

GREAT EXPECTATIONS

Understanding employee needs and drivers in the new world of work



Benefex™
A Zellis Company

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About the research

- 4,027 online interviews with employees across UK, US, Singapore and India were conducted.
- All respondents worked for organisations with 200 or more employees and within a broad range of job roles and levels of seniority.
- Respondents worked for organisations within a wide range of industries including manufacturing, healthcare, pharmaceutical, technology, retail, public sector, professional services, financial services, media, transport and logistics, education, hospitality and leisure, and energy and utilities.
- All research was conducted by Insight Avenue up to January 2022.

Foreword

As most countries around the world continue to emerge from the tumultuous upheaval of the global pandemic, there is no denying that our working lives are still very different to how they were at the beginning of 2020 – the way we think about work, what we want from work and the relationship between organisations and employees. Individuals' priorities and ambitions have changed, both at work and in their broader lives. People are looking at their careers through a new lens.



Matt Macri-Waller
Founder & CEO, Benefex

As a result, many people have made important decisions about their careers and livelihoods, looking for new challenges and greater purpose. This is without doubt one of the big drivers (although not the only one) of the Great Resignation trend which is playing out across many economies.

Expectations soar as employees view work through a new lens

While some people have switched jobs and even careers, the vast majority have remained with their employers during this time. These people have increasingly looked to their organisations to help them; asking more of their employers than ever before. They're leaning on the organisations they work for to protect and enhance every aspect of their personal wellbeing – mental, emotional, physical and financial – both inside and outside the workplace. They're expecting employers to offer assistance in areas of their lives that would previously have been thought 'out-of-scope' of the employee benefits package.

At the same time, employees want ever greater levels of flexibility in how, when and where they work. They want access to the very best technology and systems which enables them to work effectively, wherever they are. And they want to feel valued and part of a community with a strong sense of purpose that aligns to their own personal values.

At a broader level, we have all become far more aware of the experiences we have at work – the communication we have with managers and senior leaders, the technology systems we rely on, the extent to which we feel supported and part of an inclusive culture. We're no longer simply thinking about work as the tasks we carry out that are rewarded with pay; we're considering the whole employee experience and the impact that has on our lives more generally.

Indeed, in research that we carried out in June 2021, 96% of HR and Reward leaders reported that employee experience had become more important.

Employers must act now to respond to new employee demands

Employers know they need to change in response to this massive shift in workforce dynamics. They know they need to provide a more rounded, holistic employee experience which meets these new employee needs, but our research found that many feel daunted by the scale of transformation required. They don't know where to start, often because they simply don't feel that they truly understand what employees now want and need from them.

“ We're no longer simply thinking about work as the tasks we carry out that are rewarded with pay; we're considering the whole employee experience and the impact that has on our lives more generally ”

Importantly, businesses cannot afford to think that the changes in working practices that were forced upon them during the pandemic can now be reversed. Already we're seeing employers who try to row back on commitments to hybrid working and new processes and structures coming unstuck.

Employers need to re-set their workforce plans and develop robust, future-focused strategies which give people the type of employee experience they are looking for now and tomorrow. This means embedding agility into their strategies and choice and freedom into their offerings, across the whole HR brief.

An outside-in approach to employee experience

Strategy starts with understanding. And this report sets out to arm HR and reward professionals with the knowledge of what employees are really looking for off the back of an emotionally exhausting two years.

Based on comprehensive research across 4,027 employees in four major markets (India, Singapore, the United Kingdom and the United States), the report explores attitudes to work (and to employers) in 2022. It reveals the extent to which people's priorities, ambitions, and (crucially) expectations around work have changed.

The research shows that there isn't a single aspect of people management or employee experience that doesn't need to change or transform to meet the great expectations of the new workforce. From benefits and wellbeing, to reward and recognition, and communication and technology, HR leaders are having to re-think their entire strategies to stay relevant and compete in an ever more dynamic and competitive labour market.

This report is designed to be a starting point for these new strategies and plans, a platform from which HR and business leaders can re-think how they need to evolve to meet current and future employee needs.

“ The research shows that there isn't a single aspect of people management or employee experience that doesn't need to change or transform to meet the great expectations of the new workforce ”

Great expectations, driven by a new generation



77%
say expectations have risen

84%
for employees in India and Singapore

43%
of under-40s have increased expectations of benefits package

compared to

23%
of over-40s

For the past two years, workers have increasingly demanded more from their employers, and this has been seen in all markets and across every industry. Indeed, in the research, 77% of employees reported that their expectations of their employers have risen since the start of the pandemic. Among employees in India and Singapore, this figure rises to 84% and 79% respectively.

Expectations have risen most around the level and quality of support employers are providing to protect and enhance employee wellbeing.

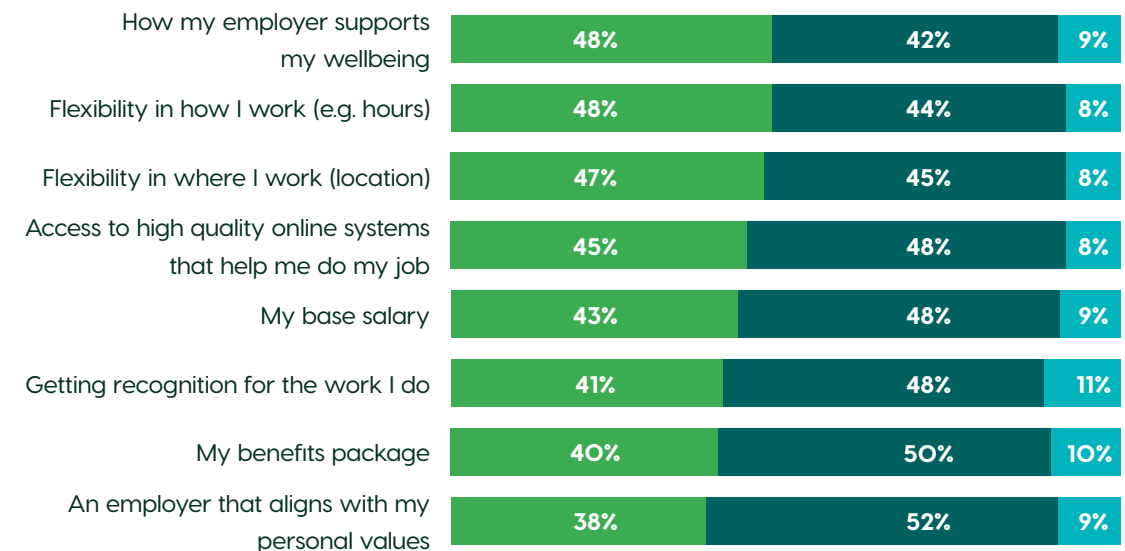
With people all over the world having to adjust to huge changes in how they live and work during lockdown, and worried about their own personal health and that of their loved ones, wellbeing has become a hugely important priority. And, without access to many of the usual touchpoints which can support wellbeing – such as meeting up with friends and family, going to the gym or seeing a therapist or wellbeing consultant – people have looked to their employers for support.

