

Global Workforce

Hopes & fears survey 2022

Mainland China Report



pwc

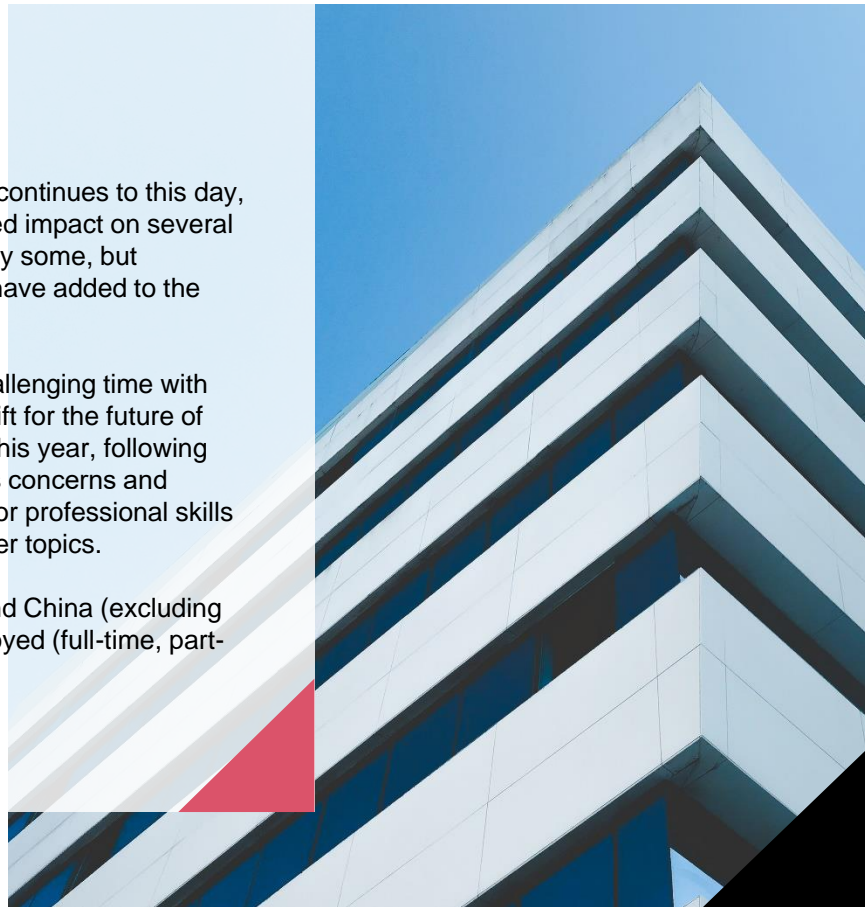


# Survey background

The global outbreak of the COVID-19 pandemic, which began in 2020 and continues to this day, has significantly changed the way people live and work and has had a varied impact on several industries. During this time, many have had to work from home, preferred by some, but unfavoured by others. In addition, mass resignations during the pandemic have added to the complexity and unpredictability of global economic trends.

To understand the feelings and perceptions of the workforce during this challenging time with high levels of volatility, and to gauge the ongoing impact of this complex shift for the future of work and life, we surveyed 52,195 employees in 44 countries and regions this year, following our second study on 'Hopes and Fears' in 2021. This study covers people's concerns and aspirations when choosing a job and employer, their perception and need for professional skills and digitalisation, and workplace trends for the next 12 months, among other topics.

This China report discusses the responses from 3,129 members in Mainland China (excluding Hong Kong SAR and Macau SAR of China), including those who are employed (full-time, part-time or contract/temporary) and temporarily unemployed.



# Key findings



Key findings	Mainland China	Global
1. There is a growing demand for employers to provide <b>remote and hybrid</b> work opportunities	<b>64%</b> have option to choose remote work, of which <b>95%</b> prefer to work mostly or entirely remotely.	<b>54%</b> have option to choose remote work, of which <b>88%</b> prefer to work mostly or entirely remotely.
2. When facing labour or expertise shortage, companies are more likely to <b>solve the problem through internal means</b>	<b>61%</b> of companies address expertise/labour shortages by upskilling their staff, improving technology, supporting staff wellbeing and increasing pay.	<b>55%</b> of companies address expertise/labour shortages by upskilling their staff, improving technology, supporting staff wellbeing and increasing pay.
3. There are concerns about the availability of training and opportunities to apply new skills within the <b>company</b>	<b>49%</b> of Chinese employees are concerned that there are no application scenarios for digital skills in the workplace or that employers are not providing technology-related training opportunities.	<b>40%</b> of global employees are concerned that there are no application scenarios for digital skills in the workplace or that employers are not providing technology-related training opportunities.
4. <b>Social discussions</b> among colleagues can have a <b>positive impact on trust</b> in the workplace	<b>71%</b> discuss current affairs at their workplace on a daily basis.	<b>65%</b> discuss current affairs at their workplace on a daily basis.

# Key findings



Key findings	Mainland China	Global
<b>5. There is a significant employee demand for information transparency in areas such as <b>health and safety and the economic impact of the company</b></b>	<b>89%</b> of employees value transparency in company information regarding employee health and safety and economic impact.	<b>85%</b> of employees value transparency in company information regarding employee health and safety and economic impact.
<b>6. When people choose a job, <b>income</b> is important, but so is <b>the sense of fulfilment and the opportunity to present oneself</b></b>	<b>91%</b> of employees weigh the expected sense of fulfilment and opportunity to present themselves as one of the most important considerations, like income, when choosing a job.	<b>89%</b> of employees weigh the expected sense of fulfilment and opportunity to present themselves as one of the most important considerations, like income, when choosing a job.
<b>7. In the next 12 months, employees are more likely to ask for <b>promotions and raises</b> at their current company and to <b>recommend their company to others</b> than to seek external opportunities</b>	Proportion of Chinese employees likely to... <ul style="list-style-type: none"><li>• Recommend the company to others: <b>81%</b>;</li><li>• Ask for salary increase: <b>86%</b>;</li><li>• Ask for promotion: <b>85%</b>.</li></ul>	Proportion of global employees likely to... <ul style="list-style-type: none"><li>• Recommend the company to others: <b>78%</b>;</li><li>• Ask for salary increase: <b>73%</b>;</li><li>• Ask for promotion: <b>67%</b>.</li></ul>

There is a growing demand for employers to provide remote and hybrid work opportunities.



# Chinese employees have more freedom and stronger preferences when choosing remote or hybrid work than global employees

**64%**

of Chinese employees are able to work remotely

**54%**

of global employees are able to work remotely

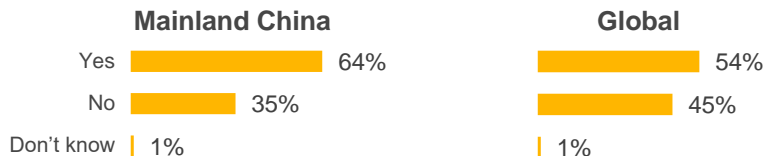
**95%**

( 2021: 56% )  
of Chinese employees prefer a mix of remote and hybrid work.

