



BAROMETER 2016 EDENRED - IPSOS

EMPLOYEE WELL-BEING AT WORK



2016 Edenred-Ipsos Barometer

Understand and improve the Wellbeing At Work

18th of May 2016

GAME CHANGERS



INSIGHTS

Wellbeing at work is a **growing challenge for companies** struggling with an unpredictable economic environment and in that perspective, more and more become dependent from their employees' willingness to go the extra mile.

Encouraging 'wellbeing at work' by developing **active policies in this area positively impacts employees engagement** and eventually companies sustainable performance.

In our 2016 research, a little bit more **7 out of 10 employees overall are positive about their wellbeing at work.**

But this proportion varies across countries, national economic environments, job markets, employees expectations and cultural differences.

The **wellbeing at work** 'best in class' countries are driven by strong scores on the '**emotional**' components (enjoy coming at work, interesting job, stimulating working environment, confidence in professional future).

Within 'matured' economies there are clear expectations for emotion and appreciation.

Developing an active policy in **managing skills** (renewal and transmission) is a "must" to avoid a low wellbeing at work score. But overall, managing "end of career" and developing "digital culture" are the two boosters of wellbeing at work = **how to transition smoothly from the XXth century economy toward the "XXIst" economy?**

THE 2016 EDENRED-IPSOS BAROMETER:

FOCUS ON THE WELLBEING AT WORK IN 15 COUNTRIES

+ 14,000 employees

interviewed by Ipsos in
January 2016...

- ...in **15 countries**
among the largest economies
in the world



Online survey undertaken in January 2016 by Ipsos

*Ranking based on 2015 overall GDP

WELLBEING AT WORK: THE ULTIMATE DRIVER OF PEOPLE PERFORMANCE?



WELLBEING AT WORK: THE ULTIMATE DRIVER OF PEOPLE PERFORMANCE?

*“It is becoming more and more evident that organizations are starting to manage employee health rather than employee sickness, not as a standalone wellbeing strategy but as an integral part of an overall employee wellbeing programme. Such strategies seem to be giving real benefits to these organizations in **reducing turnover and increasing the productivity and engagement of their employees**”.*

Conclusion of a research conducted by the Chartered Institute of Personnel and Development -CIPD- the association for HR professionals committed to championing better work and working lives - 140,000 worldwide members.

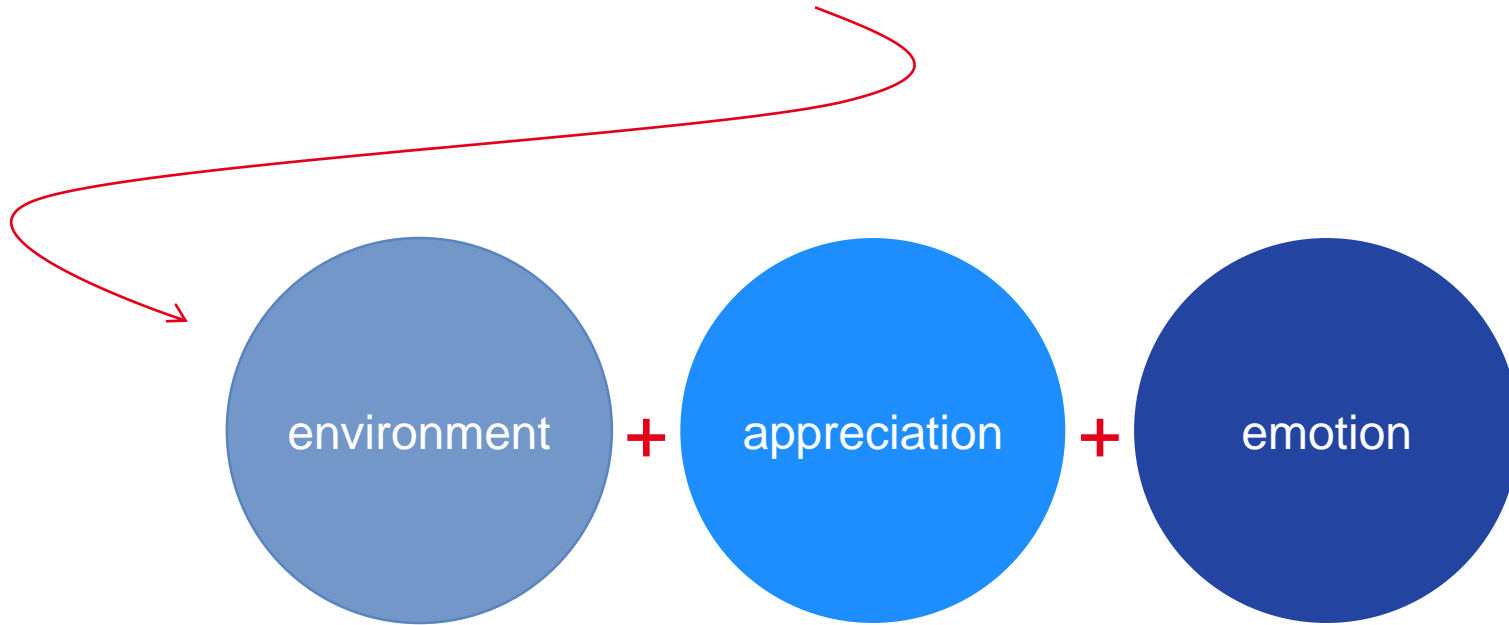
*“For its theoretical basis as much as its day-to-day implementation, the culture of wellbeing at work is gaining respectability and continues to prove itself. We therefore believe that **a promising path is opening for companies wishing to engage on the way of their employees wellbeing**”.*

