The situation in the world and in our region has dramatically changed since we wrote this report, as a result of the Covid-19 pandemic. However, we believe that the insights in this report – capturing what tomorrow’s talent needs and expects from their employer – are just as important as before the crisis. Our needs to socialize, to feel that our work is meaningful and our crave for a more empathic leadership are truly highlighted right now. We hope that you will enjoy the reading and that we soon will approach a post corona world, where we hopefully have learnt some important things about ourselves, about working together over distance and what is truly creating meaning in life.
THE FUTURE OF WORK

What tomorrow’s talent will demand from their employers
ABOUT THE REPORT
WHY WE DID THIS

“It is vital for us to understand what is attractive for our employees now and in the future, to keep and attract talents to our company. To understand what kind of leadership people need to perform at their best and what makes them happy at work, will be crucial for us to be able to deliver on our business strategy. Together we want to create a place where everyone feels a strong sense of belonging. Work should feel like a home where you work with great people on great things that create opportunities for you, for our business, and for the world around us.”

SUSANN JOHNSSON
Head of Brand and Insight
Telia Company

EMELIE AIDEHAG
Head of Insight and Foresight
Telia Company
FUTURE OF WORK

WE UNCOVERED 8 PEOPLE TRENDS:

1. EVERYDAY PURPOSE
2. MANAGEMENT BY CARE
3. HAPPINESS HUNTERS
4. SOCIAL CRAVE
5. LIMITLESS CAREER
6. LEARNING BY WORKING
7. BE MY OWN BOSS
8. FLEXIBILITY BACKLASH
We increasingly want to feel that our work is meaningful. What creates meaning becomes more and more individual and needs to come from within.

An engaging company purpose that gives people a good reason to get up in the morning is a great start, but won’t be enough in the future. Neither will having the opportunity to do charity work once in a while. Even if it’s during working hours.

Meaningfulness comes from feeling that we all, as individuals, contribute in our everyday work. And we want our employers to encourage us to find our individual purpose.

**EVERYDAY PURPOSE**

*Finding our personal motivation*

We increasingly want to feel that our work is meaningful. What creates meaning becomes more and more individual and needs to come from within.

An engaging company purpose that gives people a good reason to get up in the morning is a great start, but won’t be enough in the future. Neither will having the opportunity to do charity work once in a while. Even if it’s during working hours.

Meaningfulness comes from feeling that we all, as individuals, contribute in our everyday work. And we want our employers to encourage us to find our individual purpose.

**MACRO TRENDS:**
- Purposeful organizations
- Circular economy
- New religions
- Individualization

**EMOTIONAL DRIVERS:**
- Sense of purpose
- Sense of belonging
"If the economy continues to grow, people will choose the work that gives them the most meaning rather than the highest salary. Meaning could be anything from helping others, solving problems, or creating something new – it all depends on the person."

EXPERT
Marketing Specialist, Career Hunting, Estonia

"To have purpose is a human need. You cannot fool young people into believing in your company purpose. They must feel it's true. Otherwise you'll risk losing them as soon as they realize you cannot walk the talk."

EXPERT
CEO of agency, Corporate Culture, Norway

"It is important to me that what I do at work is not just about increasing profits; I want to have a concrete positive impact on people's lives. Like designing something that makes people's lives easier."

TALENT
Woman, 29 years, Sweden
WHAT DOES IT MEAN TO PEOPLE?

Find an “every day” purpose
Many organizations have understood the value of engaging in charity/responsibility activities during work hours, but that will not be enough in the future. What truly creates a sense of purpose are the small, personal and relatable things we do every day.

Get continuous feedback
People will increasingly expect managers to guide them to fulfill their personal values and goals. Consequently, employees will expect to get continuous feedback and concrete evidence of their individual contributions.

Co-create company values
In these times, characterized by fake news and disinformation, people are tired of generic words and empty promises. Employers need to prove that they actually live and act upon their purpose. By involving employees in co-creating values, the trust will increase.
WHAT DOES IT MEAN TO EMPLOYERS?

Measure your purpose
A company’s purpose should be about motivation and what makes people go to work every morning. Therefore, to measure how companies perform, KPIs and incentives should also reflect more aspirational behaviours, that can be clearly connected to the company’s purpose and values. For example, innovativeness, team contribution etc.

Personalize feedback
One of the most important jobs for leaders will be to connect people to their own purpose; to help them understand what really matters to them. To be able to guide employees to reach their individual purpose, processes for personalized feedback need to be implemented within the organization. We will see better tools that help direct and personalize feedback.

Prove your purpose
A company’s purpose will only provide a sense of meaning if it’s true and transparent. Trustworthiness comes from the concrete actions taken by an organization. It is not what you say, but what you do, that shows how companies truly live their purpose and fulfill expectations, aspirations and intentions towards its people, customers and society.
EVERYDAY PURPOSE IN NUMBERS

92% of the world’s CEOs agree that in an increasingly digital world it’s becoming more important than ever to have a strong corporate purpose. (PwC, 2017, Human value in a digital world)

That’s the number of views of Simon Sinek’s “Start with why”. (YouTube, 2019)

Newly graduated Swedes identify meaningfulness as the number one factor for motivation. (Academic work, 2018, Young Professional Attraction Index)
In a more individualistic, but also results-driven world, we increasingly value companies with a caring and empathic culture. Work should be a place where everyone looks after each other, where we can be ourselves, where we can both laugh and cry together.