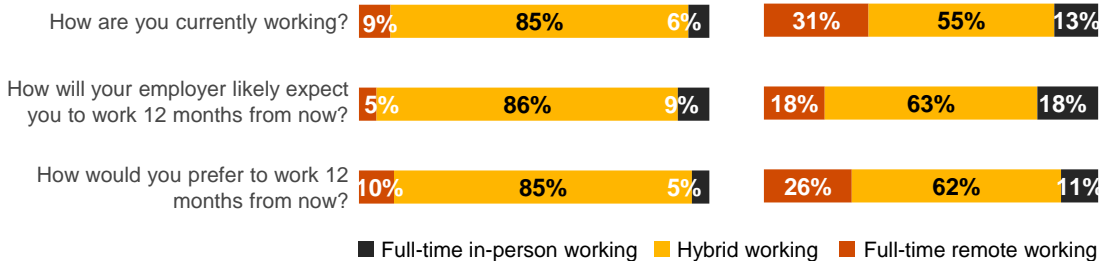
**88%**

( 2021: 72% )  
of global employees prefer a mix of remote and hybrid work.

### Q: Can your job be done remotely/from home?



### Q: Regarding your current job role: (Only asked respondents who answered 'Yes' to the question above)

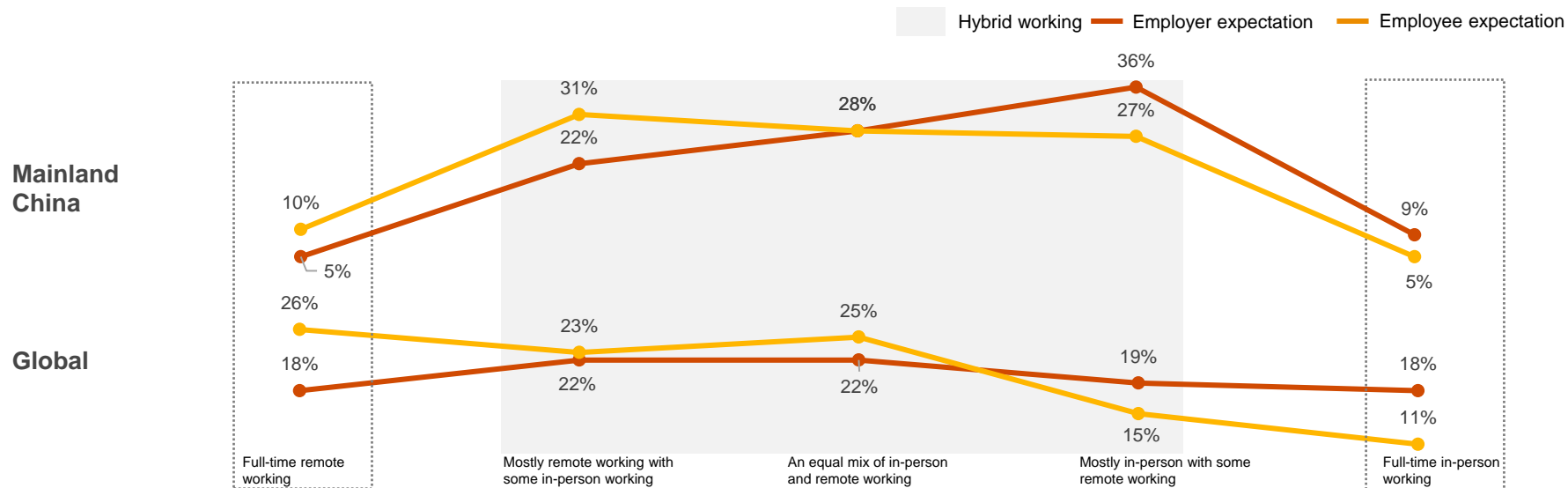


## Remote and hybrid working

In general, employees prefer remote work, but they perceive their employers prefer the opposite; this gap is larger among global employees than Mainland Chinese employees

Q: How will your employer likely expect you to work 12 months from now?

Q: How would you prefer to work 12 months from now?



When facing labour or expertise shortage, companies are more likely to solve the problem through internal means.





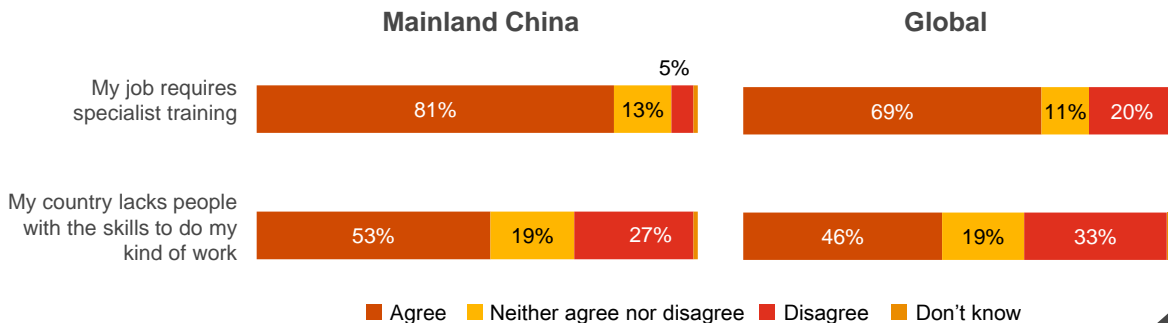
# Mainland China shows a much higher demand for professional skills training than global

Compared to global employees, more Chinese employees indicate a demand for professional training

**81% of Chinese employees** believe they need more professional training to do their job

**69% of global employees** perceive their job needs more professional training

**Q: Regarding your current job role, how accurate are the following statements?**

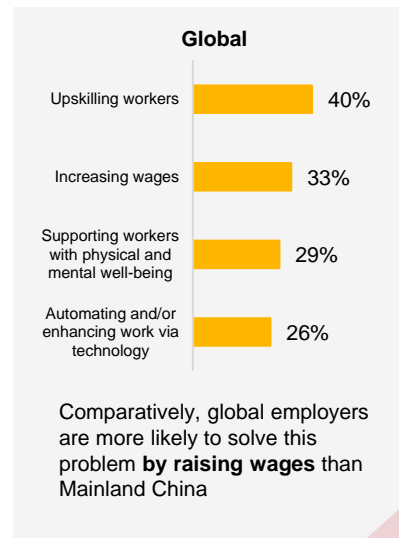
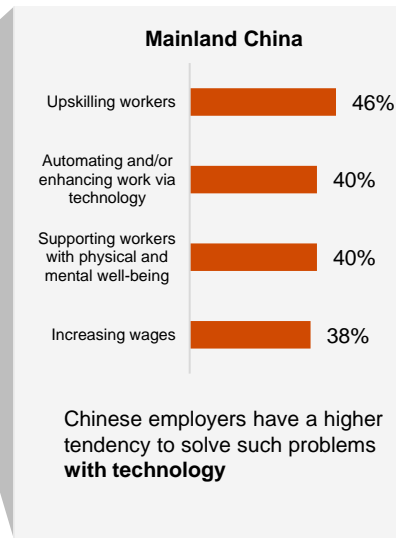
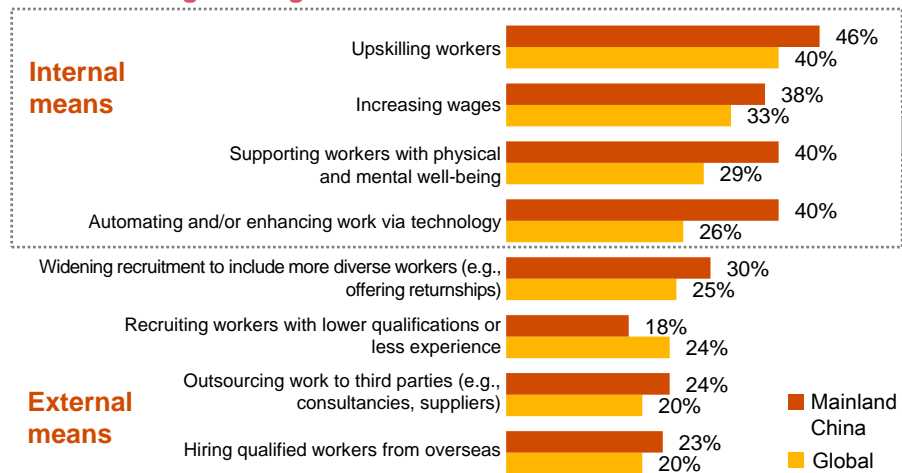


# When facing shortages in expertise or labour, Chinese employers have a higher tendency to solve this problem through technical automation than employers globally

**Q: What, if anything, is your employer doing to address shortages in skills/labour?**

(This question was only asked to respondents who said they agree with the following statement at 'My country lacks people with the skills to do my kind of work'.)