Spinoza Fabric – “Practical guide of wellbeing at work measurement tools “ (Nov. 13)



Measuring **Wellbeing At Work**

HOW TO MEASURE WELLBEING AT WORK?



= a positive experience at work

HOW TO MEASURE WELLBEING AT WORK?

10 QUESTIONS



- The **equipment** and materials at your disposal are suitable
- You have a **clear idea** of what is expected from you on the job
- If you have problems, you can **count on your colleagues** to support you
- You are satisfied with the **balance** between your work and your private life



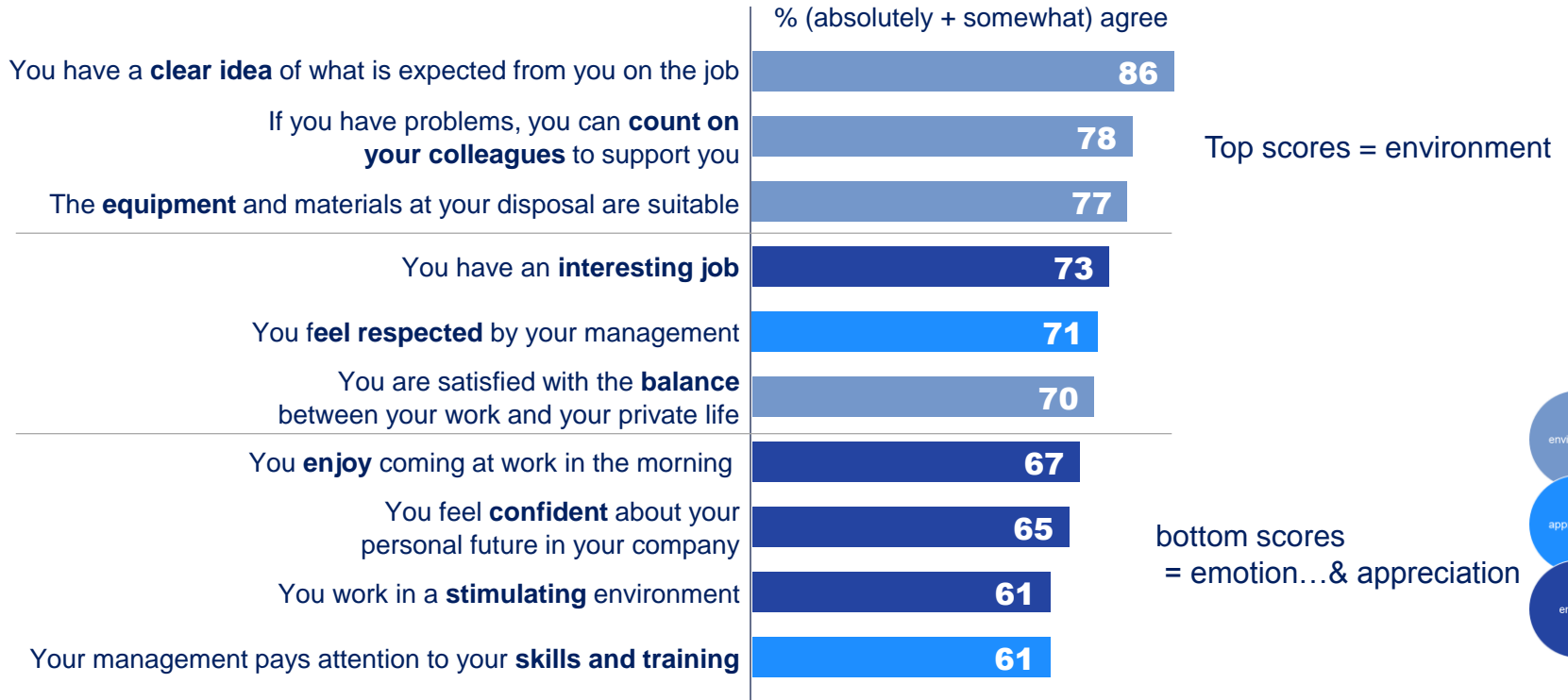
- You feel **respected** by your management
- Your management **pays attention** to your skills and training