In the future, the border between private and professional will be erased and therefore we want employers to see us as the people we really are. We want leaders who see our individual needs, and understand both the smaller and bigger things in life. Someone who will notice both our highs and lows. In a caring and safe environment, everyone has the potential to thrive, perform at their best and make a difference.

**MACRO TRENDS:**
- Emotional intelligence
- Personalization
- New normal
- Individualization

**EMOTIONAL DRIVERS:**
- Feel secure
- Be the person I want to be

**TREND 2:**
**MANAGEMENT BY CARE**

**The rise of the empathic organization**

In a more individualistic, but also results-driven world, we increasingly value companies with a caring and empathic culture. Work should be a place where everyone looks after each other, where we can be ourselves, where we can both laugh and cry together.

In the future, the border between private and professional will be erased and therefore we want employers to see us as the people we really are. We want leaders who see our individual needs, and understand both the smaller and bigger things in life. Someone who will notice both our highs and lows. In a caring and safe environment, everyone has the potential to thrive, perform at their best and make a difference.
“People today have a need for guidance, to understand why they are doing the things they do. The role of the leader is to show employees that they matter, and that the things they do matter. Simply to show the difference they are making for the company and for people.”

EXPERT
Foresight specialist, Future of work, Finland

“Today’s youth are the first generation to demand diversity and truly mean it. They crave an inclusive culture with a high level of psychological stability.”

EXPERT
Psychologist & researcher, Talent management, Sweden

“What really makes my employer special, is when they notice even the smallest things. For example, the other week they reminded me and payed for my kid’s vaccination. I had totally forgotten about that!”

TALENT
Woman, 33 years Finland
WHAT DOES IT MEAN TO PEOPLE?

**Expects individual treatment**
People expect to be treated in a way that makes them feel unique, special and appreciated for who they are. Feeling only like a cog in a wheel, creates emotions of emptiness and de-motivation.

**From manager to mentor**
To enable management by care, an empathic leadership that supports both professional and private life is needed. Thus, the role of a manager is turning more into the role of a mentor - someone who coaches, supports and motivates you.

**A culture where diversity thrives**
As borders between personal and professional are fading, people want to feel that they can be themselves at work. We will see higher demands for an inclusive company culture, where new dimensions of diversity can thrive, in everything from sex, age, ethnicity, personality, interests, looks and all the other things that makes a person unique.
WHAT DOES IT MEAN TO EMPLOYERS?

**Individualization at scale**
Using a standardized approach towards benefits, compensation and training will not work for an increasingly diverse group of employees. The technology that is necessary to scale individualization does exist. The challenge will most likely be adapting management and recruiting, and developing leaders with the right beliefs and skill sets. This will be crucial to effectively lead people with higher demands for individual treatment.

**Coach managers to cope**
A coach can identify each person’s strengths, unlock their true potential and encourage persistence. This requires high engagement and emotional intelligence, and leaders that are driven by people, not by power. A first step towards this could be to start evaluating leaders on soft KPIs such as empathy. This type of more empathic leadership will require a lot from a person, and it is also important to coach leaders how to cope in this new, more demanding environment.

**Build a safe culture**
An environment built on trust, that fosters psychological safety and embraces diversity, will make people more creative and collaborative. The first step in getting there is to start acknowledging employees who dare to take risks by voicing new ideas, admitting errors, or just thinking differently.
When Google investigated factors for creating an effective team, psychological safety was the number one factor. This element was more important than technical skills within the team. (Google/Rework, 2015, “The five keys to a success Google team”) 

73% of US workers consider health and wellness offerings important when choosing a job. (LSN Global, 2019, “Wellness incentives attract workers”) 

We live in the era of self-actualization. We strive to seize the moment and find the perfect formula for happiness in life, at work, with friends and at the gym. It is a way of living and refers to both our personal and professional lives. We look for a workplace where we can be happy regardless of what stage of life we are in.

It is no longer enough to get paid for a job well done. We want to have positive affirmation, to do good and to feel good. Success in life is no longer a result of our financial situation; it stems directly from how happy we are.

**MACRO TRENDS:**
- Holistic health
- Experience economy
- Personalization
- New religions

**EMOTIONAL DRIVERS:**
- Sense of wellbeing
- Be the person I want to be
"There is a shift going on. Success used to be about working hard, making lots of money and buying expensive things. Now it’s about balance, focusing on family and having time for cool experiences."

"Happiness is seen as a choice. People today are worried about having an unfulfilling job that will lead to destructive ways of thinking and unhappiness, affecting all other parts of life."

"I am more interested in knowing how my employer will support me in becoming a better, smarter and healthier person than becoming better at, for example, sales technique."

**EXPERT**
Speaker, author & advisor, Motivation & Meaningfulness, Sweden

**EXPERT**
Foresight specialist, Future of work, Finland

**TALENT**
Man, 35 years Sweden
WHAT DOES IT MEAN TO PEOPLE?

Rise of existentialism
People are constantly fed pictures of perfect, happy lives and careers, which creates unrealistic expectations of happiness. It is also perceived as somewhat shallow. Consequently, we see an increase in existential questions, which affects our attitude to both our private and working lives. What creates happiness? Who is the real me? How can I become the best possible version of myself?

Work less, reach high(er)
As people start to focus more on happiness and wellbeing, the less time they want to dedicate to working. Nonetheless, their career ambitions remain the same. People want to reach high, but with less time invested. People expect their employers to respect this and to support them in not becoming “workaholics”.

Positive feedback
To reach their full potential and to understand their contribution to the world, people crave constant feedback. Today’s youth are used to getting and giving a lot of positive feedback (e.g. from likes and comments), but might have a harder time dealing with constructive feedback.
WHAT DOES IT MEAN TO EMPLOYERS?