**Both global and Chinese employers prefer to solve the problem of skills / labour shortage through internal means**



There are concerns about the company's availability of training and opportunities to apply new skills.



# Compared to global employees, Chinese employees show greater concern regarding the impact technology has on future work

In terms of the impact of technology on future work, the biggest concerns for both Chinese and global employees are:

- There is no opportunity to work with and learn from colleagues with technical or digital skills
- The company hasn't provided relevant training opportunities

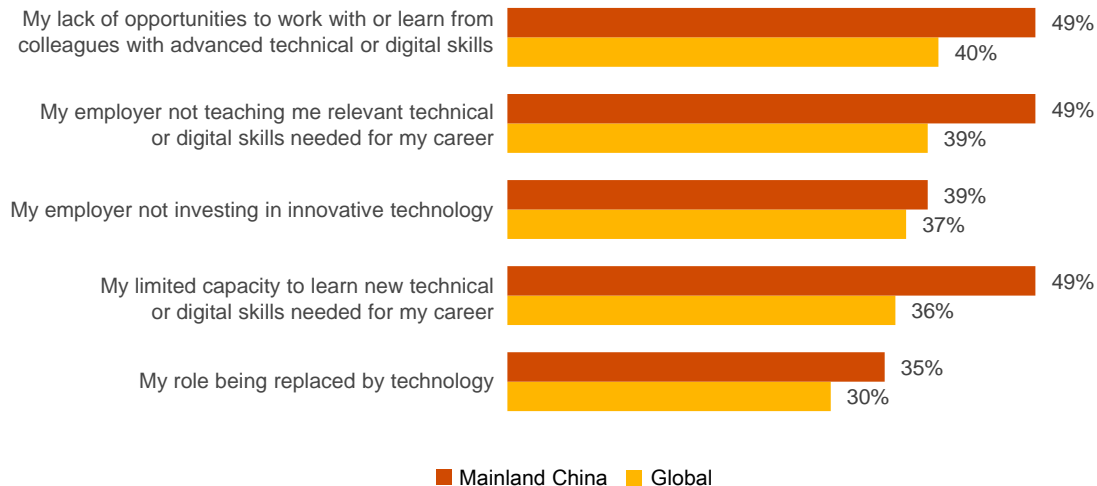
**49%**

of Chinese employees are concerned about it

**40%**

of global employees are concerned about it

**Q: When you think about technology's impact on your job over the next three years, what are you most concerned about?**



Social discussions among colleagues can have a positive impact on trust in the workplace.



## Social discussions in the workplace

Compared to global employees, Chinese employees have more social discussions in the workplace

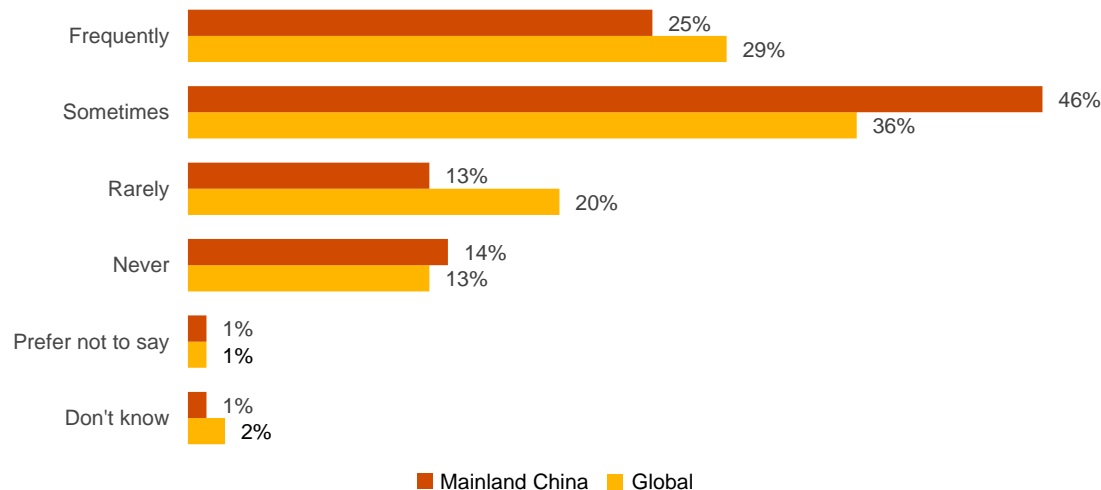
**71%**

of **Chinese employees** reported having discussions on social issues in the workplace

**65%**

of **global employees** reported having discussions on social issues in the workplace

**Q: Over the last year, how often have you been involved in conversations with colleagues about social issues?**

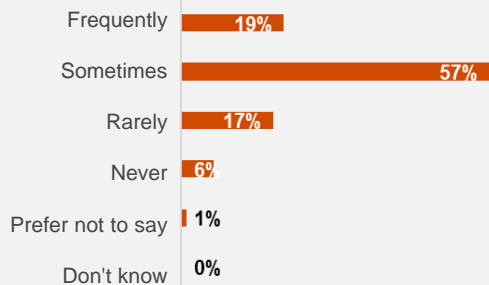


## Social discussions in the workplace

In Mainland China, the frequency of social discussions among employees in the workplace has increased with age

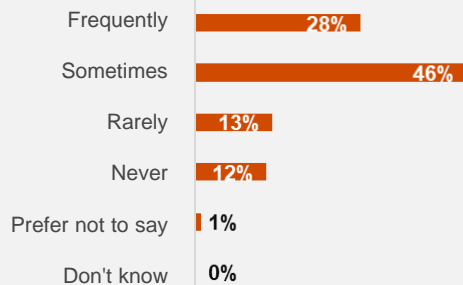
Q: Over the last year, how often have you been involved in conversations with colleagues about social issues?

