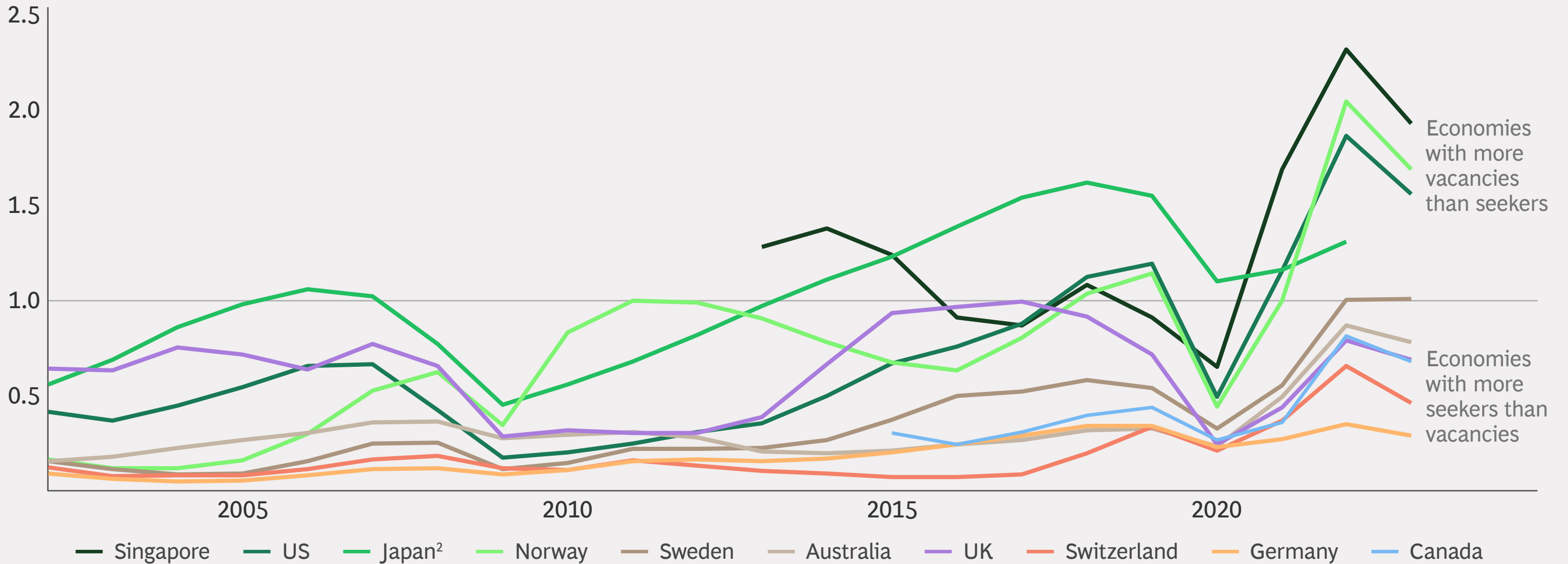


# The labor market dynamic has shifted, ushering in an era of tight conditions

HISTORICAL JOB VACANCY TO SEEKER RATIO,<sup>1</sup> 2002–2023



Sources: OECD; Oxford Economics; Eurostat; BCG analysis.