Happiness at work
Employers will need to go the extra mile in the future to make people feel that their work contributes to happiness in life. Feelings of boredom, disengagement and chronic stress at work will make people leave, while the possibility of having fun and being surrounded by positive energy will make people stay.

Coach people to cope
In a world where our lives are becoming more exposed than ever through social media, the grass will always look greener on the other side. Increasingly, people will need help to cope with unrealistic expectations of themselves and what work should be like. For example, how do we coach employees to manage negative feedback? How do we help people focus less on the superficial that looks good to others?

Hub for convenience
With today’s busy lifestyles and new family constellations, more and more the office will become the place for everything. A great way to attract employees will be adding services that respond to their needs for convenience, be it a delivery hub for online shopping, getting a haircut, going for a workout or babysitting.
HAPPINESS HUNTERS IN NUMBERS

65% of employees said the opportunity for personal development was the most influential factor for job satisfaction in their current job. (Boston Consulting Group, 2018, New Ways of Working)

70% of employees would consider using treatments (augmentation technology, medication and implants) to enhance their brain and body, if this would improve employment prospects in the future. (PwC, 2018, Workforce of the Future)

79% of people who quit their jobs cite ‘lack of appreciation’ as their reason for leaving. (Forbes/O.C.Tanner, 2018, "10 workplace stats you need to know")
Even though it's great to be able to work from home, it also means we become more and more isolated. Today's flexibility makes our whole world a potential office, if we want. But the more we work from home, the more we realize the importance of colleagues and working in teams. People are social animals and we need to meet each other to be able to collaborate.

This means that in the future, the actual office will still serve an important role for building culture and creating a feeling of belonging. The office will need to be optimized for collaboration, socializing and should manifest the organization's values.

**MACRO TRENDS:**
Seamless experiences
Experience economy
Networked society
Post urbanization

**EMOTIONAL DRIVERS:**
Sense of freedom
Sense of belonging

**TREND 4:**
**SOCIAL CRAVE**

*The office is the hub for collaboration*

Even though it's great to be able to work from home, it also means we become more and more isolated. Today's flexibility makes our whole world a potential office, if we want. But the more we work from home, the more we realize the importance of colleagues and working in teams. People are social animals and we need to meet each other to be able to collaborate.

This means that in the future, the actual office will still serve an important role for building culture and creating a feeling of belonging. The office will need to be optimized for collaboration, socializing and should manifest the organization's values.
"Young people believe that the individualistic society has gone too far. They want to work in a small team with close relationships."

"When I need to focus, I prefer to work from home. But I love coming to the office to hang out with all of my amazing colleagues."

"I want to work at an office that feels alive and thriving."

**EXPERT**  
Researcher & Speaker, Attracting young professionals, Sweden  

**TALENT**  
Man 41 years  
Finland  

**TALENT**  
Woman, 39 years  
Estonia
WHAT DOES IT MEAN PEOPLE?

Searching for a social oasis
As flexible work styles gain in popularity, people will feel more isolated with social interactions only taking place through digital platforms. Humans are social animals and our need for belonging and physical contact is very strong. Therefore, the importance of the office as a social oasis will increase in the future.

Importance of colleagues
When the office becomes a place people go to for socializing and collaborating rather than to focus, the importance of the people working there will increase. Talented people want to go to an office where they are intellectually stimulated, motivated and inspired by others.

Purposeful premises
The office is a great way to manifest what the organization stands for, to build a strong company culture and a sense of belonging. But it is not enough. People must be able to go to their office and seamlessly perform a wide variety of tasks, from concentrating alone, to brainstorming in a group, or simply experimenting with the newest technology. A purposeful office provides the right tools, no matter the task.
WHAT DOES IT MEAN TO EMPLOYERS?

Design for vibrancy
A vibrant office that is full of life, energy and enthusiasm will also become a place where people want to meet, engage and share learnings with each other. Designing for vibrancy means optimizing the space for social needs, and creating natural social hot spots, from coffee machines to larger social areas.

Long distance socialization
Physical distance to team members is already a reality for many. In the future, new collaboration platforms and technologies like VR will enable us to work together even more from a distance. As an employer it’s important to ensure that socializing is still taking place, even if team members are not in the same room. It is the small talks between meetings, during lunch or at the coffee machine, that build strong culture and create trust.

Manifest your culture
The physical environment acts as a symbol for the organization, its culture and people. It is a great tool for manifesting culture and values. It can be anything, from the art that hangs on the walls, to the food that is served, or the rules for the space, like allowing employees to invite friends to hang out.
"Nice colleagues and good atmosphere" is the number one element that newly graduated Swedes actively look for when choosing an employer. (Academic work, 2018, Young Professional Attraction Index)

71% want their co-workers to be their second family. (Business Insider/PGI, "Millenials want to be connected to their co-workers")

88% of Millennials want a fun and social work environment.

84% of leaders see culture as critically important to business success. (PwC, 2017, Human value in a digital age)
As our lives become longer, we will work longer. This means that in the near future, we will both demand and be forced, to constantly develop our skills.

The days when a career followed a straight line are over. We need to have the motivation to continuously learn, or we will become obsolete. People will increasingly want and need to develop horizontally. That's why we need employers that inspire, support and challenge us on that journey.

