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Global Human Capital Trends 2018

The rise of the social enterprise

Country Report: United Kingdom

Contents

Introducing the 2018 UK Human Capital Trends report	1
At a glance	2
Global Human Capital Trends 2018	4
Top trends for the UK in 2018	6
Comparing the UK and global trends	7
A spotlight on the UK's top three trends	
• From careers to experiences: new pathways	8
• Wellbeing: a strategy and a responsibility	10
• The hyper-connected workplace: will productivity reign?	12
Conclusion	14
Contacts	15
Endnotes	16

The theme of this year's report, 'The rise of the social enterprise', signifies a shift in the mindset of organisations both in the UK and globally.

Introducing the 2018 UK Human Capital Trends report

This year, over 11,000 human resources (HR) and business leaders in 124 countries participated in Deloitte's Global Human Capital Trends Survey. I am delighted to share this special report with you, summarising the key Human Capital trends that are emerging as priorities in the UK.

The theme of this year's report, 'The rise of the social enterprise', signifies a shift in the mindset of organisations both in the UK and globally. They are no longer measured solely on their financial performance and the quality of their products and services. Rather, they are also judged on the way they treat and engage with their people and customers, the support they give to the communities in which they operate and their impact on society as a whole. This is increasingly important for attracting and retaining staff, building a strong reputation and cultivating loyalty amongst customers.

We are living in a society where people have less trust in their politicians and we are increasingly expecting businesses to fill the gap. In the 2017 Deloitte Millennial Survey,¹ 76 per cent of millennials stated that they see business as a force for positive social impact, and the number holding this view is growing year on year. This is not something we would have seen in previous generations; businesses today are developing into 'social enterprises' with a broader focus than simply on profit. Take for example Amazon's new venture in partnership with JP Morgan and Berkshire Hathaway to transform healthcare delivery for their employees.

This and similar initiatives are no longer simply philanthropic actions that are considered a 'nice to have' to help improve reputation; it is now a fundamental issue for organisations, driven by an understanding that this is now the only way to run a successful enterprise and deliver value far beyond immediate shareholder returns.

Today, human capital is being linked to social capital, resulting in a need for leaders and stakeholders to account for a wider range of interests than in the past. Organisations are aware of increased expectations placed upon them due to social, political and technological changes that are taking place. However they are struggling to convert this awareness into actionable programmes and the changing social and political climate is often not yet reflected in their people strategies and culture.

In this report, we look at the top three human capital trends that are having a significant impact in the UK. 'From careers to experiences: new pathways', is the top trend this year, reflecting the importance of individual employees and their development. The other two top trends are 'Wellbeing: a strategy and a responsibility' and 'The hyper-connected workplace'.

We hope this UK-focused report gives you insights into the key challenges and opportunities that are appearing on the horizon for the world of work. I would also encourage you to read our global report and interactive survey dashboard, where we share insights and case studies in more detail. This is available at www.deloitte.co.uk/hctrends.

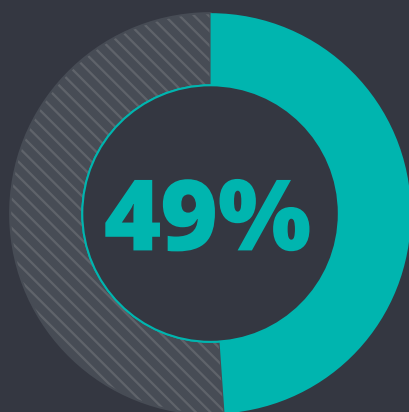


Anne-Marie Malley
UK Human Capital Leader

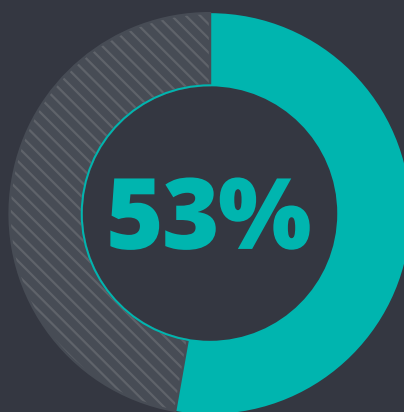


At a glance

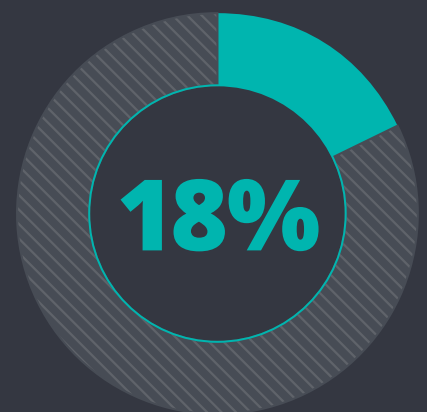
Organisations are increasingly aware of the challenges they face, but do not yet have enough tangible actions underway to meet them



of respondents consider the capability of their Human Capital programmes to be **fair** or **poor**



of respondents have **social responsibility programmes** that aren't well developed, or have no focus at all on this area



of organisations stated an intention to **increase** their **investment in HR** over the next 12-18 months