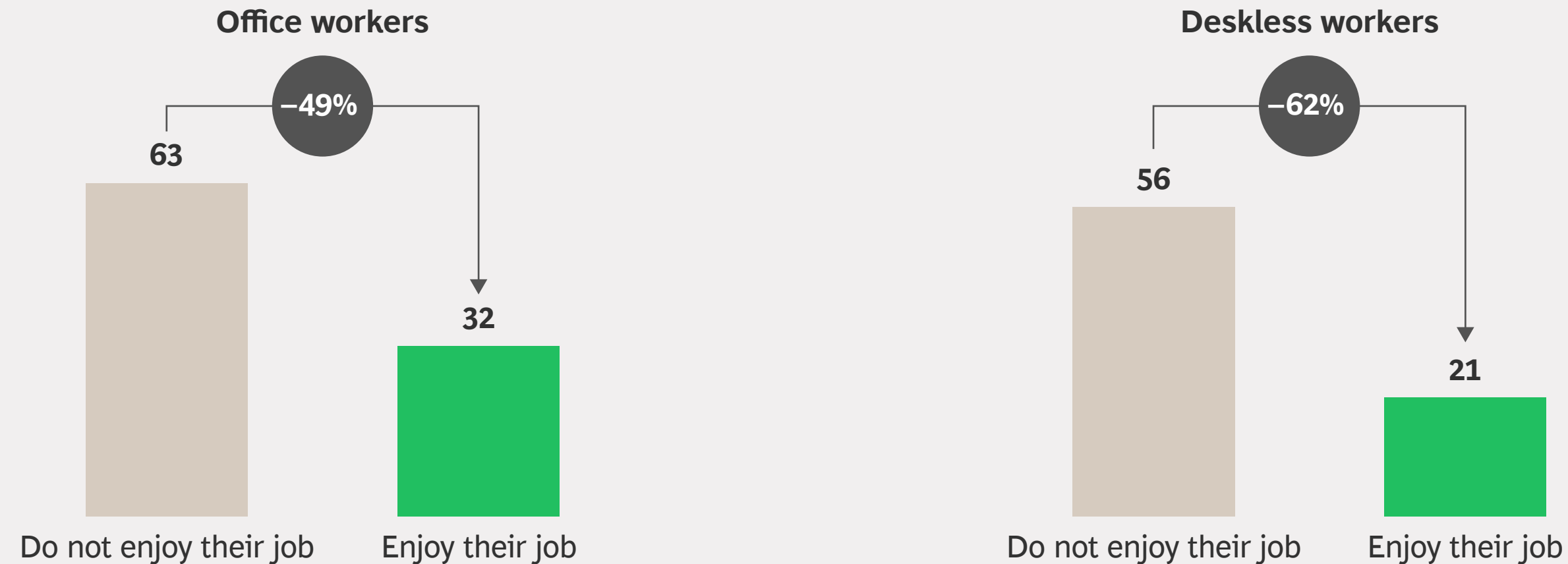
<sup>1</sup>Average job vacancies versus unemployed people.

<sup>2</sup>Japan data available only to YE 2022.

# Enjoying work strongly correlated with employee retention—but the impact on deskless workers is most pronounced

**Question: Are you looking for a new job? How much do you enjoy your job?**

% OF EMPLOYEES LOOKING FOR A JOB



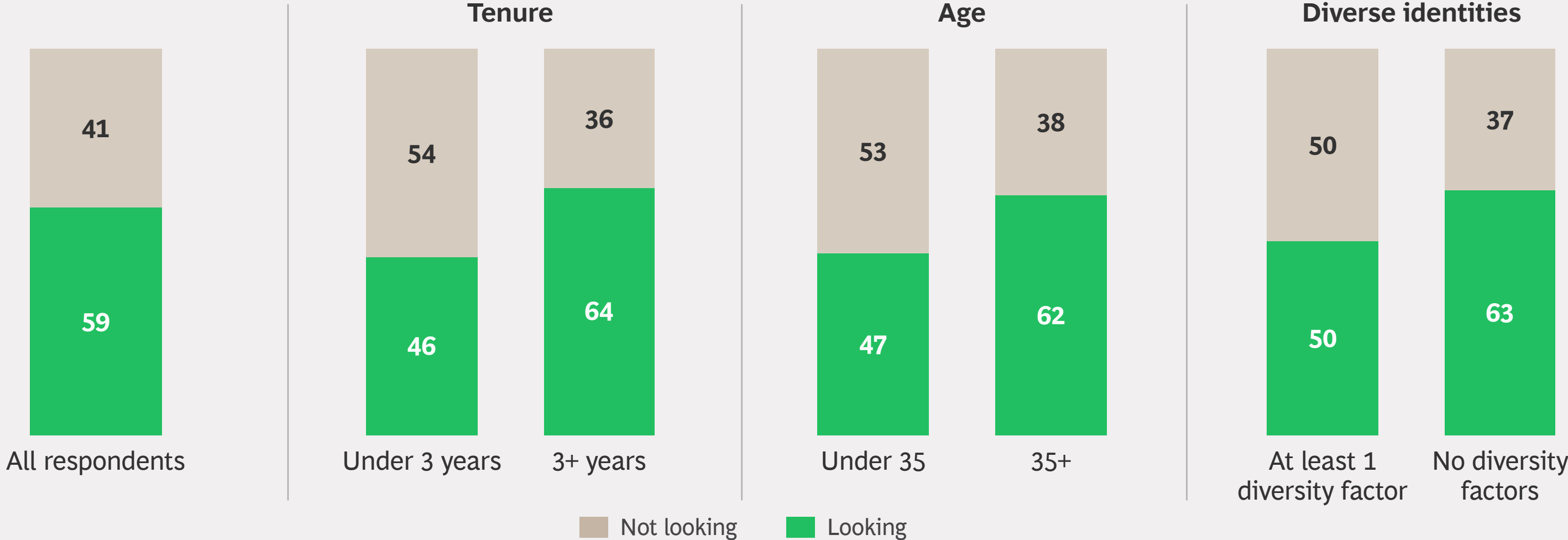
**Sources:** The BCG Henderson Institute’s “Making Work *Work*” survey, office worker version conducted in the fall of 2023 (n = 1,008), deskless worker version conducted in May 2024 (n = 764); BCG analysis.