**Lifelong learning is not a straight line**

MACRO TRENDS:
- Automation
- Emotional intelligence
- Personalization
- Demographic shifts

EMOTIONAL DRIVERS:
- Succeed in life
- Confidence in the future
"My students think of their future path in a whole new way. They are much more open to a career consisting of shifts, with many ups and downs. They simply find energy and inspiration from the freedom of choice.”

EXPERT
Assistant Professor Economics, Multi-generational workforce, Finland

"The illiterate of tomorrow will be people that don’t have the ability to relearn and adapt to rapid changes.”

EXPERT
CEO of think-tank, Future of work, Sweden

“If your employer doesn’t have a clear plan for how to support your growth and continuous development, you’ll leave after 2-3 years.”

TALENT
Man, 45 years Lithuania
WHAT DOES IT MEAN TO PEOPLE?

Horizontal ways of learning
People are increasingly interested in broadening their horizon by switching between different roles, projects and colleagues. They probably have a clear idea of how they want to develop, but are looking for guidance on their career path.

Fear of being outdated
If people don’t feel they are growing, they will fear their knowledge will become outdated. It is key for talented people to nurse their interests, passions and talents and they expect their employer to make sure they have the resources and opportunities to do so.

Skills for the long run
Some skills are considered more important and future-proofed than others. People want to focus on emotional and adaptive skills such as life management, psychology, interpersonal communication and rhetoric. These skills are less likely to become obsolete or irrelevant, no matter with what or where people work.
WHAT DOES IT MEAN TO EMPLOYERS?

Personalized growth plans
People want their employer to be a provider of opportunities. Personalized growth plans, as well as structures and ways of working that support personalized growth, are required. The focus should be on each individual’s needs, so that the employee can grow professionally and personally in a way that suits them.

Beyond technical skills
Many skills will be made redundant by technology. Employers have a responsibility to nurture and train employees beyond short-lived technical skills. For example, agility, adaptability, creativity and communication will be vital human skills in an increasingly automated world.

Technology to upgrade training
Virtual and mixed realities will increasingly be used for training employees. These technologies have the ability to improve engagement and retention, making it very easy and intuitive to learn, in a scalable and cost-efficient way.
LIMITLESS CAREER IN NUMBERS

74% of employees are ready to learn new skills or completely retrain in order to remain employable in the future. (PwC, 2018, Workforce of the future)

15-20 is described as the "new normal" number of positions that people will have throughout their careers in the future. (McKinsey, 2017, Winning hearts and minds in the 21st century)

37% of employees are worried about automation putting jobs at risk. (PwC, 2018, Workforce of the future)
Continuous learning will soon be considered a critical factor to stay relevant. Therefore, we need a new approach to learning - not just taking a course now and then, but learning and applying our knowledge at the same time.

We want to face new challenges. Motivation comes from a feeling of individual achievement when solving them. Our employer should provide us with the resources we need to create better solutions, for customers and for society.

Learning by solving challenges makes us push our limits. We gain a sense of meaning, while building team spirit.

**MACRO TRENDS:**
Automation
Emotional intelligence
Experience society
Access economy

**EMOTIONAL DRIVERS:**
Succeed in life
Sense of thrill
Each day at work should feel like getting a customized master class. But I find that most companies fall back on more traditional development practices, such as giving formal reviews or sending employees on a course now and then.

“Each day at work should feel like getting a customized master class. But I find that most companies fall back on more traditional development practices, such as giving formal reviews or sending employees on a course now and then.”

EXPERT
Assistant Professor Economics, Multi-generational workforce, Finland

People get bored and move on to new challenges if they don't feel that they get enough intellectual stimulation at work.”

“People get bored and move on to new challenges if they don't feel that they get enough intellectual stimulation at work.”

EXPERT
Speaker, author & advisor, Motivation & Meaningfulness, Sweden

“When my team solves complex challenges, I learn so much. And it feels amazing to achieve things together!”

“When my team solves complex challenges, I learn so much. And it feels amazing to achieve things together!”

TALENT
Man, 33 years
Estonia
WHAT DOES IT MEAN TO PEOPLE?

Dare to fail
When trying to solve new or complex challenges, the risk of failure is high. And most people find failing difficult to handle. People need to feel safe and supported to experiment and come up with ground-breaking ideas. In a culture that accepts and celebrates failure as much as success, employees will dare to experiment and explore the unknown.

Bet on the “winning horse”
People want to be part of creating a success story. They want to be on the winning team, and bet on the winning horse. The company culture should be open, daring and brave.

Safe collaboration and close teams
It is easier to win and fail together. Employees need the right conditions and resources to feel safe and motivated to learn from other team members - to share experiences and ideas, and ultimately build on each other’s capabilities.
WHAT DOES IT MEAN TO EMPLOYERS?

Celebrate failure
Failures are an inevitable part of innovation, but celebrating failure does not come naturally to people or organizations. It requires an organization, and especially its leaders, to reposition failure as an opportunity for important learnings, growth and development, rather than a setback.

Organize for new thinking
Innovative companies are increasingly structured in small, agile and cross-functional teams, that combine all relevant types of expertise, to learn and develop together. To make this work, it is crucial that teams are empowered to make decisions and dedicate time to working together.

Train skills for collaboration
A more flexible, project-based work model means that people will change teams more frequently, and competence will not be enough to establish trust within the teams. People will also need to learn soft skills (such as mindful listening and compassion).
LEARNING BY WORKING IN NUMBERS

8HRS is the number of hours Google employees spend per week working on their own creative side projects. (Mashable, 2018, “How the 20% time rule led to Google’s most innovative products”)

#1 The opportunity to learn and progress was cited by Millennials when asked which benefit they would most value from an employer. (PwC, 2018, Millennials at work)

74% of employees believe it’s their own responsibility to update their skills rather than relying on any employer. (PwC, 2018, Workforce of the future)
We've had it with micromanagement, office hours and people telling us what to do. Our employers should trust that we’ll get the job done, in the way that suits us best.