76%



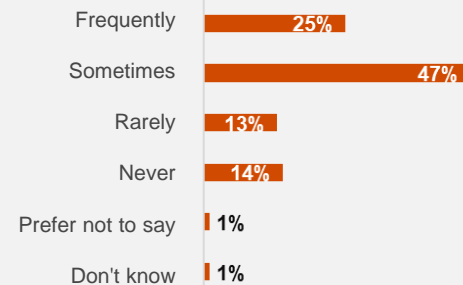
Gen Z (18–25)

74%



Millennial (26–41)

72%



Gen X (42–57)

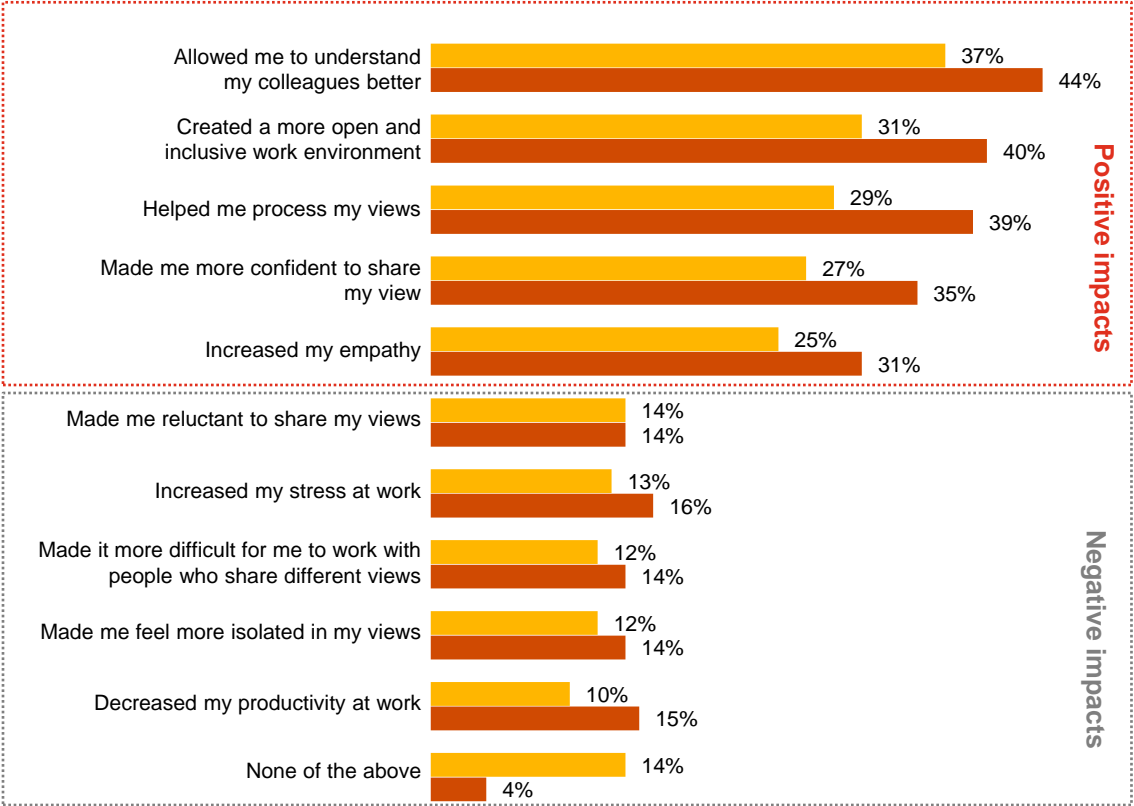
(Note: 76%, 74% & 72% are the sums of 'Frequently' and 'Sometimes')

## Social discussion in the workplace

Employees who have discussed social or current affairs with their colleagues believe that the positive impact it brings to workplace environment are greater than the negative impact.

The positive impacts are more significant in Chinese workplaces than Global.

### Q: What impact, if any, have conversations with colleagues about social issues had on your work environment?

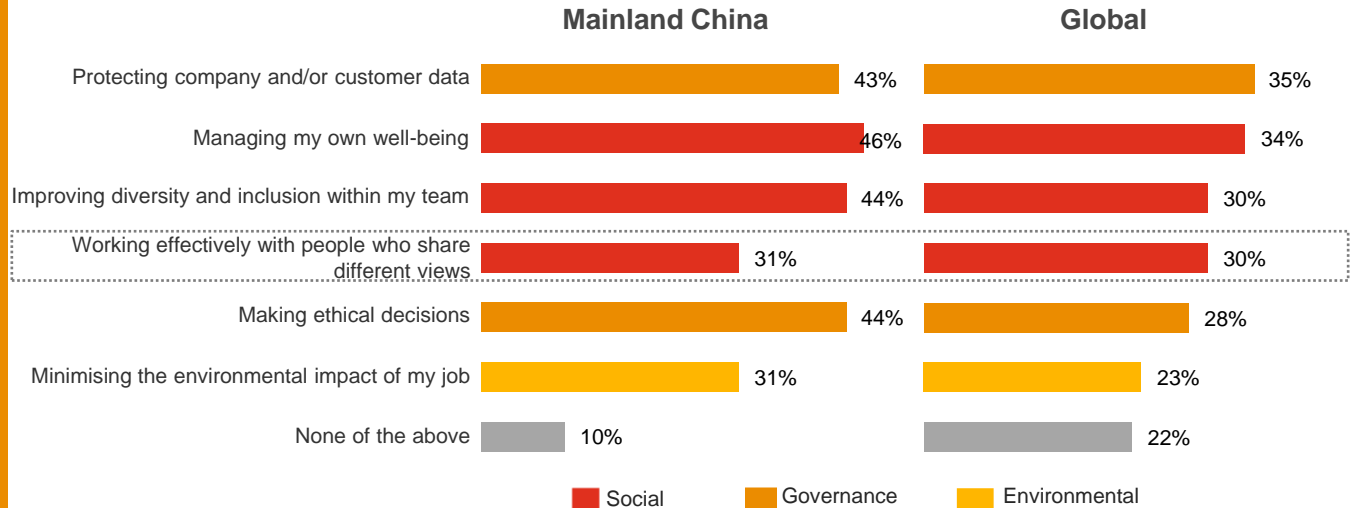




However, employers still have a lot of room to improve in driving effective collaboration between employees with different views

Q: Has your employer provided support and resources to help you with any of the following?

Around **30%**  
of employers provide  
resources and support to  
help people work  
effectively with colleague  
who share different views  
(China: 31% Global: 30%)

