



Workplace 2000 Working Toward the Millennium

A portrait of working Canadians

Fall, 1997

Forward

Why do a National Workplace Survey?

Surveying our own employees isn't new. Royal Bank has always checked in with staff to find out how we're performing as an employer, and how we can do better. But we felt it was time to look out, to take a closer look at Main Street. So a national survey of the Canadian workplace -- our second in as many years -- appealed to us for a number of reasons.

We wanted the broadest possible picture, not just our own assumptions and experience. By looking at Canada-wide results about what working Canadians think, what works and what doesn't, and then matching those with a picture of our own workforce, we can pinpoint our gaps and create relevant solutions.

We also felt it important to share what we've learned. By publishing survey results, we can help other employers -- many of who are our clients -- identify their own gaps and improve their own workplaces.

We also wanted to continue a dialogue we began last year with *Workplace 2000* about what this country and its citizens will need to succeed in the 21st century.

We once had generations to adapt to change. In today's climate of rapid change, we not only have to adapt "now" but adapt "right," the first time out. If we do, we head into the future with a workforce that is motivated, satisfied, and prepared; if we don't we institutionalize mistakes and risk our competitiveness.

That's true for Royal Bank; and it's true for Canada, too.

1. Introduction and Methodology

Royal Bank of Canada commissioned the Angus Reid Group to investigate the state of the workplace in Canada. This report discusses the findings of an extensive telephone survey of 1,000 working Canadians, including their job satisfaction and security, training issues, their company or entity, and the spirit of entrepreneurship in Canada, conducted between August 28 and September 3, 1997. The data has been weighted to represent the proportion of full-time, part-time and self-employed Canadians by province.

This is the second wave of a Royal Bank study that was first conducted with a sample of 850 working Canadians between July 27 and August 9, 1996. The findings of the first study are compared, where possible and appropriate, in this new undertaking.

2. Perspective

In the 1996 study released by the Royal Bank entitled "Workplace 2000: Under Construction", an exhaustive examination of the workplace in Canada, it was evident that employees had come to grips with the changes stemming from the last recession. Clearly, the dislocation caused by the recession, globalization, "right-skilling" and increased demands for productivity took its toll on workers in Canada. However, what was identifiable was that workers were beginning to stand on their feet, begin having their feet placed more firmly on stable ground than on quicksand, and begin to equip themselves for the workplace as they enter the 21st century.

The news about the workplace was not always good. Dislocation, anxiety, demands on their time and expertise were certainly areas that concerned workers. But perhaps most strikingly the issues which were foremost to them dealt with such matters as having employers communicate effectively with them, having control over their own work and receiving fair pay for their work. Overall, Canadians were satisfied (one in two very satisfied) with their job -- almost nine in ten reporting this fact. What Canadians were not as satisfied with was certain aspects of their workplace-- many aspects which we have tracked in this 1997 survey.

Perhaps the most important element to arise from the findings in this year's report and concurrent with a number of the benchmark findings from last year, was an optimism in terms of workers' outlook in terms of how they would meet the future. This entrepreneurship dynamic finds close to seven in ten respondents (67%) believing that they have what it takes to succeed in the 21st century.

This finding is consistent with the survey results from 1996 which indicated that more and more employees had embarked on taking courses or educational opportunities to upgrade their knowledge skills for their job. This trend continues -- with this year over one in two (62%) taking at least one course, the majority paid for by their employers and many during their work hours.

But perhaps the most troubling issues that face the workplace are those that deal with simply keeping up with the pressures of this new environment. Over half (55%) of workers who report they feel stressed in their jobs find that they have too much to do within too short a time frame. Just over two in five (43%) find that simply "keeping up to date" is their biggest challenge. And 46 per cent indicate that it is getting harder and harder to make ends meet. In addition to these factors, Canadian workers are working longer hours than they did last year -- up from 38 hours a week to 40 hours and taking more work home with them.

The net result in the workplace: Canadian workers are working longer, harder and trying to right-skill themselves as fast as possible for the 21st century. While they have the confidence that they are moving in the right direction -- that their workplace is adapting to the new economy and that their fellow workers are not simply colleagues -- but teamworkers and friends in this transition, it would appear that the breakneck speed and the requirements being placed on their shoulders to both do more and keep up are significant.

As a result, employers must be mindful of this burgeoning issue within the workplace. Workers do better, are more productive, and are less stressed in their role as a contributing member of their entity when they feel they are in control of their job, know exactly what is to be done because of effective communications throughout all levels of management and become more resilient to continued changes within the workplace when they are equipped effectively.

Underlying all of these findings is a broader question of commensurate reward for service to the company. While most Canadian workers are proud of their company and would work as effective ambassadors -- and while if given a chance to move for the same pay to another company, only three in ten would likely do so -- there are segments within the workplace which are vulnerable and facing great difficulty -- on the job, and in their personal life. It is important to note that 40 percent of the work population believes that even if companies are making money, the average employee "doesn't see any benefit". Couple this with 46 percent who are finding it harder and harder to make ends meet and there is a potential constellation that exists for demands within the workplace for not only monetary but other forms of recognition.

At the same time, it is also evident that Canadians, as a whole, are much more optimistic about the future of the national economy than they ever have been in the last ten years. Forty-five percent of Canadians believe that the country's national economy will continue to grow and prosper; however, it

is also important to note that only three in ten believe that their own financial situation will get better, while only 56 percent believe it will remain the same.

As such, this year's survey opens a window on some of the issues that may have an impact on the workplace over the next two years -- namely, management's response to finding an enthusiastic worker which needs to be skilled and satisfied, and at the same time rewarded in a way that makes them feel deserved and appreciated. It would appear that within the workplace that confidence level has grown over the last number of years (based not only on the 1996 and 1997 surveys, but those that have been charted over the last decade). It suggests that the spirit of entrepreneurship is not only alive, but growing within companies in the new found notion of intrapreneurship: employees taking ownership of their jobs, suggesting new and innovative ways to save the company time and/or money (almost one-third who do so every month), and taking pride in the caring and community based contribution that their entities contribute to this country. Still, wherever entrepreneurs or intrapreneurs are found, rewards, control and independence go hand in hand, and this may be an issue that grows in stature over the months and years ahead.

3. Executive Summary

Similar to the benchmark study "Workplace 2000" that was carried out by the Royal Bank and the Angus Reid Group in 1996, again this year we found that Canadian workers are generally satisfied with their jobs, with their workplace, and with their co-workers. And employees are not just satisfied because they have a job: they truly like their work. Those who are self-employed, while working more hours than the average worker, feel fulfilled by their efforts. Most agree that their work is challenging and interesting and would recommend their company as a good place to work. A significant majority of employees disagree that their work is "boring" and their workplace is "depressing", and most employees agree that their work is challenging and interesting.

Canadian workers are adapting to a new workplace. Coming out of the recession, employees have come to recognize the need for training and skills development. This continual process of upgrading and training is an adaptability mechanism for employees. Those who remain employed feel relieved that they have made it through the recession, but want to prepare themselves *in case it happens again*. The workplace is in a careful balance of managing the expectations between employers and employees.

The top 10 survey findings are:

- 1. Employees believe they have what it takes to succeed: two in three agree they "have what it takes to succeed in the workplace in the 21st century.** The survey indicates that employees not only recognize the need for change, but are willing to take steps to adapt. The biggest challenge: keeping up to date and learning.
- 2. Employees are satisfied with their job.** Nearly one half of Canadian workers report that they are very satisfied with their job, and an additional two in five are somewhat satisfied. Workers who are self-employed report higher levels of satisfaction than full or part-time workers who work for a company.
- 3. Not all employees enjoy high levels of satisfaction.** While many workers enjoy a high level of satisfaction of their work, there is a significant segment of the workplace (about one in five) who are very dissatisfied. They would not recommend their workplace or their job to others, and feel bored by their work. Those in this situation also face much higher levels of stress than other employees.
- 4. Employers need satisfied employees.** The study shows that employees who are more satisfied are more productive, less stressed and more adaptable to the changing demands of the workplace.
- 5. Employees are working to upgrade their skills.** Over six in ten workers (62%) report that they have taken a course in the last year to either upgrade their skills, develop new skills or advance their computer skills.

6. Recognition is all important. Employees need to feel that they will be recognized for their initiative and extra effort, whether it be monetary or non-monetary. Those who feel rewarded and encouraged are much more likely to demonstrate their initiative. Less than a majority (44%) agree that their company does a good or excellent job at recognizing employees who excel at their job.

7. Dissatisfied employees are significantly more likely to leave and start their own business. While overall 26 percent volunteer that they have considered starting their own business, 37 percent of those who are dissatisfied have taken this action.