**Note:** Office workers are employees who perform most of their work at a computer. They can work from anywhere, as long as they have a computer and internet connection. Deskless workers are workers who, to complete most of their work tasks, must be at a defined asset or site. “High joy” counts individuals with above-average scores in the category of worker; “low joy” counts individuals with below-average scores in the category.

# For the deskless workforce, younger, lower-tenure, and more-diverse employees most likely to be looking for a new job

**Question: Are you looking for a new job?**

% OF RESPONDENTS



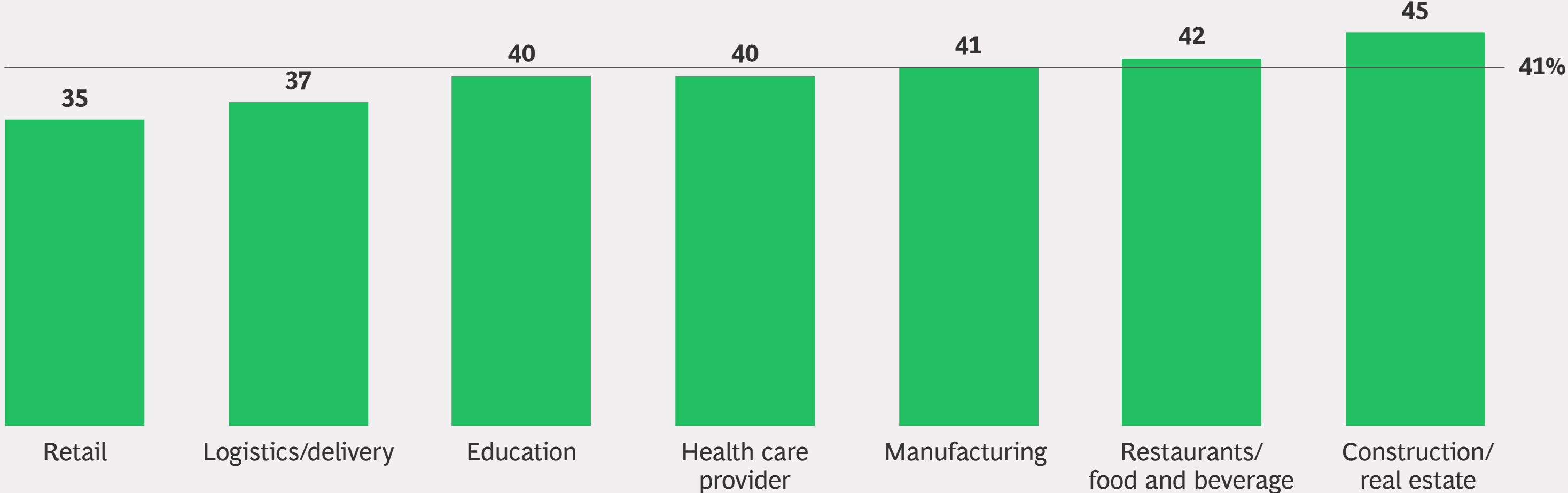
**Sources:** The BCG Henderson Institute’s “Making Work Work” survey, deskless worker version conducted in May 2024 (n = 764); BCG analysis.

**Note:** Survey respondents were asked to select all relevant DEI factors that applied: racial/ethnic minority; LGBTQ+; disability.

# Deskless worker enjoyment of work varies across industries

**Question: To what extent do you agree with the statement: “Overall, I enjoy my job”?**

% OF EMPLOYEES WHO STRONGLY AGREE



Sources: The BCG Henderson Institute’s “Making Work Work” survey, deskless worker version conducted in May 2024 (n = 764); BCG analysis.

