



Life and Work Beyond 2020

The changing nature of consumer wellbeing and values as a new world of work is embraced.



AVAYA

New Expectations

This short paper highlights the findings of a global study commissioned by Avaya.

The study surveyed over 10,000 people from 11 countries to discover the impacts of COVID-19 on consumer wellbeing and values. It tells the story of how our sense of wellbeing has changed and how the impact of a pandemic has changed our values, needs and aspirations.

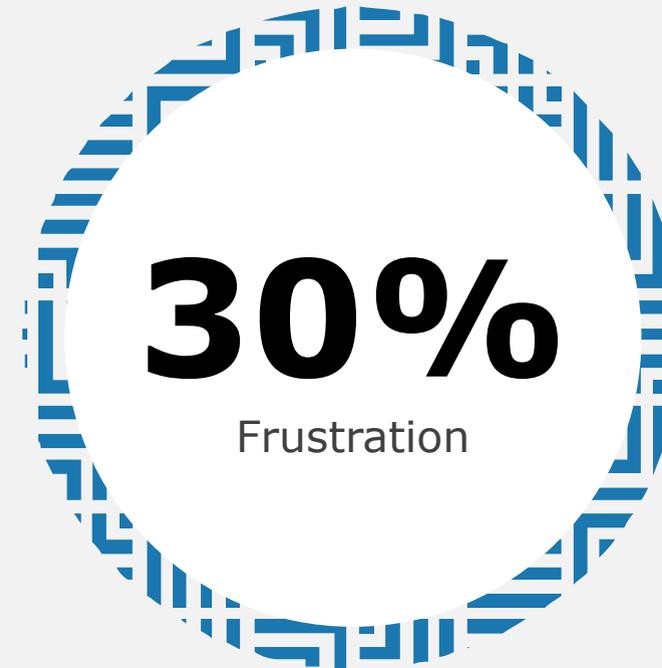
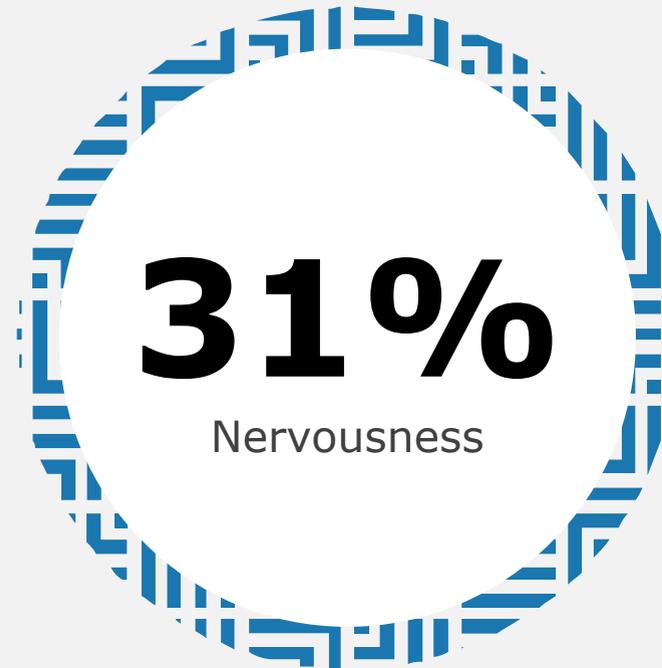
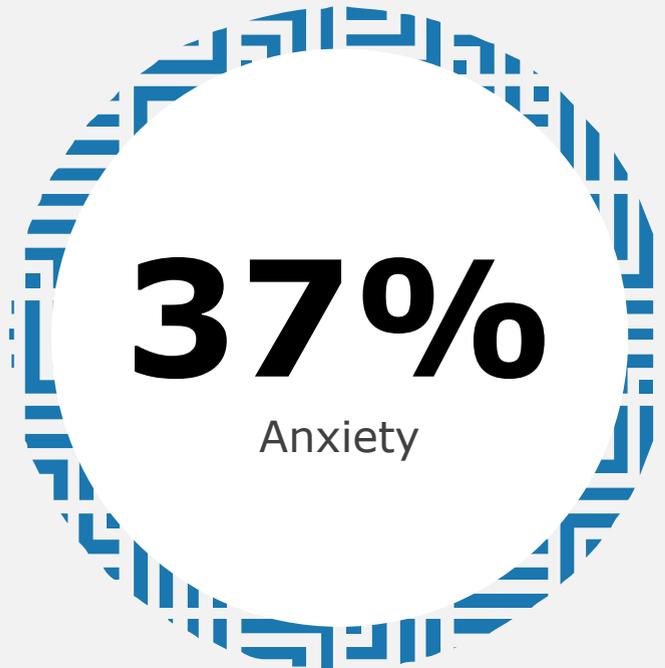
It is a snapshot of human thinking from a historic moment in time: an insight to what is important in the post-COVID world. The findings can also provide a pathway to a different way for corporates and policymakers to think about how they engage with their stakeholders and how businesses can and should interact with their customers.