People are also expecting their employers to give them greater levels of flexibility in terms of when and where they work. Many employees who had previously always worked at their employer's premises have been exposed to home and remote working as a result of the pandemic, and they have appreciated the benefits that such flexible working patterns can bring, in terms of productivity and work-life balance.

Another area where employees are demanding more is in the technology and systems they use at work. The normalisation of remote working has brought into sharp focus the quality of digital experiences that people are encountering at work. And in many instances it highlighted the extent to which these experiences trail behind those which people are enjoying in their personal lives, away from work.

Changing expectations at work since the pandemic

How have your expectations of the following at work changed since the global pandemic?



My expectations have increased

No change / same as before

My expectations have decreased

The Age Factor: How younger workers are driving higher employee expectations at work

How have your expectations of the following at work changed since the global pandemic?

Percentage saying expectations have increased	Under 40s	40+
How my employer supports my wellbeing	51%	35%
Flexibility in how I work (eg hours)	51%	34%
Flexibility in where I work (location)	49%	37%
Access to high quality online systems that help me do my job	47%	31%
My base salary	47%	28%
Getting recognition for the work I do	44%	28%
My benefits package	43%	23%
An employer that aligns with my personal values	42%	23%

Expectations have risen significantly more among employees under the age of 40, compared with those aged 40 and above. Younger workers are far more demanding around the level of flexibility they have in their working practices and in relation to the quality and suitability of the technology and systems their employer provides.

Beyond this, younger workers are also increasingly looking to their employers to offer better benefits, provide recognition for the work that they do, and to operate in a way that aligns with their own personal values.

These findings demonstrate that many of the heightened demands being placed on employers are stemming from younger workers. Evidently, employers need to recognise that these rising expectations are unlikely to fade away over time; new generations of workers have very different ideas about what employers should be doing to support them, both in and outside work, and the likelihood is that their needs will continue to evolve over time.

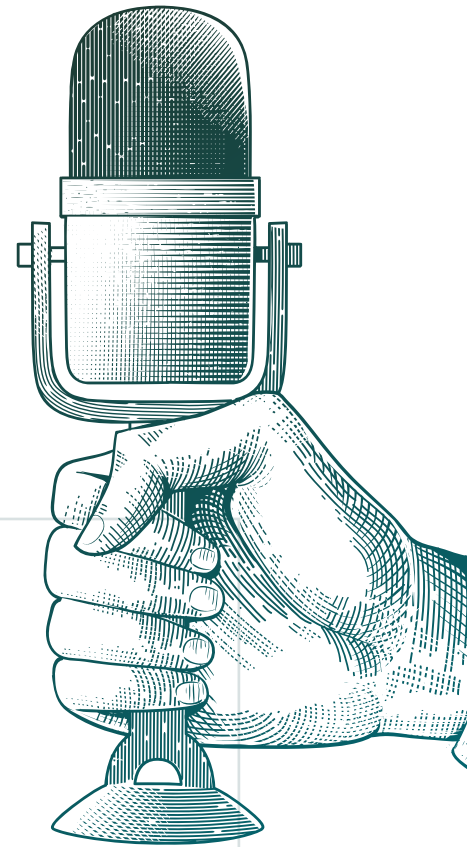


Rising employee expectations around the world

How have your expectations of the following at work changed since the global pandemic?

Percentage saying expectations have increased	UK	US	Singapore	India
Flexibility in where I work (location)	43%	42%	52%	52%
Flexibility in how I work (eg hours)	42%	46%	52%	52%
Access to high quality online systems that help me do my job	34%	40%	48%	56%
My benefits package	26%	38%	41%	53%
My base salary	36%	44%	41%	54%
Getting recognition for the work I do	34%	39%	38%	54%
An employer that aligns with my personal values	31%	36%	35%	52%
How my employer supports my wellbeing	45%	45%	49%	54%

In almost every area, expectations amongst employees in India and Singapore have risen more sharply than amongst their counterparts in the UK and US. Whether it is flexible working, better technology to do their job, benefits packages or the support they receive to support their wellbeing, workers in Singapore and India are more likely to be expecting more of their employers over the last two years.



Benefits, wellbeing and environment most important criteria for potential employees

As well as exploring what employees are expecting from their current employers, the research also examined how people's decision-making around selecting new employers has evolved over the past two years.

The findings highlight the most important considerations for people choosing a new employer; and environment, wellbeing and benefits top the list.

Most employees recognise the massive efforts that many employers have made to help them through the pandemic and meet their changing needs over the past two years.

Globally, 38% of people feel that their employer looked after them very well during the peak of the pandemic, and 43% feel that their employer did quite well.

And, significantly, these figures have remained almost at the same level two years on, as many countries continue to move beyond the worst of the pandemic. This suggests that employers, on the whole, aren't falling into the trap of easing up on their efforts now that life is returning to some form of normality.

Importance of factors when selecting a new employer

How important are the following to you when choosing an employer in the first place?