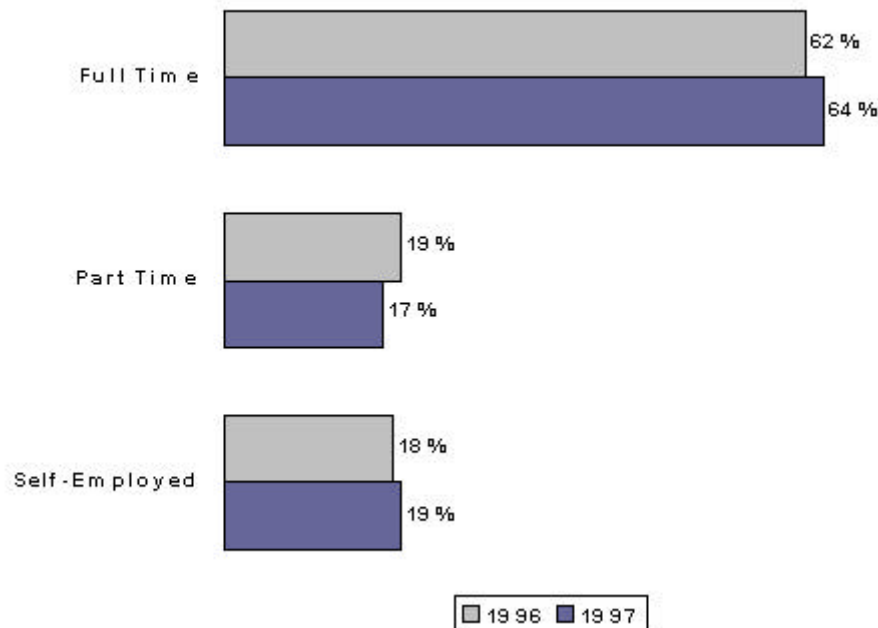
8. Anxiety exists. One in five workers are concerned about losing their job. Nearly two in five agree that their resume is always up to date, and three in ten have formally applied for a new job in the last year.

9. Employees are less satisfied with their employers than with the job itself. One half of employees agree that their company "cares about them" and two in five agree that "even if the company makes money, the average employee doesn't see any benefit".

10. Stress is a factor. One in five employees report that they are very stressed or on the verge of a breakdown, and an additional 47 percent report that they are somewhat stressed. The primary reason: too much to do, not enough time.

4. The Current Employment Situation

Employment Status



Employment status has remained almost unchanged over the last twelve months. Almost two thirds (64%) are employed full-time, seventeen percent are working part-time, and almost one fifth (19%) are self-employed. These figures have changed only by one or two percentage points since the 1996 study and, therefore, any variation is not statistically significant.

Younger employees and those with income less than \$30,000 per year are more likely to be working part-time. One in two self-employed are over the age of 40.

Pay Arrangements

Two in five employees surveyed are paid on salary, and an additional two in five are paid an hourly wage. Most employees working part-time are paid an hourly wage (74%).

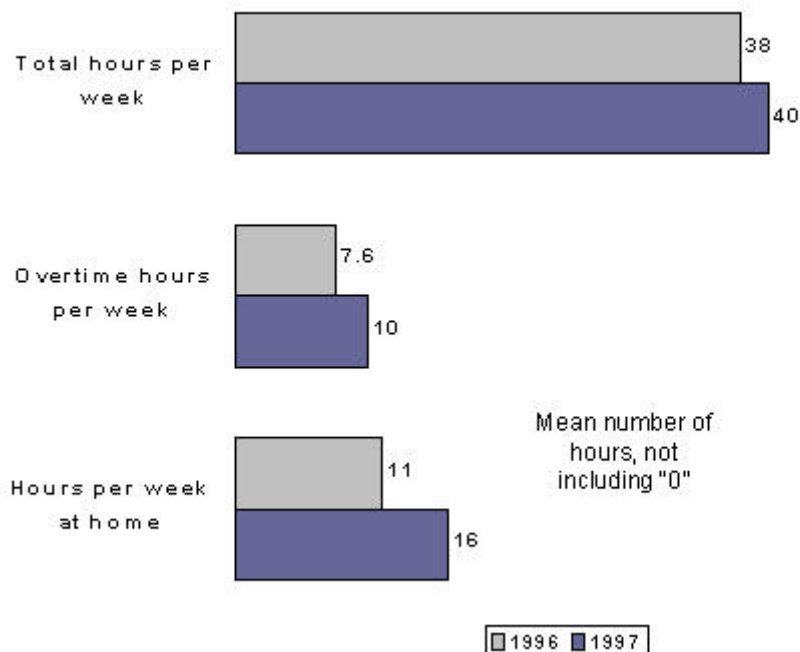
Percent of working age Canadians who entered the workforce and actually found work in 1980's:
75%

So far in the 1990's: 50%

Hours Worked Per Week

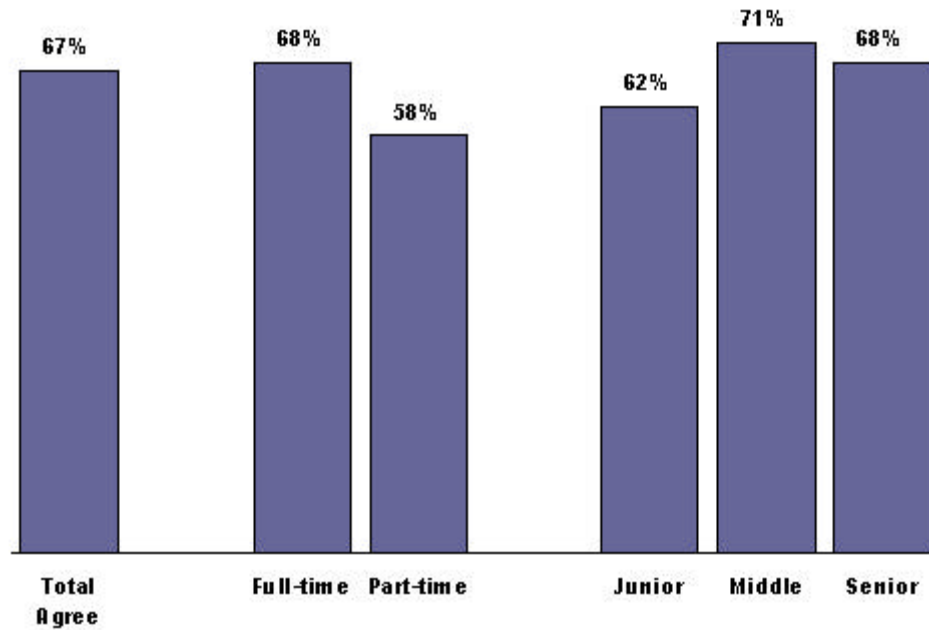
Canadians are working longer hours than they were a year ago. The average number of hours worked per week has increased slightly from 38 to 40, and overtime hours have increased from 7.6 to 10 hours per week. Further, respondents report an average increase of 5 hours worked at home per week (from 11 hours in 1996 to 16 in 1997).

One in two employees (50%) do not work any overtime hours. Fifty-two percent do not work at home.



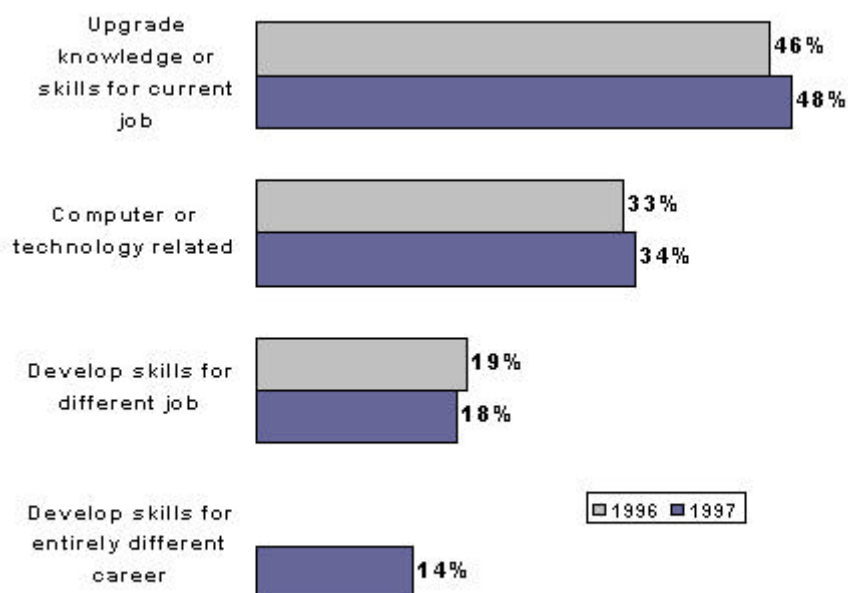
5. Looking to the Future

Do Canadian Workers Believe They Have What it Takes to Succeed in the 21st Century?



Two thirds (67%) of Canadian employees believe they have what it takes to succeed in the 21st century. This figure drops slightly among part-time workers (58%), while sixty-eight percent of full-time workers feel they have what it takes. Compared to respondents, who describe their level within their company as being junior (62%) or senior (68%), those who are at a middle level (71%) are somewhat more likely to feel they have what it takes to succeed in the new century.

Training and Education



In total, 62 percent of employees are taking at least one of the four types of courses examined.

Incidence of taking courses is higher among full-time employees (66% have taken at least one of the four types of courses in the last year), followed by 62% of part-time employees. Forty-five percent of self-employed Canadians have taken at least one course.

Employers tend to pay for training and education courses that will help the employee in their current job, or will provide them with further training for potential advancement. And these courses are as likely to be taken during work hours as they are on the employee's own time. Courses aimed at developing skills and training for different jobs or entirely different careers are usually paid for by the individual and taken on personal time.

One in four employees have taken one course, while 37 percent have taken two or more courses in the last year.