State Of Mind

Few could reasonably argue that 2020 was a year characterised by positivity.

This study revealed that negative emotions were at the forefront in respondents' minds.



When asked how they feel compared to last year, just 24% reported feeling happy, while 43% said they are less happy than last year.



State Of Mind

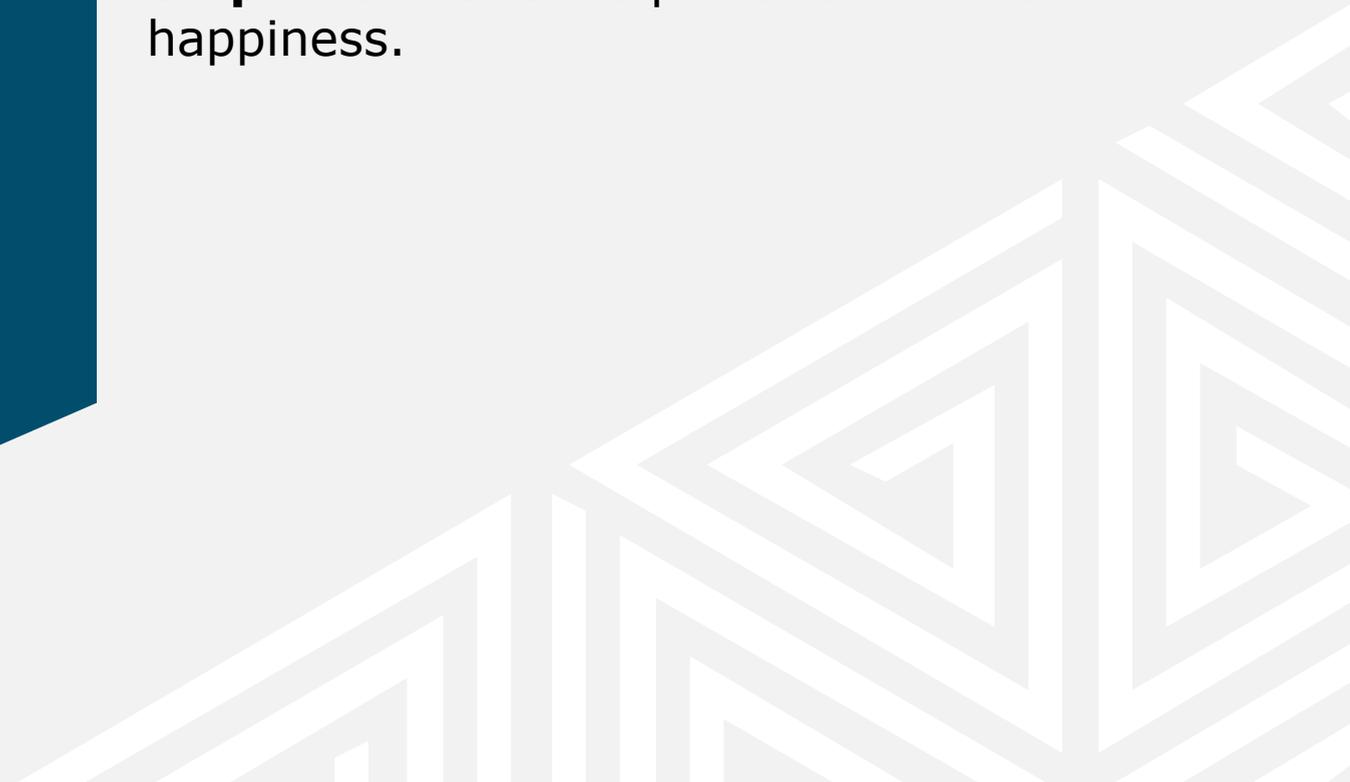
HEALTH AND HAPPINESS

There are multiple factors driving what can be described as a significant shift in how many people think, feel and act towards their employers, brands and their general place in the world. Only slightly over a quarter (27%) of respondents reported no change in their emotional state between 2019 and 2020, while 43% said they were less happy or significantly so.