The **21st century career** is becoming more fluid, with individuals taking ownership of their own career development. However,

A traditional, salaried, **hourly workforce** is still 'the norm' for

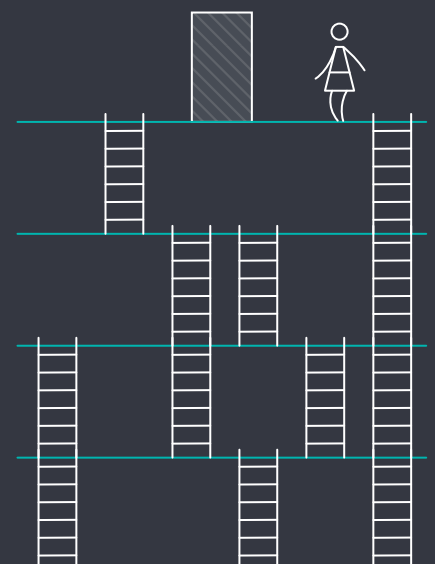
32%

of organisations



41%

of surveyed organisations have employee development programmes focused on a **defined career path**



Wellbeing is increasingly valuable to employees, but organisational wellbeing programmes are not yet hitting the mark

59%

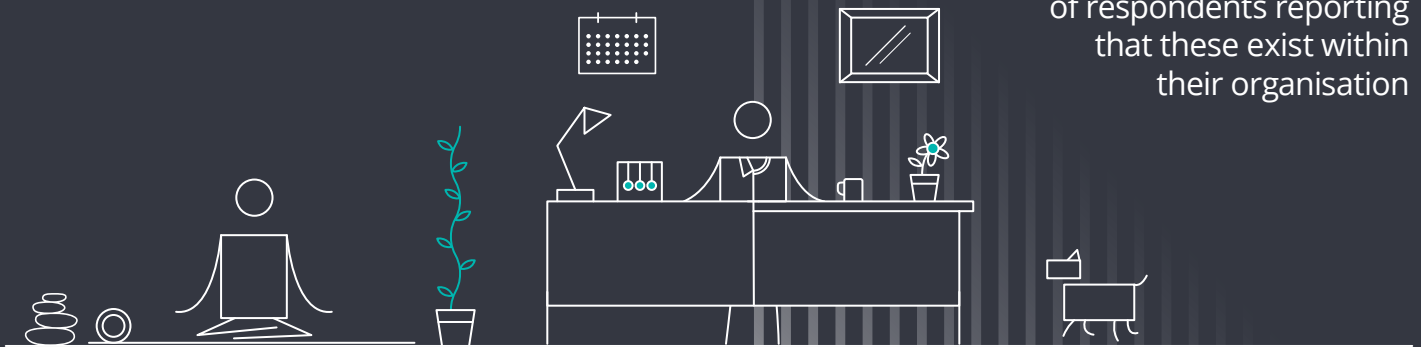
of organisations **are not working on wellbeing at all**, or only offer very basic programmes

Flexible schedules

are the most common wellbeing programme with

58%

of respondents reporting that these exist within their organisation



Employers are not harnessing the possibilities presented by the **connected workplace**, despite it being viewed positively by employees

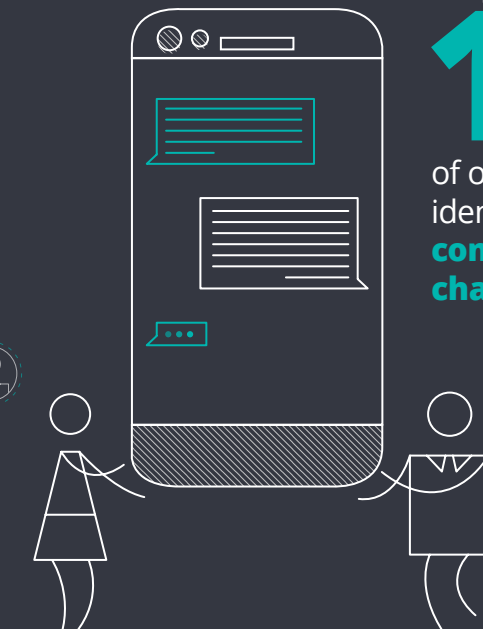
72%

of respondents state that connected work tools will have a **positive impact** on **personal productivity**

Only

11%

of organisations are actively identifying **emerging communications channels**



Global Human Capital Trends 2018

The rise of the social enterprise

Our survey examines ten critical trends shaping the human capital agenda.