Over the next twelve months, one in two (49%) respondents plan on taking courses to upgrade their knowledge or skills for their current job, and almost as many (46%) plan to take computer or technology related courses. Respondents are much less likely to plan on taking courses to develop skills for a different job (25%) or for an entirely different career (20%).

Companies that abandoned the vertical structure also need to abandon vertical thinking. A lateral company doesn't need a database listing people's academic degrees. That's appropriate for a tall corporate structure where people are going to stay in the same occupations until they go into management. Instead, a lateral organization needs to know people's job preferences, help them plan their career paths, and give them the training they need. Of course, this approach to employee management is a caring one that differs from the fashionable lean-and-mean approach, in which employees are regarded as interchangeable units of production needing no motivation other than fear of losing their jobs.

David K. Foot, Boom Bust & Echo

Needs, Strengths and Challenges

The survey examined employees' perceptions of the importance of various skills at their job, both what they consider to be their strengths and what they consider their challenges.

"Employees are working toward the needs of the workplace"

"Survivors in organizations have read the writing on the wall and are adapting"

- quotations from employers

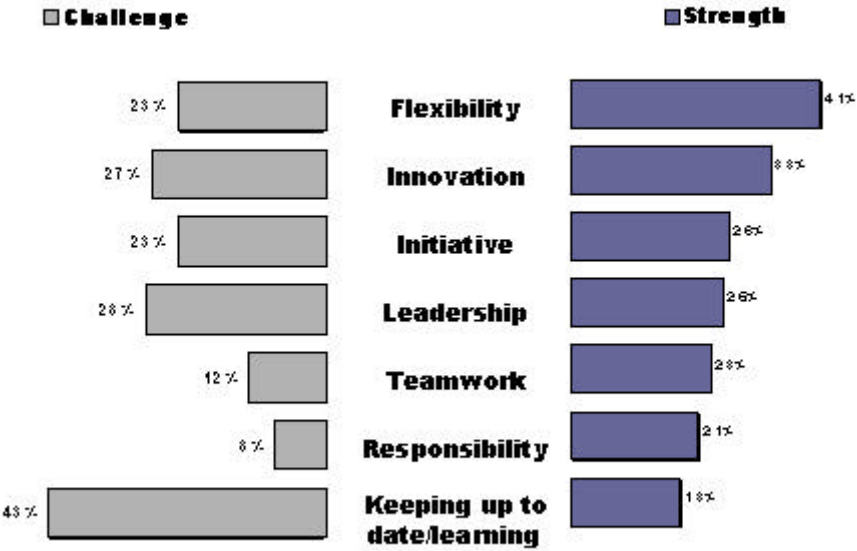
Flexibility and responsibility are considered the most critical requirements for Canadian workers. More than three quarters of survey respondents strongly or somewhat agree that each (77% and 76%, respectively) are required at their job. Teamwork (72%) and innovative/creative thinking (70%) are also considered important elements. A majority of employees agree that they need to keep up to date and that leadership is required in their job. It is notable that both two of the most important skills as discussed by Human Resource Professionals, learning and leadership, rank the lowest on the scale.

	% Need
Flexibility	77%
Responsibility	76%
Teamwork	72%
Innovative/creative thinking	70%
Initiative	67%
Keeping u to date/learning	58%
Leadership	55%

However, respondents are much less likely to consider any of these elements their biggest strengths: four in ten (41%) consider flexibility their biggest strength, thirty-three percent suggest that innovative/creative thinking is their biggest strength, and significantly fewer rate teamwork (23%) or responsibility (21%) as personal strengths on the job.

The biggest perceived challenge in the workplace is keeping up to date/learning (cited by 43% of respondents), followed rather distantly by leadership (28%), innovative/creative thinking (27%) and initiative (23%).

It is interesting to note that keeping up to date is ranked lower on the list of necessities for the workplace (58%), and is only considered a personal strength by eighteen percent of respondents. However, it is clearly considered the most significant challenge for Canadian employees.



I believe we need to focus on more than just skills training. The digital age has produced an explosion in the volume of information at our fingertips. We need more people who are able to convert this information into knowledge, people who feel confident about taking risks and assessing opportunities.

- Dr. Angus Reid, Shakedown

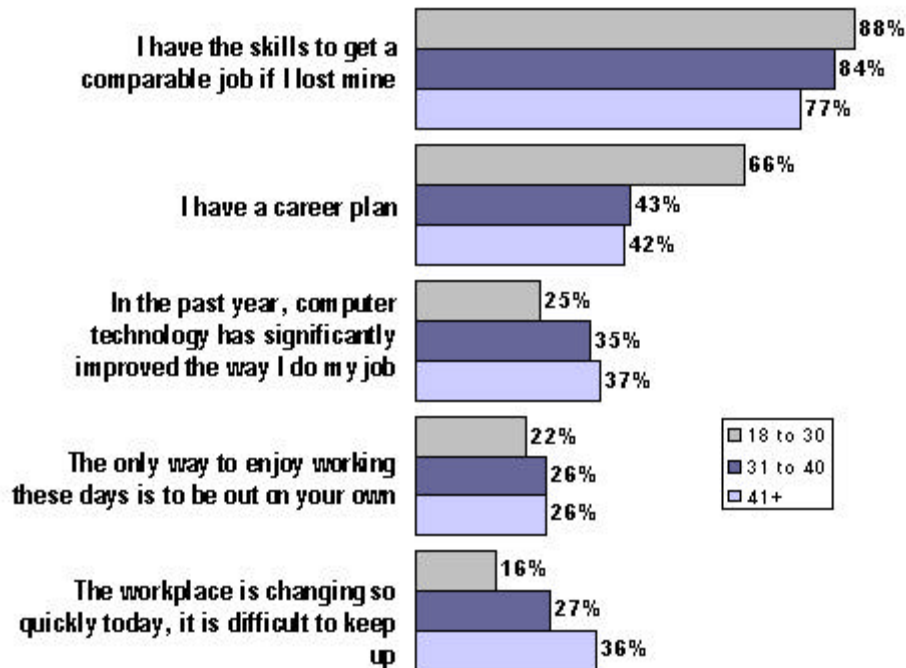
General Attitudes

Statements	% Strongly Agree	% Somewhat Agree
I have the skills to get a comparable job if I lost mine	54%	28%
I have a career plan	28%	21%
In the past year, computer technology has significantly improved the way I do my job	19%	14%
The only way to enjoy working these days is to be out on your own	15%	10%
The workplace is changing so quickly today, it is difficult to keep up	12%	16%

A vast majority of employees agree that they have the skills to get a comparable job. Younger employees are more likely to agree than older employees (10-point gap). Employees with lower levels of education are much more likely to disagree that they have the comparable skills to get a comparable job.

Two-thirds of employees under 30 years of age agree that they have a career plan (66%). Two in five respondents in very large companies agree that computer technology has significantly improved the way they do their job (40%). Older respondents are also more likely to agree (41%).

Not surprisingly, Canadians who are self-employed are significantly more likely to agree that the only way to enjoy working these days is to be out on your own (52%). Residents of British Columbia are also much more likely to prefer the entrepreneurial lifestyle (37%).



Older employees are much more likely than younger employees to agree that the workplace is changing so quickly today, it is difficult to keep up (20-percentage point gap).

6. Innovation

This section examines the concept of innovation among employees. By innovation, we are referring primarily to innovative thoughts or initiatives – not just technology or research and development.

Presenting a New Idea

A solid majority (88%), having a new idea on how to save their company time and/or money, would discuss the idea with someone else before acting on it. One in 10 (11%), would be able to act on the idea on their own. Of those who would discuss their idea with someone else, almost two thirds (64%) are confident that their idea "would be carefully considered as having merit and value". However, there are some who feel that their idea "would be listened to, but wouldn't really be considered valuable" (30%) or even that their idea "would be dismissed without consideration" (6%).

"here is nothing that links salary with productivity"

"if there is no job guarantee, there is no desire to put out 100%"

"sometimes iniative gets you fired"

quotations from employees

Employees at a senior level are much more likely to act on a new idea on their own than are those at a junior level. Company size is also a factor: employees of very small or small companies are more likely to act on a new idea on their own than are employees of large or very large companies.

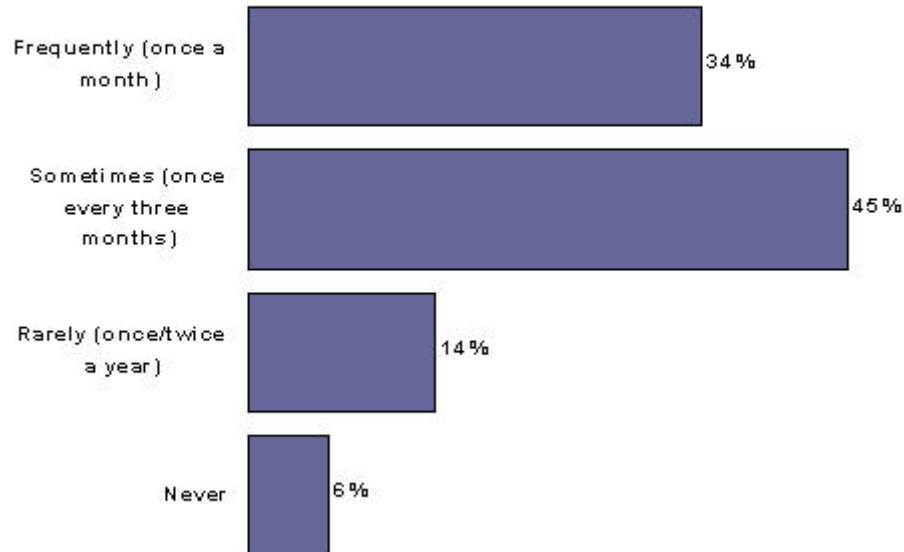
Frequency of New Suggestions

Throughout the last twelve months, one in three Canadian employees (34%) have frequently – once a month – made new suggestions that they think would improve their job and/or the profitability of their company. A further forty-five percent report offering new suggestions "sometimes" (that is, once every three or four months). Only one fifth report rarely (14%) or never (6%) making new suggestions.