Trepidation around the COVID-19 pandemic caused the most unhappiness, with 82% of respondents identifying it as their biggest driver of dissatisfaction, while 68% blamed decreased interpersonal interaction. Other factors driving lower happiness rates ranged from apprehension about global issues to worry about family circumstances and personal health. The drivers of happiness, however, can, in some cases, be easily addressed by employers; 62% are happier because they can choose where to work from. Meanwhile, 61% are happier about being healthy, or healthier than they were in the year before.

HAPPIER THAN BEFORE

Some of the findings reflect a very high level of happiness with remote working for several reasons. The attitude of the employer is particularly important: 57% of respondents feel happier because they feel that their boss trusts them to do more work from home, and 56% say they are happier because they have been properly equipped with all the tools and technologies they need to succeed whilst working from home. **Trust, respect and empowerment** are powerful drivers of happiness.



State Of Mind

SOCIAL VALUES

Inspired by the distancing trend of 2020, and with more time for deeper reflection, respondents placed a premium on social values. **Honesty** was the value cited by the most respondents (30%), followed by **respect** (28%). Other values highly rated were **optimism**, courage, the ability to **innovate**, and **endurance**. It should be noted that precisely half of the 10,000 people surveyed feel happier because they have less face-to-face contact with other people. When asked to identify which values had become important to them in 2020, the top answers included good humor, loyalty, compassion, reliability, a spirit of adventure, commitment, service to others and open-mindedness – in addition to others.

PARTNERS AND FAMILIES AT THE HOME OFFICE

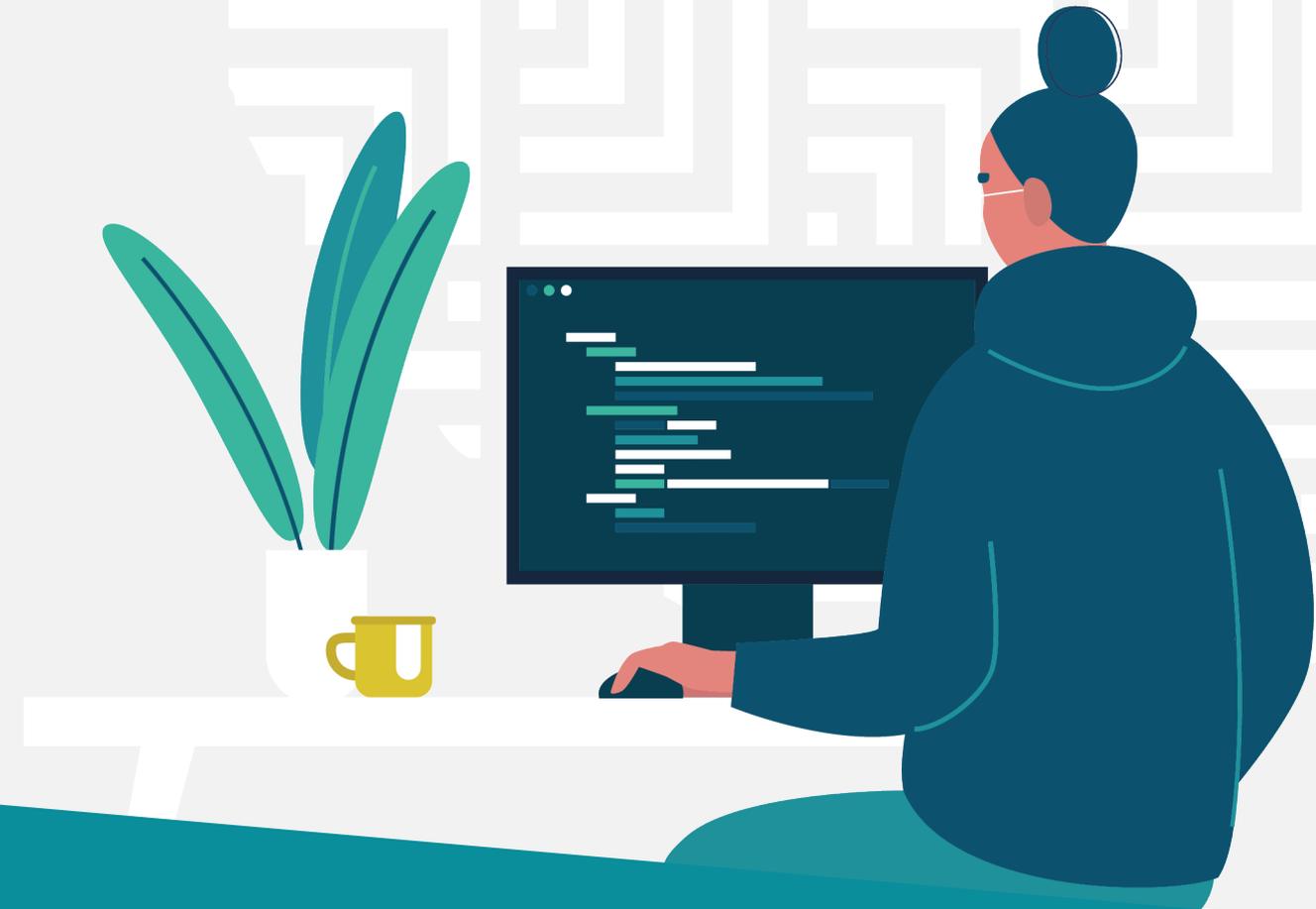
With millions of people being shifted to remote working from home, the kitchen, living room and garden shed have become the new office for a huge portion of the world's workforce. Yet their ongoing presence has a clear impact on those they live with. The good news is that 66% of those who do not work but live with someone who has had to work more from home due to the Covid-19 pandemic, say they have felt happier consequently. Sixty-four per cent say the experience has been better for their family life and/or children. However, for many it has been enormously stressful. Thirty-three per cent of respondents say it has created difficulties for their relationship, 40% say that their home is not suited to working from home, and 62% want things to return to the way they used to be.