- You **enjoy coming at work** in the morning
- You have an **interesting job**
- You work in a **stimulating environment**
- You feel **confident** about your personal future in your company

COMPONENTS RESULTS

Average positive scores among employees in 15 countries

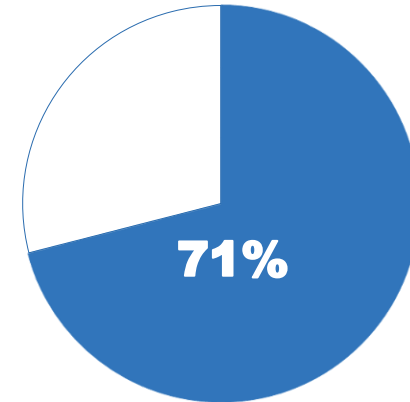


WELLBEING AT WORK:

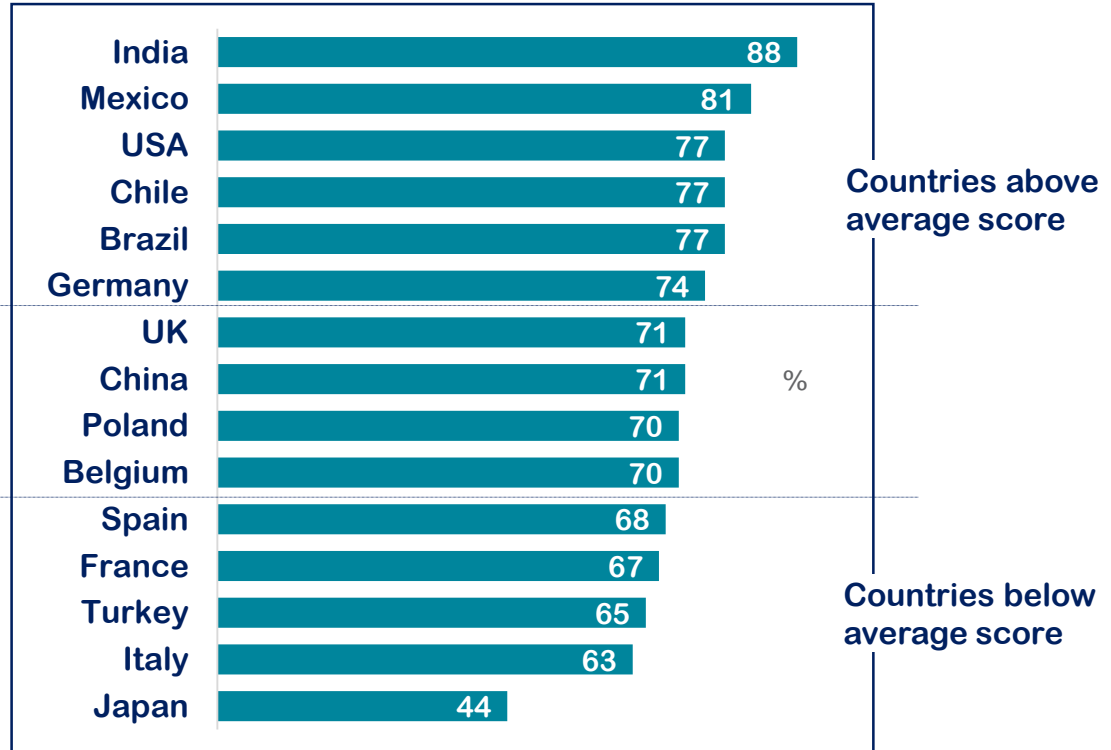
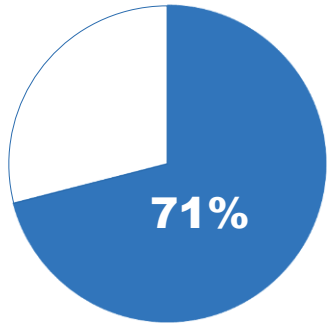
GLOBAL AVERAGE SCORE AMONG EMPLOYEES 15 LEADING ECONOMIES