# Individual contributors feel significantly less connected and supported than managers

**Question: To what extent do you agree with the following statements?**

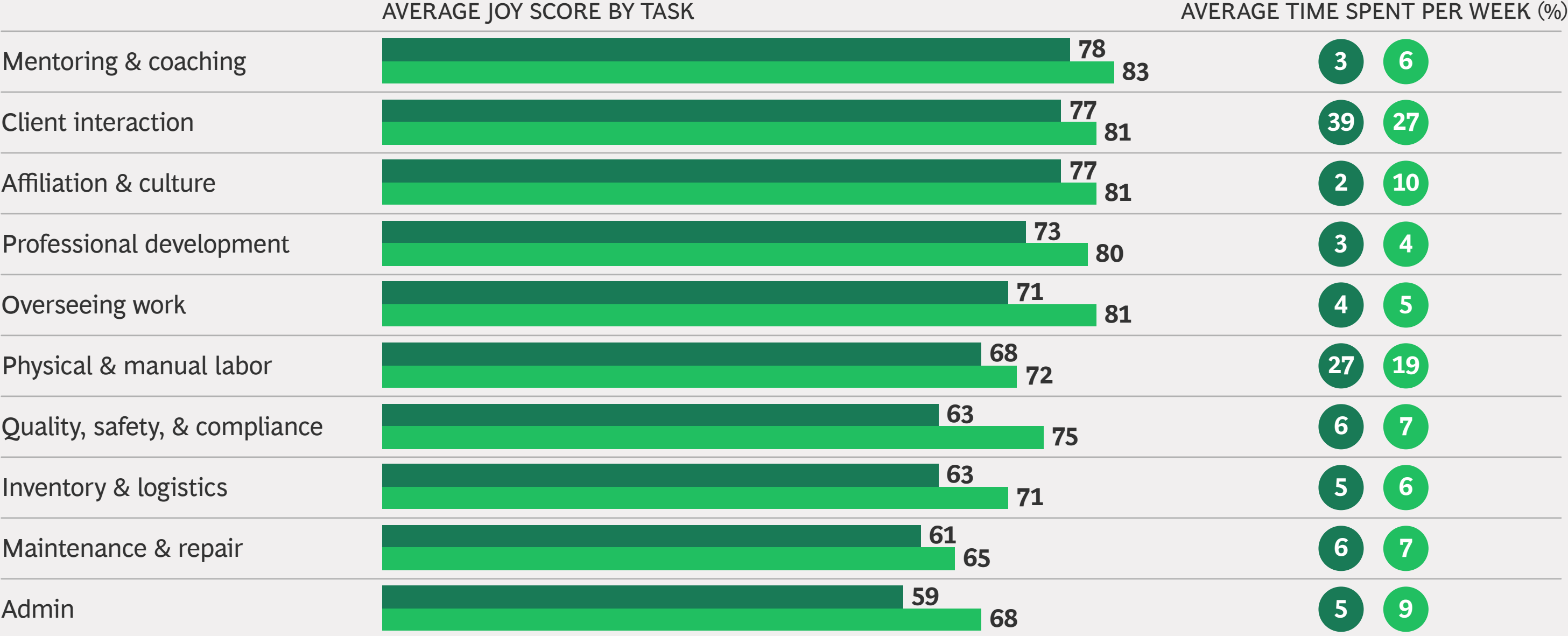
% OF RESPONDENTS WHO “STRONGLY AGREE” AND “AGREE”



Sources: The BCG Henderson Institute’s “Making Work Work” survey, deskless worker version conducted in May 2024 (n = 764); BCG analysis.