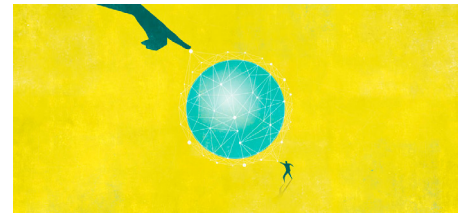
Trend 1 – From careers to experiences: new pathways

In a 21st-century career, the individual and his or her experiences take centre stage. Instead of a steady progression along a job-based pathway, leading organisations are shifting towards a model that empowers individuals to acquire valuable experiences, explore new roles, and continually reinvent themselves.



Trend 2 – Wellbeing: a strategy and a responsibility

As the line between work and life blurs further, employees are demanding that organisations expand their benefits offerings to include a wide range of programmes for physical, mental, financial, and spiritual health. In response, employers are investing in wellbeing programmes as both a societal responsibility and a talent strategy.



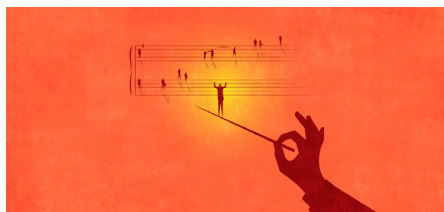
Trend 3 – The hyper-connected workplace: will productivity reign?

New communications tools are rapidly entering the workplace. But as these tools migrate from personal life to the workplace, organisations must apply their expertise in team management, goal-setting, and employee development to ensure that they actually improve organisational, team, and individual performance and promote the necessary collaboration to truly become a social enterprise. Like the outside world, organisations are becoming hyper-connected; can they also become hyper-productive?



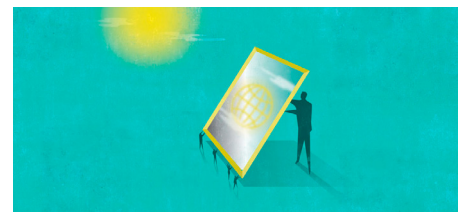
Trend 4 – People data: how far is too far?

The rapid increase in data availability and the advent of powerful people analytics tools have generated rich opportunities for HR – but they are now also generating a variety of potential risks. Organisations face a tipping point: develop a set of well-defined policies, security safeguards, transparency measures, and ongoing communication around the use of people data, or risk employee, customer, and societal backlash.



Trend 5 – The symphonic C-suite: teams leading teams

Behaving as a social enterprise and managing the external environment's macro trends effectively demands an unprecedented level of cross-functional vision, connectivity, and collaboration from C-suite leaders. To do this, they must behave as what we call the 'Symphonic C-suite', in which an organisation's top executives play together as a team while also leading their own functional teams, all in harmony.



Trend 6 – Citizenship and social impact: society holds the mirror

An organisation's track record of corporate citizenship and social impact now has a direct bearing on its core identity and strategy. Engagement with other stakeholders on topics such as diversity, gender pay equity, income inequality, immigration and climate change can lift financial performance and brand value, while failure to engage can destroy reputation and alienate key audiences.



Trend 7 – New rewards: personalised, agile and holistic

Leveraging their power as individuals, employees are asking for more personalised, agile, and holistic rewards, including a focus on fair and open pay. While companies recognise this overall shift, only eight per cent report that their rewards programme is 'very effective' at creating a personalised, flexible solution. Early experiments are exploring how to develop a holistic variety of rewards and match them to individual preferences, across diverse talent segments and on a continuous basis.



Trend 8 – AI, robotics, and automation: put humans in the loop

The influx of AI, robotics, and automation into the workplace has dramatically accelerated in the last year, transforming in-demand roles and skills inside and outside organisations. Perhaps surprisingly, those roles and skills focus on the 'uniquely human' rather than the purely technical. To be able to maximise the potential value of these technologies today and minimise the potential adverse impacts on the workforce tomorrow, organisations must put humans in the loop—reconstructing work, retraining people and rearranging the organisation. The greatest opportunity is not just to redesign jobs or automate routine work, but to fundamentally rethink 'work architecture' to benefit organisations, teams and individuals.

In this report, we look at the top three trends that are having a significant impact in the UK.



Trend 9 – The longevity dividend: work in an era of 100-year lives

Forward-looking organisations see extended longevity and population aging as an opportunity. 20 per cent of this year's survey respondents said that they are partnering with older workers to develop new career models. This longevity dividend enables companies both to address a pressing societal issue and to tap into a proven, committed, and diverse set of workers. However, doing this requires innovative practices and policies to support extended careers, as well as collaboration between business leaders and workers, to tackle shared challenges such as age bias and pension shortfalls.