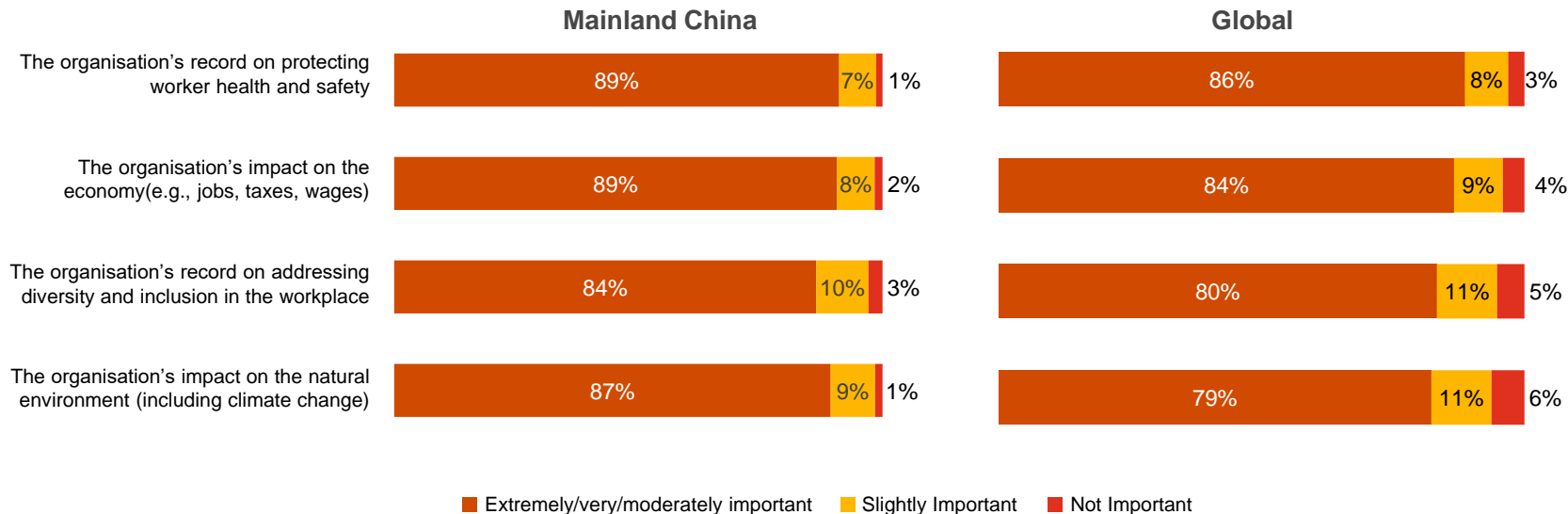


There is significant employee demand for information transparency in areas such as health and safety and the economic impact of the company.



# Employer transparency is valued by most employees, both globally and in Mainland China, with Chinese employees finding it slightly more important than global employees

**Q: How important is it to you that your employer is transparent about each of the following areas?**



# In Mainland China, Millennials and Gen X employees are more concerned about information transparency in all areas

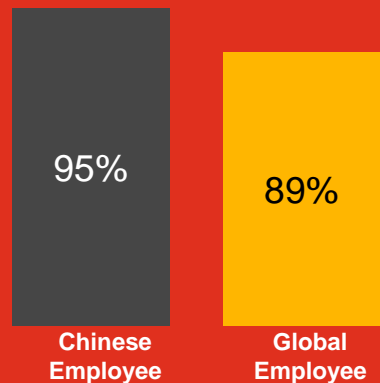
**Q: How important is it to you that your employer is transparent about each of the following areas?**  
 (Showing only 'Extremely important' and 'Very important' responses)

	Mainland China			
	Gen Z (18-25)	Millennial (26-41)	Gen X (42-57)	Baby Boomers (58-76)
The organisation's record on protecting worker health and safety	55%	64%	67%	52%
The organisation's impact on the economy(e.g., jobs, taxes, wages)	54%	63%	63%	51%
The organisation's impact on the natural environment (including climate change)	43%	56%	63%	51%
The organisation's record on addressing diversity and inclusion in the workplace	49%	56%	62%	49%

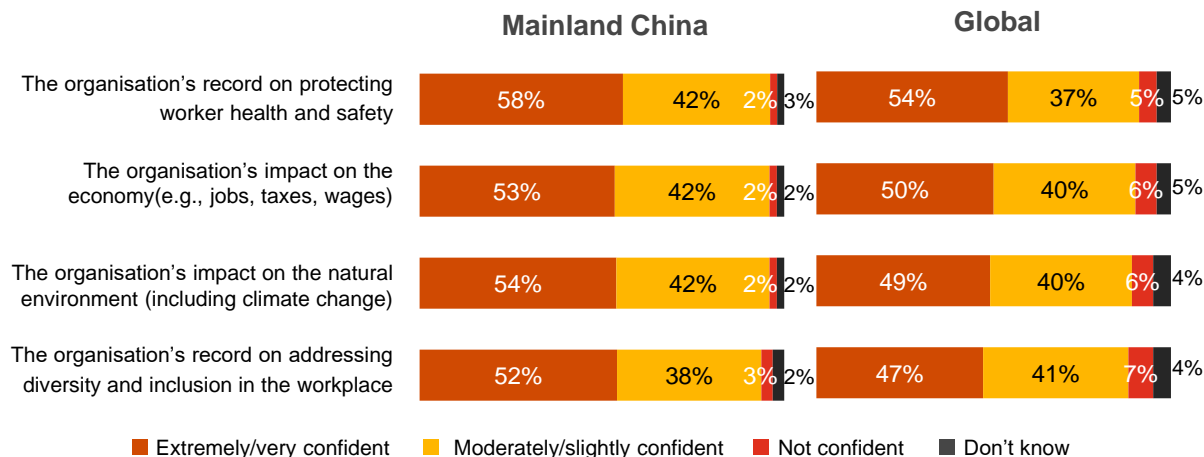
	Global			
	Gen Z (18-25)	Millennial (26-41)	Gen X (42-57)	Baby Boomers (58-76)
The organisation's record on protecting worker health and safety	63%	67%	63%	64%
The organisation's impact on the economy(e.g., jobs, taxes, wages)	60%	64%	57%	54%
The organisation's impact on the natural environment (including climate change)	54%	57%	50%	45%
The organisation's record on addressing diversity and inclusion in the workplace	57%	58%	50%	47%

# Chinese employees tend to be more confident with their employer's in transparency than Global employees

Overall, Chinese employees demonstrate a higher level of confidence in their employer's transparency than Global employees

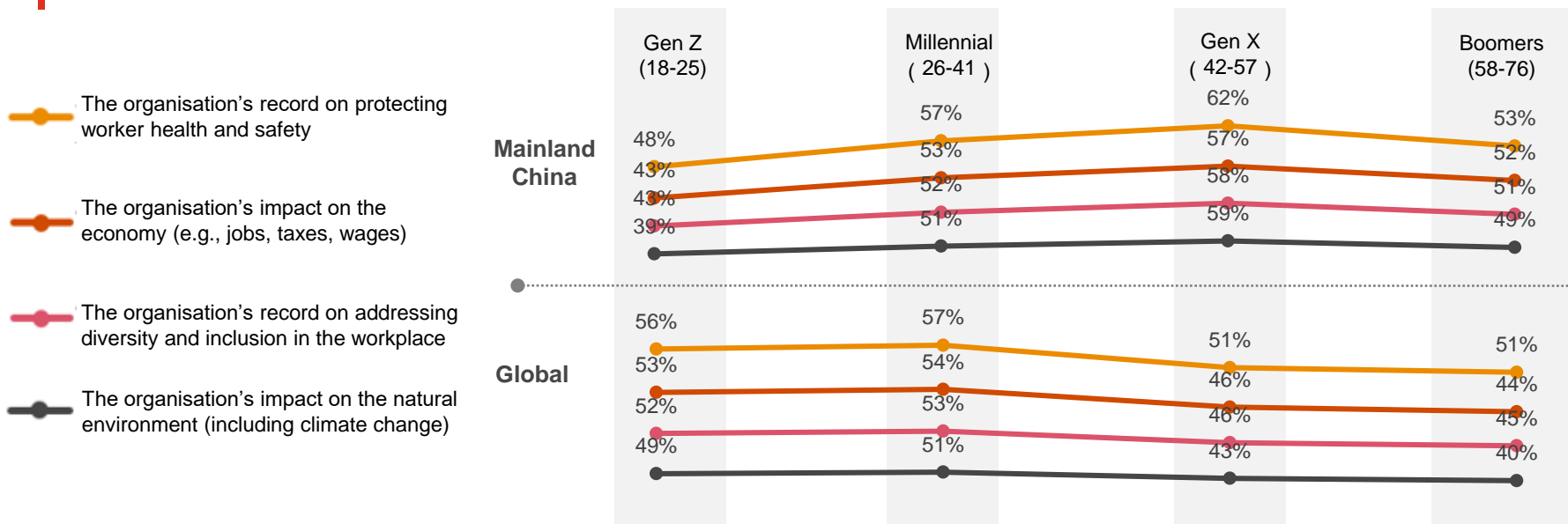


Q: How confident are you that your employer is transparent about the following areas?



