



BARRETT VALUES CENTRE

# The Great Transformation?

**Global COVID-19  
Culture Assessment**



**“How wonderful it is  
that nobody need wait  
a single moment  
before starting to  
improve the world.”**

— Anne Frank  
*1929 to 1945*



# Agenda

1. Introduction
2. The Survey
3. The Cultural Impact of COVID-19
4. What's Needed to Recover and Thrive
5. Industry Stories
6. Social and Data Science
7. Questions and Call to action



BARRETT VALUES CENTRE



# Who We Are & Why

**Why:** To create a values-driven world where all **people, organisation and societies thrive**

**What we do:** Organisational **culture** analytics and **leadership** development

**Where:** Global presence:  
8,000+ Certified Consultants  
in 100 Countries



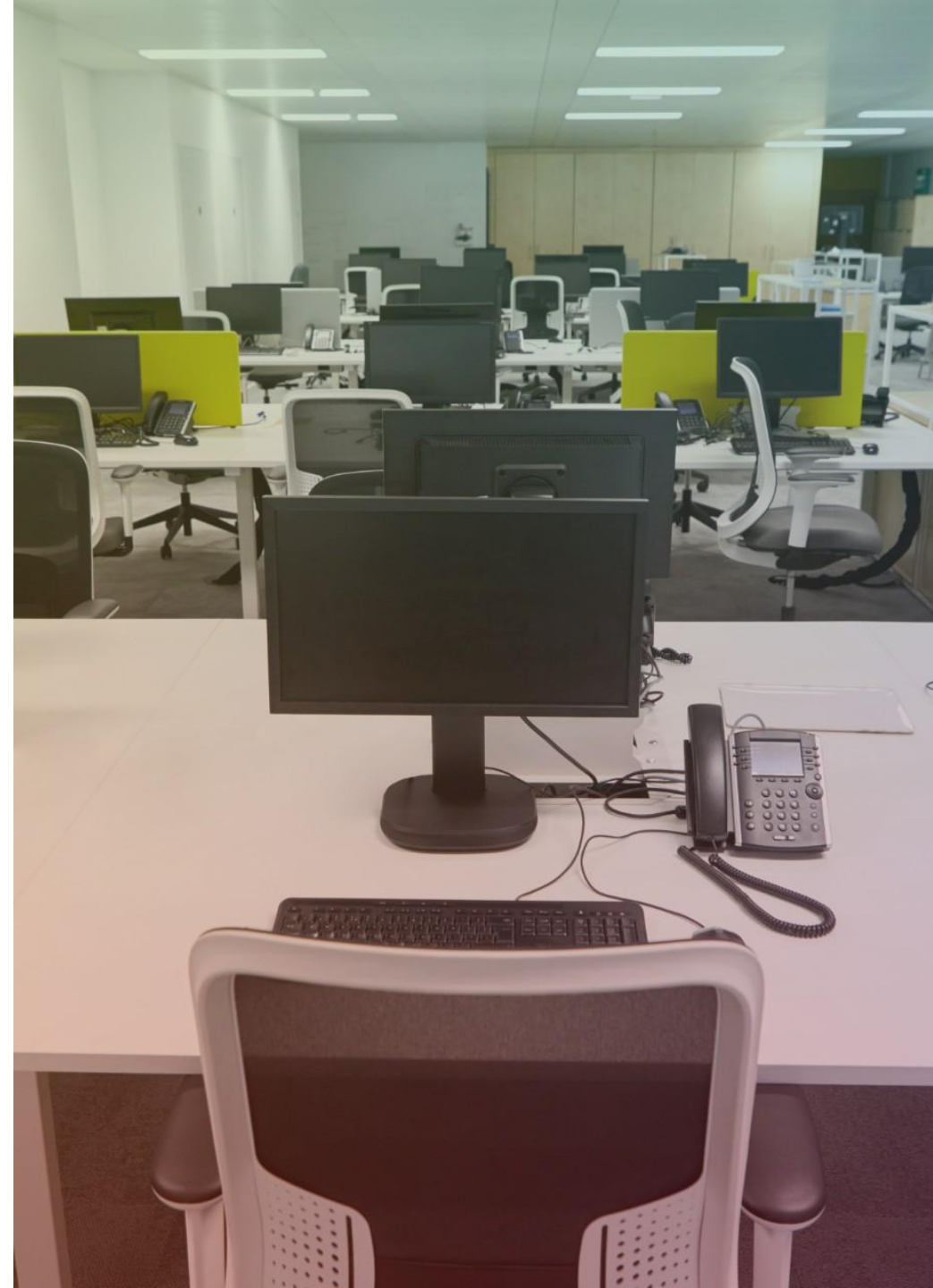
# Why Culture & Values Matter

We value what we need.

When life conditions change, the priority of our values and purpose also change.

Culture can be life enhancing or life depleting.

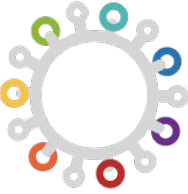
Societal and environmental sustainability require organisational sustainability.



# Global COVID-19 Culture Assessment



# Why



How has the pandemic impacted the values and culture of organisations?

What are the emerging priorities of governments, businesses, employees, and citizens?

What is needed in order to recover and thrive?



# Questions Asked

## PERSONAL VALUES

- Please select ten of the following values/behaviours that most reflect **who you are**, not who you desire to become.

## PRE-COVID CULTURE

- Please select ten of the values/behaviours that from your own experience, best describe **how your organisation operated before** the impact of COVID-19.

## DURING COVID CULTURE

- Please select ten of the values/behaviours that from your own experience, best describe **how your organisation is operating now**, in the current COVID-19 climate.

## POST COVID RECOVERY

- Please select ten of the values/behaviours that you believe are essential for your organisation to **recover and thrive after COVID-19**.





# Who Responded

Number of participants: All 2,520 / Employed 1,387

Position in the Organisation



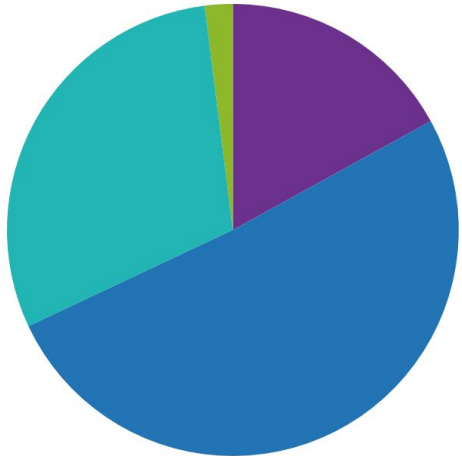
- C-Suite/Exec
- Manager
- Staff

Regions of the World



- Africa
- Asia
- Europe
- Middle East
- North America
- Oceania
- South America

Generations

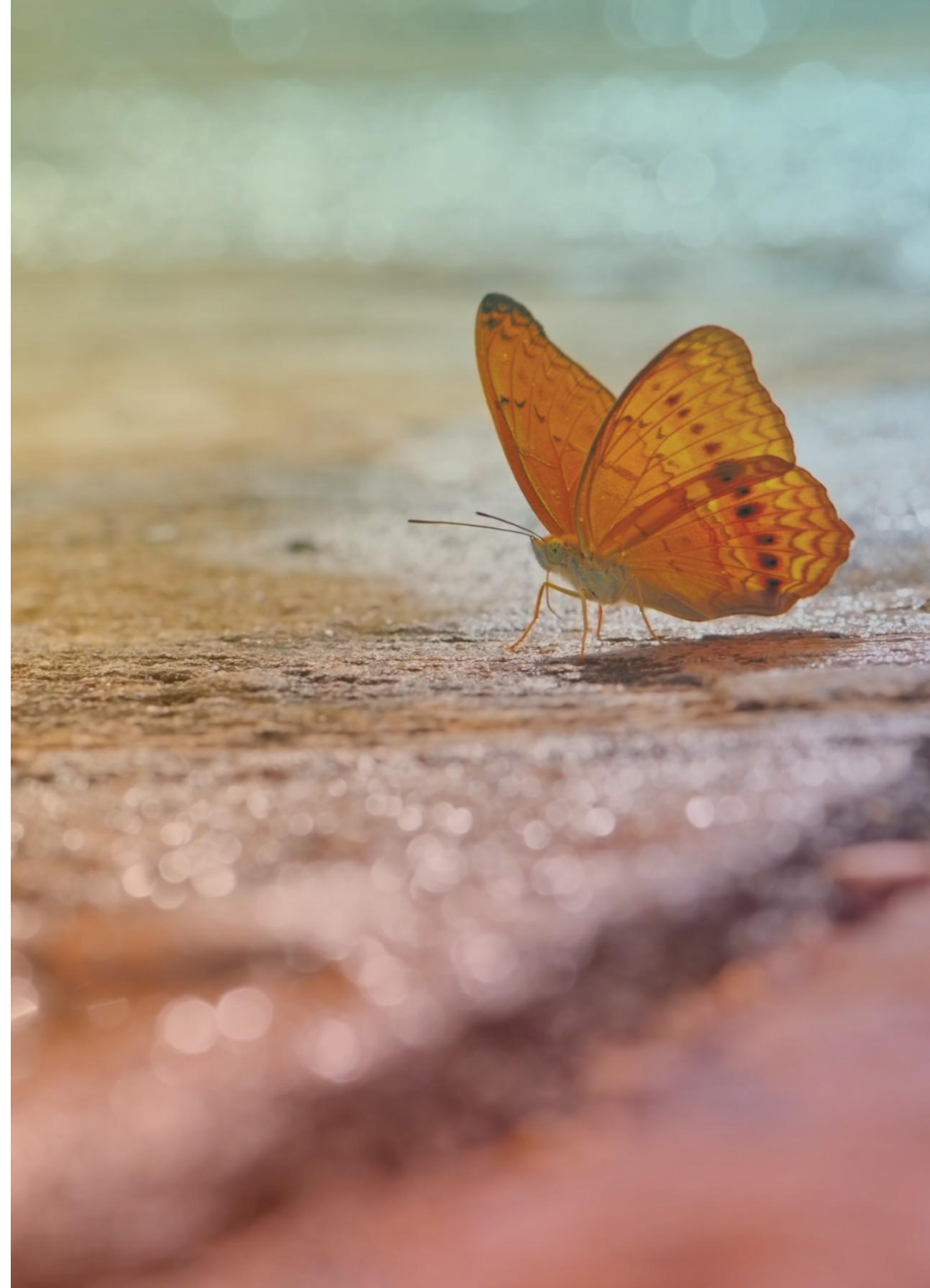


- Boomers
- Gen X
- Millennials
- Gen Z

Additional demographics: Industry (38), Gender, Key Worker, Work from Home  
Survey dates: 21st April to 5th May

# Rapid Transformation

Transformation that normally would have taken 5-7 years seemed to happen in just 6 weeks.