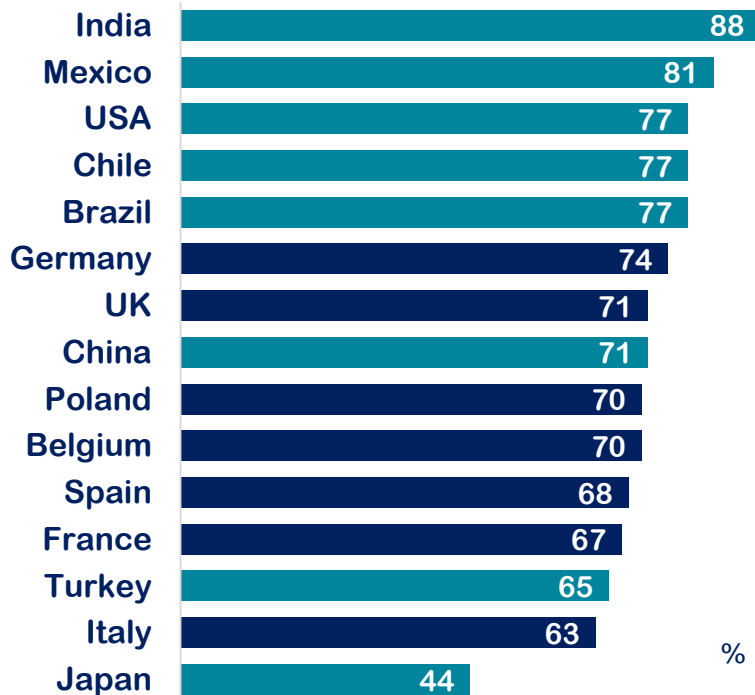
More than 7 employees on 10 show positive results on their well being at work (average positive score for the 10 questions)



WELLBEING AT WORK: BREAKDOWN BY COUNTRIES (1/2)



WELLBEING AT WORK: BREAKDOWN BY COUNTRIES (2/2)



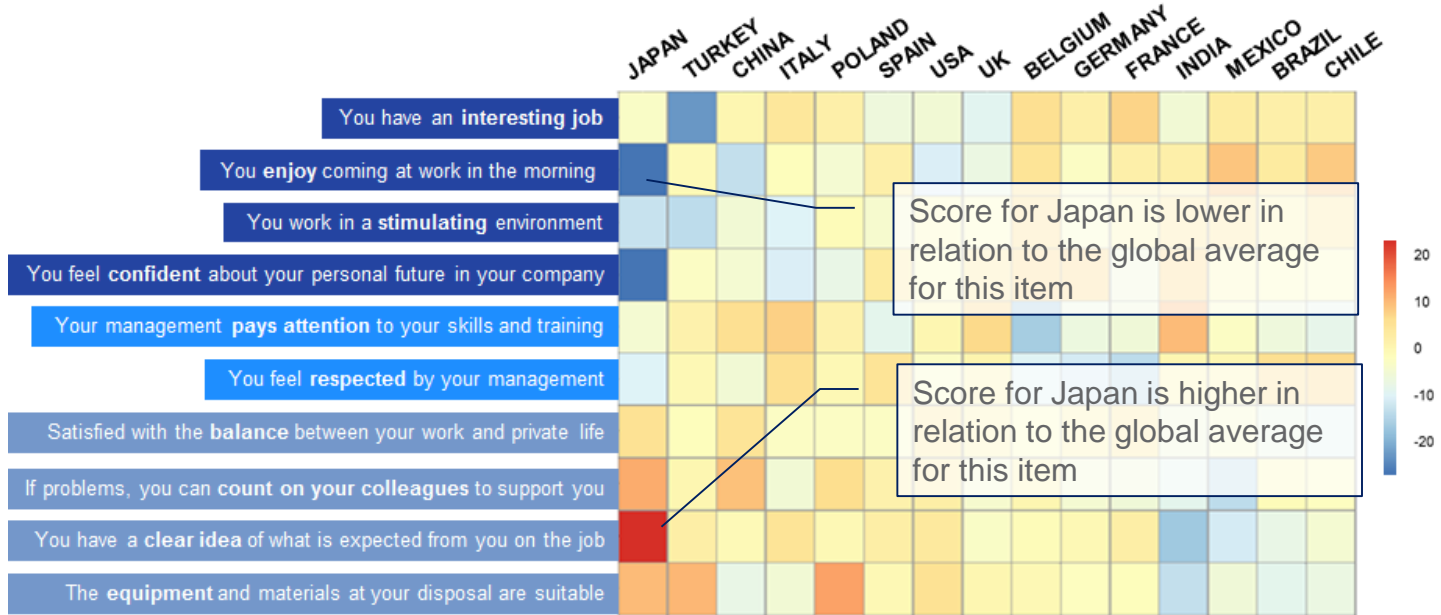
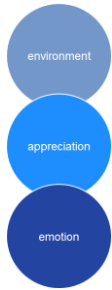
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Findings