# However, in Mainland China, Gen Zs have a lower level of confidence in information transparency

Q: How confident are you that your employer is transparent about the following areas?



When people choose a job, income is important, but so is the sense of fulfilment and the opportunity to present oneself.



## When people choose a job, income is important, but so is the sense of fulfilment and the opportunity to present oneself

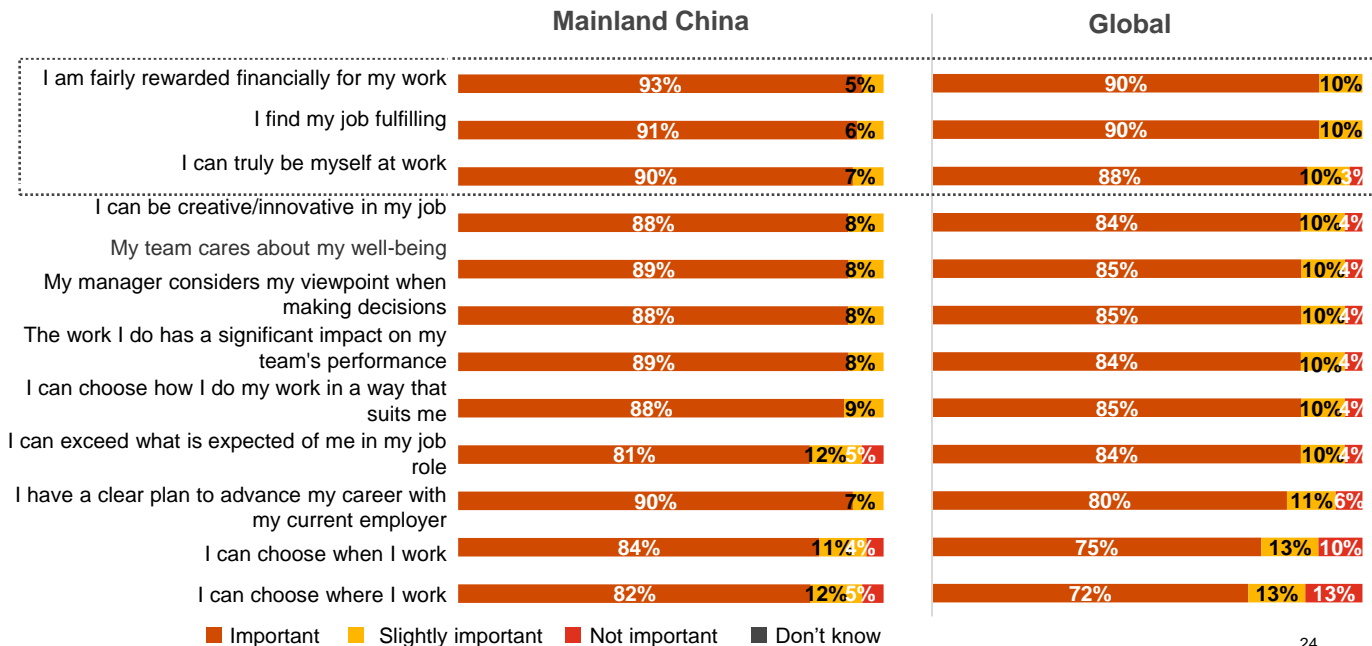
**Q: How important are the following factors to you when considering making a change in your work environment?**

**91%**

of **Chinese employees** put job fulfilment and the opportunity to truly be oneself as the most important factors after income

**89%**

of **Global employees** put job fulfilment and the opportunity to truly be oneself as the most important factors after income





## In contrast, Mainland Chinese Gen X employees attach great importance to all aspects when considering their job change

**Q: How important are the following factors to you when considering making a change in your work environment?**  
(Showing only 'Extremely important' and 'very important' responses)

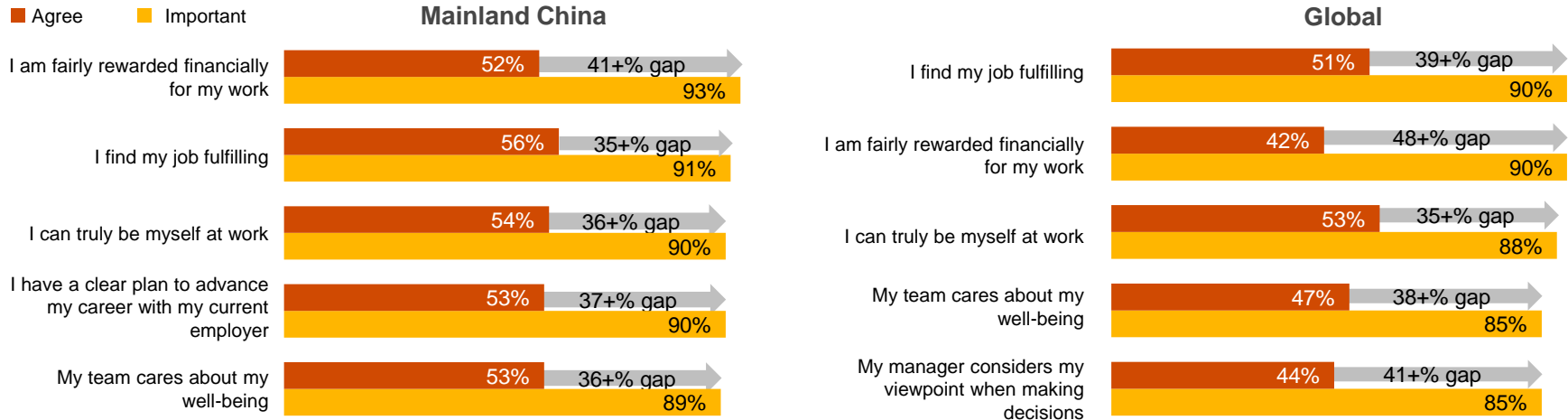
	Mainland China				Global			
	Gen Z (18-25)	Millennial (26-41)	Gen X (42-57)	Baby Boomers (58-76)	Gen Z (18-25)	Millennial (26-41)	Gen X (42-57)	Baby Boomers (58-76)
I am fairly rewarded financially for my work	68%	73%	70%	59%	68%	74%	70%	67%
I find my job fulfilling	58%	67%	67%	55%	68%	71%	67%	65%
I can truly be myself at work	59%	67%	68%	53%	66%	70%	64%	61%
I can be creative/innovative in my job	52%	63%	64%	53%	61%	64%	56%	52%
My team cares about my well-being	56%	60%	67%	53%	63%	65%	57%	51%
My manager considers my viewpoint when making decisions	38%	57%	67%	61%	59%	63%	56%	52%
The work I do has a significant impact on my team's performance	41%	61%	66%	57%	57%	62%	56%	52%
I can choose how I do my work in a way that suits me	47%	58%	66%	54%	58%	63%	56%	51%
I can exceed what is expected of me in my job role	40%	51%	64%	55%	59%	63%	55%	51%
I have a clear plan to advance my career with my current employer	58%	64%	65%	56%	60%	62%	49%	40%
I can choose when I work	37%	52%	64%	58%	50%	54%	47%	41%
I can choose where I work	34%	50%	61%	53%	47%	51%	44%	36%