# The Cultural Impact of COVID-19



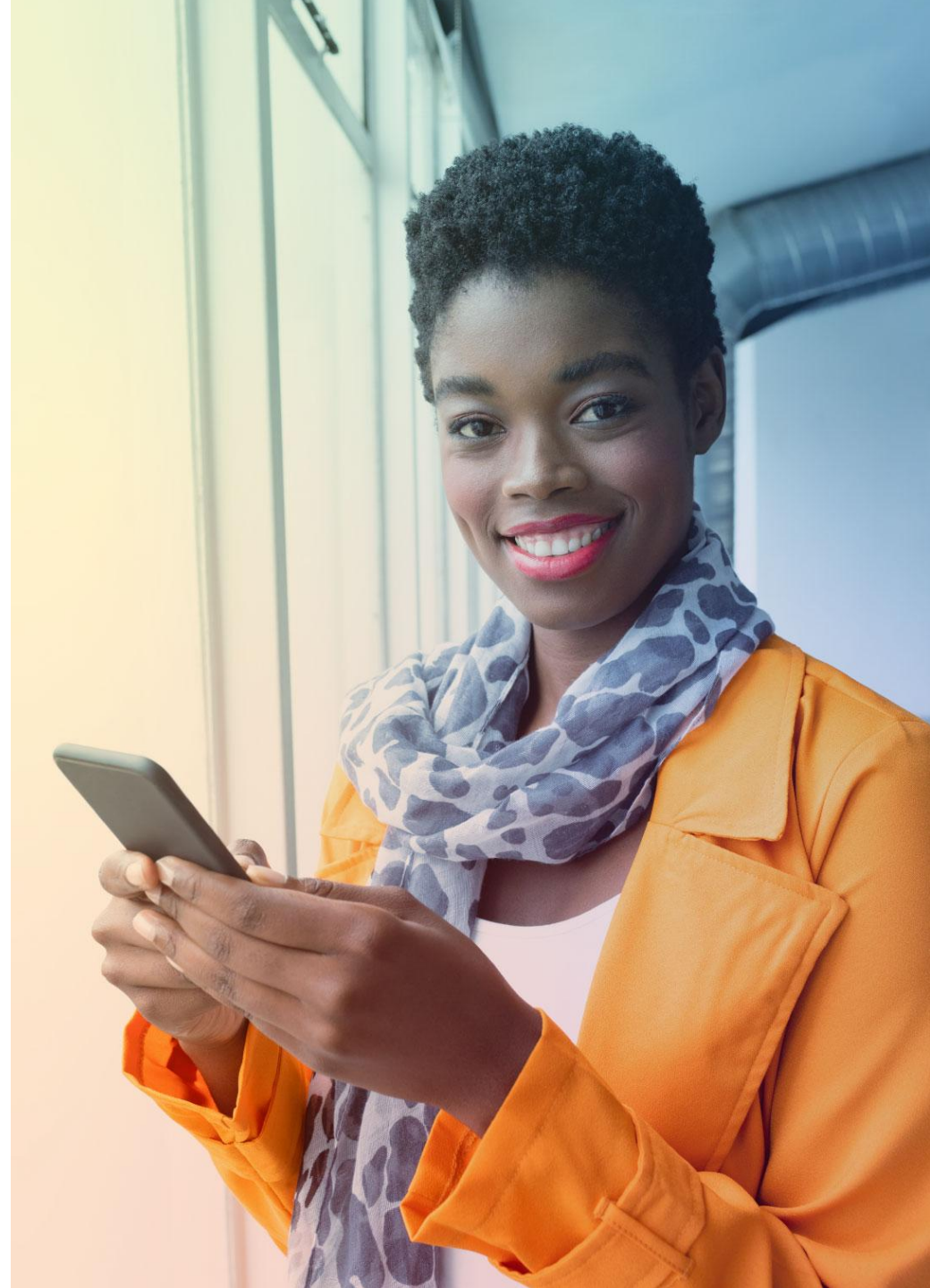
# Personal Values Shift

What is important to people **now**?

- Making a difference
- Adaptability
- Well-being
- Caring
- Continuous learning & Family\*

\*Jumped in priority

© Barrett Values Centre



# Personal Values Shift

## All 2019 Surveys

**honesty**

accountability

commitment

positive attitude

family

**respect**

humour/ fun

continuous learning

**trust**

**integrity**

## During COVID

continuous learning

family

**making a difference**

**adaptability**

**well-being**

positive attitude

commitment

accountability

**caring**

humour/ fun



# New Organisational Experience

Performance → People focus

Control → Adaptability

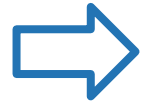
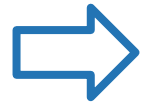
Hierarchy → Working together



# New Organisational Experience (detailed)

## Pre-COVID Culture

- High performance focus  
Results orientation, Achievement, Financial stability
- Some sense of alignment  
Teamwork, Engagement, Commitment, Accountability
- Restrictive practices  
Bureaucracy, Control, Cost reduction



## During COVID Culture

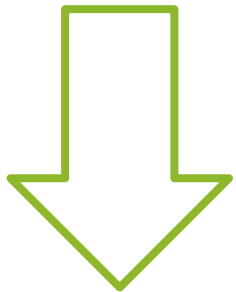
- Responding to changing needs  
Adaptability, Agility, Digital connectivity
- People focus  
Caring, Employee health, Balance (home/work)
- Working together  
Teamwork, Collaboration, Information sharing



# Cultures are Healthier

Cultural Entropy declined  
from 20% to 17%.

Concerns have shifted.



Bureaucracy  
Control  
Hierarchy









Cautious  
Confusion  
Job Insecurity





# Concerns have shifted (detailed)

Value	Pre-COVID Culture	During COVID Culture	Change
Bureaucracy	#3	#52	 -49
Hierarchy	#11	#46	 -35
Control	#8	#33	 -25
Caution	#75	#18	 +57
Job Insecurity	#87	#26	 +61
Confusion	#56	#29	 +27



# Barrett Model

**Contribution** - Living Purpose

**Collaboration** - Cultivating Communities

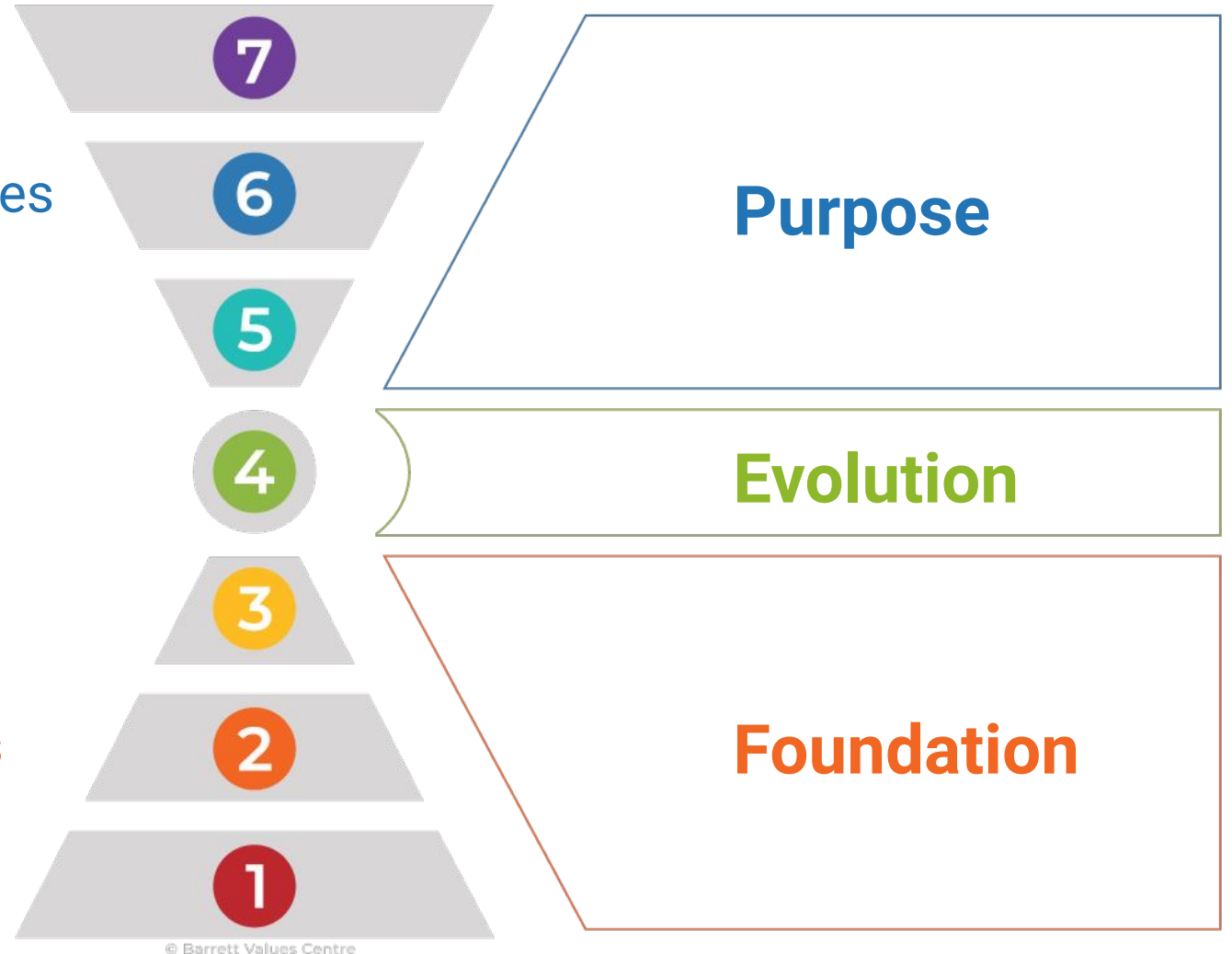
**Alignment** - Authentic Expression

**Evolution** - Courageously Evolving

**Performance** - Achieving Excellence

**Relationships** - Building Relationships

**Viability** - Ensuring stability

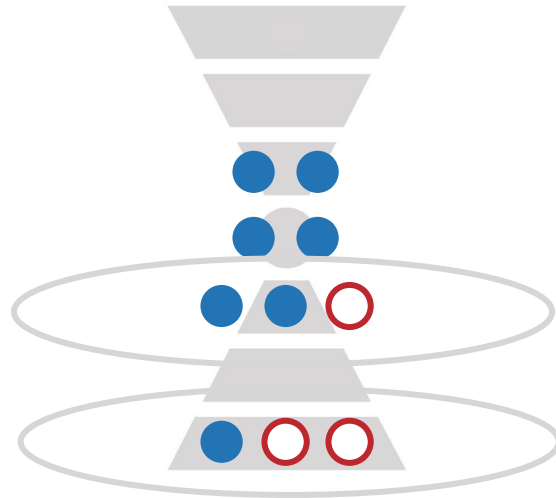


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# Where is the energy now?