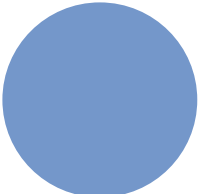


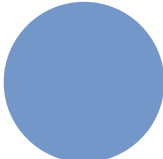








- American countries are leading the pack just behind India.
- Europe is behind the fastest growing economies.
- Japan is behind everyone.
- These results are impacted by cultural bias (Latin America or Japan) and local economic environments (e.g. Germany vs. France).

WELLBEING AT WORK: COUNTRIES PROFILES (1/3)

Countries positioning based on their relative scores by questions



WELLBEING AT WORK: 4 COUNTRIES PROFILES (2/3)

Higher results on*...	Environment	Appreciation	Emotion
JAPAN (15**) TURKEY(13) CHINA (8) POLAND (9)			
SPAIN (11) UK (7) USA (3)			
BELGIUM (10) GERMANY (6) FRANCE (12)			
INDIA (1) MEXICO (2) BRAZIL (5) CHILE (4)			

(*): independently of their usual way to answer surveys (after 'neutralization' of cultural bias)

(**): country rank re global wellbeing score

WELLBEING AT WORK: 4 COUNTRIES PROFILES (3/3)

Higher results on*...	Environment	Appreciation	Emotion
JAPAN (15**) TURKEY(13) CHINA (8) POLAND (9)			
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(*) independently of their usual way to answer surveys (after 'neutralization' of cultural bias)

(**): country rank re global wellbeing score

Findings

- Components of wellbeing at work vary between countries.
- The wellbeing at work 'best in class' countries are driven by strong scores on the 'emotional' components
- Wellbeing at work results are higher on 'environment' (comparatively) in Japan, China, Turkey, Italy and Poland.
- Employees in mature economies have a more balanced wellbeing at work score with a lack of emotion in Spain, USA and UK and a lack of appreciation in France, Germany and Belgium.