38%

said their employer looked after them very well during the pandemic

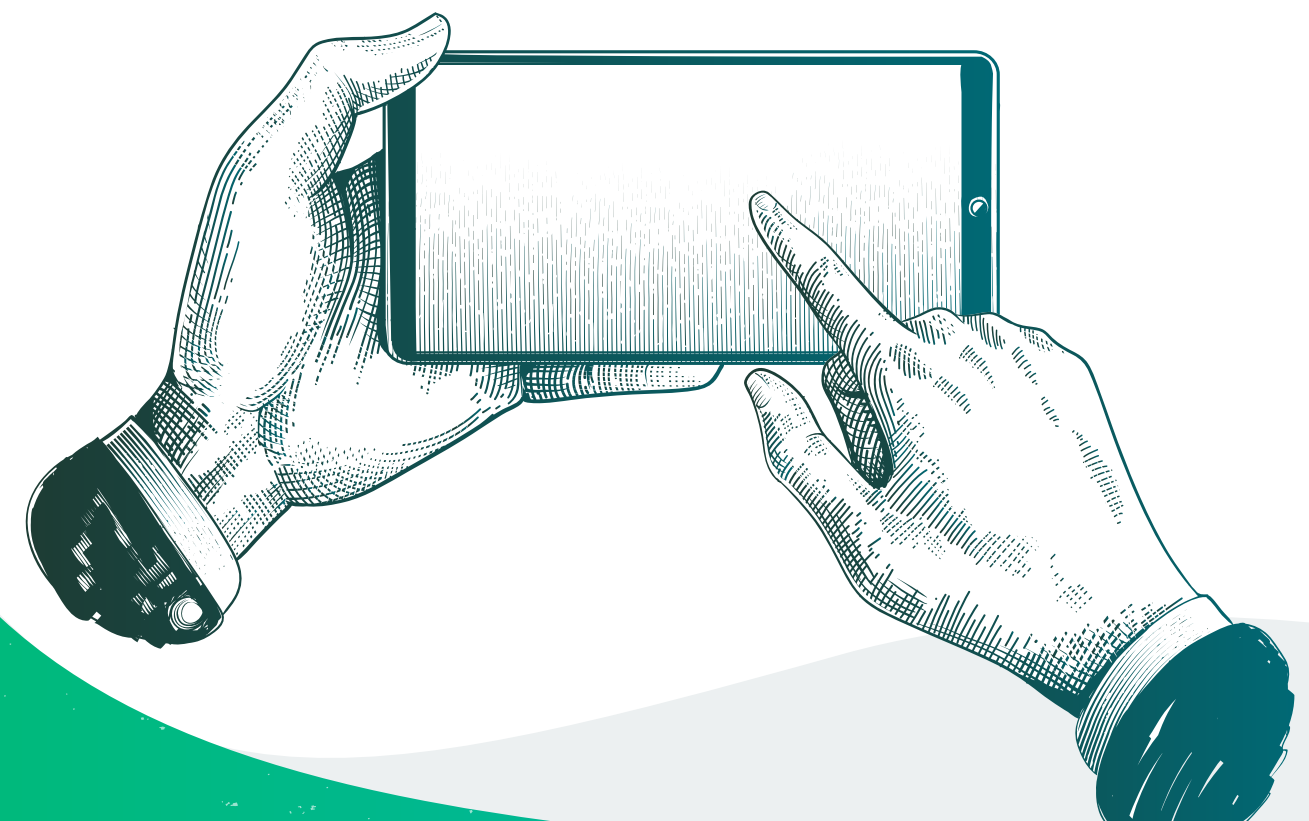
83%

who said they were not well supported are considering moving jobs

63%

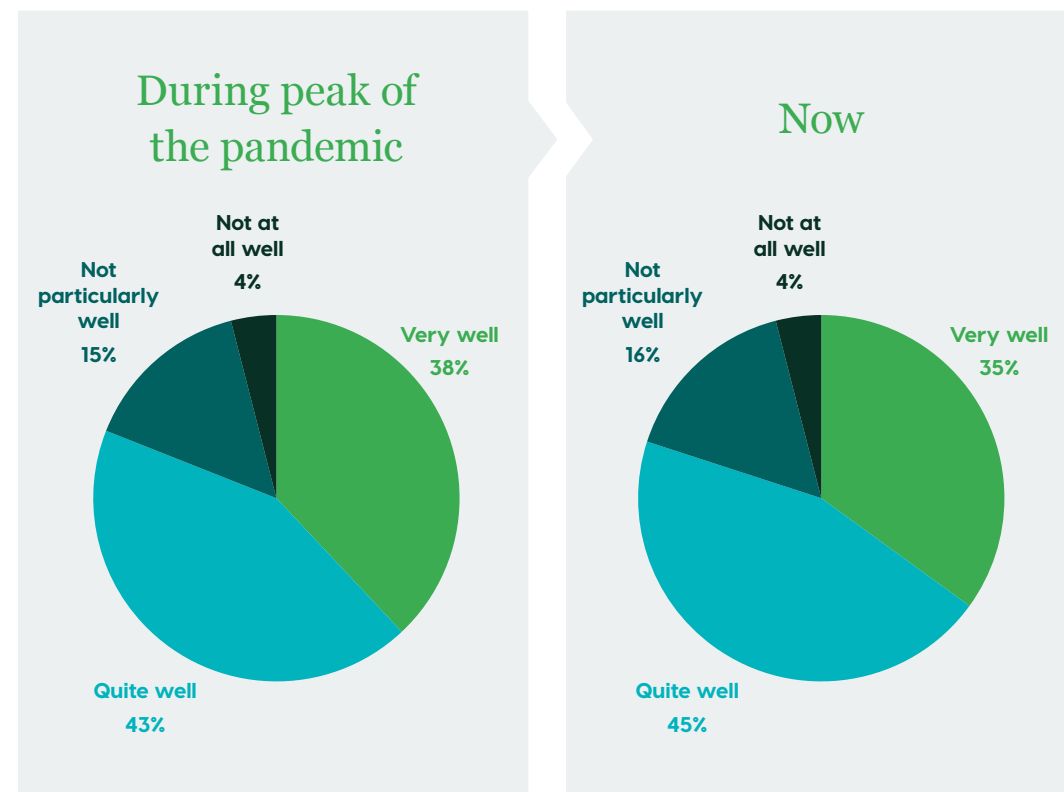
who were well looked after who are looking for a new job

compared to



Employees' assessment of how employers supported them during the peak of the pandemic and beyond

How well did your employer look after you during the pandemic? And how well are they looking after you now?



“...people who feel that they have been well supported during the pandemic are significantly more likely to say that they are committed to their current employer and unlikely to leave their organisation...”

The research reveals some marked differences in responses between different countries. In the US, as many as 47% of employees report that their employers looked after them very well during the pandemic, and 45% of employees

in India feel the same way. However, it is a very different picture in Singapore, where only 22% of employees feel that their employers did a very good job of looking after them during the pandemic.

By country: Employees' assessment of how employers supported them during the peak of the pandemic and beyond

How well did your employer look after you during the pandemic? And how well are they looking after you now?