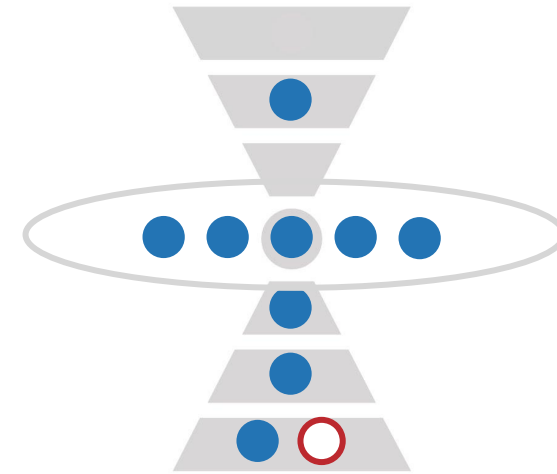
- 7 Contribution
- 6 Collaboration
- 5 Alignment
- 4 Evolution
- 3 Performance
- 2 Relationships
- 1 Viability

Pre-COVID Culture



	<u>Level</u>
teamwork	4
results orientation	3
bureaucracy (L)	3
financial stability	1
cost reduction (L)	1
achievement	3
accountability	4
control (L)	1
commitment	5
employee engagement	5

During COVID Culture



	<u>Level</u>
<b>adaptability</b>	4
<b>digital connectivity</b>	3
cost reduction (L)	1
<b>caring</b>	2
<b>employee health</b>	1
teamwork	4
<b>information sharing</b>	4
<b>agility</b>	4
<b>balance (home/work)</b>	4
<b>cross group collaboration</b>	6

● = Positive Values

○ = Potentially Limiting Values (L)



# Largest Increases (detailed)

Value	Pre-COVID Culture	During COVID Culture	Change
Managing well under pressure	#75	#18	+57
Information Sharing	#62	#7	+55
Resilience	#83	#30	+53
Digital Connectivity	#50	#2	+48
Employee Health	#61	#5	+46
Safety	#54	#13	+41
Well-Being	#57	#16	+41
Compassion	#67	#31	+36
Agility	#43	#8	+35



# Top Values Shifts

## Pre-COVID Culture

Position	Value
1	teamwork
2	results orientation
3	bureaucracy (L)
4	financial stability
5	cost reduction (L)
6	achievement
7	accountability
8	control (L)
9	commitment
10	employee engagement
11	hierarchy (L)
12	continuous improvement
13	organisational growth
14	brand image
15	making a difference
16	balance (home/work)
17	continuous learning
18	customer/ patient/ student satisfaction
19	long hours (L)
20	silos mentality (L)

## During COVID Culture

Position	Shifts	Value
1	<input type="checkbox"/>	adaptability
2	<input type="checkbox"/>	digital connectivity
3	<input type="checkbox"/>	cost reduction (L)
4	<input type="checkbox"/>	caring
5	<input type="checkbox"/>	employee health
6	<input type="checkbox"/>	teamwork
7	<input type="checkbox"/>	information sharing
8	<input type="checkbox"/>	agility
9	<input type="checkbox"/>	balance (home/work)
10	<input type="checkbox"/>	cross group collaboration
11	<input type="checkbox"/>	managing well under pressure
12	<input type="checkbox"/>	open communication
13	<input type="checkbox"/>	safety
14	<input type="checkbox"/>	continuous learning
15	<input type="checkbox"/>	financial stability
16	<input type="checkbox"/>	well-being (physical/ emotional/ mental/ spiritual)
17	<input type="checkbox"/>	cooperation
18	<input type="checkbox"/>	caution (L)
19	<input type="checkbox"/>	commitment
20	<input type="checkbox"/>	employee engagement
21	<input type="checkbox"/>	positive attitude



# What's Needed to Recover and Thrive



# On the Right Track

Six values experienced during COVID are **also** requested going forward.

- Adaptability
- Agility
- Teamwork\*
- Digital connectivity
- Balance (home/work)
- Cross group collaboration

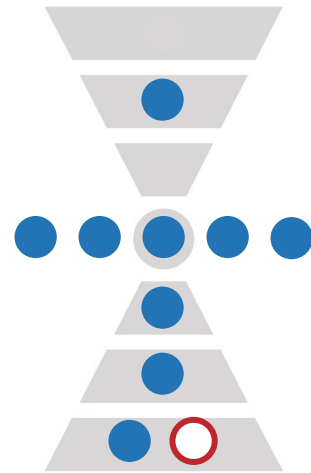
\*Consistent throughout



# On the Right Track

- 7 Contribution
- 6 Collaboration
- 5 Alignment
- 4 Evolution
- 3 Performance
- 2 Relationships
- 1 Viability

## During COVID Culture

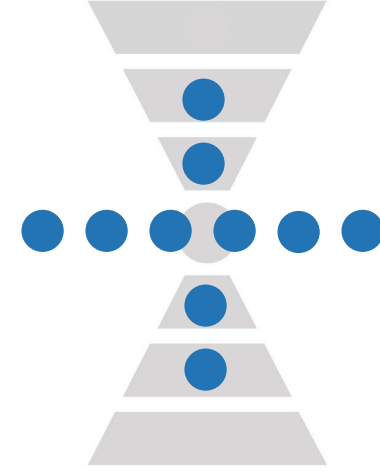


<b>adaptability</b>	4
<b>digital connectivity</b>	3
cost reduction (L)	1
caring	2
employee health	1
<b>teamwork</b>	4
information sharing	4
<b>agility</b>	4
<b>balance (home/work)</b>	4
<b>cross group collaboration</b>	6

### Level

4  
3  
1  
2  
1  
4  
4  
4  
4  
4  
6

## Post COVID Recovery



<b>adaptability</b>	4
<b>agility</b>	4
employee engagement	5
<b>teamwork</b>	4
<b>digital connectivity</b>	3
<b>balance (home/work)</b>	4
innovation	4
<b>cross group collaboration</b>	6
continuous learning	4
open communication	2

### Level

4  
4  
5  
4  
3  
4  
4  
6  
4  
2



# New Directions

The new values being requested going forward:

- Employee engagement\*
- Innovation
- Continuous learning
- Open communication

\*Top value Pre-COVID

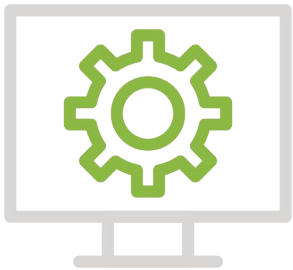
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# Business Focus Areas

We can also better understand what is needed to recover and thrive by seeing where employees are asking for more focused energy.

## Process



- Finance & Effectiveness
- Agility & Innovation

## People



- Employee Well-Being
- Trust & Engagement

## Purpose



- Direction & Communication
- Society & Sustainability



# Shift in Business Focus

Thanks AxiaOrigin for the data analytics



PROCESS

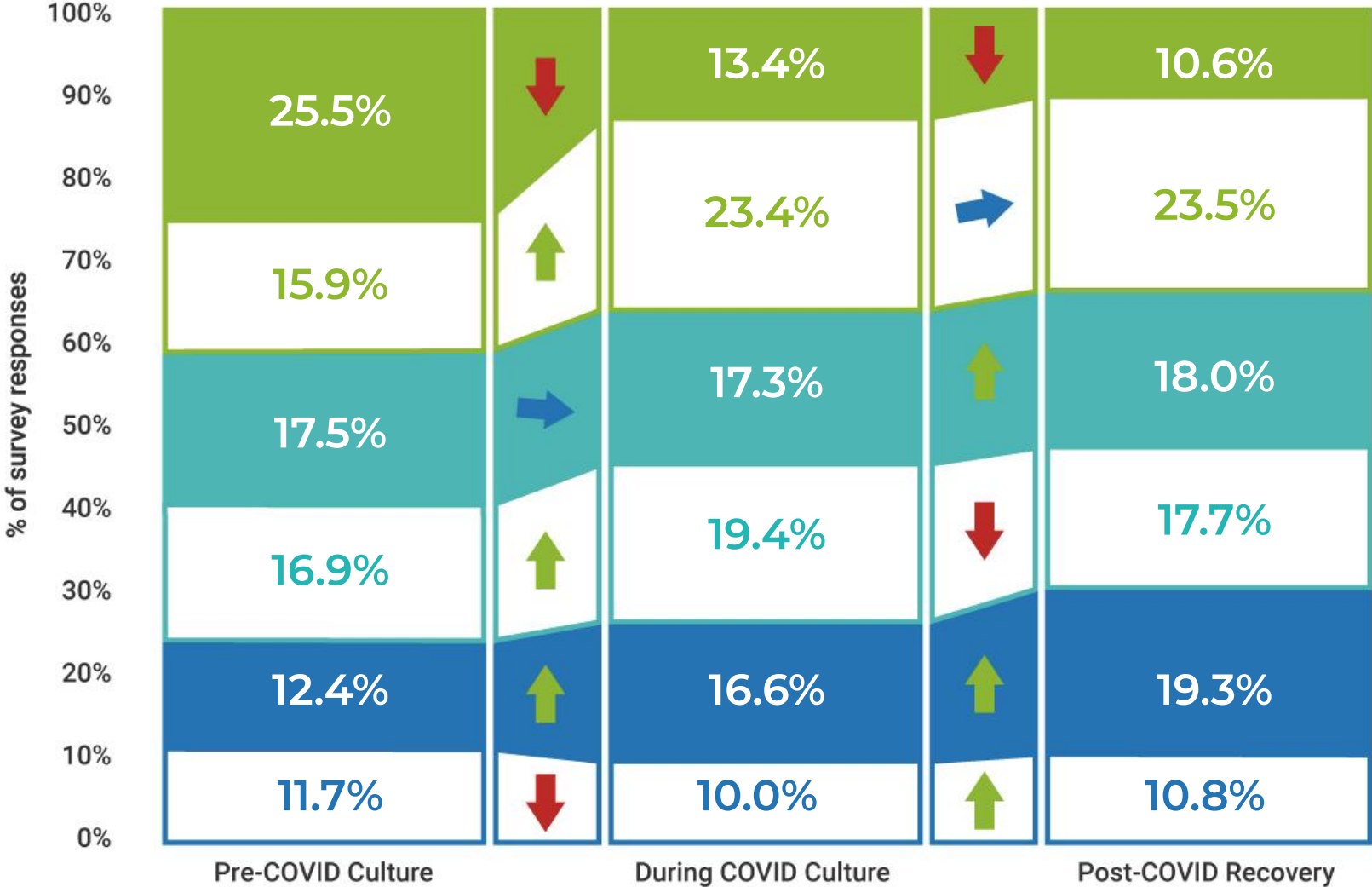
- Finance & Effectiveness
- Agility & Innovation