Senior level employees are more likely to have offered new suggestions in the past year than those at either a middle or junior level.

The most frequent suggestions are geared toward a "change in procedures/methods" (32%), followed by "time saving suggestions" (13%). Other new ideas include: Money saving suggestion (11%); gave input (10%); improved the product (5%); new product ideas (4%); and new/better equipment (4%).

I would now like you to think about the last twelve months of your job. During that time, how often have you made suggestions that you think would improve your job and/or the profitability of your company -- frequently, sometimes, rarely or never?



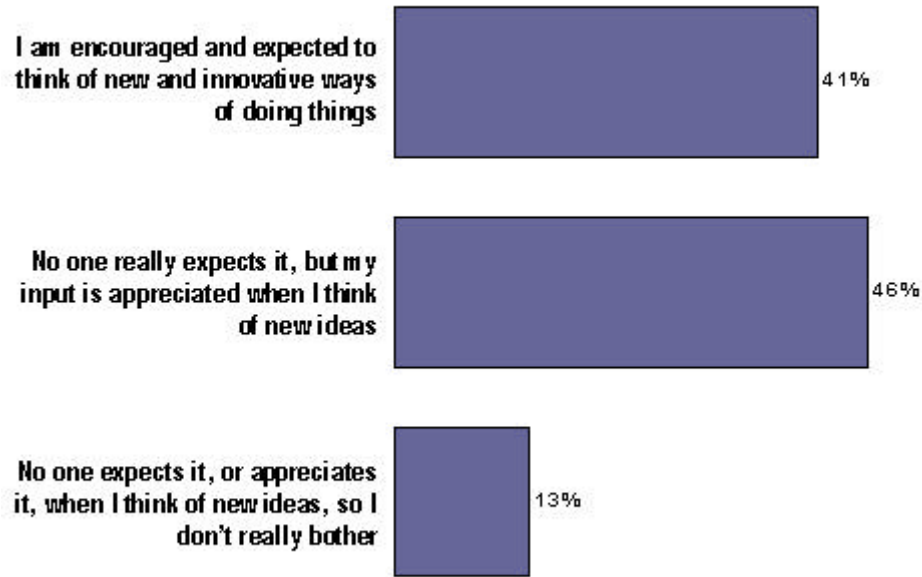
When my children were younger we used to go to the Shrine circus every year. Our favourite act was always the last one on the program. It involved Aldo the Human Cannonball being fired from a cannon mounted at one end of the Winnipeg Arena into a net at the other end. It was hard not to be captivated by Aldo, who defied gravity and risked personal injury to provide the audience with a dramatic finale to an afternoon filled with magicians, clowns and animal acts. What made Aldo's act work wasn't just the cannon or his training or even his bravery, but the net. Indeed, without the net, the act couldn't take place. There's a link between risk taking and security that exists not just for circus acts but in many other areas of human endeavour. This link may prove especially important as a key to resolving one of the greatest challenges in our current age - the creation of jobs.

I'm not suggesting that we should sign up to become human cannonballs, but we're going to have to start thinking in innovative ways about our jobs. We're going to have to become more entrepreneurial and take more risks.

- Dr. Angus Reid, Shakedown

Expectations of the Workplace

When it comes to the expectations of their job and the workplace, a majority of Canadian workers feel that no one really expects them to present new ideas. While many feel that even though it is not expected, their "input is appreciated when (they) think of new ideas" (46%), some feel that no one "appreciates it ... so (they) don't really bother" (13%). On the other hand, four in ten (41%) say that they are "encouraged and expected to think of new ideas and innovative ways of doing things".



Attitudes Toward Innovation

Respondents were asked a series of questions regarding their attitudes toward innovation in the workplace. These results indicate that employees do not agree that their innovation is limited by either time or by concern it may cost them their job, but rather that they do not feel rewarded.

Statements	% Strongly Agree	% Somewhat Agree
In the last year, I have definitely saved the company money because of changes I have personally introduced	15%	13%
Employees are rewarded for implementing ideas which save the company time or money	12%	13%
I am so busy moving from one thing to the next, I don't even have time to think about ways to improve my job	10%	12%
I just don't see the need to stir things up by making suggestions on how to improve things	8%	5%
I'm afraid to try new things because it could cost me my job	5%	5%

Less than three in 10 employees have saved the company money because of changes they have

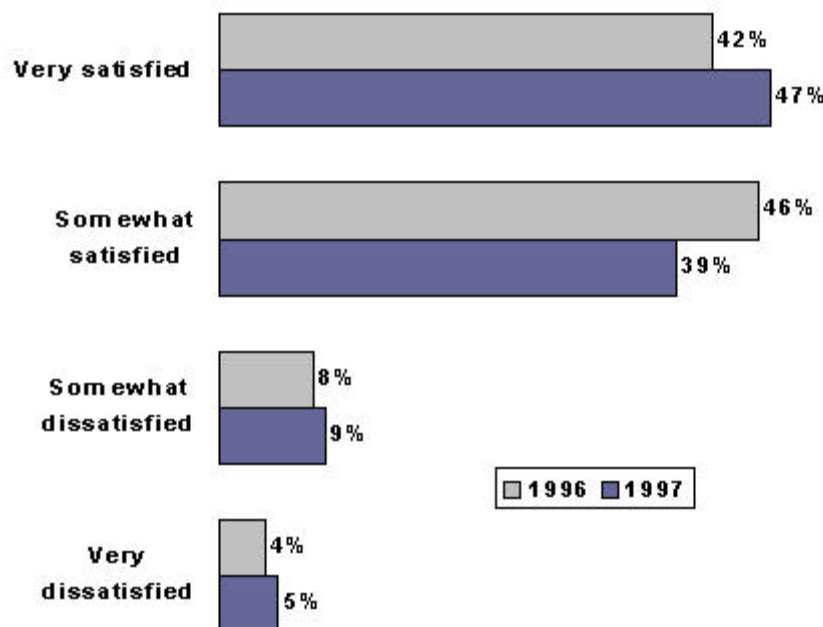
introduced. With employees at a senior level, forty-four percent are much more likely to agree. Those who agree they have saved their company money are much more likely to report their company encourages innovation (53% vs. 41% overall). Employees who work in an environment that fosters innovation are more likely to respond.

Only one in four say that employees are rewarded for implementing ideas that save the company time or money. These results emphasize the importance of employers supporting new initiative which in turn leads to progress and innovative thinking.

7. Work and Job Satisfaction

Job Satisfaction

Canadians continue to be satisfied with their jobs, with more than eight in 10 being either very or somewhat satisfied. In fact, while the figures for those who are somewhat satisfied have decreased slightly in the last year (from 46% to 39%), the proportion of respondents who are very satisfied has increased five percentage points (from 42% to 47%). Fourteen percent of Canadian employees are somewhat (9%) or very (5%) dissatisfied with their jobs.



Job satisfaction is highest among senior level employees (49% very satisfied), the self-employed (68% very satisfied), and employees of smaller companies (60% very satisfied).

Fully three-quarters are satisfied because they like their job and the work they do – as opposed to twenty-three percent who feel that their satisfaction is merely due to the fact that they feel fortunate to have a job these days. In fact, one third (32%) directly attribute their satisfaction with their job to the fact that they "enjoy (their) work" (in response to an open-ended question "Why are you very/somewhat satisfied?"). Compensation is also a factor: eleven percent attribute their job satisfaction to being "well paid".

Those who are very or somewhat dissatisfied with their jobs tend to focus on "low wages" (20%), a "heavy workload" (11%), or that their "company doesn't treat employees well" (10%). Other reasons for a lack of job satisfaction include:

- Poor management – 8%
- Restructuring/layoffs – 7%
- Not getting enough hours/work – 7%
- Lack of career opportunities/nowhere job – 7%
- Dislike boss/co-workers – 6%

Attitudes Toward The Job/Employer

A series of statements regarding the job and employers reinforce the general findings of job satisfaction.

Statements	% Strongly Agree	% Somewhat Agree
My work is challenging and interesting	44%	27%
My current job is just a way to make money, it is not a career	18%	8%
The last thing my employer wants is an employee with initiative – they just want us to do our jobs	16%	10%
I am in a dead-end job	12%	6%
My job requires skills significantly below my level of expertise	11%	12%
I find my job extremely boring	6%	5%

The findings show that employees generally agree that their work is challenging and interesting. Further, most consider their job a career, rather than 'just a way to make money', and less than one in five agree that they are in a dead-end job.

