Pandemic and Beyond



## Question:

Has your organization communicated specific steps it is taking to define, manage or implement future-of-work strategies to employees? (157 respondents)



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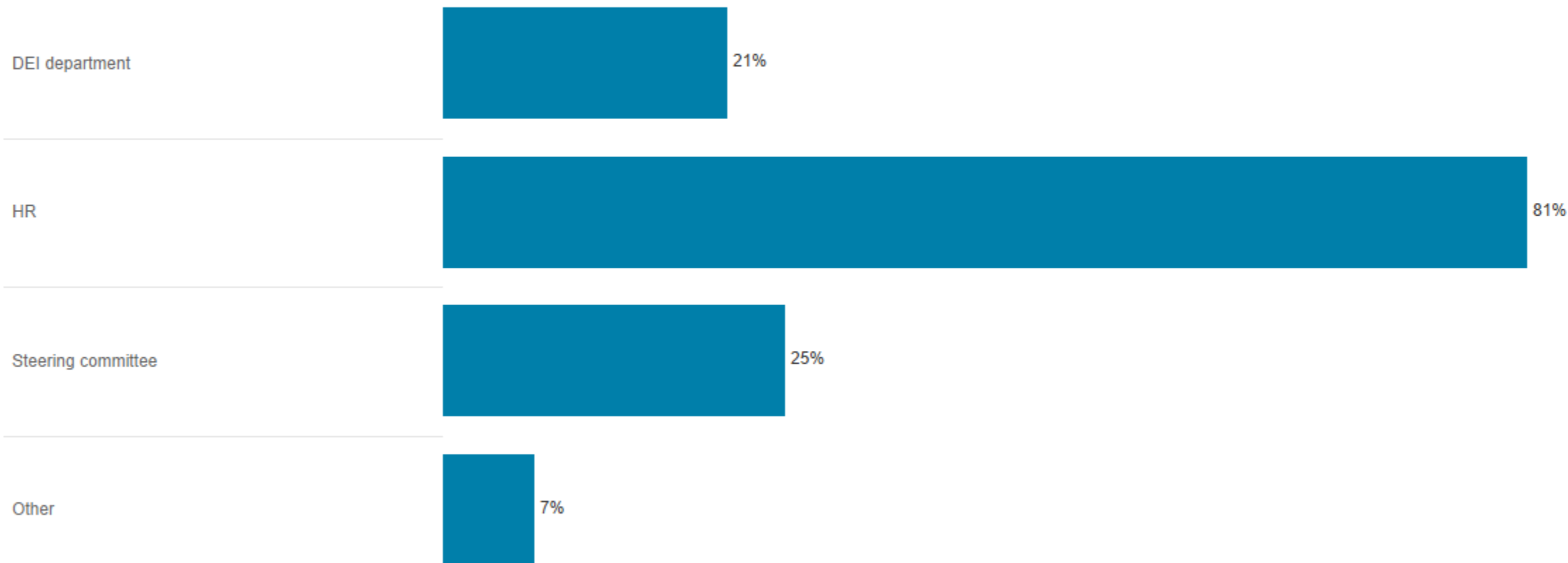
# **Future of Work: Enhancing Diversity, Equity and Inclusion (DEI) Strategies**