PEOPLE

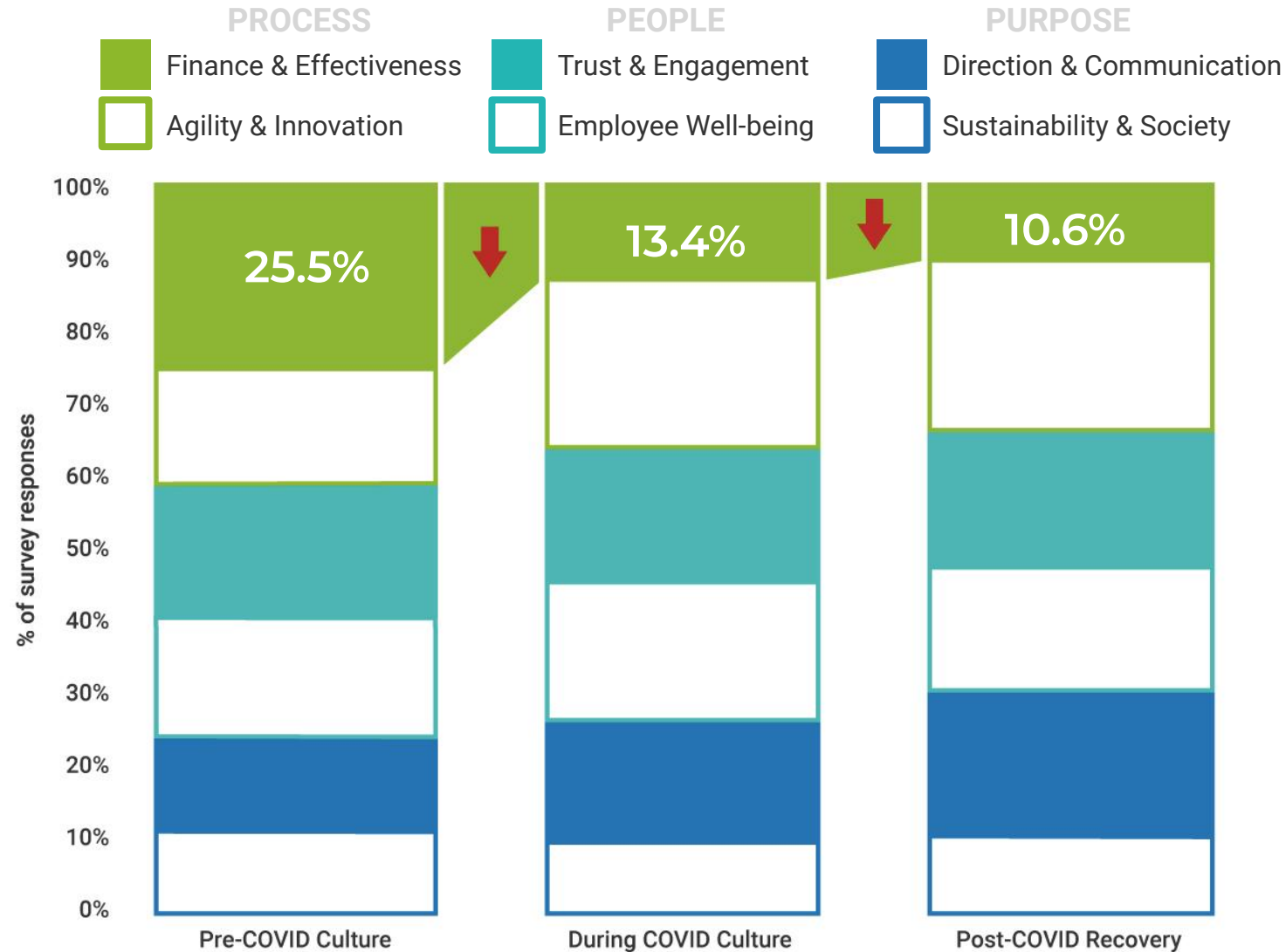
- Trust & Engagement
- Employee Well-being

PURPOSE

- Direction & Communication
- Sustainability & Society



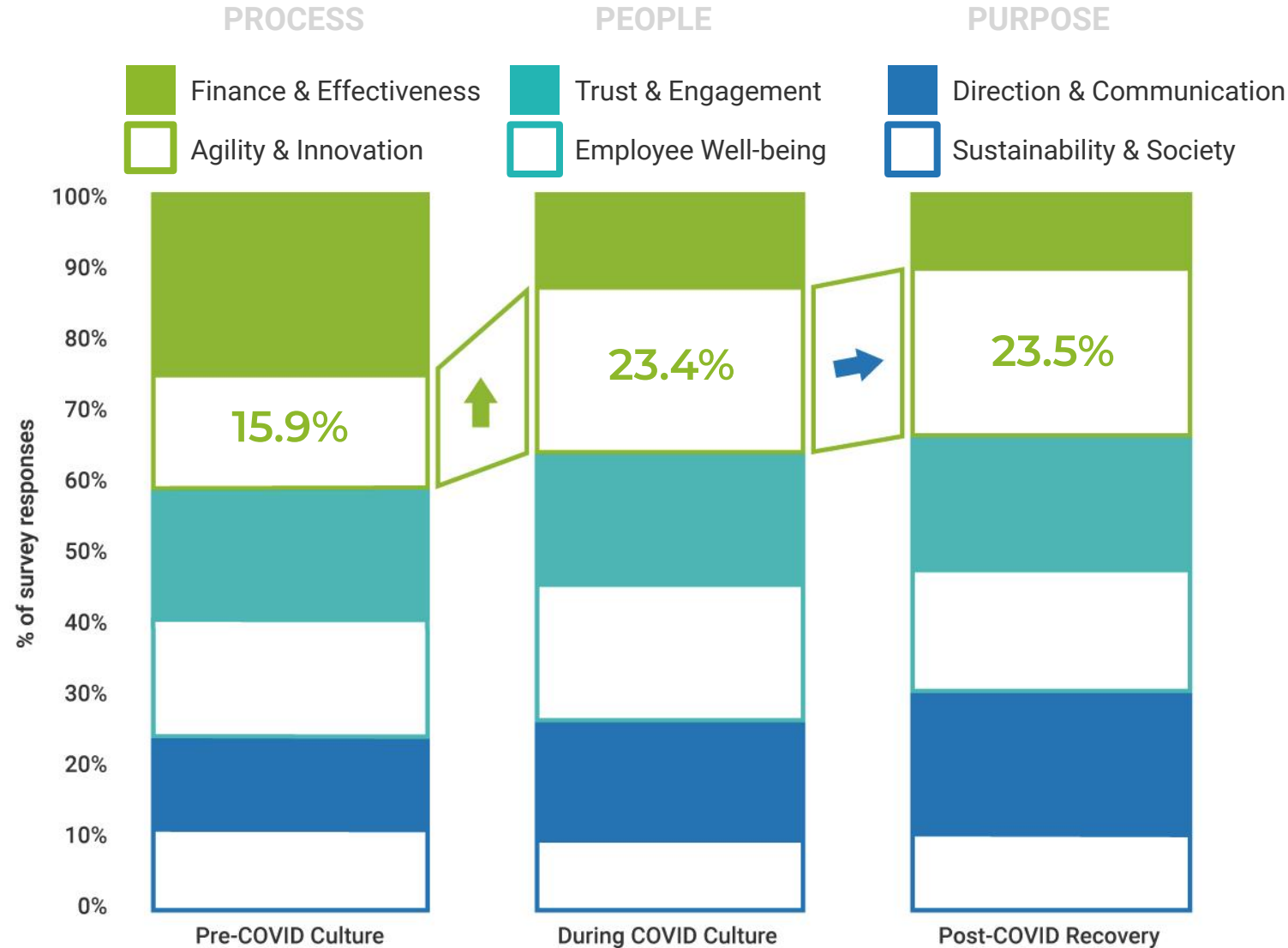
# Finance & Effectiveness



Values that were prominent pre Covid-19, but are no longer as desired in a potential future?...

- Results orientation: #58 down from #7
- Achievement: #71 down from #8
- Organisational Growth: #51 down from #11
- Customer satisfaction: #46 down from #13
- Brand image: #57 down from #5
- Professionalism: #64 down from #16