Note: baseline is above 60%

## There is a significant gap between what people value in their work environment and the perception of their current experience

**Q: To what extent do you agree or disagree with the following statements about your current work environment?**  
(Showing only 'Strongly agree' and 'Moderately agree' responses)

**Q: How important are the following factors to you when considering making a change in your work environment?**  
(Showing only 'Extremely/Very important' and 'Moderately important' responses)



Note: Select the five most important factors of question

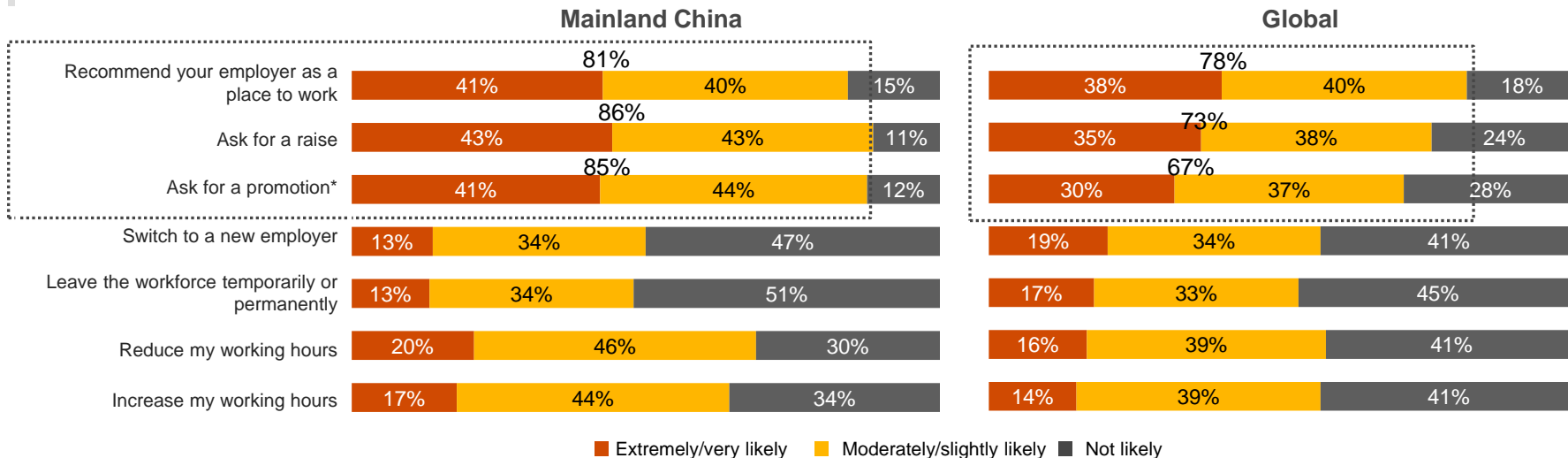
In the next 12 months, employees are more likely to ask for promotions and raise at their current company and to recommend their company to others than to seek external opportunities.





# Compared to Global employees, Chinese employees are more likely to ask for promotions and raises

**Q: How likely are you to take the following actions with your employer within the next 12 months?**



\* Please note "Ask for a promotion" was not asked to those respondents who selected CEO as their job role



# In China, the demand for promotions and raises are more prominent amongst Millennials and Gen X

**Q: How likely are you to take the following actions with your employer within the next 12 months?**  
 (Showing only 'Extremely likely' and 'Very likely' responses)

	Mainland China				Global			
	Gen Z (18-25)	Millennial (26-41)	Gen X (42-57)	Boomers (58-76)	Gen Z (18-25)	Millennial (26-41)	Gen X (42-57)	Boomers (58-76)
Recommend your employer as a place to work	27%	44%	45%	26%	41%	42%	33%	29%
Ask for a raise	30%	47%	45%	31%	41%	41%	29%	20%
Ask for a promotion*	29%	45%	44%	28%	38%	37%	25%	15%
Switch to a new employer	10%	12%	16%	5%	27%	23%	15%	8%
Leave the workforce temporarily or permanently	8%	13%	15%	5%	23%	19%	12%	12%
Reduce my working hours	15%	21%	21%	15%	21%	18%	12%	10%
Increase my working hours	17%	22%	22%	6%	21%	16%	11%	7%

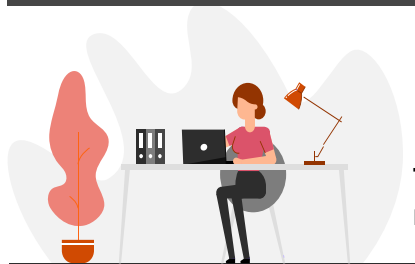
Note: Respondents who answered 'Ask for a promotion' did not include the CEOs

What can employers and business leaders do?

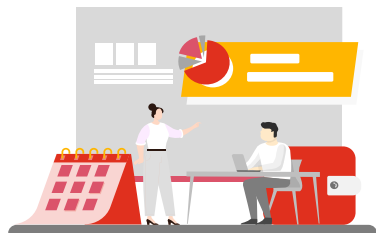


# What can employers and business leaders do?

## Fast facts



**There is a growing demand for remote and hybrid work**



**When facing labour or expertise shortages, companies are more inclined to solve the problem through internal means**

## What can employers and business leaders do?

### Develop methods and techniques consistently, enabling productive remote work

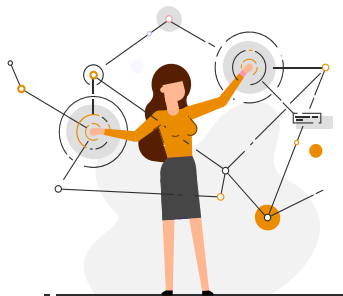
- Provide employees with more digitalised tools and trainings, enabling flexible or remote work.
- Empower management to be better at delegating and managing work outputs
- Strengthen employee relationships through online activities.
- Establish and improve remote work policy.

### Build a sustainable talent pipeline through continuous capacity development, technology introduction and innovation, and physical and mental empowerment

- Upskill employees with the most urgently needed skills in the market, e.g. digital skills, through training.
- Actively introduce digitalisation and automation solutions with innovation or new technologies to resolve the problem of labour or expertise shortages.
- Foster a corporate culture that celebrates flexibility and diversity, cares for its employees and drives self-motivation.
- Train leaders to manage with empathy, increase accessibility of mental health services, regularly identify and analyse issues with employee data.

# What can employers and business leaders do?

## Fast facts



**There are concerns about the company's availability of trainings and opportunities to apply new skills**



**Social discussions among colleagues can have a positive impact on trust in the workplace**

## What can employers and business leaders do?

### Clarify the company's digital vision and strategy and empower employees with digital training

- Clarify digital strategy and identify its key initiatives.
- Help employees to understand the impact of digitalisation on their job.
- Leverage digital technologies to develop more integrated, flexible, lower-cost tools, resources, and learning channels and platforms.

### Create opportunities for social discussions, and cultivate an inclusive and diverse corporate culture

- Create both online and offline opportunities, spaces or scenarios for social discussions among employees to promote trust and understanding among them.
- Create an inclusive and diverse corporate culture, and promote the sharing of different opinions.