Trend 10 – The workforce ecosystem: managing beyond the enterprise

Business leaders and Chief Human Resource Officers (CHROs) recognise the need to actively and strategically manage relationships with workforce segments beyond the enterprise, which increasingly affect how an organisation delivers services and interacts with customers. Organisations are finding ways to align their culture and management practices with these external talent segments – engaging the workforce ecosystem for mutual benefit.

Top trends for the UK in 2018

'From careers to experiences: new pathways' emerges as the top human capital trend in the UK in 2018, with 'Wellbeing: a strategy and a responsibility' and 'The hyper-connected workplace' second and third in importance.



From careers to experiences:
new pathways

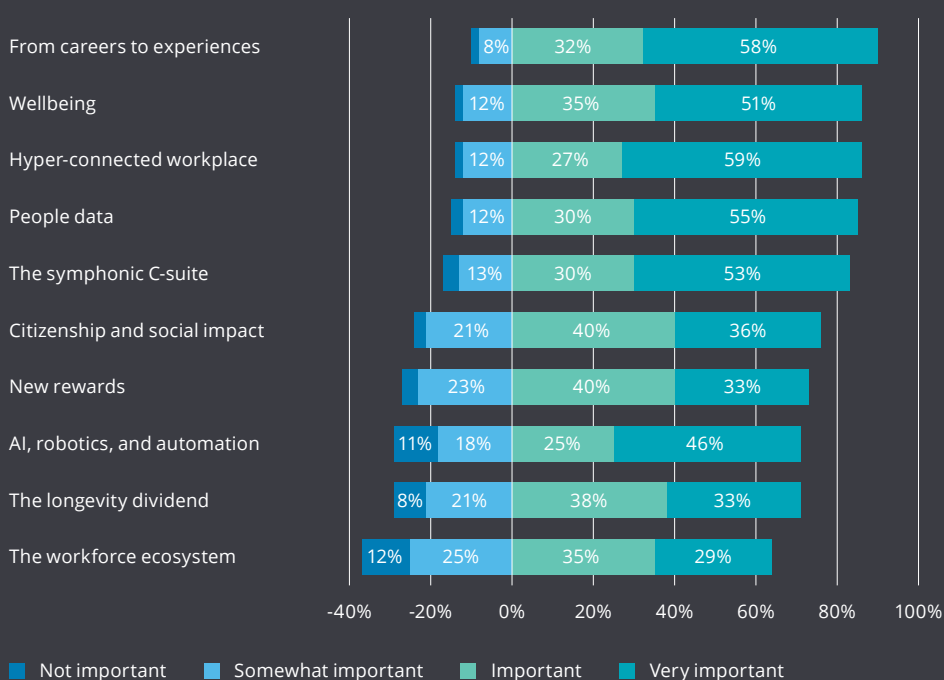


Wellbeing: a strategy
and a responsibility



The hyper-connected
workplace

Figure 1. Top UK trends by importance



'From careers to experiences: new pathways' is the top trend in the UK this year: 58 per cent of respondents see this as 'very important' and a further 32 per cent consider it 'important'. Though it emerges as the top trend, many organisations indicate that they continue to provide a structured career path within an organisational hierarchy, and regard career development first and foremost as a responsibility of the individual employee.

Executive leadership collaboration is ranked fifth in the UK, while the increasingly central role data plays in the enterprise is ranked fourth.

Comparing the UK and global trends






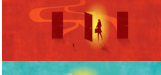














'From careers to experiences: new pathways' takes first place in the UK, whilst it is the third-most important trend globally.

When comparing UK and global responses around the importance of human capital trends in 2018, we see some key differences. The role of individuals in empowering their career through new experiences, roles and continuous reinvention, is ranked as the top trend in the UK, but is only the third-most important globally.

The top global trend is 'The symphonic C-suite: teams leading teams' (whereby leaders connect and collaborate across the organisation) but this was ranked only the fifth-most important in the UK, where empowered employees and employee wellbeing are given greater prominence.

However, further down the rankings, we start to see more similarities between the global and UK views, with 'AI, robotics and automation' in the eighth spot for both, followed by 'The longevity dividend' and 'The workforce ecosystem'.

Figure 2. Comparison of UK and global trends

2018 Trend	UK Ranking	2018 Trend	Global Ranking
 From careers to experiences: new pathways	1	 The symphonic C-suite: teams leading teams	1
 Wellbeing: a strategy and a responsibility	2	 People data: how far is too far?	2
 Hyper-connected workplace: will productivity reign?	3	 From careers to experiences: new pathways	3
 People data: how far is too far?	4	 Wellbeing: a strategy and a responsibility	4
 The symphonic C-suite: teams leading teams	5	 Hyper-connected workplace: will productivity reign?	5
 Citizenship and social impact: society holds the mirror	6	 New rewards: personalised, agile and holistic	6
 New rewards: personalised, agile and holistic	7	 Citizenship and social impact: society holds the mirror	7
 AI, robotics, and automation: put humans in the loop	8	 AI, robotics, and automation: put humans in the loop	8
 The longevity dividend: work in an era of 100-year lives	9	 The longevity dividend: work in an era of 100-year lives	9
 The workforce ecosystem: managing beyond the enterprise	10	 The workforce ecosystem: managing beyond the enterprise	10

Spotlight on the UK's top three trends

The power of the individual – From careers to experiences: new pathways

The 21st century career

90 per cent of UK respondents describe 'the 21st century career' as 'important' or 'very important' to their organisation. However only 34 per cent are ready to tackle this trend. Why is this? And what can businesses across the UK do to attract the best talent and construct careers around individual needs?