# Overall, individual contributors enjoy work tasks less than managers

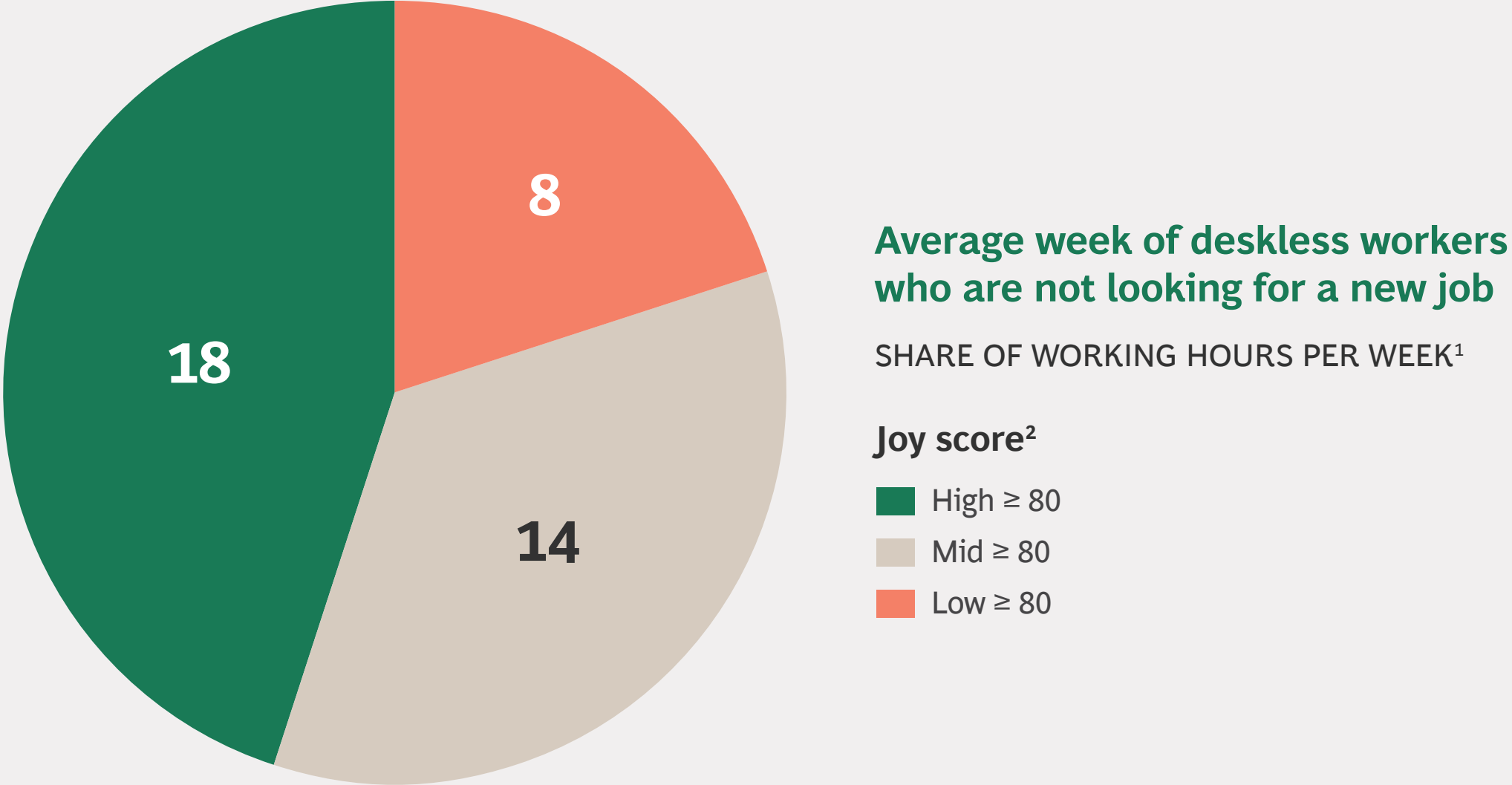
Question: To what extent do you agree with the statement: “I enjoy performing [this task]”?



Sources: The BCG Henderson Institute’s “Making Work Work” survey, deskless worker version conducted in May 2024 (n = 764); BCG analysis.

■ Individual contributors    ■ Managers & executives

# Not every minute of every day needs to be enjoyable



**Sources:** The BCG Henderson Institute’s “Making Work Work” survey, deskless worker version conducted in May 2024 (n = 764); BCG analysis.