# 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? (161 respondents)



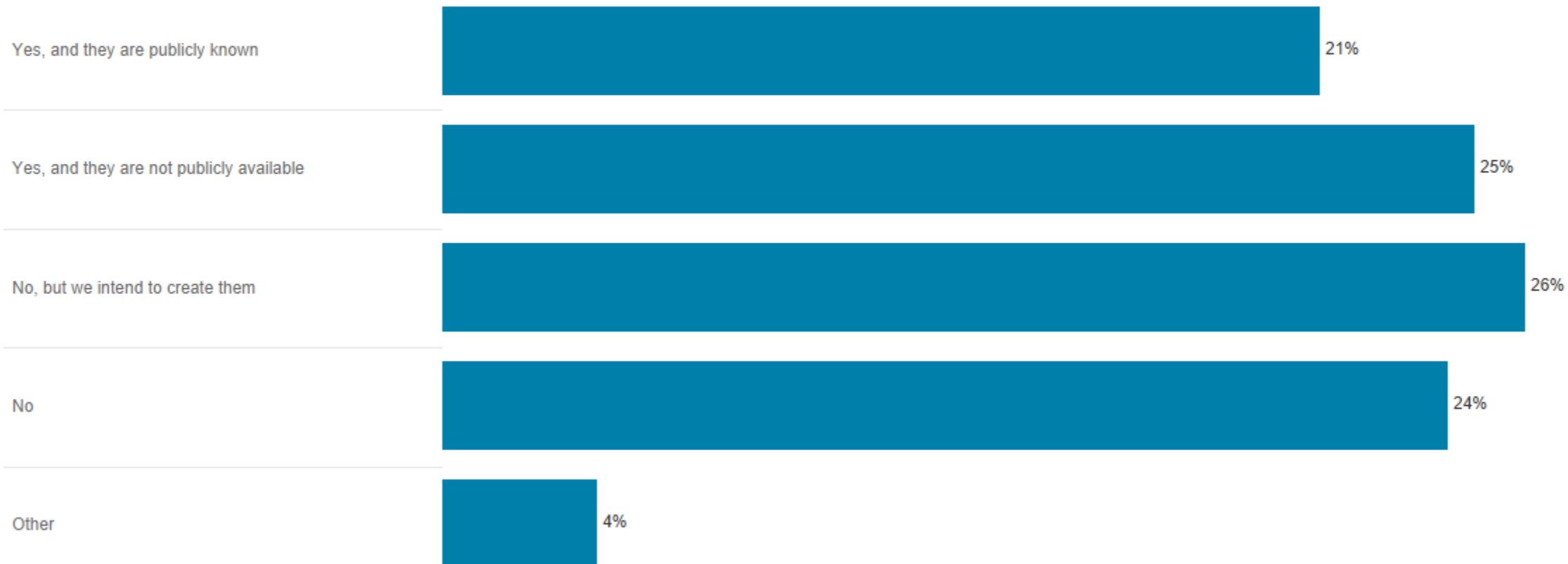


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## Question:

Does your organization have DEI metrics or goals? (161 respondents)



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## Question:

What changes is your organization making to strengthen diversity, equity and inclusion initiatives? (147 respondents)

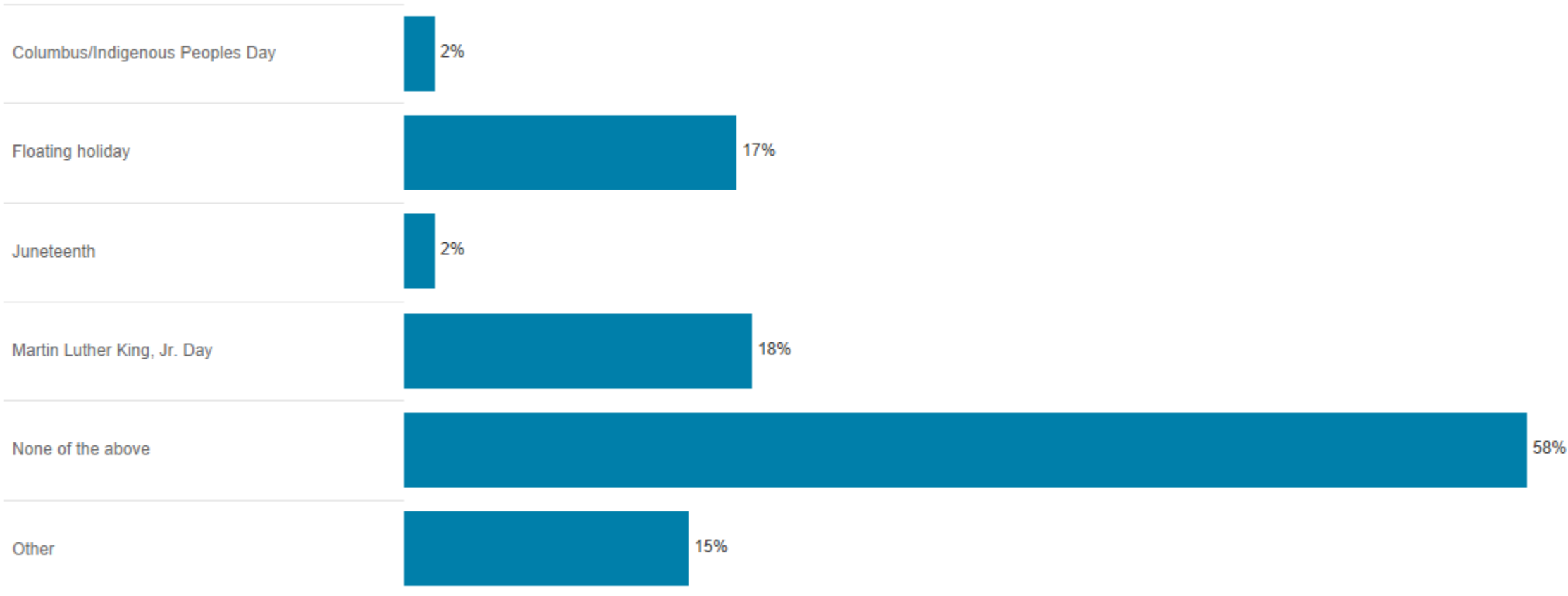


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## Question:

For your operations in the U.S., are you adding any of the following holidays to your fixed, paid holiday schedule? (123 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.

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