More Productive At Home

Those who reported being happier in 2020 than in 2019 identified working from home as a key driver of that happiness. And 52% worry about going back to a fully in-office workday.

The research notes that, to achieve the best results, businesses should take heed of the fact 46% of respondents reported an increase in productivity because they were happier and had developed working practices to suit their circumstances.



“Professional is personal for employers looking to maximise productivity”



Well-Being

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Well-Being

Of the 10,000 individuals surveyed, 58% felt safer taking a domestic holiday rather than travelling abroad – and 51% said they had become more risk-averse 'than ever before'. This reflects an unprecedented level of personal fear amongst the general population.

Loneliness is also a significant factor. Exactly half of respondents said that they feel lonelier when only being able to stay connected with people digitally – including video, phone and social media. If ever there were a litmus test for how important real-world social contract is to the human condition, it was COVID-19.

Our survey also showed anxieties about overuse of social media, with 42% saying they are worried about spending too much time on social media and not enough time reading books and articles.



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Shifting Customer Demands

“A fresh perspective on what constitutes ‘good’ service”



We all want happy customers but the findings from this study show very clearly that the entire construct of the ‘happy customer’ has changed.

It is striking that **71%** of the 10,000 individuals surveyed claim that customer service problems now negatively impact their wellbeing – either to a considerable extent (43%), or a great extent (28%).

Businesses have already begun responding; more than a third (35%) of respondents have noticed a positive shift in the formats and tone of how brands engaged with them. However, the fact that **four-in-ten** say they feel no different about how brands engaged with them underscores the impetus for creating a more caring customer experience.

Shifting Customer Demands

Shifting values are already influencing the way that consumers choose and interact with businesses: Most respondents will choose to engage with organizations and brands that demonstrate the values they hold dear – 33% always, and 36% sometimes.