During peak of the pandemic	UK	US	Singapore	India
Very well	36%	47%	22%	45%
Quite well	44%	36%	55%	39%
Not particularly well	16%	13%	20%	13%
Not at all well	4%	3%	4%	3%
% Well	80%	83%	76%	84%

Now	UK	US	Singapore	India
Very well	32%	42%	20%	45%
Quite well	42%	39%	56%	42%
Not particularly well	22%	14%	19%	11%
Not at all well	5%	4%	4%	3%
% Well	74%	82%	77%	87%

Despite these country differences, the proportion of people who are satisfied with the support they have received from their employers over the last two years is otherwise relatively consistent across industries, age groups and genders.

Interestingly, people who feel that they have been well supported during the pandemic are significantly more likely to say that they are committed to their current employer and unlikely to leave their organisation in the next 12 months. Conversely, those who feel that they have been less well supported are now more likely to be actively looking for a new job or open to new opportunities.

These findings signal an important message to employers – that unless they demonstrate to employees that they are taking real action to meet their increased expectations in the current environment, then employees are more likely to move on.

In almost every area, expectations amongst employees in India and Singapore have risen more sharply than amongst their counterparts in the UK and US. Whether it is flexible working, better technology to do their job, benefits packages or the support they receive to support their wellbeing, workers in Singapore and India are more likely to be expecting more of their employers over the last two years.

Employee experience in the spotlight

79%
report that the employee experience is more important than 12 months ago

83%
for employees in Singapore and India

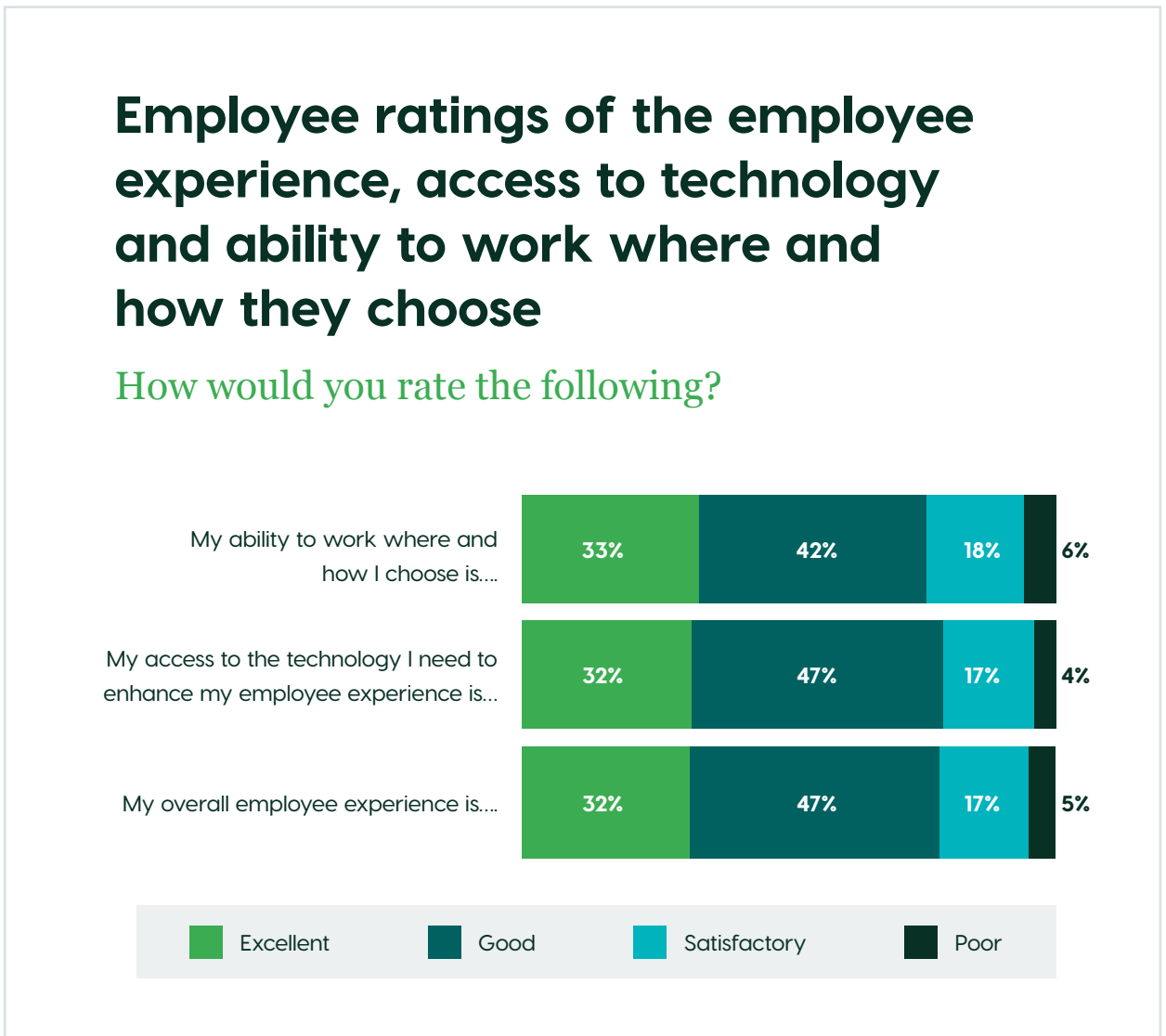
32%
rate their overall employee experience as excellent

Without doubt, people are giving far greater consideration to the experience they have while working; whether that is at an employer premises, at home, or a hybrid of the two. But what's really telling is that people aren't just thinking about their experience in terms of the time they're spending doing their everyday operational tasks. They're also reflecting on how their job fits their lives more broadly, and the role their employer plays in supporting them and their wellbeing outside working hours.

People are taking a far broader view when they reflect on their work and their employer. Overall, 79% of employees report that this holistic employee experience is more important to them than it was 12 months ago. This figure rises to 83% amongst employees in Singapore and India.

Encouragingly, most employees are at least reasonably satisfied with the level of experience their employer provides. Globally, 32% rate their overall employee experience as excellent, 47% describe it as good, and only 5% report that it is poor.