The nature of careers are changing and with it is a shift in the 'power balance' between employers and employees. Employees, irrespective of their skill set, prefer, within the parameters of the workplace, to work on their own terms and at their own pace.

The workplace is now home to several generations, and employers are having to respond to a variety of differing generational needs, wants and expectations from their workforce in regards to work, management style, team-working and career opportunities and growth. Millennials, now nearing 50 per cent of the workforce in many organisations, seek flexibility, a degree of self-management and learning experiences,¹ over more traditional forms of progression. Older workers nearer the end of their careers may be better placed to provide mentorship and guidance, remaining longer in the world of work than previous generations. Indeed, one-third of individuals now expect to earn 25 per cent of their income through work after they have officially retired.²

Advances in technology are also driving the changing nature of careers. Increasingly, employees can work anytime, anywhere, and technology is providing organisations with a range of digital platforms that enable them to identify and secure talent in locations across the globe. These same digital platforms are increasing the choice that individuals have over who they work with, when, where, and how they work. Individuals can now operate in a more 'open ecosystem', whereby a career is no longer constrained by organisational boundaries – individuals can make a choice on how they interact with organisations and it isn't always as full time, long-term employees. The growing acceptability of flexible working arrangements is giving individuals an opportunity to build their careers around their personal expertise, interest and availability – sometimes referred to as a 'portfolio career'.

In addition, due to the pace of social, technological and economic change, skills are becoming obsolete at a faster rate. The 'half-life of skills' has dramatically reduced from around 30 years to between 1.5 and 5 years; and not just for technical roles. In response, individuals will need to change careers several times, or settle for steadily declining returns as their skills reduce in value.³ Imagine working in cybersecurity, or data privacy over recent years; the changes to the very purpose of these roles, as well as the activity within them has changed to the extent that a very different set of skills and behaviours is now required.

58 per cent of talent sourcing models are traditional in their nature, and only 20 per cent focus on providing individuals with meaningful experiences.

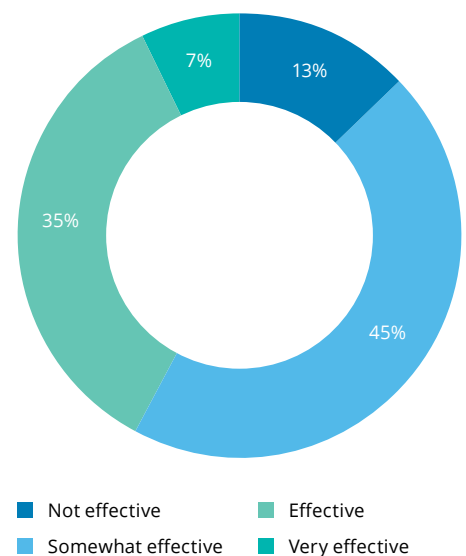
To address these changes successfully, organisations must recognise and change the relationship they have with their workforce. Leaders must recognise that they have a responsibility to help individual employees to define their careers, empowering them with the learning tools and experiences they will need for continuous development. However, our research indicates that organisations have not geared up their talent management programmes to support 21st century career models. 58 per cent of talent sourcing models are traditional in their nature, and only 20 per cent focus on providing individuals with meaningful experiences. So what can organisations do to gear up to support 21st century career models?

Organisations should undertake a fundamental re-evaluation of their approach to careers in the 21st century. They must focus on striking a balance between the needs of the organisation, society and the individual, building flexible career opportunities that focus on skills and tasks rather than just jobs. Organisations will need to be continually accessing different and new talent pools across the globe, remembering that the alternatives to full-time salaried employees are ever increasing, whether 'gig' workers, associates or third party alliances.

A move towards a culture of continuous learning and valuation of experience, especially amongst business leadership, is also key. Learning has a crucial role to play in this; shifting from a focus on content to one on experiences. As the boundaries between education, work and retirement blur, individuals are using learning opportunities within their organisations to learn for life, not just for their current role and potential next step. To support individuals, organisations need to be communicating the skills that will be important in the future and give employees both the tools and the responsibilities to acquire these. Some organisations are starting to create diverse learning environments that facilitate continuous learning, including formal, informal, social and collaborative learning. For example, Bank of America now offers a pre-paid 'credit card' for employees to pay for re-skilling themselves and AT&T offers employees \$8,000 to spend on learning activities.³

And since more change is coming, agility is key. Organisations will need to constantly react to ongoing change and have methods and tools in place to make decisions and mobilise teams quickly to respond to the changing demands society will continue to impose.