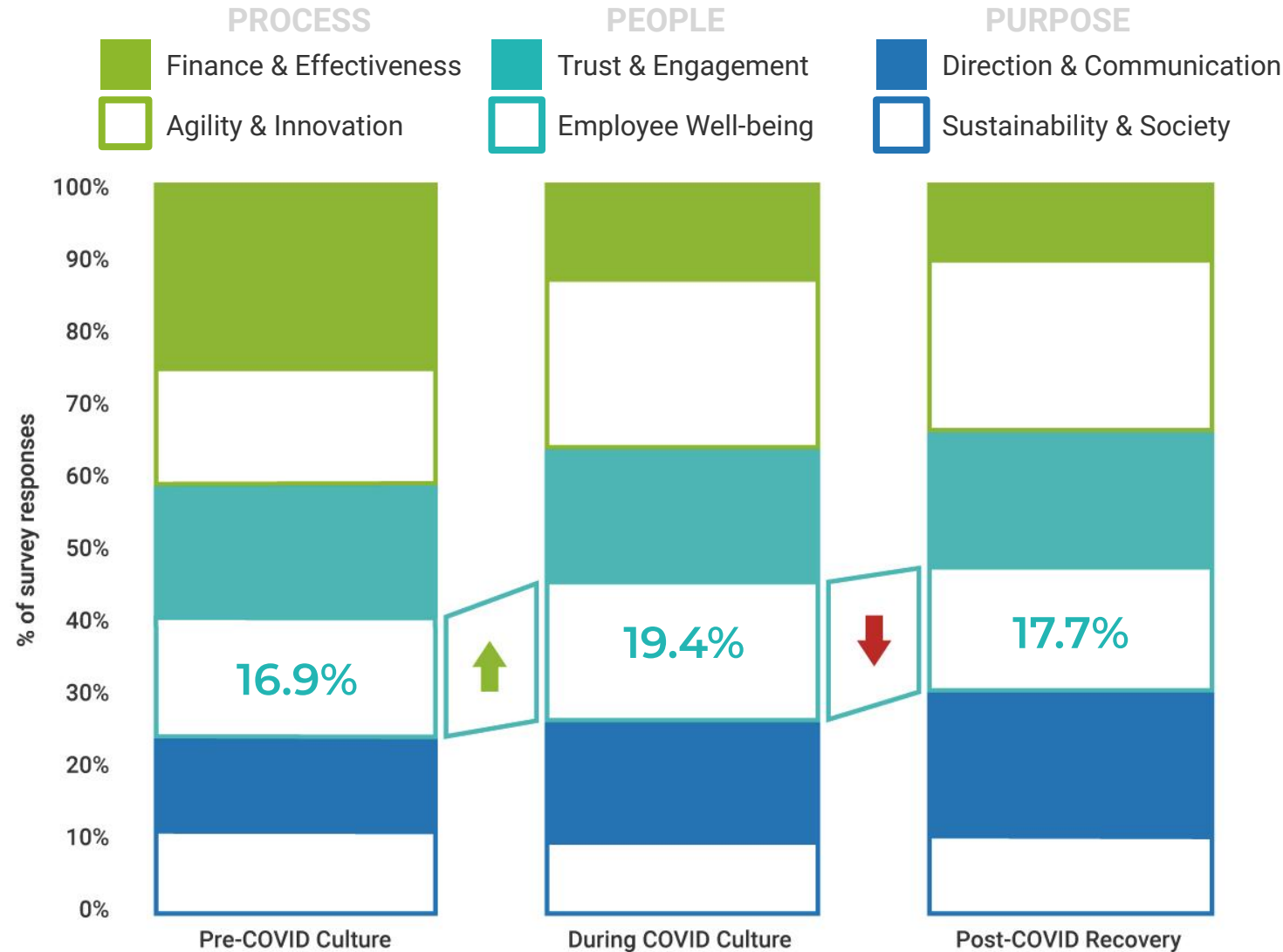
# Agility & Innovation



Which highly desired values were not prominent pre Covid-19?....

- Adaptability: #1** up from **#13**
- Agility: #2** up from **#36**
- Digital Connectivity: #3** up from **#62**
- Innovation: #5** up from **#43**
- Creativity: #8** up from **#23**

# Employee Well-Being



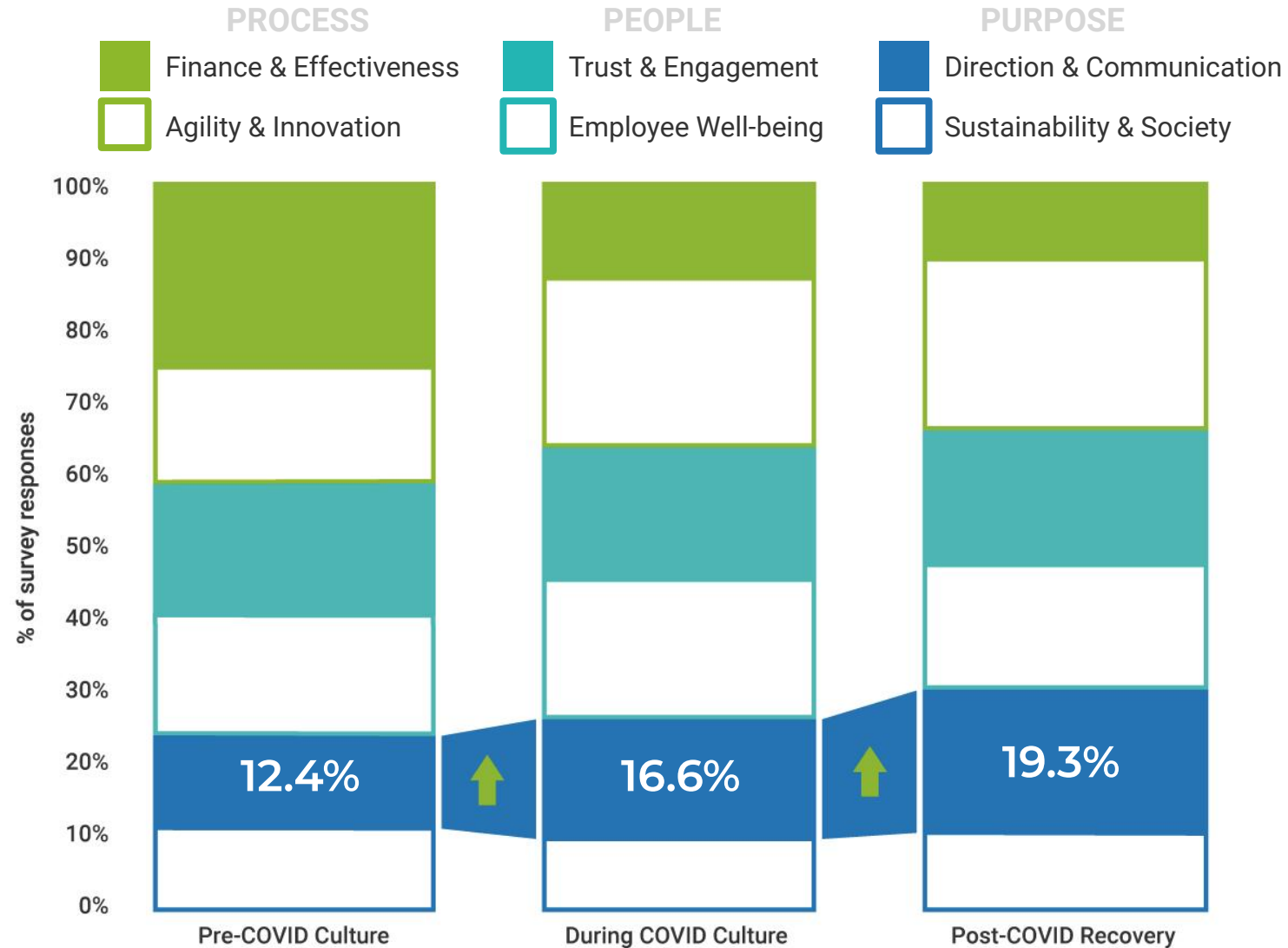
Which highly desired values (under the current pandemic) were not prominent pre Covid-19?....

**Caring:** #3 up from #21  
**Wellbeing:** #5 up from #24  
**Employee health:** #7 up from #73  
**Safety:** #18 up from #62

Which values are prominent under Covid-19, but are no longer as desired in a potential future?...

**Caring:** #25 down from #3  
**Employee health:** #49 down from #7  
**Safety:** #79 down from #18

# Direction & Communication



Which highly desired values were not prominent pre Covid-19?....

Open communication: #14 up from #40  
Shared vision: #20 up from #63  
Long term perspective: #21 up from #64

# Differing Priorities for Leaders & Employees

They are seeing the way to their 'New Normal' differently in terms of:

- Direction & Communication
- Agility & Innovation
- Trust & Engagement
- Sustainability & Society