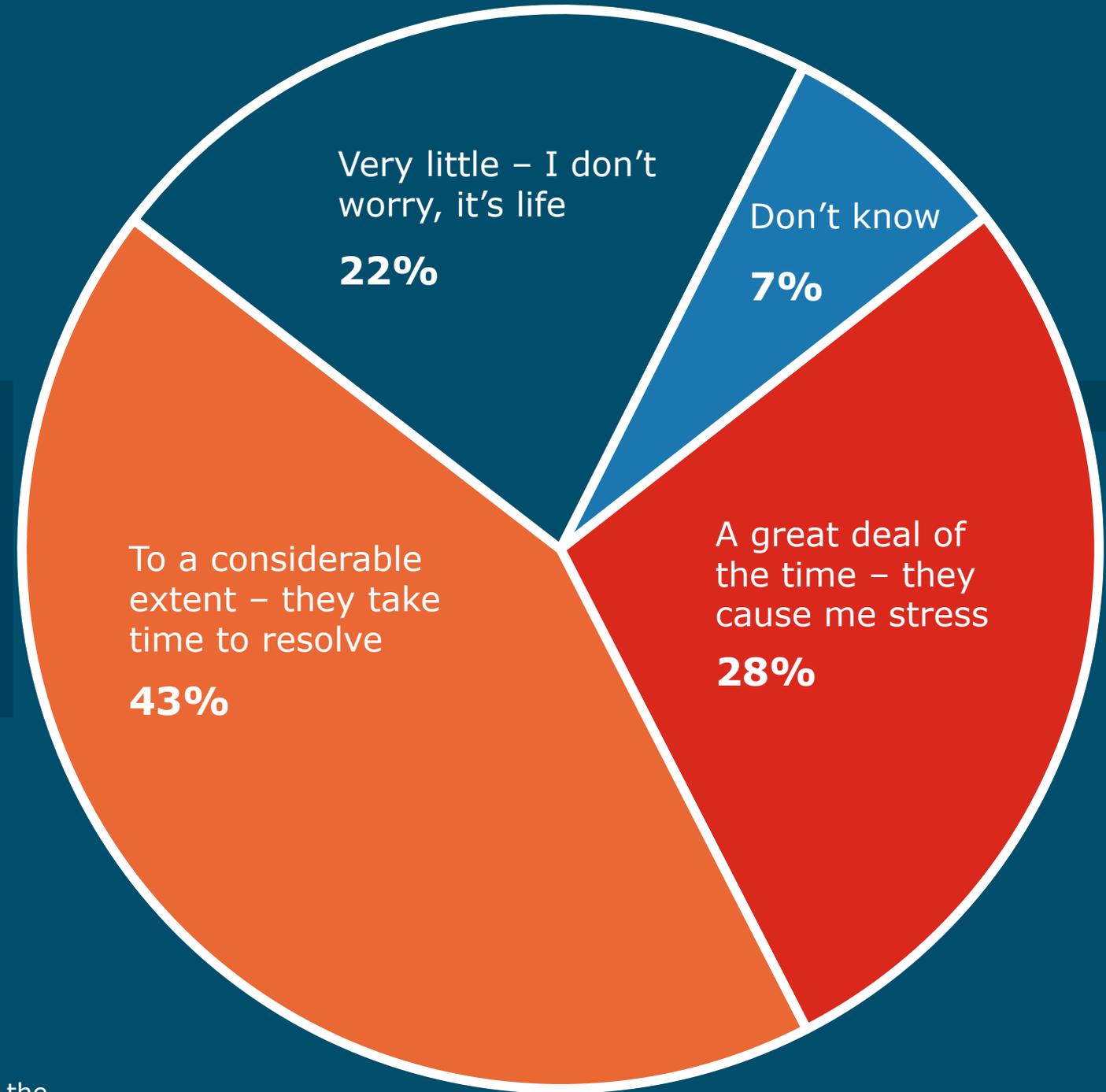
Some brands may still be formulating strategies in response to this; four-in-ten respondents said they feel no different about the way they engaged with brands.

Irrespective of how brands engage with them, with a deeper appreciation of the human connection, several respondents said that, while they **will do more shopping online**, they will be more friendly and understanding with in-store staff and customer service agents.

Indeed, in recognition of the frontline role that contact center workers have played in customer satisfaction, 39% of respondents said they were confident that agents were doing everything in their capacity to address their needs, and 44% are always comfortable with service levels from customer service and sales agents.



To what extent have customer services problems affected your wellbeing and happiness?



The consensus among respondents is that the service they received over the last year has been more empathetic and relevant, with the stand-out sectors being retailers, hospitals, and hotels.

Working To Live

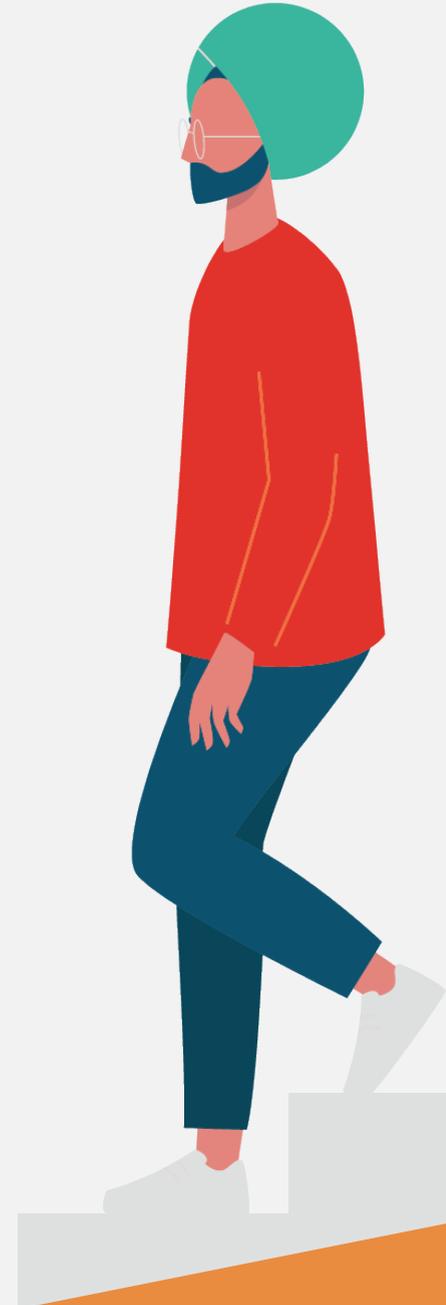
There is a strong shift towards wanting to achieve a greater sense of work-life-balance in the wake of COVID-19, with 37% of respondents **feeling angry** to have to work long hours to pay for childcare rather than spend time with children.