Figure 3. Organisations' effectiveness in empowering employees to manage their own careers as rated by UK survey respondents



To support individuals, organisations need to be communicating the skills that will be important in the future and give employees both the tools and the responsibilities to acquire these.

Filling society's leadership gap

Wellbeing: a strategy and a responsibility

The case for investing in employee wellbeing (defined as 'feeling good and functioning well⁴⁾'), is a compelling one. Now more than ever, the line between work and home life is blurred. Individuals are faced with ongoing change and uncertainty and the demands of work can often pose a real threat to our physical and emotional health. In a time when employees are expecting their employers to take an interest in their personal contribution to work, employee wellbeing is no longer seen as a 'nice to have' but as an essential differentiator.



It was once considered a 'fluffy' concept, but a growing body of empirical research suggests that wellbeing is strongly associated with a range of individual, organisational and societal benefits, such as better health, improved rates of employee retention and engagement, and improved creativity, innovation and productivity.

The return on investment from wellbeing initiatives is substantial and can have a tangible impact on the bottom line.⁵ Such investment also benefits employees' lives outside work, through improved personal relationships and contributing to home lives and society in general.

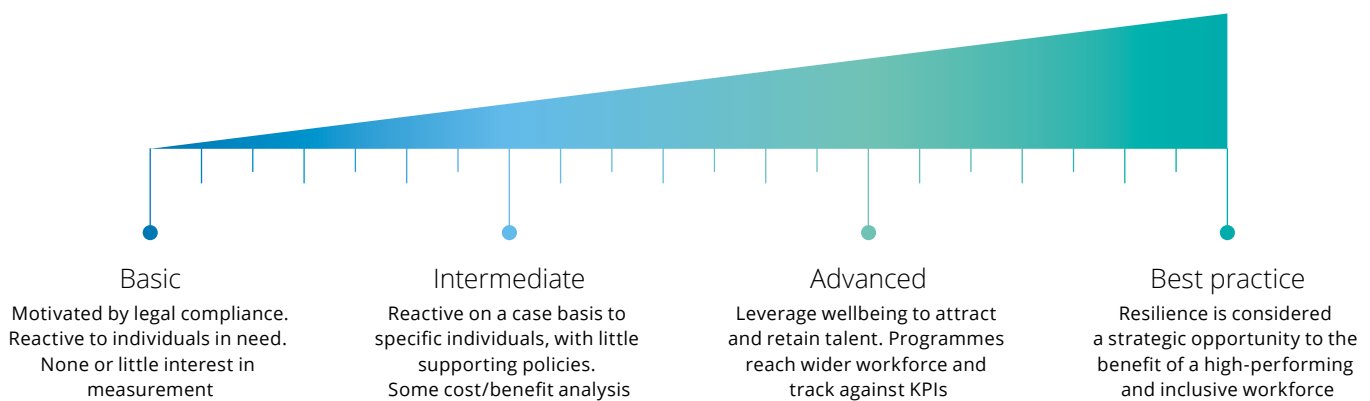
Awareness of wellbeing as a driver of productivity has increased significantly over the past decade, and 86 per cent of respondents in our UK survey acknowledged its importance. However, less than half (48 per cent) of UK respondents feel ready to take on the challenge. Those organisations that have taken the plunge are beginning to address wellbeing in the workplace by investing in a range of programmes.

From those directly targeting personal wellbeing (such as nutrition, fitness programmes, Employee Assistance Programmes and counselling) to those that address work context (such as career development, reward/incentives, home-work interface, interpersonal relationships, culture, and leadership) and work content (such as quality and quantity of workload, work pace, and working schedules).

59 per cent of UK respondents reported having limited or basic wellbeing programmes, typically focused on traditional interventions such as adjusted working patterns and additional exceptional leave. This compares to less than five per cent of respondents who described themselves as having an extensive wellbeing programme on offer. The most popular interventions include flexible work schedules (59 per cent), employee assistance programmes (50 per cent), healthy office snacks (48 per cent), and in-office wellness services (44 per cent). This suggests that the UK may still have some way to go before even the more basic initiatives are truly embedded across all organisations.

86 per cent of organisations in our UK survey acknowledged the importance of wellbeing as a driver of productivity.

Figure 4. The wellbeing maturity spectrum



The sophistication of the approach by an organisation to wellbeing – their ‘wellbeing maturity’ – can be conceptualised on a spectrum from ‘basic’ to ‘best practice’ (see Figure 4). With this approach, organisations at the ‘basic’ end of the wellbeing maturity spectrum are inclined to adopt a reactive, risk mitigating or ‘scattergun’ approach to wellbeing issues.