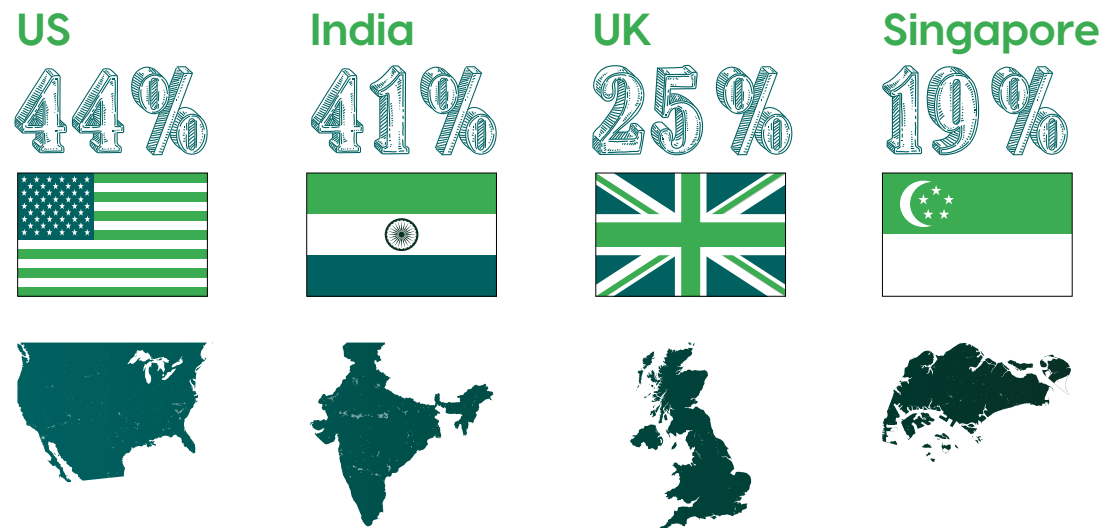
Likewise, when it comes to two of the most critical factors that contribute to this overall employee experience – flexible working and access to technology – the figures are very similar. 53% of people rate their flexibility to work where and how they choose as excellent, and 42% state that it is good. And 32% of employees describe the access they have to high quality technology as excellent, with 47% rating it as good.



Interestingly, older workers (aged 40 and above) are slightly less likely to rate their overall employee experience as excellent or good (75%), compared to colleagues under 40 (80%). This is also the case when it comes to how they perceive the level of flexibility they have and their access to high quality technology and systems.



My employee experience is excellent



Behind the global figures are some stark differences between geographies when it comes to attitudes to employee experience.

Once again, employees within the US and India are more positive about the employee experience they currently have at work, with 44% and 41% respectively describing it as excellent. Employees within Singapore and the UK, on the other hand,

are far less enthusiastic about their employee experience, with only 19% and 25% respectively stating that it is excellent.

Similarly, employees in the US and India are more enthusiastic about the technology they use and the level of flexibility they have at work than their counterparts in Singapore and the UK.

The employee experience wishlist

Employees have firm ideas around how employers could improve the experience they provide to people at work and the top of the wishlist is tightly packed. Significantly, these opinions are relatively consistent across all four markets included in the study.



Factors include a stronger sense of belonging and community (cited by 83% as helping to improve employee experience), ensuring better support from line managers (84%), and delivering more regular and engaging communications (84%) but, for now, let's break down the top three...



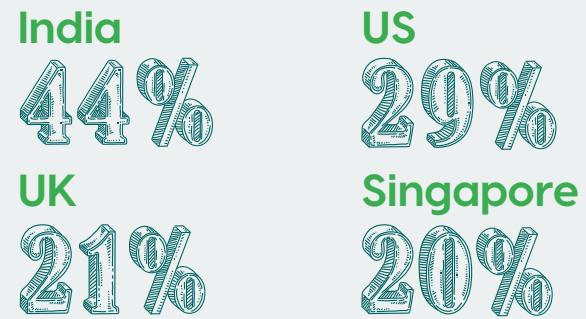
The employee experience wishlist

1. Relevant benefits

31%

feel employer's benefits provision aligns 'very closely' with what is important to them

GLOBAL COMPARISONS



Along with flexible working, employees believe that the single most effective way for employers to improve employee experience is to provide relevant benefits that align with their own personal needs and wants. But currently, only 31% of employees feel that their employer's benefits provision aligns with what is important to them.

By country: How closely benefits provision aligns with what is important to employees

How closely do you think your employer's benefits provision aligns with what is important to you as an employee?

	UK	US	Singapore	India
Not particularly closely	21%	15%	17%	11%
Quite closely	52%	40%	62%	43%
Very closely	21%	39%	20%	44%
Don't know	6%	6%	1%	1%

The research highlights the extent to which people want their employers to use benefits to provide assistance across a wide range of areas. These include all aspects of their personal wellbeing, achieving greater work-life balance and providing a culture where they feel connected to colleagues.

Once again, expectations have risen significantly when it comes to benefits, and employees point to a range of different ways in which benefits provision could be improved. As you would expect, these include a greater focus on benefits that protect wellbeing, more ongoing communication around benefits, and better alignment between benefits and company and personal values.

Employee views on how benefit provision could be improved

In what ways do you think your employer's benefits provision could be improved?



More than anything else, however, employees view flexibility as the critical factor in improving benefits. This means employers giving people more choice in the benefits they choose and access to more services and products that will support their lives outside of work.

The employee experience wishlist

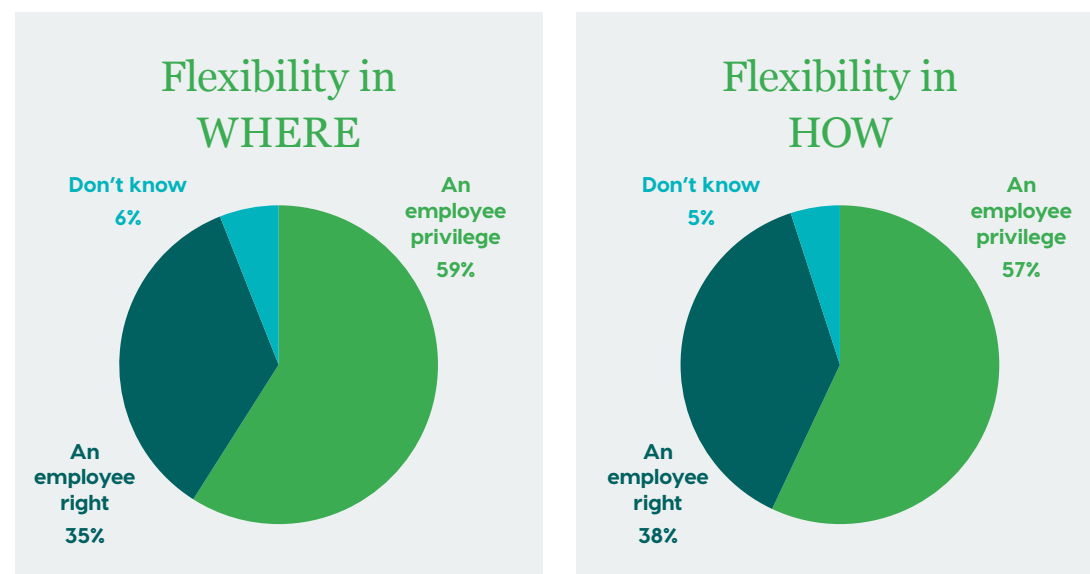
2. Flexible working

Flexible working is also viewed as an important way in which employers can enhance employee experience. 88% of people said that feeling supported by their employers regardless of where they work would make a significant difference, and 82% stated that being able to work where and when they choose would improve their experience at work.