**Note:** Assumes a 40-hour workweek.

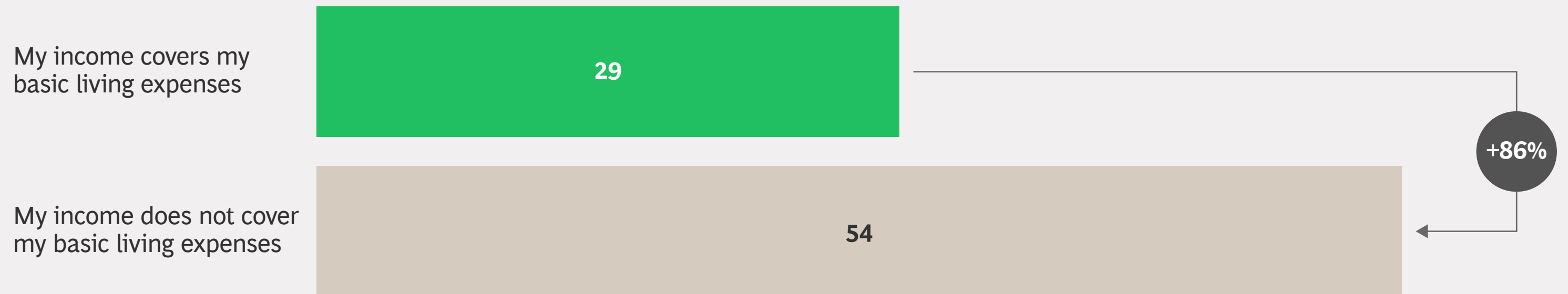
<sup>1</sup>Time spent based on calculating mean answers to “What proportion (%) of your time was spent on each task last week?”

<sup>2</sup>Task enjoyment based on responses to “To what extent do you agree with the statement: ‘I enjoy performing this task?’”

# Attrition risk is significantly higher for workers who feel their income is insufficient

**Question: To what extent do you agree with the statement: “The income from my job is enough to cover my living expenses and basic needs”?**

% OF EMPLOYEES LOOKING FOR A JOB





# Respondent overview

% OF RESPONDENTS

# 764

Total respondents

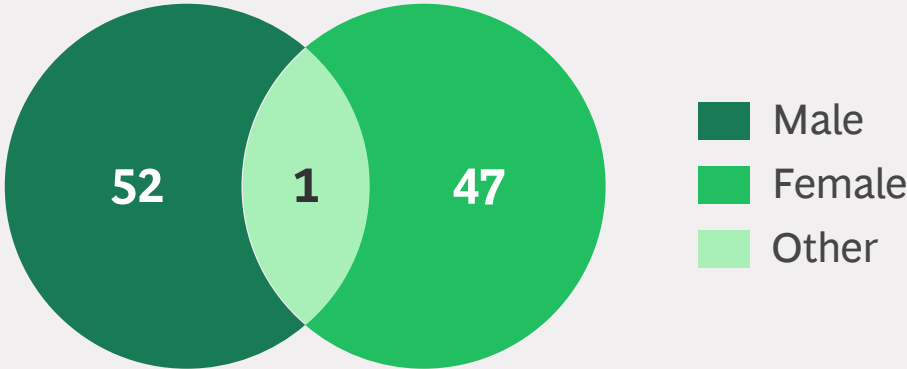
## Diversity

- 10** Adult caregiver
- 18** Child caregiver
- 13** Single parent household
- 20** Dual career household
- 11** Ethnic/racial minority
- 7** LGBTQ+
- 7** Disability