Those further along the wellbeing maturity spectrum, whilst adopting a more proactive approach, are perhaps more likely to have a ‘patchwork quilt’ of wellbeing initiatives, providing a blend of interventions in a relatively ‘one size fits all’ approach. Those at the ‘best practice’ end of the spectrum adopt a far more strategic and targeted approach, ensuring that their wellbeing offering is tailored to the needs of their people, viewing wellbeing as a means of improving business performance and embedding wellbeing into their culture and values.

Best practice programmes need to be data-driven, incorporating interventions that have been shown through research and the experiences of others to be effective.

The gap that exists between wellbeing awareness and action is unsurprising given that the focus on wellbeing is still relatively new. Organisations are likely to face challenges in implementing effective and sustainable wellbeing programmes. These might include:

- lack of leadership support, preventing wellbeing from becoming a strategic priority
- inability to secure investment to establish a wellbeing strategy and programme
- limited awareness of best practice or what is ‘evidence-based’

- difficulty in measuring success and return on investment, to support the case for ongoing investment
- a tendency to adopt a reactive rather than proactive approach to wellbeing.

Increasingly, organisations are recognising the importance of investing in employee wellbeing. However, the question for many is: “Where do we start?” First of all, bridging the gap between awareness and action requires organisations to make wellbeing a priority at the most senior management levels. After this, an adequate review of organisational needs, understanding what is best practice and targeting interventions to the needs of those in the organisation will be key drivers of success.

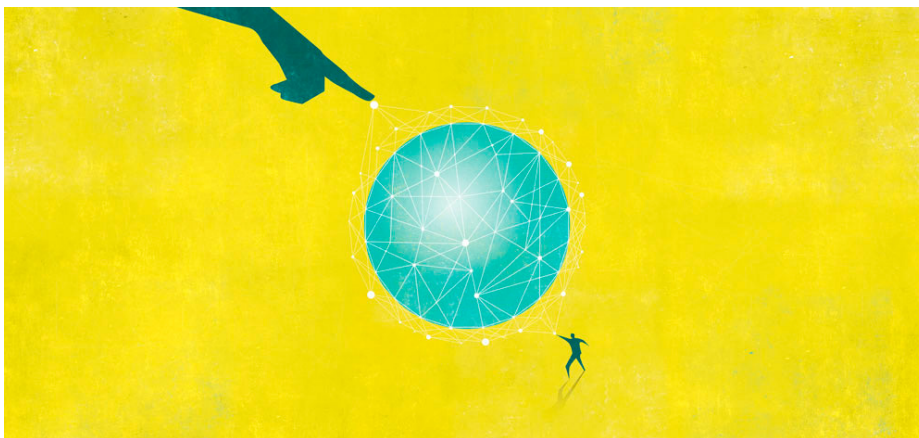
Leveraging technology for sustainable growth

The hyper-connected workplace: will productivity reign?

The adoption of innovative workplace technologies is now being led by employees rather than the employer. Individuals are taking popular social and collaboration tools from their personal life and applying them in the workplace.

This revolution is gaining momentum: 84 per cent of respondents believe that workers in the future will spend more time on online collaboration platforms and 74 per cent predict an increase in work-based social media and instant messaging.

Like the outside world, organisations are becoming hyper-connected: but can they also become hyper-productive?



A hyper-connected workplace should improve productivity, and evidence suggests that it does: 72 per cent of our survey respondents have already seen benefit from using connected workplace tools.

A connected workplace will play a central role in organisations of the future, as they race to replace structural hierarchies with networks of empowered teams.⁶ It will provide tools that enable team leaders to connect quickly and easily to new people and skills, share centralised knowledge and drive shared tracking against tasks – anytime, anywhere.

Connected tools drive virtual decision-making beyond mass emails and conference calls, connecting employees around the office and around the world for effective operations.⁷

The data they produce can also give insights into how people work together, and data analytics can be used to map a ‘neural network of connections’ to understand effective collaboration and drive productivity further.

So the potential impact is great; however, many collaboration technology initiatives currently fall well short of their transformational potential, with less than 50 per cent of respondents reporting adoption of such technologies.

Connected technology deployment suffers from a lack of business focus with technology becoming outdated and falling behind wider social practices, or they complicate the workplace rather than simplify it. The introduction of connected tools should have employees at its heart, and should simplify their increasingly complex work environment.⁸ A connected workplace will only drive productivity if tools are seen as a help rather than a hindrance.

A connected workplace will only drive productivity if tools are seen as a help rather than a hindrance.