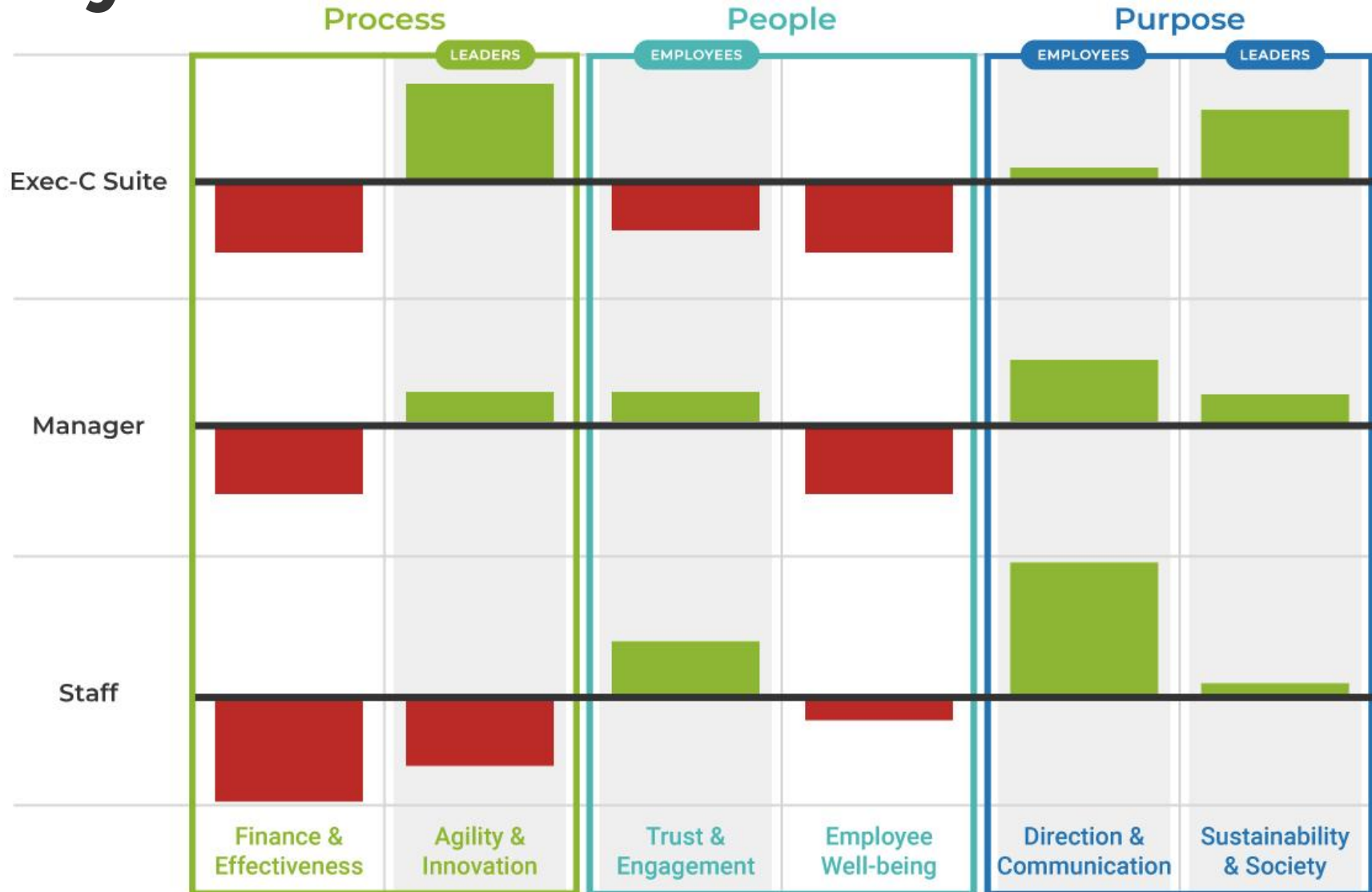




# Differing Priorities for Leaders & Employees

Thanks AxiaOrigin for the data analytics

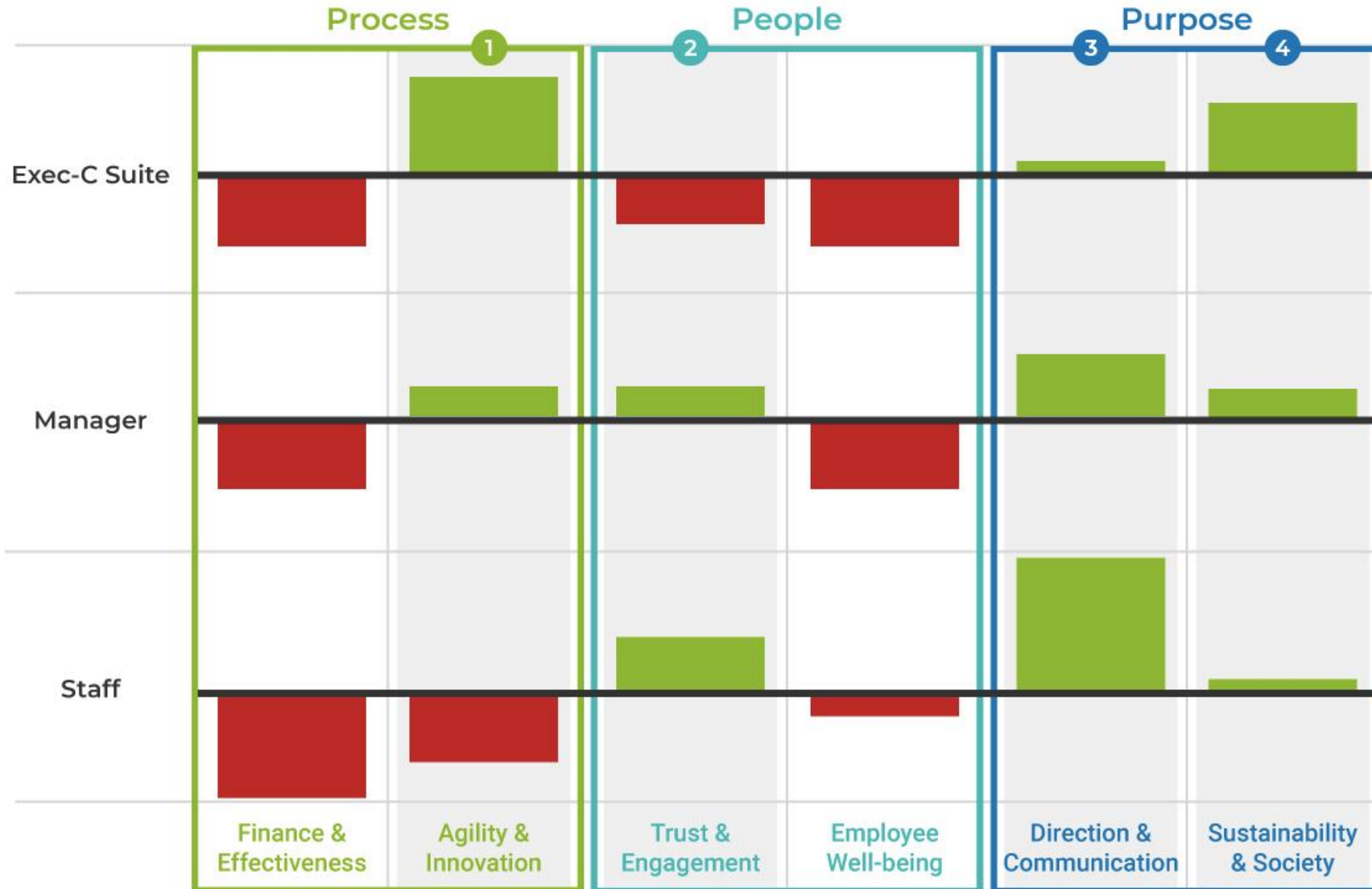
AxiaOrigin



# There are 4 key areas where values are diverging between C-Suite Execs and their staff, as we look towards recovery

Thanks AxiaOrigin for the data analytics

**AxiaOrigin**



4 key gaps are present between C-Suite Execs and their staff...

1 – **Agility & Innovation** are highly desired by C-Suite in the future relative to now, whereas these are less desired for Staff

2 – **Trust & Engagement** has less importance in the future for C-Suite, but is more highly valued in the desired state by Staff and Managers.

3 – **Direction & Communication** are by far the most highly desired type of values in the desired future for Staff. Yet for C-Suite Execs, there is a negligible change from today's position.

4 – **Sustainability & Society** are among the most highly desired set of values for C-Suite Execs relative to the current situation. Yet for Staff, there is a negligible difference in their importance from today.

# Staff Desire for Leadership Direction & Communication (detailed)

Value	During COVID Culture	Post COVID Recovery	Change
Shared Vision	#94	#17	+77
Leadership Development	#95	#29	+66
Leading by Example	#67	#22	+45
Long-term Perspective	#70	#25	+45
Shared Values	#74	#35	+39
Open Communication	#22	#4	+16

Changes in Value Emphasis During COVID Culture to Post COVID Recovery

# Leaders' Increased Focus on Sustainability (detailed)

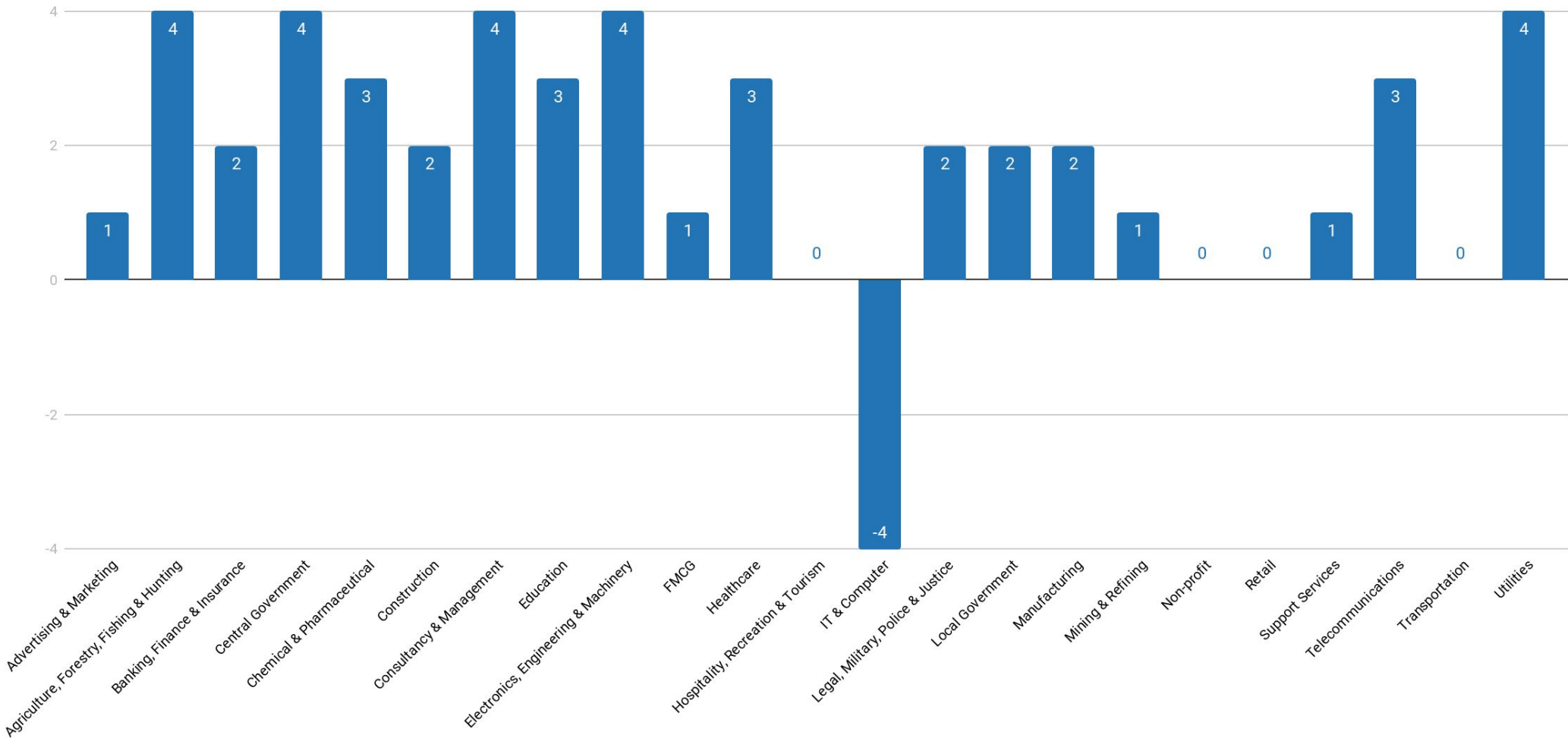
Value	During COVID Culture	Post COVID Recovery	Change
Future Generations	#90	#35	+55
Environmental Responsibility	#102	#65	+47
Strategic Alliances	#62	#21	+41
Sustainability	#87	#52	+35
Global Thinking	#45	#25	+20

Changes in Value Emphasis During COVID Culture to Post COVID Recovery

# Industry Stories



# Increased Confidence in Current Direction



# Banking, Finance, & Insurance

## Pre-COVID Culture



- People operating in a **restrictive environment**
- Focus on **traditional business metrics**
- Opportunities for **staff involvement**

## During COVID Culture



- Much **less focus on monitoring and governance**
- **New ways of working**
- Strong attention to **looking after others**

## Post COVID Recovery

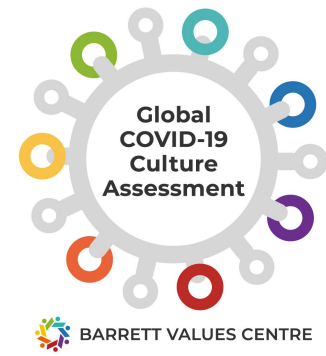


- Expanding call for **change**
- Desire for **greater sense of connection**
- Care for the **whole person**

What support is needed for a highly regulated industry to embrace new possibilities and empower employees?