Our need for freedom and autonomy in deciding when, where, how and what we work with is becoming increasingly important.

Therefore, we expect our employer to provide us with the perks of being self-employed, combined with the stability of full-time employment. Otherwise, we always have the option to live our passion to the fullest and go "gig".

This also means employers will need to be better at collaborating with freelancers on projects.
In the future we’ll see more "ubers" for advanced professions, a huge talent pool with a broad range of competences.”

Being micromanaged at work makes me PANIC!

EXPERT
Foresight Expert within tech and future of work, Estonia

TALENT
Man, 33 years
Estonia
WHAT DOES IT MEAN TO PEOPLE?

New expectations on autonomy
The feeling of freedom at work is important. This means that people do not think it is enough to be able to decide when or where they work, but also how and what they work with. An employer that does not micromanage people’s work is both satisfying, and proves their trust in employees.

Build our personal brands
People are increasingly focusing on building their personal brands, to stand out from the crowd. The focus is on “promoting” me and my “portfolio” of many different capabilities. It is less about having a career and more about being a character.

Option to go “gig”
The gig economy may still represent a small portion of workers, but the pace of growth is high. It will become more common to work as a “gigger”, including higher educated people. What drives people is the opportunity to work with passion and on their own terms. However, the downside of going gig is the loneliness and uncertainty of where such a career leads.
WHAT DOES IT MEAN TO EMPLOYERS?

More flexible contracts
Various forms of interim and short employment contracts are growing in popularity; some of this is a result of people's need for more flexibility. Employers can benefit by combining flexibility (e.g. titles, tasks, teams), with stability (e.g. compensation, location, term) in contracts.

Ensure freedom in career path
Employees are increasingly focused on their own growth and brand, in order to build their portfolio. Therefore, organizations must make sure that people can continue to grow in the direction they want. This means paying attention and ensuring an employee can take the next step in their development, when they feel ready.

A culture that embraces gig-workers
In an era where companies source agile talent - gig-workers - old notions about loyalty and belonging will die. Approaching employees based on whether they are "giggers or full-timers" will harm the organization's culture. Therefore, new ways will have to be developed to include and engage all employees—regardless of whether they’re permanent or gig workers.
BE MY OWN BOSS IN NUMBERS

79% of U.S. Millennials said they would like to be their own boss in the future (LSN global, 2014, "Change among US").

60% of employees think ‘few people will have stable, long-term employment in the future’. (PwC, 2018, Workforce of the future)

+30-40% That’s how much more a full-time employee costs compared to a gigger. (McKinsey, “Independent work: choice, necessity and the gig economy”)
While flexibility is a hot topic, there are downsides to unlimited autonomy and freedom. Flexibility demands a lot from us as individuals. We need to be on top of our own time and get the job done.

While it’s positive to be able to work from home, it may not be positive to never be able to shut work off. When is it okay, for example, to email a colleague and through which channels?

Will it be more common in the future to have fixed office hours in the morning and flex hours in the afternoon? Will it be forbidden to work during the holidays? Perhaps emails sent during that time will be erased!

What’s clear is that we need to learn how to handle the flexibility that is here to stay.

**MACRO TRENDS:**
- Holistic health
- Networked society
- Individualization

**EMOTIONAL DRIVERS:**
- Sense of freedom
- Stand of wellbeing
“The problem with flexibility is not that people will work too little, it’s that they will not know when to stop working.”

“When people stop coming to the office, we must ask ourselves: should we offer something else? Because no matter what, physical contact with colleagues will always be important to stay motivated.”

“At the office you have your defined working hours. But when working from home there is no natural endpoint.”

**EXPERT**
Foresight specialist, Future of work, Finland

**EXPERT**
Speaker, author & advisor, Motivation & Meaningfulness, Sweden

**TALENT**
Woman, 25 years
Estonia
WHAT DOES IT MEAN TO PEOPLE?

A safe harbor
Some people perceive the world as becoming more and more unsafe and uncertain. Unlimited amounts of flexibility and freedom at work can cause anxiety. An employer should be the safe harbor in that world, guaranteeing long-term stability and security through contracts and benefits, while also being a caring partner.

Rules for freedom
Too much flexibility can be confusing, even to those who appreciate it. To manage all this freedom, while still being efficient and focused, people will need clearer guidelines, routines and structures - for example, when it comes to communication and reporting.

Places to recharge
With more pressure and busier lifestyles, the need to recharge becomes more important. But as the physical and psychological separation between home and work blurs, people need new places where they can refresh and relax. For example, "recharge rooms" where employees can take a few minutes of downtime to zone out, relax, stretch, nap, or even meditate, will be more common.
WHAT DOES IT MEAN TO EMPLOYERS?

From office hours to contact hours
The old ways of regular office hours won’t come back anytime soon, so clear policies are needed regarding when employees are allowed to contact each other. This will help people live a more balanced life, motivate them to spend more time face-to-face, and take away the unnecessary stress of always being “on duty”.

Reward balance
Promoting work-life balance is key to retaining talent and ensuring their long-term productivity. In the future, company health programs will focus more on preventing work-related diseases, rather than treating them. Leaders should inspire and reward a healthy, balanced lifestyle.