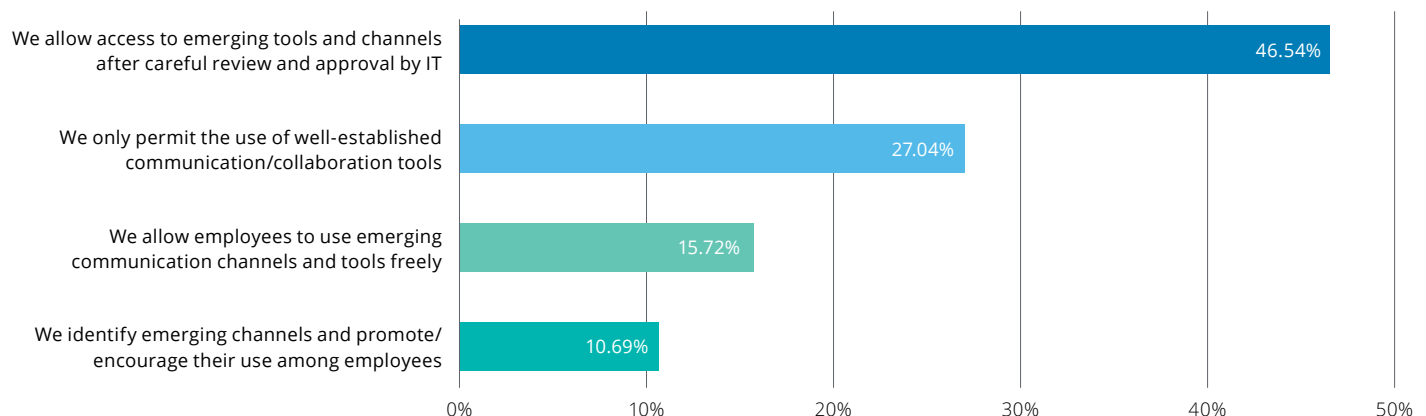
Investment must be made in designing tools based on a complete and intuitive employee experience, integrating with existing communication channels (e.g. email, phone, instant messaging) and including capabilities (e.g. notifications) to avoid a fragmented and distracted working experience.

A well thought out technology architecture that is focused on improving employee productivity and user experience will increase connectivity and productivity of the workforce – a network effect – and support greater empowerment through the use of digital tools. Organisations should not get held back by trying for a high level of adoption for collaboration tools. Small pockets of collaboration can lead to significant benefits, and will grow organically with experience and as teams evolve.

A pressing issue is for HR to begin to take ownership of this initiative: only five per cent of respondents indicated that HR is the primary driver for connectivity in the workforce. As these tools migrate from personal life to the workplace, HR should take a proactive approach to identifying emerging channels and promoting their use in the workplace. They should apply their expertise in team management, goal-setting, and employee development to improve performance of the organisation, teams, and individuals, and promote the necessary collaboration to help organisations respond to the wider range of stakeholders and interests that are involved in becoming a social enterprise.

Small pockets of collaboration can lead to significant benefits, and will grow organically with experience and as teams evolve.

Figure 5. Organisations' use of emerging communication channels and connected work tools as rated by UK respondents



Conclusion

In an era where people trust business more than government,⁹ business leaders are finding that their organisations are expected to bring value to society as a whole, as well as to customers and shareholders. Although this expectation places a new pressure on organisations, it provides them with an exciting opportunity. Below we provide a list of key actions, in line with our top three human capital trends, for building a 'social enterprise' and for better engagement with and development of your employees.



To do list



From careers to experiences:

- **Define the role of leaders and managers** in helping and encouraging individuals to shape their future careers
- **Have honest conversations with employees** about the skills that will be valued in the future and the various opportunities that exist to build their future careers
- **Provide employees with the tools and the responsibilities** to acquire these skills in a way that works for them
- **Put learning at the core** of your organisation, facilitate it and reward those who actively engage in it
- **Acknowledge the importance of career coaches** in the organisation to support individuals in understanding and navigating their career options



Wellbeing: a strategy and a responsibility:

- **Don't do it alone!** Improving wellbeing should be a collaborative objective, involving people from across the business
- **Build a wellbeing strategy:** take time to plan an approach that targets the right people in the right way – interact with employees across your organisation to build your strategy so it reflects their needs
- **Measure the effectiveness of interventions:** this may be done through employee surveys and/or your organisation's health and absence data
- **Obtain leadership support:** this is critical to making any wellbeing intervention 'stick'



The hyper-connected workplace:

- **Put employees at the heart of your design:** understand their appetite, needs and frustrations with connection and collaboration
- **Understand the current work environment,** and the technologies in use, and focus on integrating the two to deliver a seamless experience
- **Don't get caught up on complete adoption:** even a small improvement in collaboration can produce benefits, and adoption will spread organically across dynamic teams
- **Articulate value** based on employee appetite and needs
- **Make it sustainable** by using processes to measure team and personal performance, and then use insights from this data

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