Notably, three in 10 report they are underemployed and their job requires skills below their level of expertise. These employees are significantly more likely to agree they find their job boring (25% compared to an average of 11%) and are more likely to agree that they are in a dead-end job (38% compared to an average of 18%). They are also significantly less likely to report they are very satisfied with their job (18% compared to an average among employees of 43%). It is interesting to note that employees who are more likely to agree that their job requires skills significantly below my level of expertise have a lower level of education than those who disagree with this statement.

Employees who work in the service industry (including retail and food service) are more likely to agree with the statement "the last thing my employer wants is an employee with initiative – they just want us to do our jobs".

Statements	% Strongly Agree	% Somewhat Agree
Some of my good friends are my co-workers	28%	22%
It is getting harder and harder to make ends meet	27%	19%
My resume is always up to date	26%	11%
I have formally applied for a new job in the last year	24%	3%
I am concerned about losing my job	9%	10%

One of the contributing factors to job satisfaction is the relationship employees enjoy with their co-workers. One in two agree that some of their good friends are their co-workers.

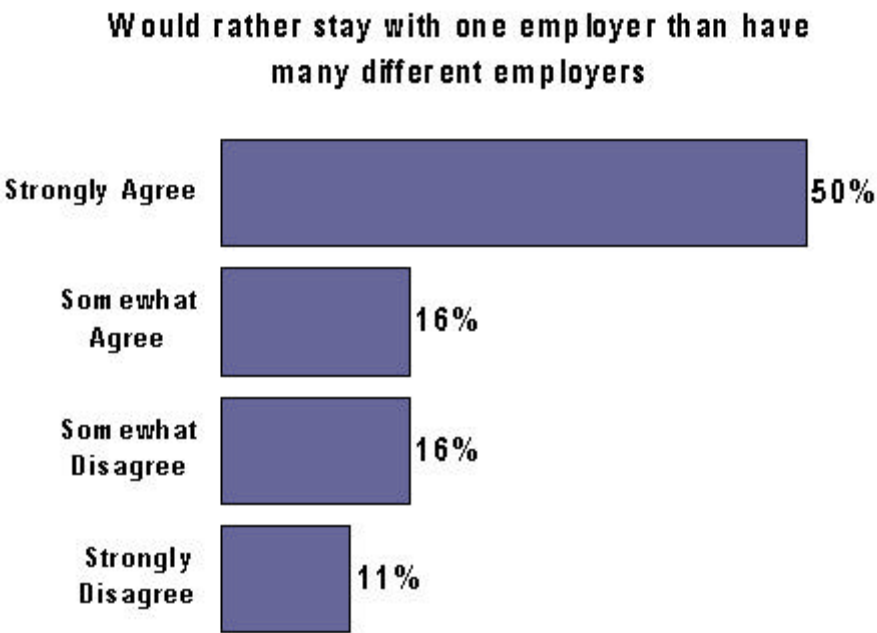
Employees do believe that it is getting harder and harder to make ends meet. Agreement is much higher among those earning less than \$30,000 per year (51% agree) compared to those in higher income brackets.

One of the measures of job mobility is whether employees are actively searching for employment. Our study indicates that nearly two in five employees are keeping their resumes up to date – just in case, and that nearly three in ten have formally applied for a job in the last year. Part-time employees are significantly more likely to agree that they have formally applied for a new job (36%), perhaps due to a desire to move to a full-time position. Other segments who are more likely to have applied for a job are: non-union members (35% compared to 20% of union members); junior level employees (36%); employees under the age of 30 (41%); and those who are much less likely to be very satisfied with their jobs (29%).

Nineteen percent agree that they are concerned about losing their job. Those who are most likely to agree are: employees in a junior position (24%); employees over the age of 40 (22%); and employees in Ontario (23%). Those who agree that they are concerned about losing their job are less likely to be very satisfied with their job.

8. The Workplace

Movement in the Workplace



Canadian employees enjoy employment stability: on average, they have been with their current employer for nine years and expect to stay with their current employer, company or business for another nine years. Furthermore, two thirds either strongly (50%) or somewhat (16%) agree that they "would rather stay with one employer for most of (their) career than have many different employers". And, one in two (51%) say that if they were to change jobs, they "would prefer to move within (their) company rather than moving to another employer" – and more than four in ten (43%) expect that they will change job assignments with their current employer in the next two years.

Employees of larger companies are more likely to state a preference for a move within their company rather than moving to another employer.

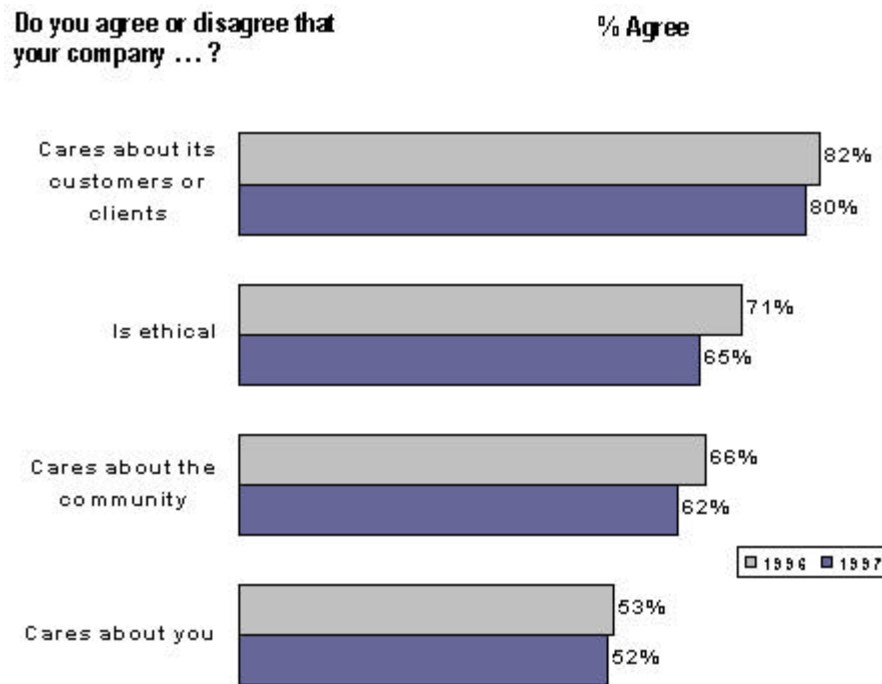
Rating of the Workplace

As the following table illustrates, Canadian employees rate their workplace high in terms of fairness, flexibility and vacation allowance, but are significantly less pleased with communication, feedback, rewards and opportunity for advancement. Factors such as pay, involvement in decision-making and the feeling of making a difference receive average ratings.

% Good/Excellent (Topbox score: 4,5 on 5 point scale)	1996	1997
• provides me with the flexibility to respond to personal or family responsibilities	67%	73%
• overall, treats me fairly		73%
• provides reasonable paid vacation		70%
• promotes without bias to age, race, colour, sex or family status	72%	66%
• allows me to do my work the way I want to		63%
• provides sufficient benefits such as health or dental plans	63%	62%
• offers fair/reasonable pay for the work I do	58%	61%
• is a place I feel I can really make a difference	56%	58%
• involves me with decisions that affect my work		53%
• offers security so that I am not concerned about losing my job	51%	47%
• communicates corporate changes to employees effectively	45%	45%
• provides time off during work hours for upgrading or skills development		45%
• provides effective performance evaluations or feedback	45%	44%
• recognizes employees who excel at their jobs	44%	44%
• provides funding for upgrading or skills development	44%	44%
• provides opportunity for advancement	36%	40%

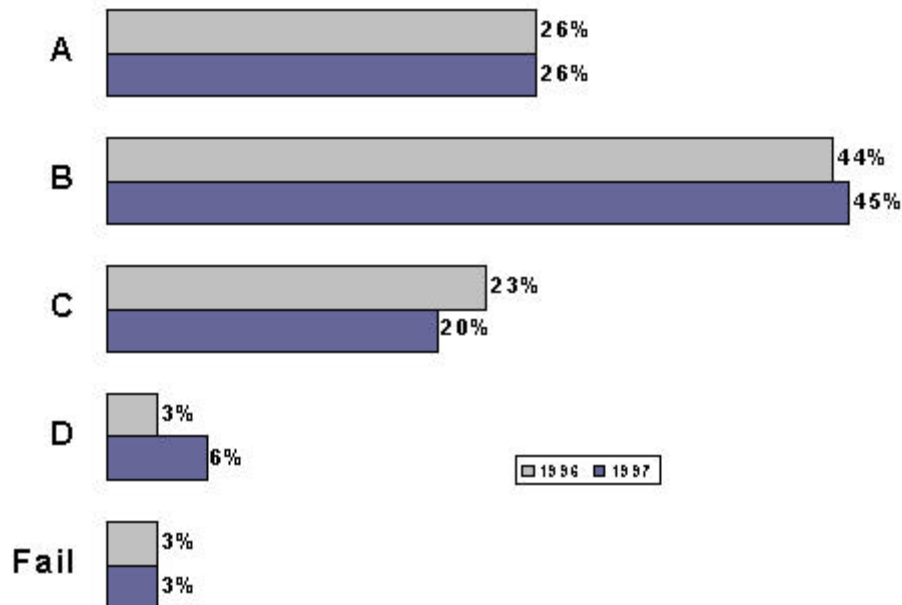
Rating of the Company

Respondents are significantly more likely to feel that their company cares about its customers or clients (80%) than they are to believe their company cares about them (52%). In fact, Canadian employees feel their company cares more about the community (62%) than its employees. There has been no significant change in any of these figures over the last twelve months. On the issue of ethics, two thirds (65%) agree that their company is ethical. This figure has decreased slightly from more than seven in ten (71%) in 1996.