Reimagine wellness initiatives
A company’s health and wellness offering is becoming a key factor when talent are choosing one job over another. This offers a great opportunity to companies to stand out from the crowd, by creating new types of wellbeing programs.
FLEXIBILITY BACKLASH IN NUMBERS

29% of employees say that their boss expects them to work on vacation (Forbes/Comparably, 2018, “Best work-life balance”)

42% of regular at-home workers said they suffered from insomnia compared to only 29% of their colleagues. (Medical Express/ United Nations International Labour Organization, 2017, “Study links working remotely to more stress, insomnia”)

20B€ That’s the yearly cost for burnout in the EU. (Europe PMC, 2018, “Intervention for Physician Burnout: A Systematic Review”)
MACRO TRENDS AND EMOTIONAL DRIVERS
Internet of things, artificial intelligence, advanced robotics, an automated workforce… What was seen not long ago as sci-fi is becoming reality, and it will disrupt the way we live and work. This revolution has the power to improve people’s lives, raise productivity, living standards and average life span. People might finally have more time to focus on personal fulfillment and wellbeing. But as many of the things we used to do become automated, the number of jobs available might dramatically decrease. If society does not adapt quickly enough, a larger group of people might be left outside the labor market, creating a more polarized world.

MACRO TRENDS:

AUTOMATION
EMOTIONAL INTELLIGENCE
SEAMLESS EXPERIENCES
TECH REVOLUTION

Automation, AI and machine learning will affect every level of business and its people. Many jobs face an uncertain future and might be automated sooner than we would like to believe. While administrative and repetitive tasks are likely to disappear soon, there will be greater demand for those working in nursing, fine arts and scientific fields. Beyond dystopian warnings, automation could create a world where human abilities are amplified. Machines will help humans process, analyze, and evaluate the abundance of data we are creating, allowing people to spend more time engaged in high level thinking and decision-making.

Along with the rapid pace of technological development, there is a growing realization that humans cannot compete with machines when it comes to intelligence. But instead of fearing that we will gradually become obsolete or lose our independence as a result of this, we have to ask ourselves: what does it mean to be human in a digital world? How can we complement technology? As AI and robots take over more manual work, emotional intelligence and interpersonal skills like creativity, empathy and leadership are becoming more valuable assets. These differentiate humans in the age of machines, at least for a little longer…

People have no patience with bad customer experiences anymore. With technological advancement comes higher expectations on seamlessness in everything we do. But what about the employee experience? Our demands on flexibility and convenience will be just as high when working as when shopping. Because we are people. Just imagine what seamlessness will mean when driverless cars can offer new areas for productivity? As we head towards the next decade, employers must invest in experiences that are intuitive, time-saving and offer value, to retain and keep people satisfied.
There is a lot of talk about the aging population – as well as Generation Z, the people coming of age now. Seniors will want to keep their independence for many years after retirement. The future 40-somethings might ditch traditional living arrangements in favor of something more flexible. But beyond that, in the future people's choices will have more to do with lifestyle and culture than with demographics. Technology makes the world feel smaller and brings into question the relevance of country boundaries. Cross-border collaborations and socializing will be the new normal.

MACRO TRENDS:

- DEMOGRAPHIC SHIFTS
- POST - URBANIZATION
- NETWORKED SOCIETY
PEOPLE DYNAMICS

MACRO THEME 2: DEMOGRAPHIC SHIFTS

With a few regional exceptions the world’s population is ageing, putting pressure on business, social institutions and economies. Our longer life span will affect business models, talent ambitions and pension costs. Older workers will need to learn new skills and work for longer and "reskilling" will become the norm. The shortage of human workforce in a number of rapidly growing economies will drive the need for automation and productivity enhancements. Tomorrow’s employers must seek to figure out how to benefit from a workforce that will be more diverse than ever before.

MACRO THEME 2: POST URBANIZATION

Half of the world’s population already lives in cities today. Significant increase in the world’s population will lead to even more people living in cities. By 2030, the UN projects that 4.9 billion people will be urban dwellers and, by 2050, the world’s urban population will have increased by around 72%. Furthermore, many of the largest cities today already have GDPs larger than mid-size countries. In this new world, cities will become important agents for job creation. Simultaneously, we will see a blurring of the lines between city and countryside as more people have the possibility to work remotely and therefore aren’t bound to a physical place.

MACRO THEME 2: NETWORKED SOCIETY

In a society where everything and everyone is connected, the very concept of communication is undergoing a transformation. The independence that the networked society provides, allows people to work whenever and wherever it suits them, regardless of physical location. As people become more interlinked, they will have near constant access to information and communication. The challenge in the future won’t be to find information, but to weed out disinformation and fake news. Ant to find ways to collaborate in a decentralized world.
More people are starting to ask themselves how to change their behavior to promote a more sustainable future. Environmentally of course, but also socially, to promote wellbeing and life balance in society. The digital revolution promised to save us time, but instead we seem busier than ever. Stress and other anxieties are becoming more of a concern for people. Status symbols are shifting towards having more time and enjoying fuller experiences, making the “always busy” mindset outdated. Today, people have an increasing hunger to live life with more purpose, happiness and fun.

MACRO TRENDS:

- HOLISTIC HEALTH
- CIRCULAR ECONOMY
- PURPOSEFUL ORGANIZATIONS
Since we began living more sedentary lives, we have been focused on how our behavior affects our health. What is changing now is that people are focused not only on physical, but also mental health, and how this has an impact on the community as a whole. Wellness is not only connected to exercise and nutrition anymore, but also positive thinking, mindfulness, relaxation and self-care. It will become crucial for companies to actively promote a healthy, mindful and balanced approach to both work and life, to support happy, secure and stress-free employees.