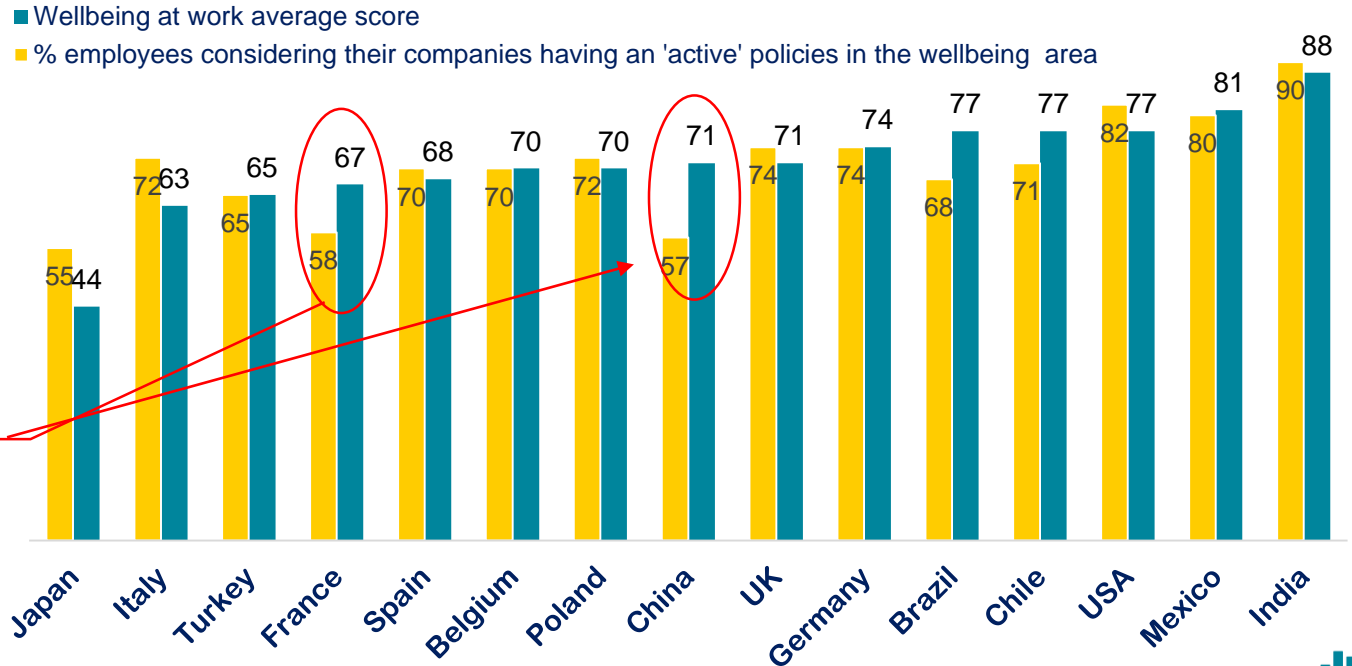


Implementing Wellbeing At Work

WELLBEING AT WORK AND COUNTRIES WELLBEING POLICIES

Findings

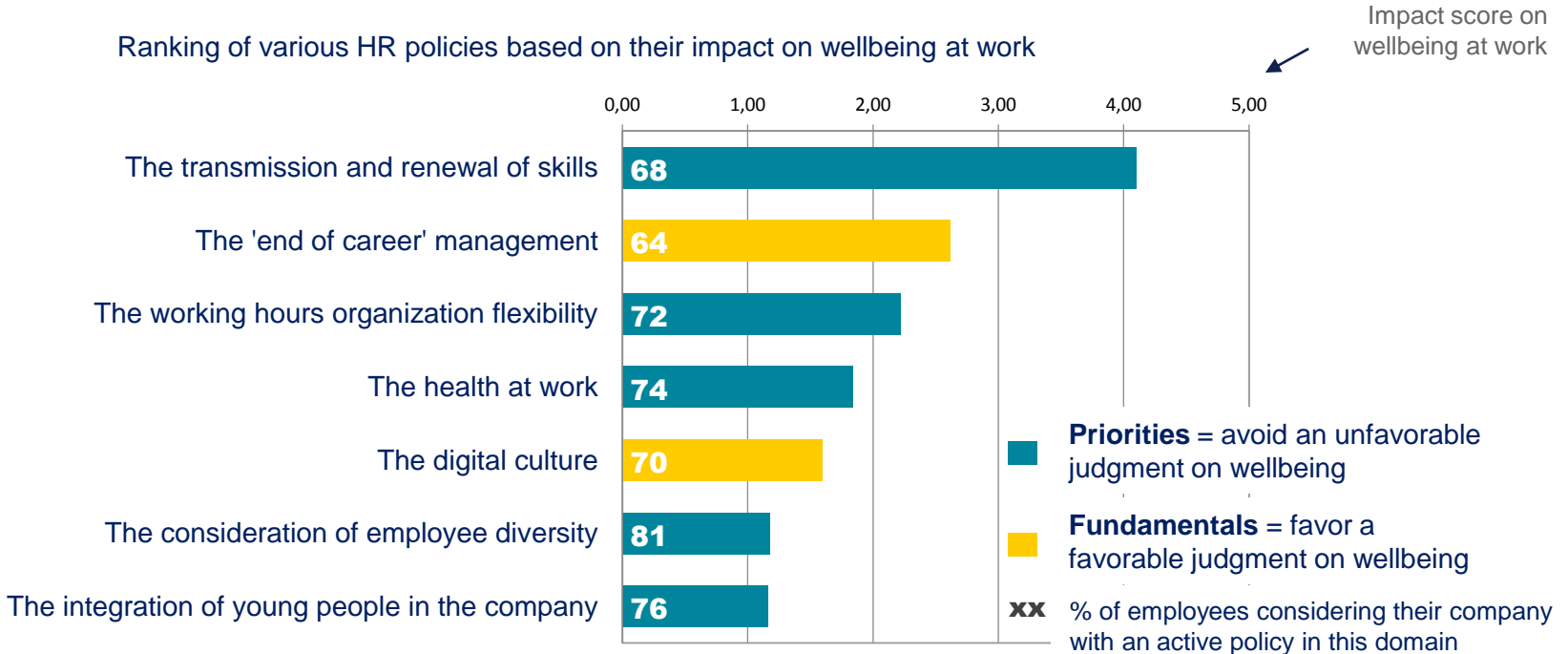
There is a correlation between wellbeing at work and the perception of an 'active' policy regarding wellbeing in the company except for Brazil, Chile and more critically in France and China → are there less active policies or policies with a low visibility? Are there higher expectations from employees ?