Despite this huge appetite for more flexibility and the fact that so many people have had the opportunity to work from home during the pandemic, most employees still don't take flexible working for granted. The majority of people continue to regard having flexibility in working hours and location as a privilege rather than a right, and significantly, this is true across all four geographies included in the study.

A right or a privilege? How flexible working is viewed in 2022

Do you see flexible working in terms of location and/or the hours you work as an employee privilege or an employee right?



Younger workers are more likely to view flexibility as a right, but even amongst those under 40, the majority still see it is a privilege for an employer to give them choice over where and how they work.

However, while employees may not feel that having some level of flexible working is their right, they do still see flexibility as a key factor within their overall employee experience. And, as we have seen, if employers are able to match their expectations around employee experience, then people are significantly more likely to remain engaged and committed to their employer.

The employee experience wishlist

3. Meaningful recognition

41%

say that their expectations of recognition at work have increased

83%

state that a recognition programme is an important consideration when choosing an employer

People have become more discerning and more demanding in terms of how they are recognised at work. 41% of employees say that their expectations around getting recognition at work have increased during the pandemic, while 48% of people say that their expectations have remained the same.

And it's not just existing employees that are closely examining organisations' approaches to recognition. 83% of employees state that the quality of an organisation's employee recognition programme is now an important consideration when choosing an employer.

Evidently, employee recognition is playing an increasingly important role in how people feel about their employer and even potential employers.

88%

want to be able to recognise colleagues for their efforts and successes

89%

believe people should be recognised for embodying the values of the company

86%

expect their employer to have recognition technology in place

Employees have clear ideas around what they want and expect from employers when it comes to recognition. 89% believe it's important for employers to encourage recognition at work and 88% say it's important for them to be able to recognise colleagues for their efforts and successes. This sentiment is felt particularly strongly among workers under the age of 40.

How technology enables experience

Employers can improve employee experience by giving their people access to seamless and intuitive technology and systems. 40% of employees report that their expectations around having access to high quality online systems that help them to do their job have increased since the beginning of the pandemic. And 86% state that having access to high quality online systems that help them do their job is very or quite important when choosing an employer.

Unfortunately, these heightened expectations are generally not being met. As we explored in detail in our employee experience tech report, *Building an experience around employee expectations*, 60% of employees state that the technology they use at

work lags behind the technology they use at home. And only 32% of employees perceive the access they have to technology that enhances their employee experience to be excellent.

The research reveals widespread demand for more seamless and integrated digital experiences for HR related tasks at work. 86% of employees say they would like to be able to access all the benefits, content and resources that they get from their employer in one place. And this appetite for a consolidated digital home for benefits and wellbeing is consistent across both remote and on premise workers and across all ages.



Conclusion

The pressure on employers to respond to changing employee needs shows no signs of easing up. Expectations continue to rise in relation to every aspect of employee experience – from benefits and recognition through to technology and communication.

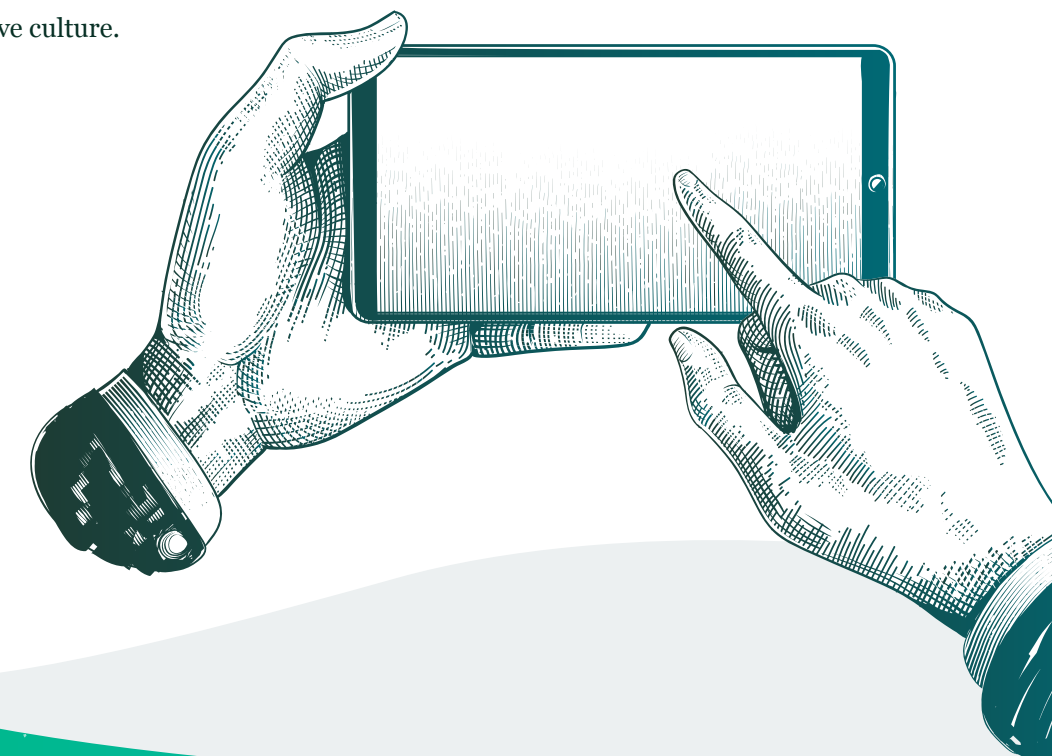
People want to work in more flexible ways than ever before; and they are demanding that employers do more to address their mental, physical and financial wellbeing.

The overriding message for employers from this research is clear. Employees recognise the efforts their employers have made to support them during the pandemic and to respond to their changing needs; but there is still a way to go before people feel that their new expectations are truly being met.