If we want humanity to survive on this planet, people, organizations and societies need to apply a more circular thinking. Circular economy is about capturing value and increasing profitability while reducing dependence on natural resources. The system should be restorative and regenerative by design. One way for businesses to broaden their thinking around sustainability is to use the creative thinking of their employees. Letting people engage in topics like “new creative ways to eliminate waste”, may even increase profits and the value of the company.

Whether it’s about doing social good or building the next Facebook, the desire to make a meaningful contribution is affecting career decisions. Working in large organizations is increasingly associated with a loss of meaning, while working independently is seen as a way of finding fulfillment in one’s work. This has several impacts on how to manage the new workforce. Companies must develop a clear purpose that is trustworthy and that explains how their employees are making a difference to people and society. In the future, solving real problems is what will give employees a sense of meaning.
Status has shifted from what we own to what we have experienced. As we approach a new decade, the yearning for memorable experiences will become even stronger. It affects everything in human behavior, be it convenience-seeking in shopping, thrill-seeking in entertainment, or purpose-fulfillment at work. Consequently, employers need to meet people’s high expectations that work will not only contribute a paycheck, but also a meaningful experience.
Material abundance means that many traditional status symbols have lost their power. Instead we see a rise in expectations to collect rare and surprising experiences. Product and choice-saturated consumers will increasingly achieve their status fix from the stories they can tell. This is affecting our motivation to work too. We can see a value shift at work, where creativity, happiness and meaningful experiences are becoming more and more important.

The access economy is about people’s increasing desire to free themselves from ties of ownership. Ownerless access offers the ability to try multiple products, freedom from maintenance and lower upfront costs, yet provides the same experience at the moment of use. While physical assets require commitment and ongoing costs, access satisfies the desire for flexibility, convenience and choice. People might join the access economy because of convenience, but many seem to stay for the community that this new behavior creates.

People are getting used to products and services being customized to their individual needs. The abundance of data, combined with more sophisticated ways of analyzing it, will lead to the next level of personalization. And it seems like our desire for better and smoother experiences makes us overcome our safety and privacy concerns. The increased amount of real-time data and technologies, such as facial recognition, will enable employers to create truly seamless and personalized employee experiences.
Improved standards of living around the world over the last century have brought greater welfare and better education to the masses. As we steadily move up the hierarchy of needs, more people than ever have time to focus on more existential questions around self-actualization and finding their true selves. Old beliefs regarding everything from religion to the definition of family are being challenged by new norms. Technology has also spurred new behaviors in the way people make and maintain relationships, enabling individuals to find other like-minded and emerging ‘value-driven’ tribes as a result.

MACRO TRENDS:

NEW NORMAL

INDIVIDUALIZATION

NEW RELIGIONS
The nuclear family, a concept upon which much of 20th-century’s cultural, political and economical life was centered, has taken a step back. New living constellations such as same-sex relationships, cross-generational families, single living, non-marriage, extended families and co-living with friends are becoming more common. The evolution of the family is being powered by the increasing influence of technology. Widespread connectivity helps people to find and form strong relationships with others, all over the world.

Our society is becoming more individualistic, which means that people put more interest in their own needs rather than the needs of the group. This leads to a more diverse society, where people want to encourage their unique identity. Historically, belonging to a group was seen as the main marker of identity, like gender or race. More and more people are beginning to challenge these rigid classifications, replacing them with visions of identity as something more personal and nuanced. They envision a future where identity is no longer reduced to skin color or gender. As people continue to question the confines of identity, they will also search for employers who share their vision.

People feel insecure about the future and what it might bring in terms of wealth, peace and stability. A more polarized society with larger gaps between the richest and the poorest, more extreme parties gaining power in parliaments, and the fear of the consequences of global warming, create this anxiety. It is no secret that religion is losing relevance in western societies. Nevertheless, no matter how progressive the world is becoming, humans still have a need for purpose and spirituality. As traditional religions lose relevance we look for new sources of meaning and guidance, be it humanism, feminism, nationalism, or even dataism and super intelligence.
**EMOTIONAL DRIVERS HELP US UNDERSTAND PEOPLE’S MOTIVATION TO ADAPT TO NEW TRENDS**

<table>
<thead>
<tr>
<th>Emotional Driver</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sense of Purpose</td>
<td>To feel meaningfulness in life, and to have purpose connected to actions.</td>
</tr>
<tr>
<td>Sense of Belonging</td>
<td>Have a connection with people and to feel part of a group.</td>
</tr>
<tr>
<td>Sense of Security</td>
<td>To feel safe and in control, without having to worry about tomorrow.</td>
</tr>
<tr>
<td>Be the Person I Want to Be</td>
<td>Fulfill a desire for ongoing self-improvement; live up to the ideal self-image.</td>
</tr>
<tr>
<td>Succeed in Life</td>
<td>To feel successful, a worth that goes beyond financial or socio-economic measures.</td>
</tr>
<tr>
<td>Confidence in Future</td>
<td>Perceive the future as better than the past; have a positive picture of what’s to come.</td>
</tr>
<tr>
<td>Sense of Thrill</td>
<td>Experience pleasure and excitement; participate in exciting and fun events.</td>
</tr>
<tr>
<td>Stand Out from the Crowd</td>
<td>Project a unique social identity; to be seen as special.</td>
</tr>
<tr>
<td>Sense of Wellbeing</td>
<td>Feel healthy and in balance; seek a stress-free state without conflicts.</td>
</tr>
<tr>
<td>Sense of Freedom</td>
<td>Act independently, without obligations or restrictions.</td>
</tr>
</tbody>
</table>

ABOUT THE RESEARCH
FUTURE OF WORK

METHODOLOGY

Our approach to uncover trends is to combine external thinking and quantitative data on the topic, with fresh qualitative research, with talents and experts. The report has been developed in collaboration with PwC Experience Center Stockholm during 2019.