Senior level employees and those working in smaller companies are more likely to feel that the company they work for cares about them. Union members, on the other hand, are much less likely to think their company cares about them.

The Company Report Card



More than four in 10 Canadian employees (45%) rate their company as a B overall as a place to work and a further quarter (26%) give their company an A. One fifth rates their company as a C, and six percent give theirs a D. Only three percent give their company a failing grade. Any variations

since the 1996 study are very slight and not statistically significant. Employees in very small and small companies rate their company higher than those in larger companies.

Advice for the Company

Given the opportunity to give their employer one piece of advice on how to keep them satisfied as an employee, fully one quarter of respondents don't know what advice they would give. Others would recommend "better raises/salaries" (13%), "better communication" (12%), or to "respect/appreciate the employees" (9%).

General Attitudes Toward The Workplace

Statements	% Strongly Agree	% Somewhat Agree
I would recommend my company as a good place to work.	33%	28%
Even if my company makes money, the average employee doesn't see any benefit.	27%	13%
I would take a comparable job with comparable pay if it were offered to me.	16%	12%
Employers are simply asking too much of employees today.	14%	18%
My employer only cares about the shareholders, not the employees.	12%	9%
The level of stress that I experience from my job negatively interferes with my family or personal relationships.	10%	14%
The atmosphere at my work is depressing.	9%	10%

These statements illustrate that a majority of employees would recommend their company as a good place to work, consistent with the levels of satisfaction recorded throughout the survey. These results also do indicate an underlying dissatisfaction among a segment of employees – roughly one in five. Nineteen percent agree that the atmosphere at their work is depressing, and twenty-one percent agree "my employer only cares about the shareholders, not the employees".

These statements also indicate that an even larger segment of the employee population, although still less than a majority, believe their employers are asking too much of employees today, and that employees do not see any benefit if the company makes money.

The results show that one in three feel that "employers are simply asking too much of employees today", indicating that most do not feel pressured by their employer – reinforcing the findings examining stress in the workplace.

For most variables, the results do not vary significantly by demographics and employee profile. Employees in larger companies are somewhat more likely to agree, particularly with the statement that they see no benefit if their company makes money (40% overall; 45% among employees in very large companies). Union members are also slightly more likely to agree.

9. Flexible Work Arrangements

One in two Canadian employees consider themselves to be on a flexible work arrangement. This figure has not changed in the last year. More than half (56%) of those who are on a flexible work arrangement describe it as flextime and one in five (20%) say they work a modified workweek. Compressed workweeks (9%), job sharing (7%) and working at home (4%) are less common flexible work arrangements. Almost all (97%) respondents who work at home report that this is a formal arrangement with their employer.

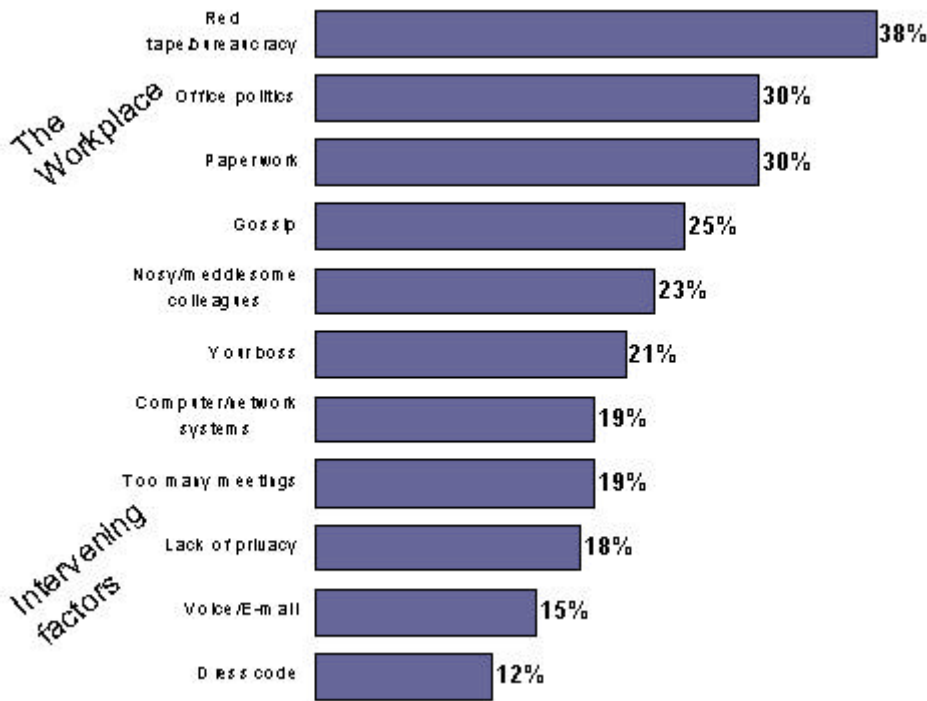
Those who are most likely to take advantage of flex-time are senior employees, and those with higher income.

Employees who have dependent children living with them are no more or less likely to report they are using a flexible work arrangement. However, employees who report that their parents or another family member live with them are more likely to be on a flexible work arrangement (63%).

10. Barriers to Job Satisfaction

Respondents report that elements of the workplace itself detract more from their ability to do their job than do other intervening factors. It is interesting to note that of the eleven factors tested, not one is considered a detractor by more than forty percent of respondents.

Red tape/bureaucracy (38%) is considered the biggest barrier, followed by office politics (30%) and paperwork (30%). Gossip (25%) and nosy/meddlesome colleagues (23%) also bother employees. A sizable twenty-one percent say that their boss actually detracts from their ability to do their job.



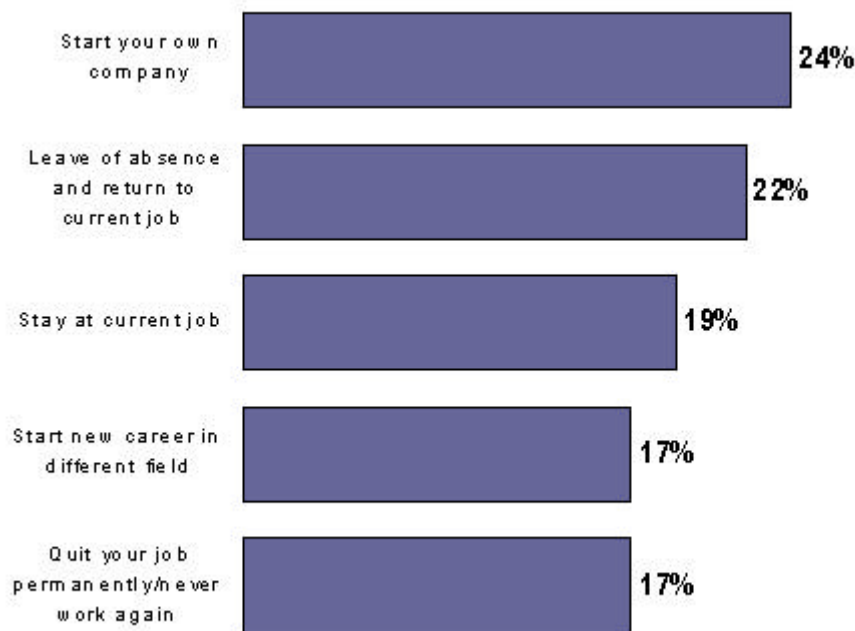
Intervening factors, such as having too many meetings (19%), lack of privacy (18%), voice/e-mail (15%) and the dress code (12%) are not considered major barriers.

On an open-ended basis, employees cite "time constraints/too much work, too little time" and

"conflicts with bosses/poor management" as the greatest detractors from their ability to do their job. Other factors mentioned include:

- Conflicts with co-workers
- Bureaucracy/too much management
- Communication/lack of feedback
- Work environment – atmosphere/physical site

Winning A Million Dollars

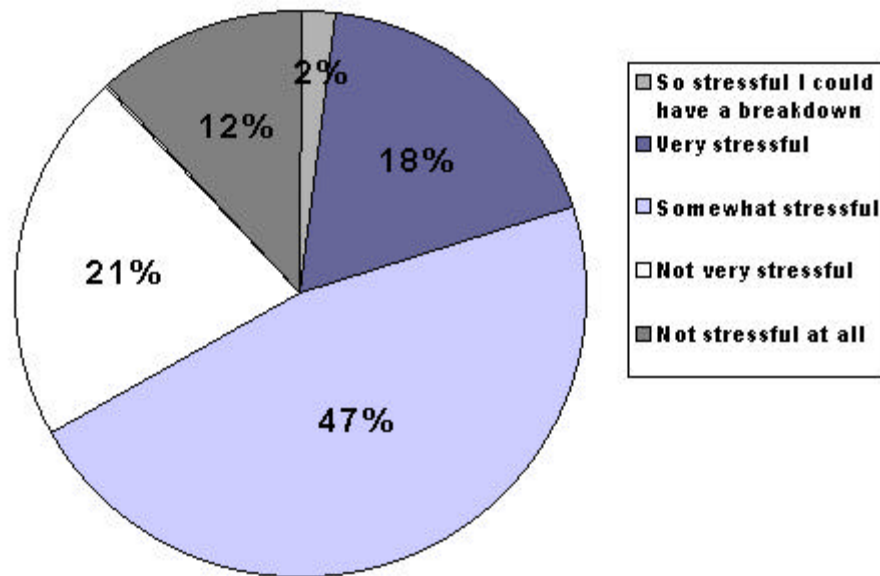


Fully four in five (80%) would stay in the workplace if they won one million dollars in a lottery. Almost one quarter (24%) would start their own company, and another seventeen percent would start a new career in a completely different field/profession. More than one fifth (22%) would take a leave of absence but return to their current job, and a further nineteen- percent would just stay at their current job. Fewer than one in five (17%) would quit their job permanently and never work again.

