GLOBAL ATTITUDES TOWARD WORK AND EMPLOYMENT

Results from a 28-Country Survey

30 April, 2020

GAME CHANGERS
METHODOLOGY

The findings in this report come from a Global Advisor survey conducted by Ipsos among 20,031 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey and 16-74 in 23 other markets, February 20 – March 3, 2020. It was carried out via the Ipsos Online Panel System in 28 markets.

Approximately 1000+ individuals were surveyed in Australia, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Mexico, Spain, Sweden, and the U.S. Approximately 500+ individuals were surveyed in Argentina, Belgium, Chile, Colombia, Hungary, India, Malaysia, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of these countries’ general adult population under the age of 75.

The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more “connected” segment of these population.

The data is weighted so that each market’s sample composition best reflects the demographic profile of the adult population according to the most recent census data.

Where results do not sum to 100 or the ‘difference’ appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 4.8 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.
EXECUTIVE SUMMARY

As millions around the world are being furloughed or laid off due to the coronavirus pandemic, a new Ipsos survey highlights how work is more than just a paycheck for many people. Nine in ten adults (92%) surveyed across 28 countries say that work should be important in someone's life. Most workers find meaning in their occupation: globally, 70% of those who are employed say that most of what they do on a typical workday is interesting while only 30% say it is boring.

The survey also sheds light on perceptions about the age until which workers around the world expect to be employable, and would like, will need, and will be physically able to work. On average, at a global level, working adults surveyed think they will:

- Be able to find work and be considered employable until they are 49;
- Want to continue working until they are 57 before retiring;
- Need to work until they are 59 before they can retire;
- Be physically and mentally capable of working until they are 60.

Globally, 92% of all adults surveyed (including those who are not currently employed) say that work should be very or somewhat important in someone's life. Only 8% say it is not very or not at all important.

- The countries where work is most widely viewed as important in life are Colombia and Malaysia (98%), Mexico and Peru (97%), and Argentina (96%).
- The minority view that work is not important in life is most prevalent in Germany (21%), the Netherlands (19%), and France and Japan (16% each).
1 - INTEREST IN DAILY WORK
Seven out of 10 workers globally find their daily work interesting.

<table>
<thead>
<tr>
<th>Country</th>
<th>Somewhat/Very Boring</th>
<th>Very/Somewhat Interesting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>27</td>
<td>73</td>
</tr>
<tr>
<td>Australia</td>
<td>32</td>
<td>68</td>
</tr>
<tr>
<td>Belgium</td>
<td>23</td>
<td>77</td>
</tr>
<tr>
<td>Brazil</td>
<td>32</td>
<td>68</td>
</tr>
<tr>
<td>Canada</td>
<td>33</td>
<td>67</td>
</tr>
<tr>
<td>Chile</td>
<td>16</td>
<td>84</td>
</tr>
<tr>
<td>China</td>
<td>33</td>
<td>67</td>
</tr>
<tr>
<td>Colombia</td>
<td>15</td>
<td>85</td>
</tr>
<tr>
<td>France</td>
<td>22</td>
<td>78</td>
</tr>
<tr>
<td>Germany</td>
<td>26</td>
<td>74</td>
</tr>
<tr>
<td>Great Britain</td>
<td>35</td>
<td>65</td>
</tr>
<tr>
<td>Hungary</td>
<td>28</td>
<td>72</td>
</tr>
<tr>
<td>India</td>
<td>20</td>
<td>80</td>
</tr>
<tr>
<td>Italy</td>
<td>34</td>
<td>66</td>
</tr>
</tbody>
</table>

- How interesting or boring are most of the things you do during a typical workday?

5 – Global Attitudes Toward Work and Employment © Ipsos
The level of interest in one’s work is comparable across all regions of the world except for LATAM where it is higher.

<table>
<thead>
<tr>
<th>Region</th>
<th>Somewhat/Very Boring</th>
<th>Very/Somewhat Interesting</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>33</td>
<td>67</td>
</tr>
<tr>
<td>LATAM</td>
<td>20</td>
<td>80</td>
</tr>
<tr>
<td>Europe</td>
<td>28</td>
<td>72</td>
</tr>
<tr>
<td>APAC</td>
<td>35</td>
<td>65</td>
</tr>
<tr>
<td>G-8 Countries</td>
<td>33</td>
<td>68</td>
</tr>
<tr>
<td>BRIC</td>
<td>30</td>
<td>70</td>
</tr>
<tr>
<td>Middle East/Africa</td>
<td>36</td>
<td>64</td>
</tr>
</tbody>
</table>

- **How interesting or boring are most of the things you do during a typical workday?**
2 – PERCEIVED AGE THRESHOLDS
2 – What is the perceived age threshold to...

GLOBAL AVERAGE

- **Be physically and mentally capable of working:** 60 years
- **Need to work before they can retire:** 59 years
- **Want to continue working before they can retire:** 57 years
- **Be able to find work / Be considered employable:** 49 years

- Until what age do you think you will...
In most countries, the age until which respondents feel they will be physically and mentally capable of working is comparable.

- **Global average**: 60 years

### Until what age do you think you will

[Global Attitudes Toward Work and Employment © Ipsos]
There are no significant differences between regions when it comes to the age until which workers expect to be fit to work.

- **BE PHYSICALLY AND MENTALLY CAPABLE OF WORKING**
  - **Global average:** 60 years

**Until what age do you think you will be physically and mentally capable of working?**

- **NORTH AMERICA:** 66
- **LATAM:** 62
- **EUROPE:** 60
- **APAC:** 57
- **G-8 COUNTRIES:** 62
- **BRIC:** 57
- **MIDDLE EAST/AFRICA:** 56

Global Attitudes Toward Work and Employment © Ipsos
On average, globally, the perceived maximum age to be employable is just under 50 – ranging from only 41 Italy, Malaysia and Poland to as much as 59 in the Netherlands and the United States.