1. FOCUS GROUPS WITH TALENTS

24 focus groups were carried out in 6 markets (Sweden, Finland, Norway, Denmark, Estonia and Lithuania) with a total of 167 respondents. Professions represented spanned from data scientists and software developers to business developers and UX designers, with 5 to 20 years of experience.

2. INTERVIEWS WITH EXPERTS

To gain additional perspectives on what the future might carry, we conducted 12 interviews with experts. The mix of people included researchers, business professionals, lobbyists and politicians focused on the future of work.

3. DESK RESEARCH OF EXTERNAL THINKING

To complement the qualitative approach with statistical proof points and a macro perspective, we have gone through more than 100 reports, articles and white papers connected to the subject.
OUR THINKING
We describe the 8 most important people trends that will have the largest impact on how to attract and retain talent in the next 3-5 years. To understand each people trend in depth, we analyzed the macro trends that are driving the change, as well as the underlying emotional drivers that help us understand people’s motivation to adapt to a trend.

MACRO TRENDS
Slow but major changes is society on a global level, that will affect everyone regardless of industry or market.

EMOTIONAL DRIVERS
People’s motivation to adapt to new trends

PEOPLE TRENDS
Trends that will have a big impact on attracting and retaining talent in the next 3-5 years.
FUTURE OF WORK

PEOPLE TRENDS SOURCES:

Academic work, Young Professional Attraction Index, 2018
Cisco, Workforce Experience 2020, Six trends that will dominate the workforce of the future
Deloitte, Health & Wellness Progress Report, 2018
Harvard Business Review, Co-Creating the Employee Experience, 2018
Harvard Business Review, Creating a purpose-driven organization, 2018
Harvard Business Review, Give Your Team the Freedom to Do the Work They Think Matters Most, 2018
Harvard Business Review, Great Employees Want to Learn. Great Managers Know How to Teach, 2018
Harvard Business Review, Employees Work on Multiple Teams, Good Bosses Can Have Ripple Effects, 2018
Harvard Business Review, Managing the high-intensity workplace, 2018
Harvard Business Review, The Virtual Work Skills You Need — Even If You Never Work Remotely, 2018
Harvard Business Review, What Does It Mean to Be an Inclusive Leader?, 2018
Harvard Business Review, Your Corporate Purpose Will Ring Hollow If the Company’s Actions don’t back it Up, 2018
LSN Global, www.lsnglobal.com
McKinsey, Attracting and retaining the right talent, 2018
McKinsey, Culture for a digital age, 2018
McKinsey, Education to Employment: Designing a System that Works, 2017
McKinsey, Ethinking the workplace: Flexibility, fairness, and enlightened automation, 2017
McKinsey, Learning innovation in the digital age, 2017
McKinsey, Putting lifelong learning on the CEO agenda, 2017
McKinsey, Retraining and reskilling workers in the age of automation, 2018
McKinsey, The overlooked essentials of employee well-being, 2018
McKinsey, Wellness at work: The promise and pitfalls, 2017
MIT, Betting on people power, 2016
Pearson, The future of skills employment in 2030, 2017
PwC, Bot.Me: A revolutionary partnership, 2017
PwC, Human value in the digital age, 2017
PwC, Millennials at work, 2017
PwC, The talent challenge: Rebalancing skills for the digital age, 2018
Trend Watching, Ethical Educators (paper), 2018
MACRO TRENDS SOURCES:

Deloitte, Forces of Change, 2017
Deloitte, Health & Wellness Progress Report, 2018
Ericsson, Beyond smartphone shopping – the rise of smart assistants, 2018
Harvard business Review, Co-Creating the Employee Experience, 2018
Harvard Business Review, Your CorporatePurpose Will RingHollow If theCompany’s ActionsDon’t Back It Up, 2018
Harvard business review, Your Flex Work Culture Doesn’t Help Employees If It Hurts Their Careers, 2018
LSN Global, www.lsnglobal.com, collected in 2018
McKinsey, Artificial intelligence the next digital frontier?, 2017
PwC, Bot.me: How artificial intelligence is pushing man and machine closer together, 2017
PwC, Confidence in the future Human and machine collaboration in the audit, 2017
PwC, Innovation for the Earth Harnessing technological breakthroughs for people and the planet, 2017
PwC, Project Blue: demographic change, 2018
PwC, The Long View How will the global economic order change by 2050?, 2017
PwC, The Sharing Economy, 2016
PwC, Tomorrow’s world A revolution begins, 2017
PwC, Workforce of the future. The competing forces shaping 2030, 2018
PwC, Experience is everything: Here’s how to get it right, 2018
United Nations, Women’s empowerment principles, 2018
THANK YOU!

We’re Telia Company, the new generation telco. Our approximately 20,800 talented colleagues serve millions of customers every day in one of the world’s most connected regions. With a strong connectivity base, we’re the hub in the digital ecosystem, empowering people, companies and societies to stay in touch with everything that matters 24/7/365 - on their terms. Headquartered in Stockholm, the heart of innovation and technology, we’re set to change the industry and bring the world even closer for our customers.