11. Stress

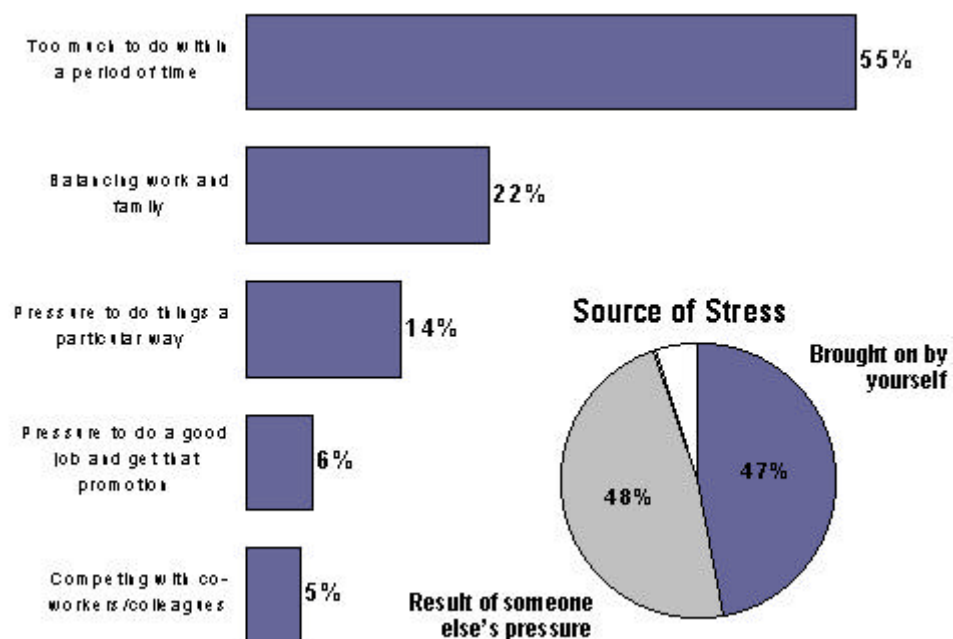
Level of Stress

Two thirds of Canadian employees say their job is either very (18%) or somewhat (47%) stressful – another two percent find their job so stressful they feel they are going to have a breakdown. A more fortunate third of the workforce say their jobs are not very stressful (21%) or not stressful at all (12%). Levels of stress do not vary among employees with dependents or those with parents or other family members who live at home.



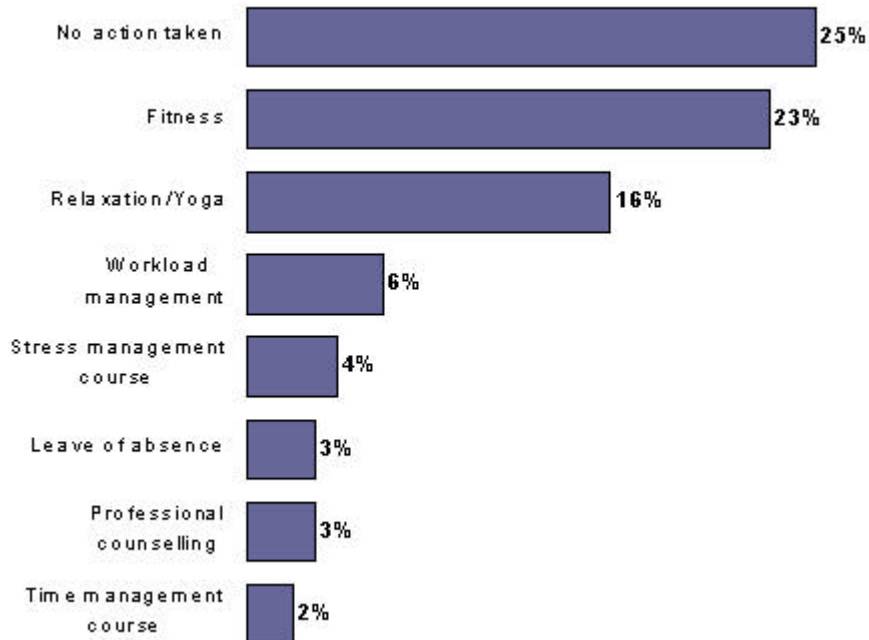
Causes of Stress

For a majority (55%) of the workforce, stress arises from the "pressure of too much to do within a period of time". Others feel their stress is brought on by "balancing work and family responsibilities" (22%) or "pressure to do things a particular way" (14%). A smaller group attributes their stress to more competitive/ambitious causes: six percent cite the "pressure to do a good job to get that promotion" and five percent say they feel the "pressure to compete with co-workers/ colleagues".



Stress Relief

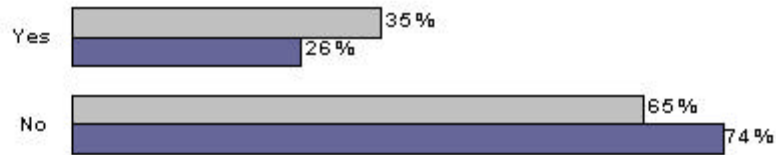
One in four (25%) do not take any action to deal with their stress. More than one in five (23%) turn to fitness, and slightly fewer (16%) practice relaxation/yoga. Six percent have taken courses to deal with their stress (4% stress management course, 2% time management course), and another three percent have sought professional counseling. Six percent try workload management, and for three percent, job-related stress has resulted in a leave of absence.



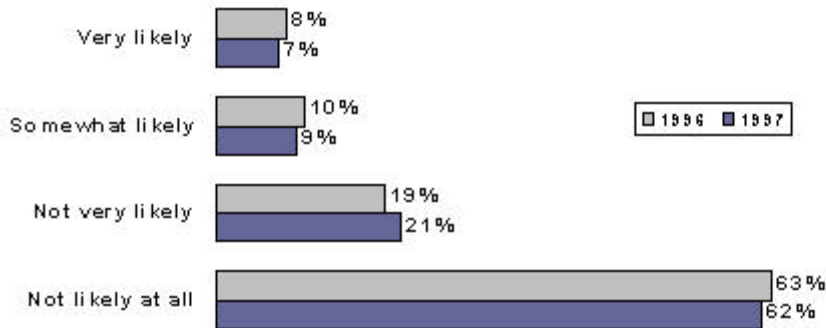
12. Self-Employment

Toward Self-Employment

Have you ever taken any action to start your own business?



How likely is it that you will be self-employed within the next year?

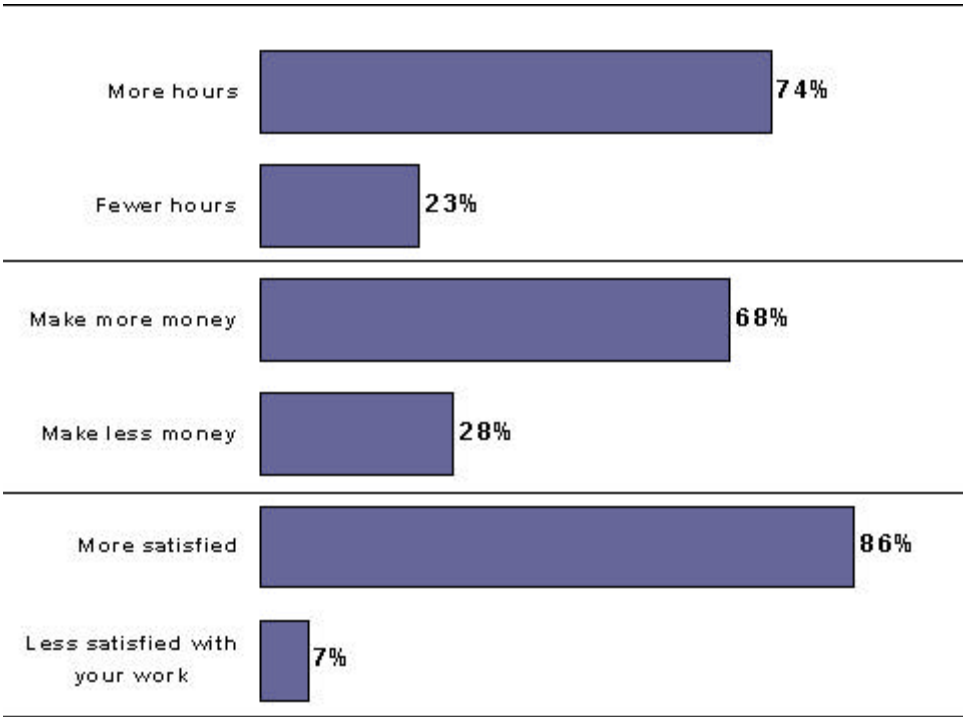


One quarter (26%) of Canadian employees has, at some point, taken action to start their own business (such as looking into financial arrangements or applying for a loan). This figure has decreased nine percentage points from 1996.