# What can employers and business leaders do?

## Fast facts



**There is a significant employee demand for information transparency from employers in areas such as health and safety and the economic impact of the company**



**Income is key when people choose a job, but fulfilment at work and the opportunity to present themselves are just as important**

## What can employers and business leaders do?

### Clarify digital vision and enable employees with digital tools

- Increase investment in data security and privacy to reduce employee concerns, especially among younger generations, i.e. Gen Z.

### Establish social settings in the workplace, cultivate an inclusive and diversified corporate culture to increase synergy and innovation across the organisation

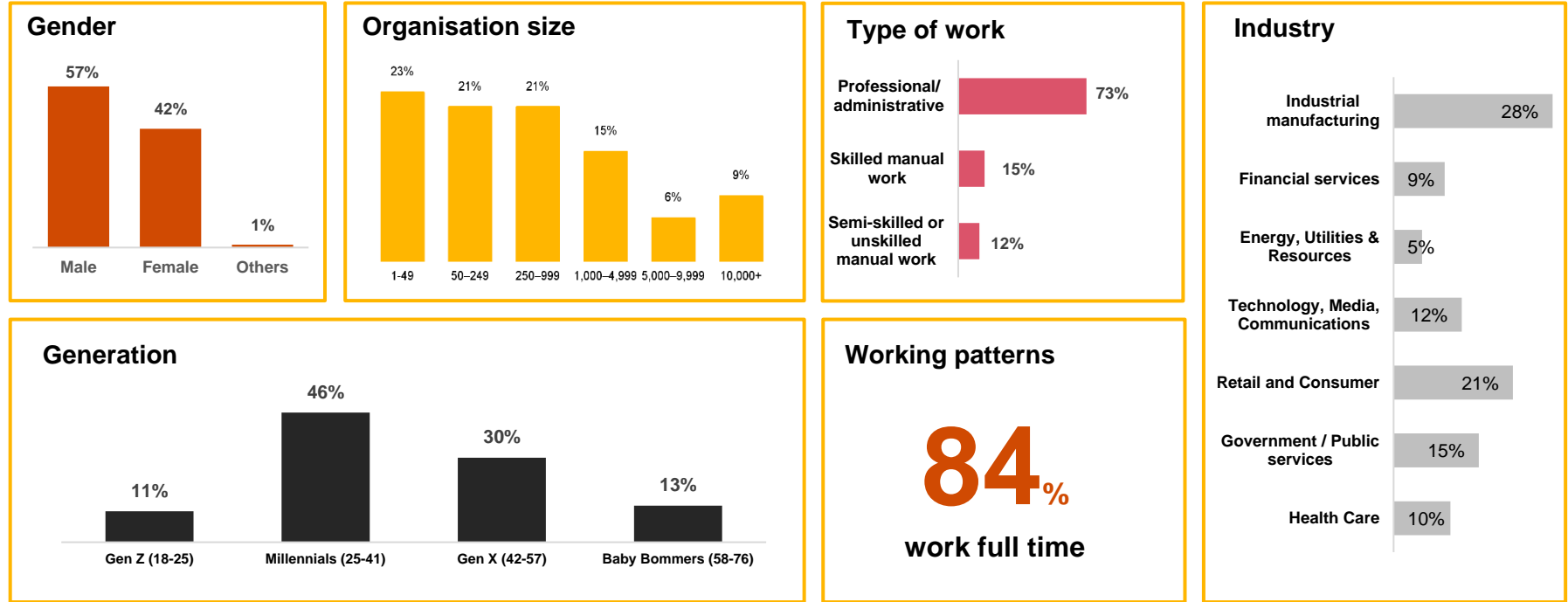
- Enable social interactions in the workplace through various online and offline communication channels to improve trust and understanding among employees.
- Build an inclusive and diverse culture that encourages different voices to be heard.

# Appendix: Methodology



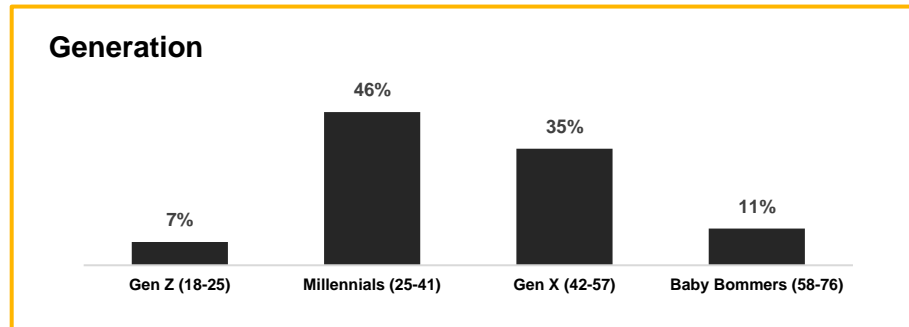
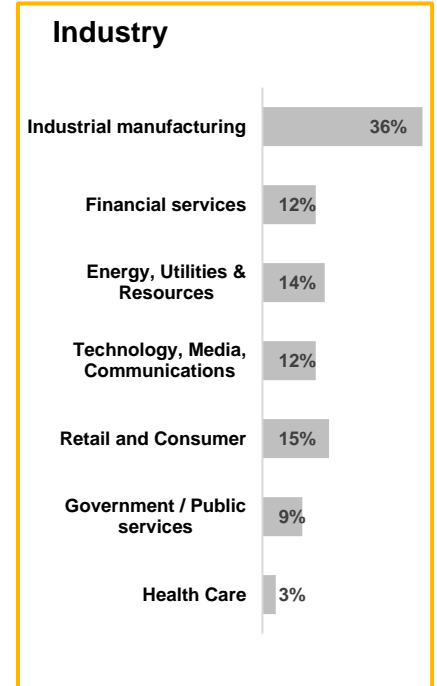
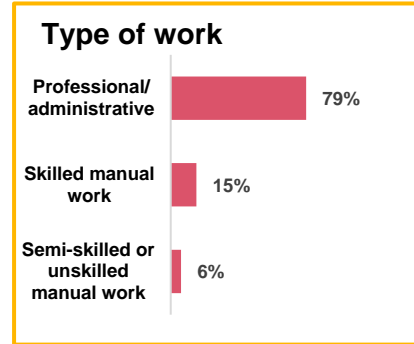
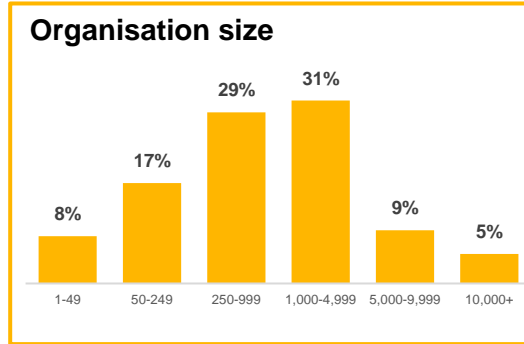
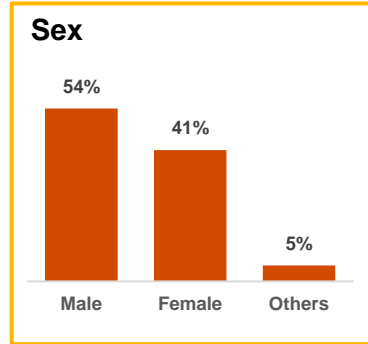
# Hopes and fears survey 2022: Global data

52,195 responses across 44 countries and territories



# Hopes and fears survey 2022: Mainland China data

3,129 total responses across Mainland China



### Working patterns

**97%**  
work full time

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