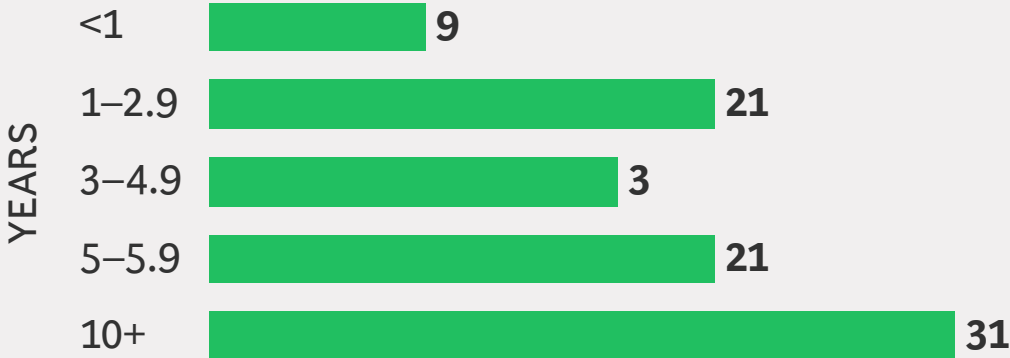
## Role

- 55** Individual contributor
- 30** Manager
- 15** Executive

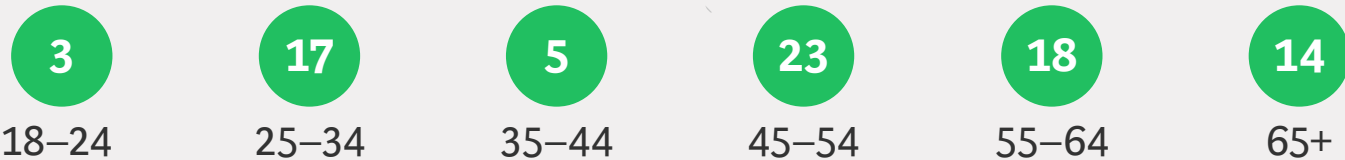
## Gender



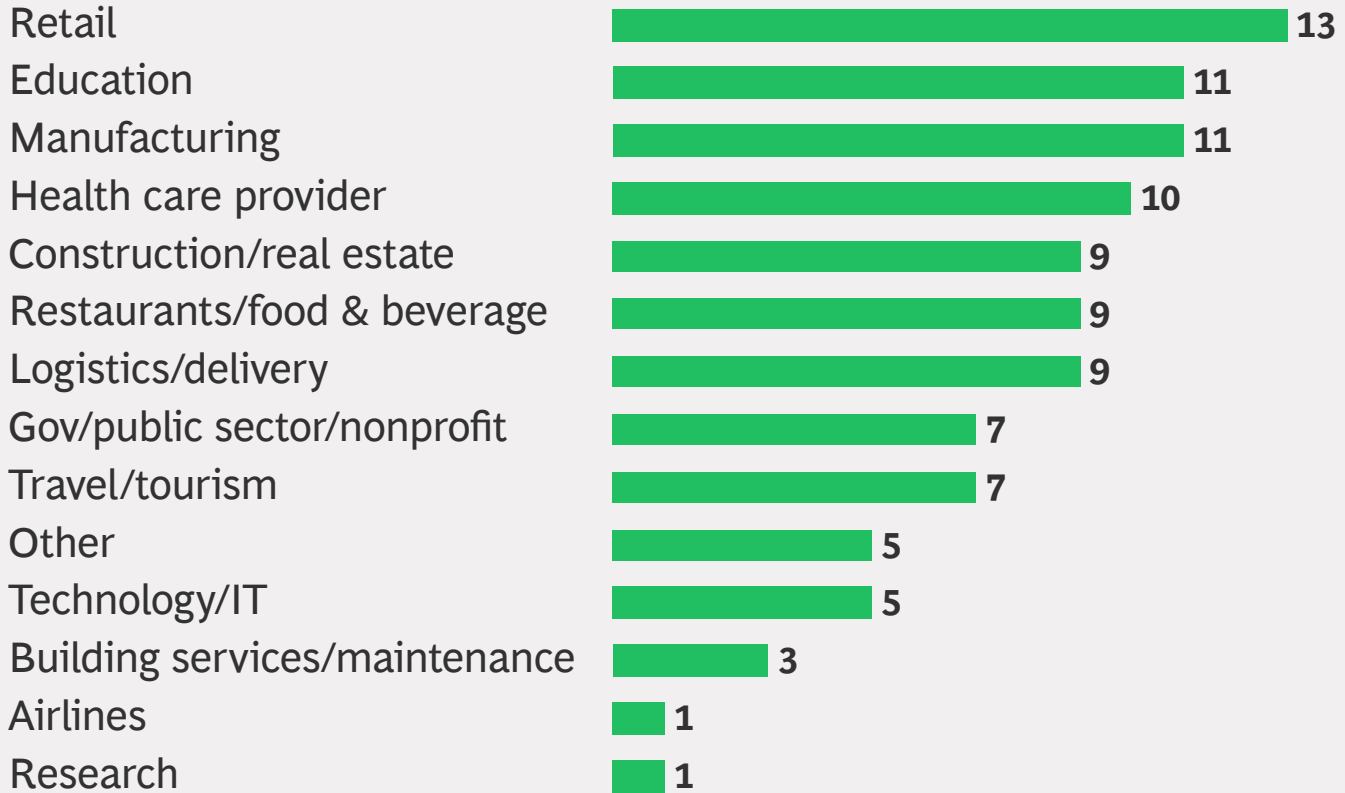
## Tenure



## Age



## Industry



Sources: BCG “Making Work Work” survey, conducted in June 2024 (n = 764); BCG analysis.  
 Note: “Other” industries include: child care, music, freelance, fitness coaching, writer, painting, funeral services.