As remote working took center-stage in 2020, 65% of survey respondents said that their employers trusted them to be productive and effective from anywhere. And overall, organizations have managed the shift to working from anywhere well, with 58% of respondents saying they had the necessary tools, access, and information to function effectively from anywhere.

Looking forward, over six in 10 would be eager to carry on as they have this year, claiming they would support government policies that encourage a hybrid work environment. Almost half (46%) of respondents see the 'work from anywhere' model as a viable way of working well into the future.

This positivity is tempered with worry about what a changing work environment can mean for specific roles and individual jobs. While a majority worry about going back to a fully in-office workday, 45% are anxious about automation potentially impacting their roles.

Meanwhile, 54% were satisfied that lockdown and remote working gave them more time to read books and newspapers instead of TV or the radio.

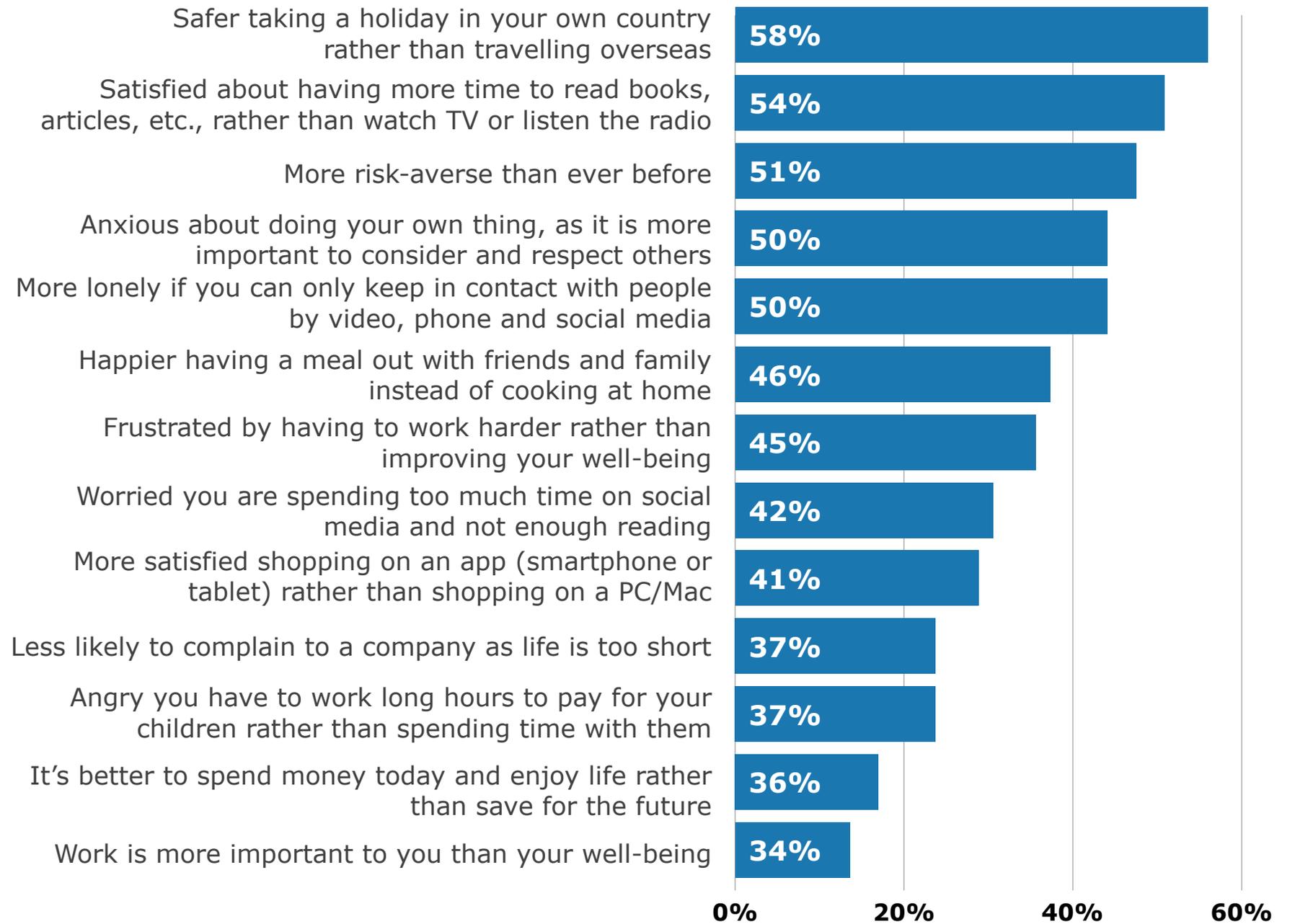


46%

say the 'work from anywhere' model is viable



When thinking about your emotional well-being, which of the following statements would you say are true to you?



Working To Live

Perhaps one of the greatest shifts laid bare in *Life and Work Beyond* is a fear of having to return to working full time in an office (52%).

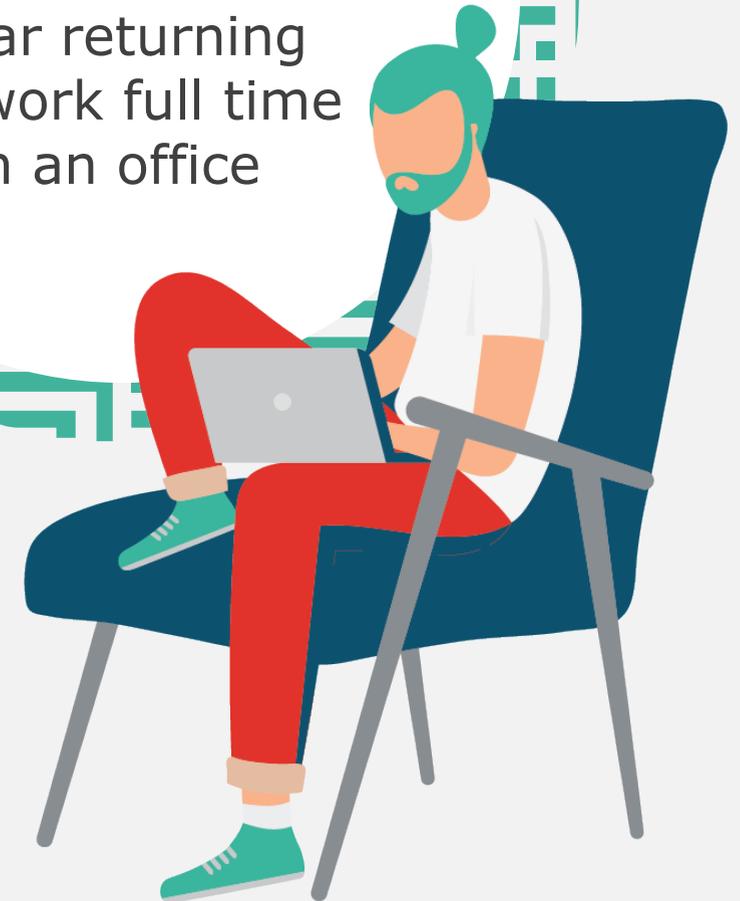
These numbers perhaps reflect a growing sense of unease in the impact of the digital transformation and worry about losing the **freedoms won during the pandemic**. These fundamental questions of who we are and what kind of place we might have in the future world of work are of great worry to many.

The nature of fourth industrial revolution capabilities such as AI and automation also raise concerns about privacy – 43% of respondents say that they are concerned about being monitored by their employers when working from anywhere. Forty-three per cent of respondents also fear being replaced by younger workers, and 42% are worried about having to work from home forever.