Global average: 49 years

Until what age do you think you will...
Each of Europe, APAC and G8 shows a maximum perceived employability age that is very close to the global average of 49 years.

**BE ABLE TO FIND WORK / BE CONSIDERED EMPLOYABLE**

- **Global average: 49 years**

- **Mean age**
  - 49 in APAC
  - 51 in G-8 Countries
  - 50 in Europe
  - 57 in North America
  - 47 in Middle East/Africa
  - 45 in LATAM
  - 45 in BRIC

**Until what age do you think you will**

- **BE ABLE TO FIND WORK / BE CONSIDERED EMPLOYABLE**

- **Global average:** 49 years

**Global Attitudes Toward Work and Employment © Ipsos**
The age gap between perceived employability and expected physical and mental ability to work is 11 years globally, ranging from 20 years in Italy and Colombia to just three years in Poland and five years in China.
Globally, on average, workers think they’ll need to work until they’re 59 before they can retire, with a difference of almost 20 years between Malaysia (48) and the Netherlands (67).

- **Need to work before you can retire**

  - **Global average:** 59 years

  - **Until what age do you think you will**

  - **Mean age**

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**Countries**

- Argentina
- Australia
- Belgium
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- Great Britain
- Hungary
- India
- Italy
- Japan
- Malaysia
- Mexico
- Netherlands
- Peru
- Poland
- Russia
- Saudi Arabia
- South Africa
- South Korea
- Spain
- Sweden
- United States
- Turkey

**Global average: 59 years**
In most LATAM countries, workers feel they would be fit to work longer than their desired retirement age, whereas in Poland they feel they’ll need to work eight years longer than they want to.
Regionally, the expected age of retirement ranges from 55 in Middle East/Africa to 63 in North America and the G8.

- **NEED TO WORK BEFORE YOU CAN RETIRE**
  - Global average: 59 years

- **Mean Age**
  - North America: 57
  - LATAM: 58
  - Europe: 57
  - APAC: 55
  - G-8 Countries: 63
  - BRIC: 61
  - Middle East/Africa: 57

- **Until what age do you think you will work**

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16 – Global Attitudes Toward Work and Employment © Ipsos
Across the world, workers would rather be active until they reach the age of 57 with those in Japan wishing to work the longest (until age 63) and those in Malaysia wishing to retire the soonest (at 50)

Want to continue working before you retire

Global average: 57 years

Until what age do you think you will
On average, workers would like to retire at 57 globally – from 54 in Middle East/Africa to 60 in North America, and generally sooner than they expect they will be able to.

- Want to continue working before you retire

  - North America: 60
  - LATAM: 58
  - Europe: 58
  - APAC: 59
  - G-8 Countries: 55
  - BRIC: 54
  - Middle East/Africa: 54

Global average: 57 years

- Until what age do you think you will

  - Mean age

Global Attitudes Toward Work and Employment © Ipsos
Russia and Australia are the countries where workers expect to have to work the longest past the age when they would like to retire.
3 -IMPORTANCE OF WORK IN DAILY LIFE
In every country, an overwhelming majority of adults think work should be important in people’s lives.

<table>
<thead>
<tr>
<th>Country</th>
<th>NOT VERY/NOT AT ALL IMPORTANT</th>
<th>VERY/SOMewhat IMPORTANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL</td>
<td>8</td>
<td>92</td>
</tr>
<tr>
<td>Argentina</td>
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<td>96</td>
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<tr>
<td>Australia</td>
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<td>89</td>
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<td>Belgium</td>
<td>13</td>
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<td>Brazil</td>
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<td>China</td>
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<td>Colombia</td>
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<td>98</td>
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<tr>
<td>France</td>
<td>16</td>
<td>84</td>
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<td>Great Britain</td>
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<td>Hungary</td>
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<td>Mexico</td>
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<td>Saudi Arabia</td>
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<tr>
<td>United States</td>
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<td>94</td>
</tr>
<tr>
<td>Turkey</td>
<td>5</td>
<td>95</td>
</tr>
</tbody>
</table>

How important do you think work should be in someone’s life?
How important do you think work should be in someone’s life?

- **WHOLE SAMPLE**
  - **NOT VERY/NOT AT ALL IMPORTANT**: 8
  - **VERY/SOMewhat IMPORTANT**: 92

- **North America**
  - **NOT VERY/NOT AT ALL IMPORTANT**: 7
  - **VERY/SOMewhat IMPORTANT**: 93

- **LATAM**
  - **NOT VERY/NOT AT ALL IMPORTANT**: 4
  - **VERY/SOMewhat IMPORTANT**: 96

- **Europe**
  - **NOT VERY/NOT AT ALL IMPORTANT**: 12
  - **VERY/SOMewhat IMPORTANT**: 88

- **APAC**
  - **NOT VERY/NOT AT ALL IMPORTANT**: 7
  - **VERY/SOMewhat IMPORTANT**: 93

- **G-8 Countries**
  - **NOT VERY/NOT AT ALL IMPORTANT**: 11
  - **VERY/SOMewhat IMPORTANT**: 89

- **BRIC**
  - **NOT VERY/NOT AT ALL IMPORTANT**: 6
  - **VERY/SOMewhat IMPORTANT**: 94

- **Middle East/Africa**
  - **NOT VERY/NOT AT ALL IMPORTANT**: 5
  - **VERY/SOMewhat IMPORTANT**: 95
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- 12 months upon Ad Hoc Study completion
- 3 years upon completion of each wave of a continuous study

Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION

- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in the methodological approach or survey overview in the report.

- This project was carried out in accordance with these international Codes and Quality standards
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