Need for a more active role from companies?

WELLBEING AT WORK AND HR POLICIES:

WHICH ARE THE MOST IMPACTFUL HR POLICIES ON WELLBEING AT WORK?



WELLBEING AT WORK AND HR POLICIES:

ACTIVE POLICIES IN DEVELOPING DIGITAL CULTURE AND MANAGING END OF CAREER ARE THE KEY DRIVERS TO BOOST WELLBEING AT WORK



Findings

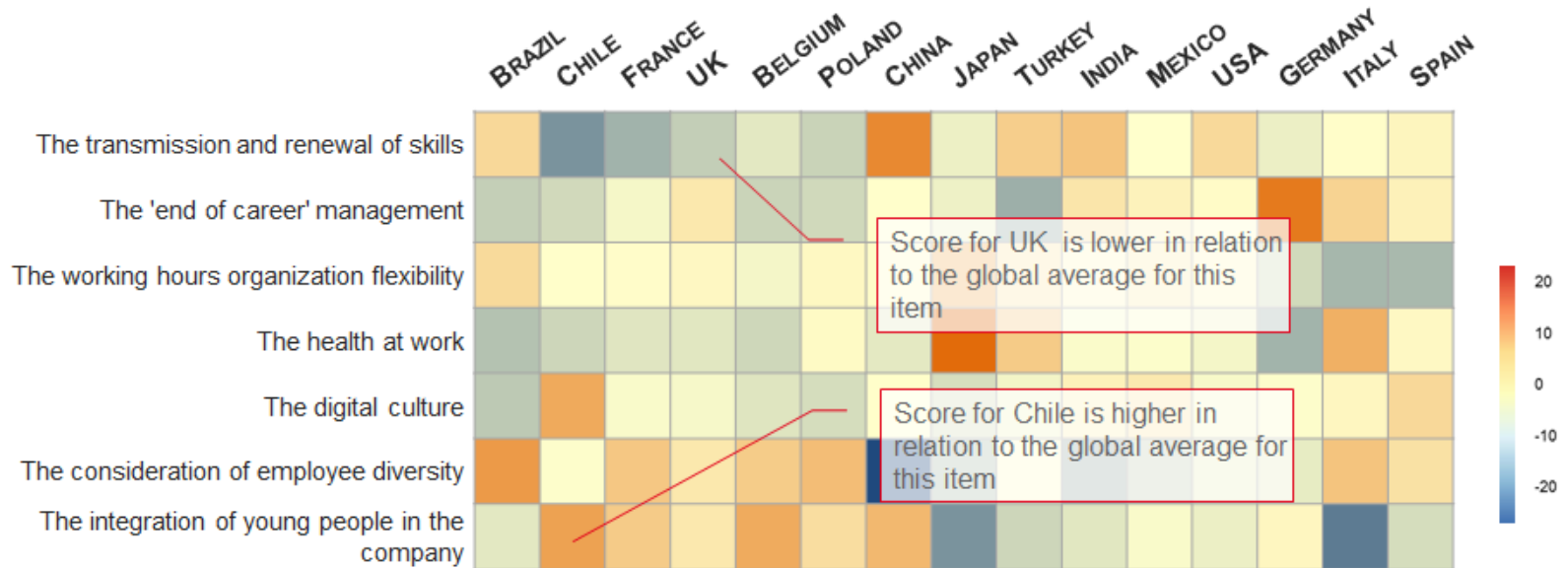
■ Skills management is the most impactful policy to avoid a negative wellbeing at work score

■ ...followed by career management for 'senior' employees, working hours flexibility and promotion of health at work.

■ Diversity and new joiners inclusion are less impactful.