# Banking, Finance & Insurance



## **Pre-COVID Culture:**

People operating in a restrictive environment (bureaucracy, control & compliance).  
Focus on traditional business metrics (growth, finances, image, results).

## **During COVID Culture:**

An apparent pause in business as usual: the culture has changed significantly.  
Focus on monitoring and governance has all but disappeared, replaced by new ways of working (adaptability, digital connectivity).  
Strong attention to looking after others (caring, employee health, social responsibility).

## **Post COVID Recovery:**

Expand emphasis on change (adaptability, digital connectivity, agility, innovation) .  
A greater sense of involvement (accountability and employee engagement) bolstered in mutually beneficial exchanges (cross group collaboration and open communication).

*What support is needed for a highly regulated industry to embrace new possibilities and empower employees?*



# IT & Computer

## Pre-COVID Culture



- Organisations were on the **right track**
- Connection with their **personal values**
- Ability to **contribute their ideas** at work

## During COVID Culture



- **Confidence** that they are moving in the right direction **drops significantly**
- **Ability to respond** takes priority
- **Emphasis on people and communication** increases

## Post COVID Recovery



- Desire to return to exploration of **big picture ideas**
- Wish to create a **common understanding** of the way forward

What lessons can this group learn from past successes to help bridge to a new way of working?



# IT & Computer



## **Pre-COVID Culture:**

Respondents felt their organisations were on the right track (7 values matches between Current and Desired Cultures).

Making a difference and creativity are of personal importance to this group, and they were able to contribute their ideas at work (employee engagement, continuous improvement, innovation, teamwork, and global thinking).

## **During COVID Culture:**

Confidence that they are moving in the right direction drops significantly.

Emphasis on people and communication increases (caring, cooperation, open communication).

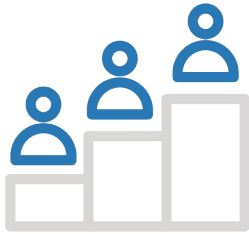
## **Post COVID Recovery:**

Desire to return to many of the top values they held previously, as well as to create a common understanding of the way forward (shared vision).

*What lessons can this group learn from past successes to help bridge to a new way of working?*

# Consultancy & Management

## Pre-COVID Culture



- **Highly driven** people
- Strong emphasis on **developing others**

## During COVID Culture



- Increase in **focus on finances**
- Attention to **looking after themselves and others**
- Bringing their **sense of optimism** and using this to **try new approaches**

## Post COVID Recovery



- Call for more **sustainable** and **resilient approach**
- Strong emphasis on **generating new ideas** and **ways of working**

How might this industry see an opportunity to use the present challenges as a catalyst for evolution?



# Consultancy & Management



## **Pre-COVID Culture:**

Highly driven people (commitment, achievement, making a difference).

The values are typical of the industry (leadership development, coaching/ mentoring).

## **During COVID Culture:**

Understandable increase in focus on finances (cost reduction and financial stability).

Attention to looking after themselves and others (caring, well-being (physical, emotional, mental, spiritual)).

They are bringing their sense of optimism (positive attitude) and are using this time to try new approaches (adaptability, agility, digital connectivity).

## **Post COVID Recovery:**

A desire for a more sustainable and resilient approach (strategic alliances, well-being, financial stability).

Strong emphasis on generating new ideas and ways of working (innovation, creativity and continue with adaptability, agility and digital connectivity).

*How might this industry see an opportunity to use the present challenges as a catalyst for evolution?*



# Other Industry Headlines

## Post COVID Recovery

**Government** – Responsive and effective approach



**Nonprofit** – Positive internal focus



**Agriculture & Forestry** – Build knowledge and deepen their connections



**Consultancy & Management** – New ideas and ongoing learning



**Manufacturing** – Look after both people and profit



# Social and Data Science

## AxiaOrigin



## Adapting to the new normal: among both C-Suite Execs and the general public, Open and Social data suggests a deflated interest in longer-term sustainability related needs

*Some key insights from Open and Social data:*

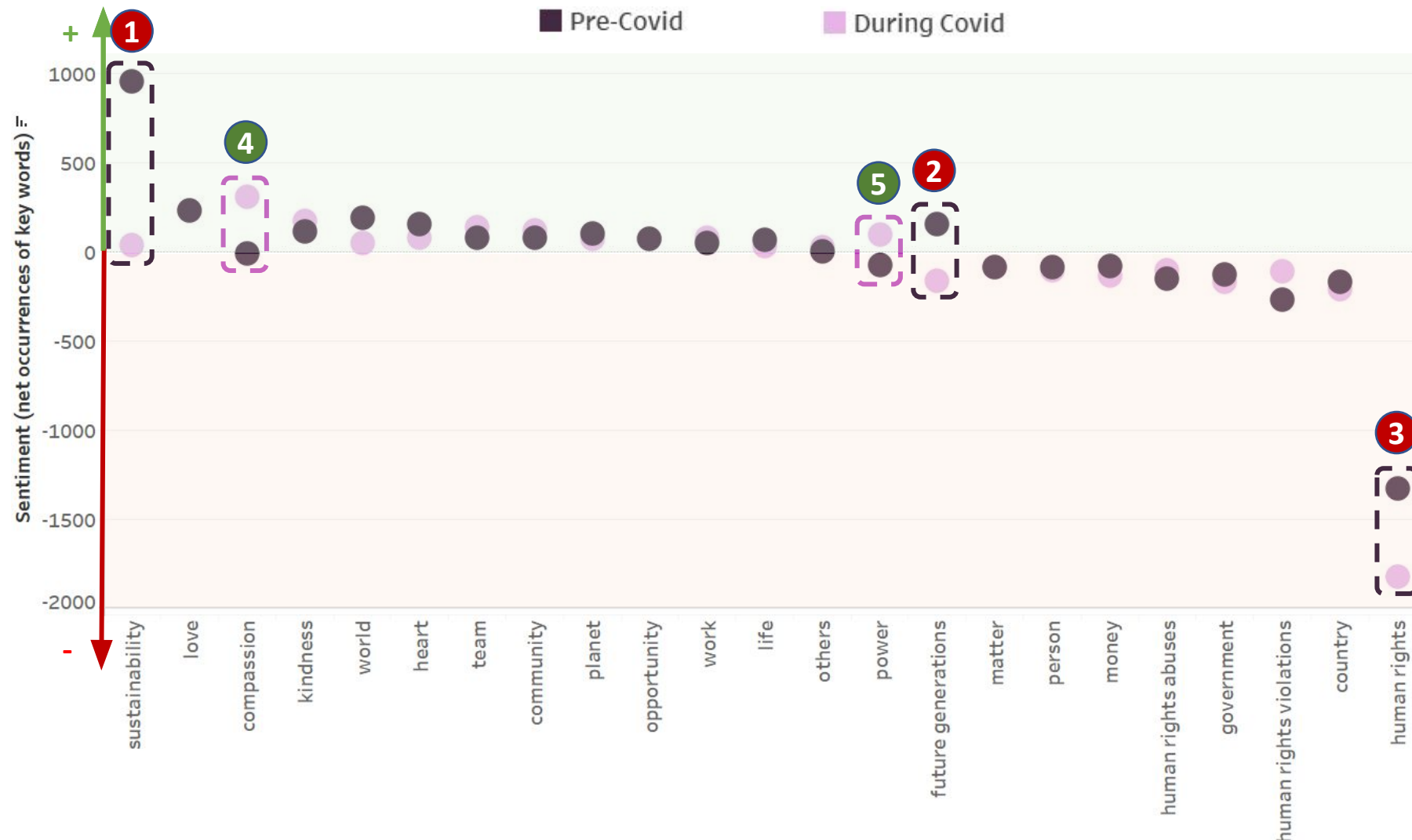
- 1 When it comes to **sustainability** (and related) topics, **C-Suite sentiment** across open and social media is now **negative** ↓ towards longer-term needs, and **positive** ↑ towards immediate needs
- 2 **Interest** in longer-term **sustainability** (and related) topics across all online searches among the **general public** has **fallen** ↓ dramatically

*We will follow up in the coming days with some digital content providing more detailed insight into:*

- 3 General public attitudes towards a range of “longer-term need” topics
- 4 General public shift towards “immediate need” topics
- 5 Breakdown in C-Suite conversations for “longer-term need” topics
- 6 C-Suite shift in frequency of conversations for “immediate need” topics
- 7 More insights into the COVID-19 survey data



When it comes to **sustainability** (and related) topics, **C-Suite sentiment** across open and social media is now **negative** towards longer-term needs, and **positive** towards immediate needs



There has been a **negative** shift in “longer-term need” topics...