Employees are demanding more relevant and flexible benefits that can enhance their wellbeing; greater choice in how and when they work; access to intuitive technology and systems that help rather than hinder them in their work; and they want to feel recognised, valued and connected within a purpose-driven and inclusive culture.

And employees are calling on their employers to do more listening to develop a greater understanding of what they are truly looking for in the current environment. The employee experience needs to feel attractive and supportive to current and prospective employees. Indeed, 86% of employees state that by better understanding what people want from their experience at work, employers can prevent employees from leaving.

The pressure is mounting on employers to identify and understand the huge variety of employee needs and drivers, and to deliver an exceptional employee experience for every type of worker. This is arguably the biggest challenge facing businesses today as they look to build and retain highly skilled, motivated and agile workforces which can thrive in the future economy. It's a big task but one that forward-thinking people professionals are ready for.



OneHub | Home

It's time to focus on each and every employee's experience at work.

Content...

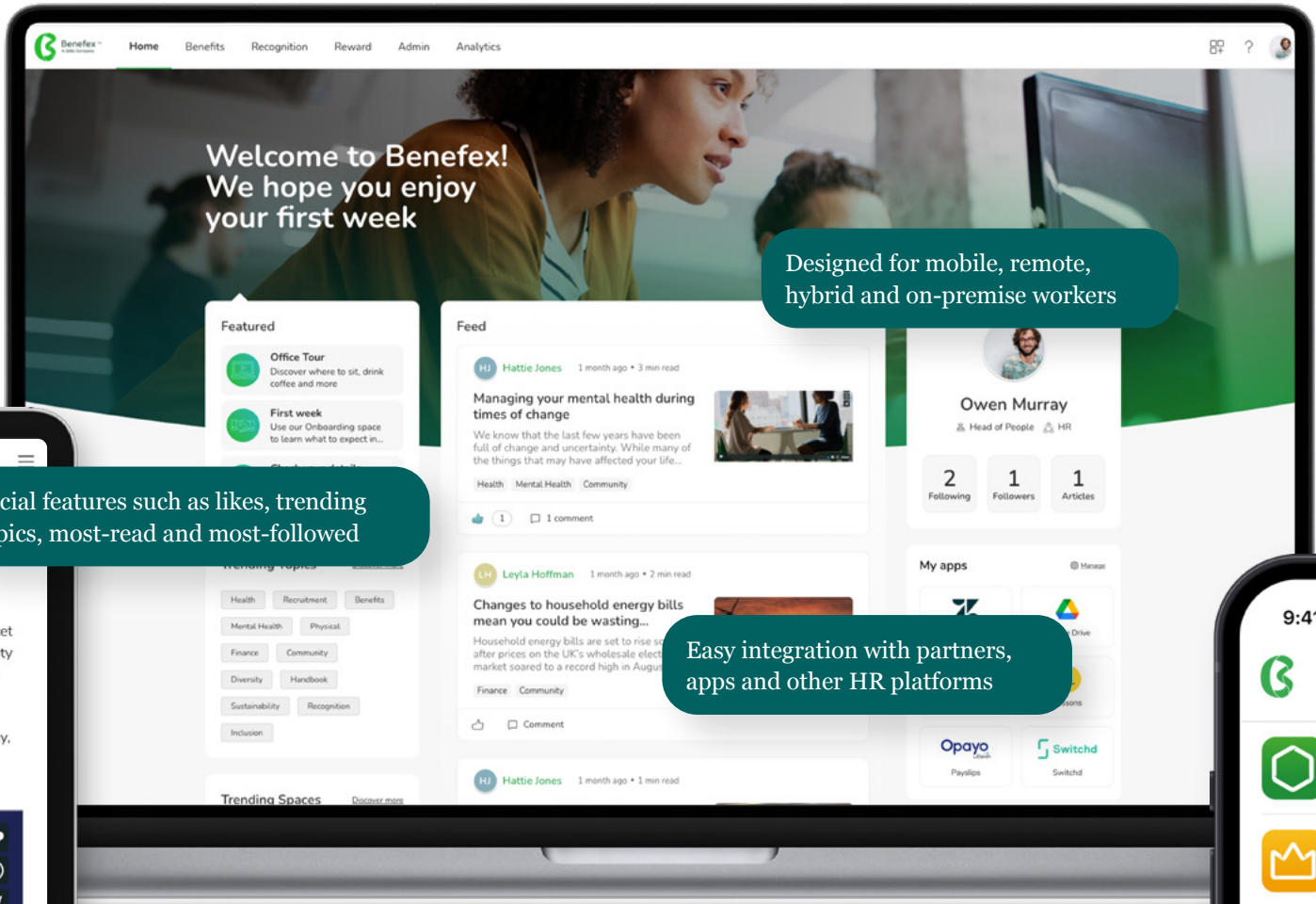
which arms people to make smarter decisions.

Experiences...

which drive action on benefits, wellbeing, recognition and reward.

Apps...

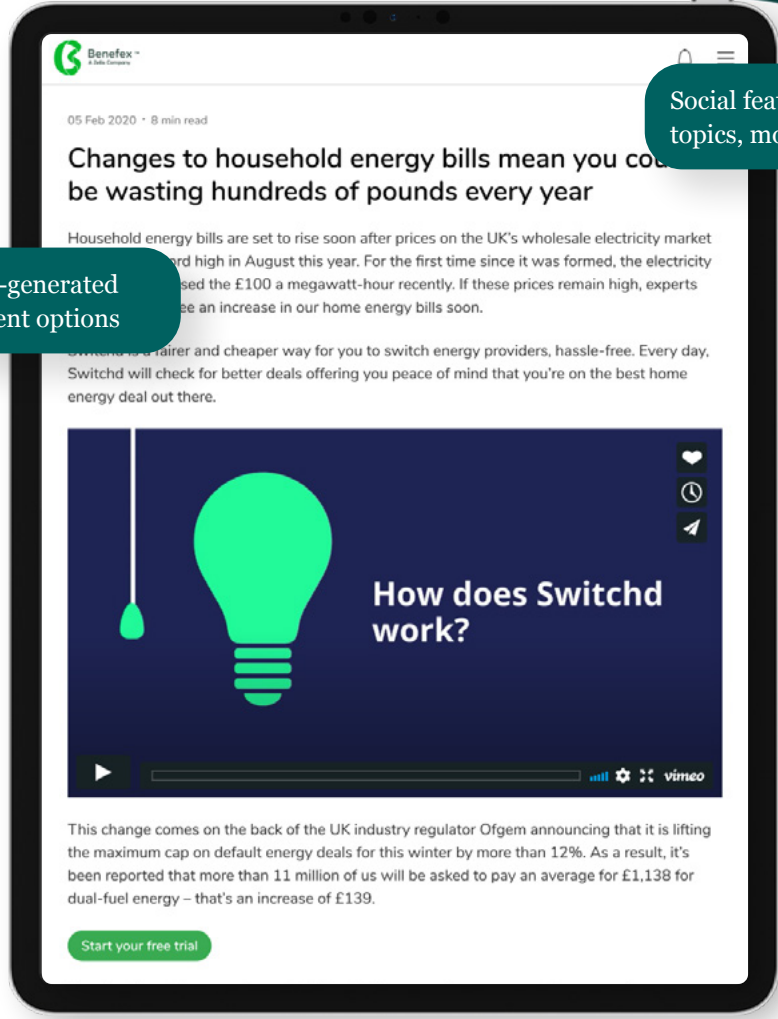
which integrate relevant workplace platforms through one single, seamless journey.