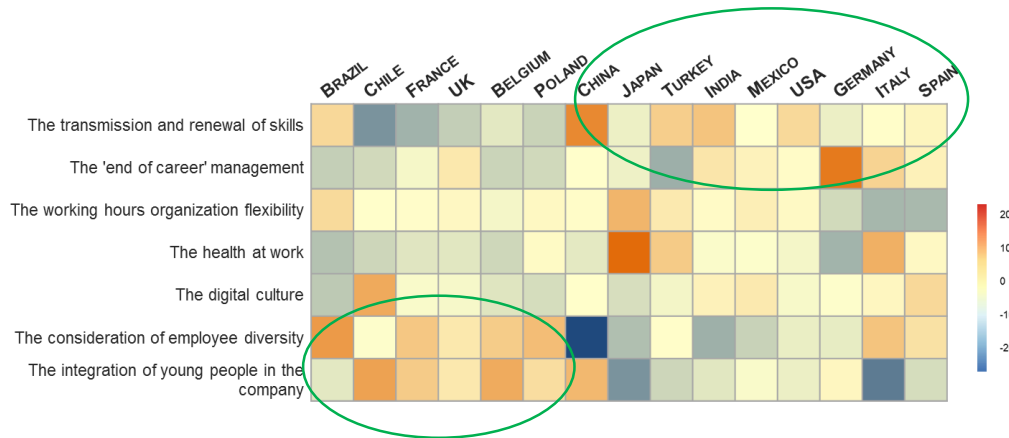
■ However, working on digital culture managing professional career of senior employees are the two policies that boost positively wellbeing at work.

WELLBEING AT WORK AND HR POLICIES: FOCUS BY COUNTRIES (1/2)



WELLBEING AT WORK AND HR POLICIES:

FOCUS BY COUNTRIES (2/2) → A YOUNG AND DIVERSITY ORIENTATION VS. SKILLS AND SENIOR ORIENTATION



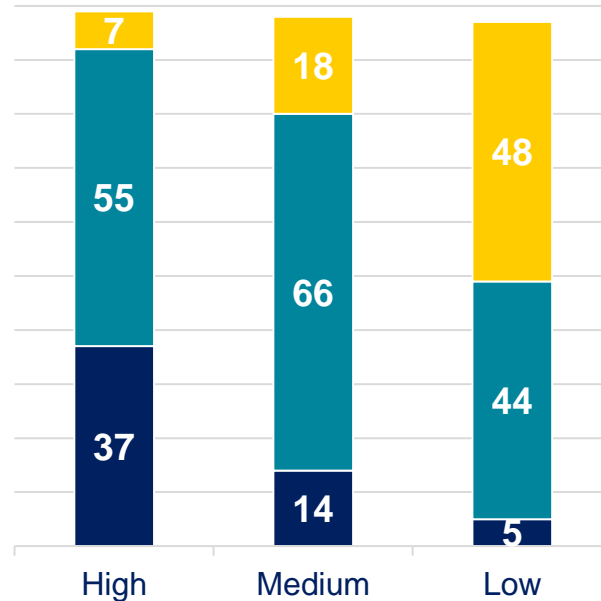
Findings

Two sets of countries can be identified:

- Countries which companies are good at developing recognized policies re. diversity and young people inclusion, but weak at policies re. management of senior and skills are Chile, France, UK, Belgium and Poland.
- At the opposite, countries which companies are weak at implementing policies related to diversity and young people inclusion but strong in the skills and senior employees management areas are China, India, Mexico, USA, Germany, Italy and Spain.
- Japan is the best country in implementing health at work policies ; China in skills management and Germany in managing end of career.

WELLBEING AT WORK AND MOTIVATION

- motivation on decline
- motivation stable
- motivation on the increase



Countries with a wellbeing at work score*...

Findings

- Wellbeing at work strongly impacts motivation.
- 37% of employees are very positive, their wellbeing at work have a motivation on the increase (vs. 14% among those who are 'rather positive' and 5% for those who have a negative opinion of their wellbeing at work).

*see slide #10

SUMMARY

1

As an unpredictable economy changes the rules, **employee engagement** is at the heart of sustainable performance.

2

Wellbeing at work is a **key driver of engagement** among an individualized and talent driven workforce.

3

Wellbeing at work is based on an **unequal combination of a job environment + appreciation + emotion.**

4

Among workforce of 15 major economies, **71% of employees are positive** about their wellbeing at work.

5

“Skills management” is the **#1 HR policy** which supports wellbeing at work overall.

6

“Digital culture development” and “end of career management” are the **boosts** for increasing wellbeing at work.

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GAME CHANGERS



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