- 1 Sustainability**
- 2 Future generations**
- 3 Human rights**

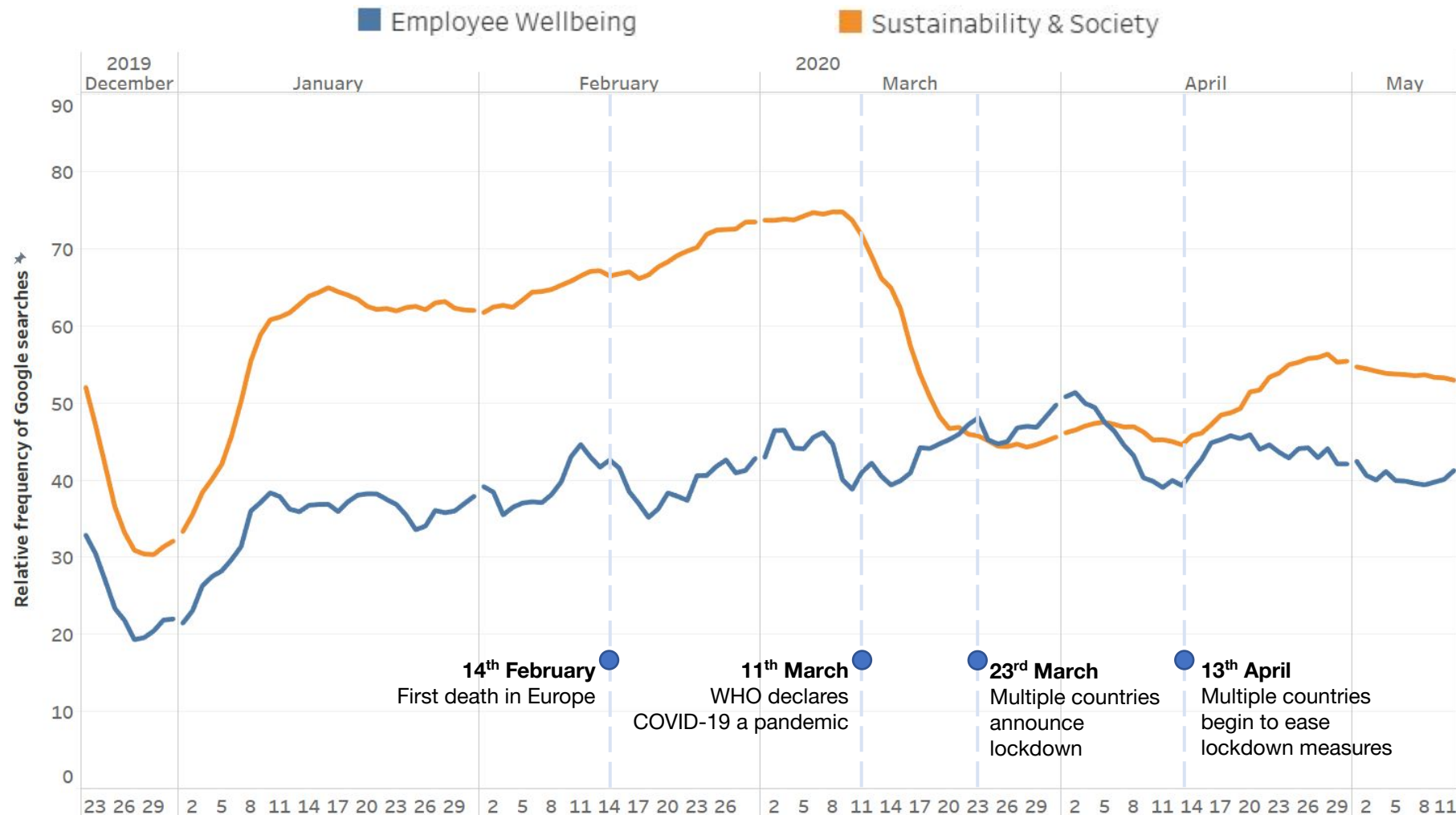
There has been a **positive** shift in “immediate need” topics...

- 4 Compassion**
- 5 Power**

**Sample** = 21,288 C-Suite executives globally  
**Pre COVID 19 date range:** 16<sup>th</sup> October 2019 – 1<sup>st</sup> January 2020  
**During COVID 19 date range:** 27<sup>th</sup> February – 15<sup>th</sup> May



## Interest in longer-term **sustainability** (and related) topics across all online searches among the **general public** has **fallen** dramatically



### Sustainability & Society search terms include longer-term needs:

- Climate Change
- Gender Equality
- Human Rights
- Sustainable Development Goals (SDGs)
- Poverty

### Employee Wellbeing search terms include immediate needs:

- Employee Mental Health
- **Employee Physical Health**
- Employee Safety
- Employee Wellness

# Questions and Call to Action



**The Guardian** UK edition


Search jobs Sign in Search

Culture Lifestyle More

# After the Covid-19 crisis, will we get a greener world?

Pollution and emissions are down, but we will squander these gains if governments fail to push ahead with decisive change

- Coronavirus - latest updates
- See all our coronavirus coverage




▲ A worker paints signs for a new cycle path in central Milan. Photograph

**T**he current crisis has revealed a sobering shutdown, which has been achieved at has barely dented our carbon emissions. International Renewable Energy Agency says annual emissions to be down by just 6-8% year's annual emissions would have no measurable effect on concentration, or its warming potential. Indeed be the hottest year ever recorded.

**CNN World** LIVE TV

## Deforestation in the Amazon is accelerating despite coronavirus

By Flora Charner, CNN  
Updated 14:51 GMT (22:51 HKT) May 15, 2020



Wood illegally removed from a reserve in

(CNN) — The coronavirus pandemic has slowed deforestation in the Amazon as many businesses remain shuttered and

**The New York Times** SUBSCRIBE NOW

Opinion

## A Time to Save the Sick and Rescue the Planet

With closer cooperation among nations, the head of the United Nations argues, we can end a pandemic faster and slow climate change.

By António Guterres  
Mr. Guterres is the secretary-general of the United Nations

April 28, 2020


**BBC** News Sport Weather iPlayer More

What is BBC Future? Follow the Food Future Planet More

**FUTURE**

COVID-19

## Will Covid-19 have a lasting impact on the environment?



tha Henriques 27th March 2020

**WSJ**

## Americans Are Pumping Gas Again as States Reopen

Fuel makers see gradual recovery in demand as coronavirus restrictions ease, but they warn the next months could be tough



The Forces Fueling 2020's Oil Bust

**The Guardian**

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**The polluters**

This article is more than 7 months old

## Firms ignoring climate crisis will go bankrupt, says Mark Carney

Bank of England governor warns of financial collapse linked to climate emergency

- Top asset managers oversee \$300bn fossil fuel investments
- Why are asset managers investing in fossil fuel companies?

Damian Carrington Environment editor  
@dpcarrington  
Sun 13 Oct 2019 12:00 BST

8,667

**CNN**

## Traffic Is Way Down Because Of Lockdown, But Air Pollution? Not So Much

May 19, 2020 - 5:00 AM ET


LAUREN SOMMER REBECCA HERSHER

HUO JINGNAN ROBERT BENINCASA

## Climate Assembly UK concludes world transformed by coronavirus

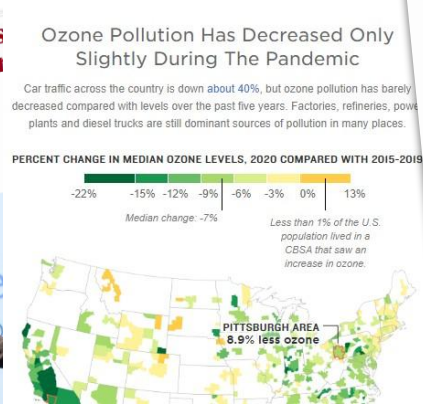
Health crisis pushed emissions down public agenda - but there's growing appetite for global reset

- Coronavirus - latest updates
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▲ Sir David Attenborough at the first UK citizens' assembly on climate change in January 2020. Photograph: Fabio De Paola/PA

When 110 people gathered at a hotel in Birmingham in January for the UK's first citizens' assembly on the climate crisis, the world was a very different



**McKinsey & Company**

Organization Practice

## Tuning in, turning outward: Cultivating compassionate leadership in a crisis

Four qualities—awareness, vulnerability, empathy, and compassion are critical for business leaders to care for people in crisis and set the stage for business recovery.

by Gemma D'Auria, Nicolai Chen Nilsson, and Sasha Zolner



**Observations | Opinion**

## Coronavirus and Climate Action

Combating global warming will take a completely different approach from confronting the pandemic

By Laura J. Martin on April 10, 2020



Xaume Olleros Getty Images

**FINANCIAL TIMES**


SCIENTIFIC AMERICAN

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## Can companies still afford to care about sustainability?

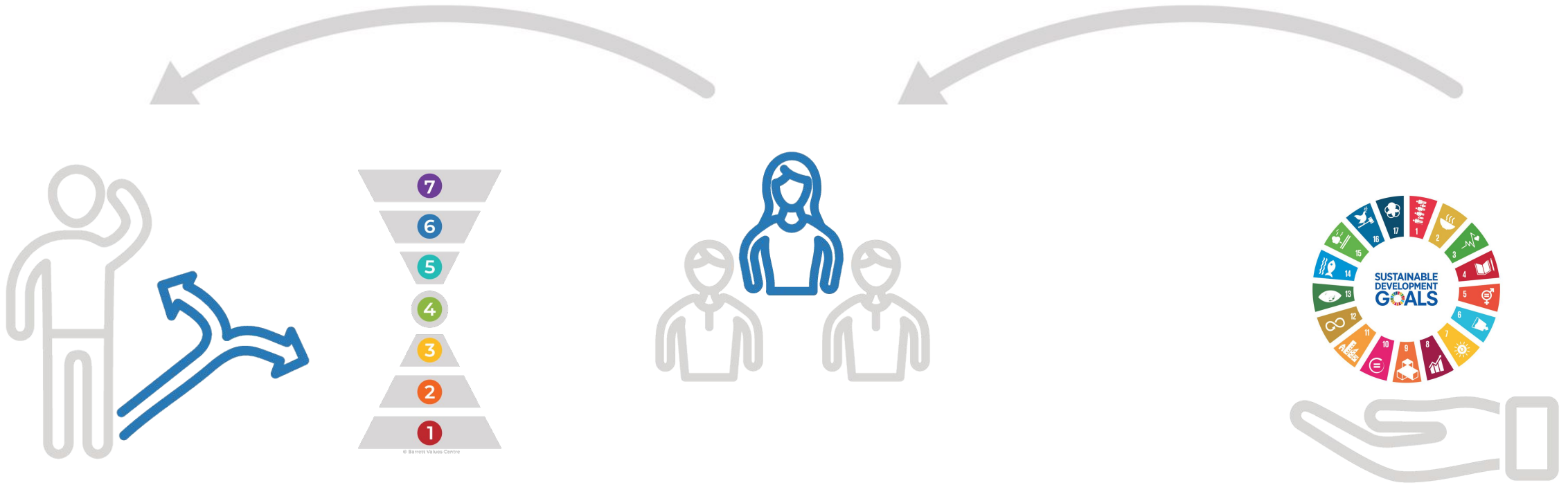
Will environmental and social initiatives survive Covid-19? Our specialists answered your questions



Andrew Hill, Gillian Tett and Billy Nauman MAY 8 2020

102

It's a lot easier to put purpose above profit when cash is flush and times are good. Now that companies' standard operations are being upended by the coronavirus pandemic, we're going to see just how much they value their sustainability goals — and whether those goals survive when a business is just trying to stay afloat



The foundation of organisational sustainability is personal sustainability.

The foundation of societal sustainability is organisational sustainability.

# Questions for the Future

People/organisations value what they need.

- What do your **stakeholders need now**?
- What are your **organisational needs**?
- What is **society and the planet** calling for?
- How do we **re-align our purpose and core business** to needs of the present without compromising the ability of future generations to meet their own needs?
- How does our **culture contribute to co-creating** the new normal?



# Thank You

And a **huge thank you** to everyone who has given their time, energy, commitment, and passion to make this happen.