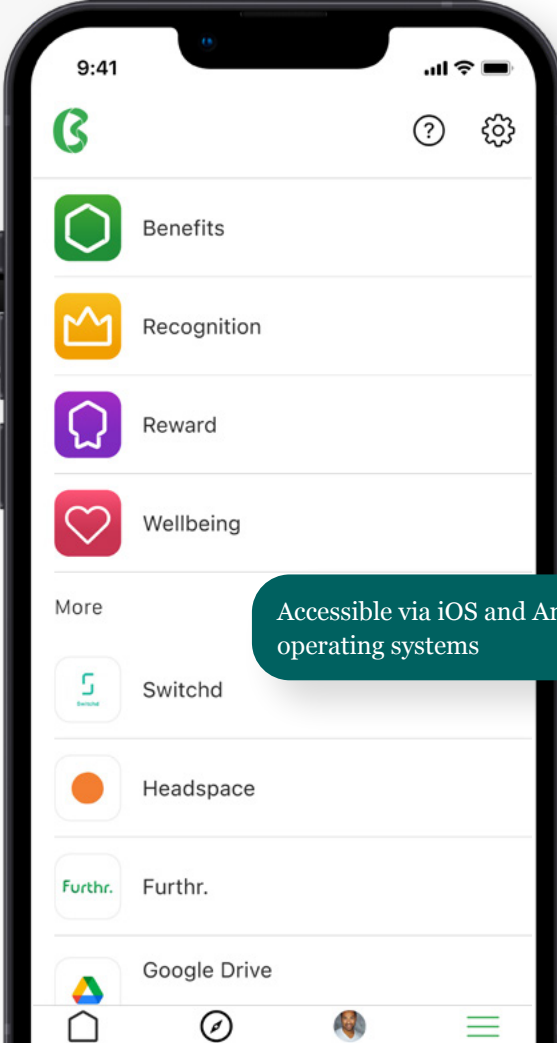
Designed for mobile, remote, hybrid and on-premise workers

Social features such as likes, trending topics, most-read and most-followed

Easy integration with partners, apps and other HR platforms



User-generated content options



Accessible via iOS and Android operating systems

OneHub | Home lets people teams bring together connected experiences, content and apps across benefits, wellbeing, culture, engagement and communication.

Deliver the exceptional employee experience you need to protect wellbeing, drive productivity, and build an agile, resilient workforce fit for the future.

Benefefex experiences

- Benefits
- Recognition
- Wellbeing
- Discounts
- Reward
- Learn
- Marketplace

1,000 Marketplace integrations

Benefefex apps

Web

APIs

Global navigation

Analytics

Translations

Chat

Campaign manager

Workflow

System comms.

Content shop

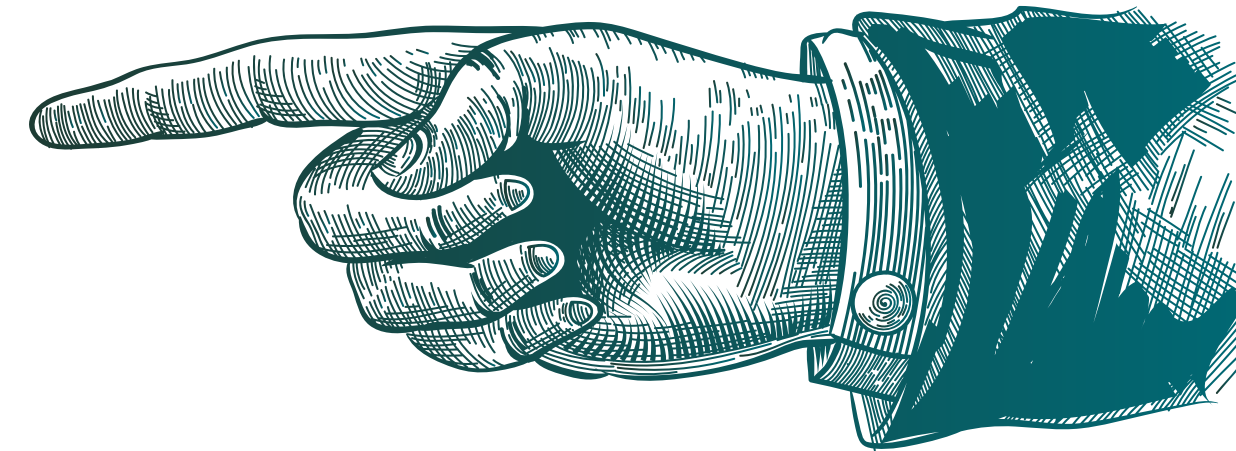
OneHub

Data layer

Segmentation

See OneHub | Home in action for yourself

Book a demo

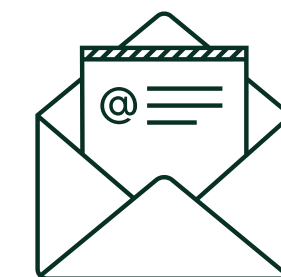


Hello!

We're Benefefex

We're the people behind OneHub: the award-winning employee experience software and home of global employee benefits, reward and recognition, wellbeing, discounts and communications.

Benefefex helps over 650 organisations across 70 countries transform the experience of more than 1.6 million employees.



Find out more at
hellobenefex.com

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GREAT EXPECTATIONS



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