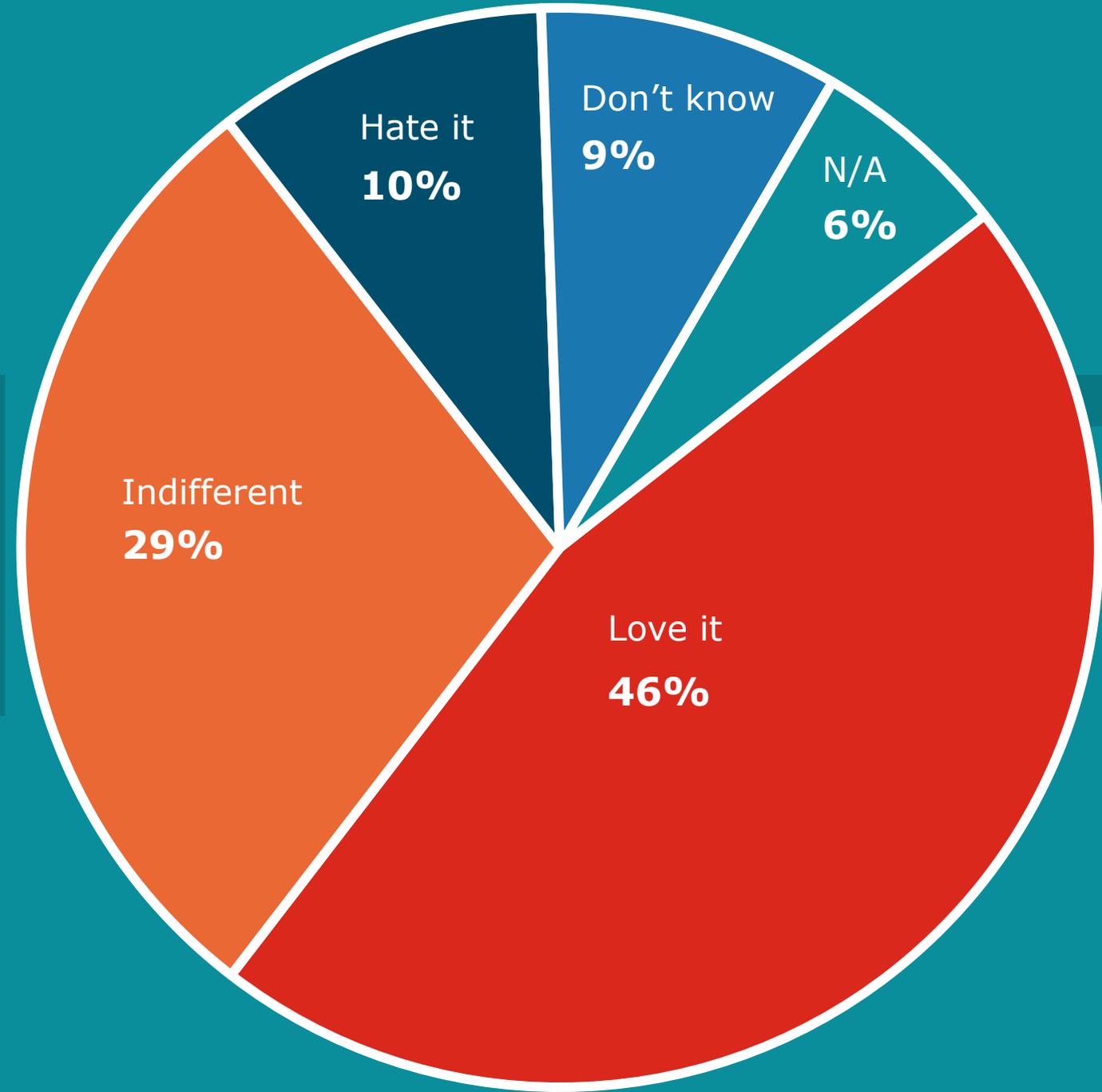
The good news is that almost half (46%) of respondents love the idea of being able to work from 'anywhere' in the foreseeable future: the freedoms delivered as a result of the pandemic have inspired millions of people to imagine a new way of living – both at work and at home.

52%

fear returning
to work full time
in an office



How do you feel about working from anywhere in the foreseeable future?



The Bottom Line

A renewed focus on wellbeing, a drive to inject humanity into the customer experience, and a preference for hybrid working are the three major trends driving life and work beyond 2020.

An emotional shift is impacting consumer relationships with the organizations that serve them, creating an impetus for delivering a more caring customer experience.

Meanwhile, a focus on the employee experience has become paramount; organizations should ensure their workers are equipped and empowered to perform at their best irrespective of where they work from.



Hybrid working – companies will benefit from giving employees the ability to **choose** to work both at home and at the office:

- Free will creates happier employees and better productivity



Connectivity – employees feel empowered when they have the right technologies, meaning they can work with confidence anywhere:

- Well connected, **digitally advanced** mobile working infrastructure creates confident workers



Values matter – consumers are increasingly choosing to buy from companies that share their values:

- Human values of **empathy** and friendliness create brand loyalty and customer satisfaction



Experiences
That Matter

METHODOLOGY

Davies Hickman Partners conducted interviews with 10,000 consumers and workers in Austria, Canada, Egypt, France, Germany, India, Saudi Arabia, Switzerland, the United Arab Emirates, the United Kingdom, and United States.

The research was sponsored by Avaya. A worldwide leader in Contact Center, Unified Communications & Cloud Business Solutions, more information about Avaya can be found at www.avaya.com or by contacting Iman Ghorayeb ighorayeb@avaya.com.

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