Fewer than one in five say it is either very (7%) or somewhat (9%) likely that they will be self-employed within the next year.

Expectations for Self-Employment

Two thirds (66%) of those who say they are likely to become self-employed in the next year say that it will happen as a result of their own personal choice. Only one in five say they will become self-employed as a result of market factors, such as job loss (4%), downsizing/restructuring (8%), or not being able to find an interesting job (7%). Nine percent say their self-employment will be due to the need for another income.



Respondents are divided as to whether their own business would be a primary (50%) or supplementary (49%) source of income. Similarly, respondents are evenly divided o whether their business will be in a field related to their current job/career (49%), or something completely different (51%).

However, respondents clearly expect that self-employment will result in more money (68%) and increased satisfaction (86%), but at the expense of working more hours (74%) than they currently do.

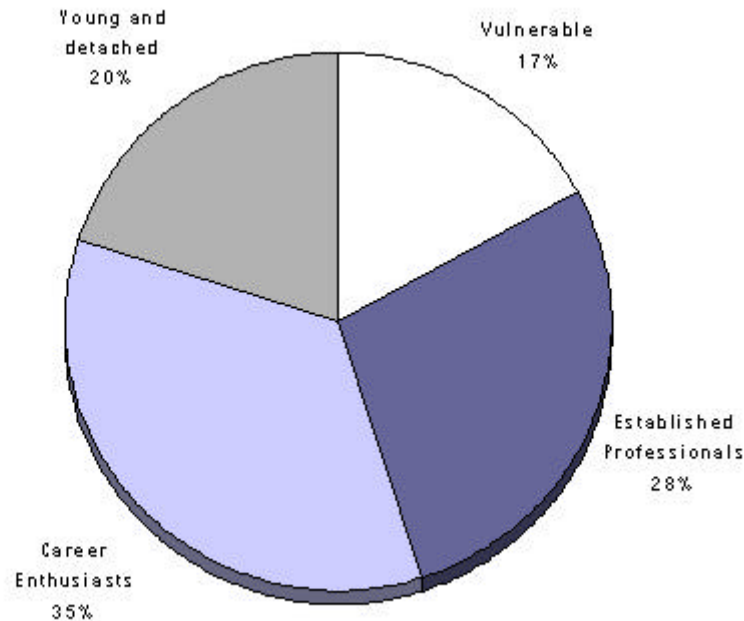
Jobs created by the private sector since 1992:
980,000
Self-employed share of this private sector figure:
310,000

13. Segmentation

A segmentation of employees indicates the ‘schools of thought’ on the workplace. One of the most interesting characteristics of segmentation analysis is that employees are grouped by their attitudes rather than by their demographics (although there may be relationships among these variables).

A summary of the analysis has been provided to assist the reader in understanding the dynamics of the workplace, and also to summarize the diversity in the results. From reading the report, it is apparent that many employees not only are satisfied with their job and their workplace, but also are working to adapt to the needs of the workplace in the future. However, it is also apparent that these attitudes are not universal. The segmentation assists in quantifying these findings. For the purposes of the analysis, the self-employed are consider a segment unique from other employees, and are not discussed here.

A graphical representation of the segmentation is provided below.



Each segment is described in the following section.

Career Enthusiasts (35%)

Career enthusiasts are the most satisfied of the four segments. Fully seven in ten (72%) are very satisfied with their job, and nearly all (98%) rate their workplace as either an A or B. Three in five (63%) strongly agree that they would recommend their company as a good place to work and nine in ten agree "my company cares about me".

This segment feels that they are encouraged to be innovative (61% say that it is encouraged), and two in five offer new ideas at least once a month. Nearly four in five (78%) agree that they have what it takes to succeed in the 21st century.

What is interesting about this segment of employees is that they report the lowest levels of stress of all employees, indicating that employees who participate and feel satisfied are much more likely to feel lower levels of stress.

Career enthusiasts are slightly more likely to have taken courses, and are more likely to respond that their workplace demands flexibility, innovation, initiative and related skills.

Demographically, career enthusiasts are less likely to be in junior positions, and are more likely to work for very large companies.

The Established (28%)

One of the distinguishing characteristics of the established is the relatively high proportion of union members. Over one in two (54%) hold a union membership card. They are more likely to work for large or very large companies. This segment is older than any other segment, and have been in the workforce longer.

While the established are less likely to be very satisfied with their jobs (34%), most are somewhat satisfied (59%), and only eight percent are dissatisfied.

This segment offer low rating of their workplace: only eight percent rate their company as an A, and

only three percent strongly agree that their company cares about them. They are also much less likely than average to feel that their company considers them important. They do not feel that they are in a dead-end job, but are less likely than average to agree that they have a career plan. This segment is least likely to have made a change that has saved their company money.

These are employees who have been in their jobs for a significant length of time, tend to be at the middle management level within companies and are less likely to feel enthusiastic about their work.

Young and Detached (20%)

This segment is younger than any of the other segments, and is more likely to work in the service industry or in the accommodation/food industry. A significant proportion is working part-time rather than full-time.

What is unique about this segment is that they are relatively satisfied with their jobs, and two in five (38%) agree that they are satisfied because they feel fortunate to have a job. While two in five are working just for the money, seven in ten agree that their company cares about them. The Young and the Detached are less likely than average to have a career plan, and are optimistic that they have what takes to succeed in the 21st century. They have lower than average levels of stress at work. They are second to the career enthusiasts as frequently mentioning new ideas. One in four have taken courses for an entirely different career than their current job.

This segment does not appear to be concerned about their future, but rather has expectations that they will succeed when they are ready to take on the challenge. For now, they are satisfied at their current workplace until their opportunity comes along.

The Vulnerable (17%)

The vulnerable comprise the segment of the workforce most at risk. They rate lower on every measure of job and workplace satisfaction:

- 1. Four percent are very satisfied with their job, three in five are dissatisfied;
- 2. One percent rate their workplace as an "A";
- 3. Three percent agree their company cares about them;
- 4. Only fourteen percent agree they would prefer to move within their company;
- 5. Four percent agree that they would recommend their company as a good place to work.

This pattern carries through all measures tested. Notably, this segment reports the highest level of stress of any of the segments. Given their attitudes toward the workplace, it is not surprising that this segment is the most likely to have taken action to start their own business, and report the highest likelihood of owning their business. They are the least likely to have taken courses, and to feel encouraged to raise new ideas. They do feel, however, that they have what it takes to succeed.

Demographically, their education level is not significantly different from the career enthusiasts or the Young and the Detached. They are slightly older than average, and are slightly more likely to be male.

Question	Career enthusiast	The Established	Young and the detached	Vulnerable
% Very satisfied with their job	72%	34%	39%	4%
% Strongly agree: company cares about me	55%	3%	28%	1%
% Rate company A/B	52%	8%	26%	1%
% Feel their company consider them very important	56%	14%	38%	3%
% Agree: Dead-end job	3%	11%	28%	61%
% Strongly Agree: have what it takes to succeed	47%	27%	33%	32%
% Encouraged to think of new ideas	61%	39%	39%	11%
% Agree: job is just a way to make money	8%	11%	47%	65%
% Agree: would recommend company to work for	93%	50%	74%	4%
% taken action to start their own business	24%	21%	26%	37%
% taken courses to upgrade skills for current job	62%	53%	43%	32%

14. Regional Highlights

A summary of the core questions in the study by province is presented in the table. Key differentiating points are presented following the table.

	B.C.	Alberta	Man/Sask	Ontario	Quebec	Atlantic
% Very satisfied with their job	53%	54%	56%	47%	41%	47%
% Agree: company cares about me	51%	60%	54%	50%	52%	54%
% Rate workplace an 'A'	21%	30%	31%	28%	20%	34%
% Agree: I have what it takes to succeed in the 21 st century	61%	77%	74%	70%	58%	60%
% Agree: encouraged and expected to think of new ideas	31%	46%	45%	40%	46%	40%
% Have taken action to start your own business	40%	30%	39%	37%	32%	18%

British Columbia

- slightly less likely to rate company as an 'A' (21%; -5%)
- less likely to report that they are "encouraged and expected to think of new ideas" (31%; -10%)
- more likely to agree: "workplace is changing so quickly, it's difficult to keep up" (39%; +11%)
- more likely to agree: "the only way to enjoy working today is to be out on your own" (37%; +12%)

Alberta

- work more hours on average (42 hours per week; +2 hours on average)
- more satisfied with their job (54% very satisfied; +7%)
- more likely to agree "company cares about me" (60%; +8%)
- more likely to report that the skills tested are needed at their workplace

- more likely to report "encouraged and expected to think of new ideas" (46%; +5%)
- more likely to agree "employees are rewarded for saving the company time and/or money" (34%; +9%)
- more likely to agree "I have what it takes to succeed in the 21st century" (77%; +10%)

Manitoba/Saskatchewan

- higher incidence of self-employment (28%; +9%)
- higher than average job satisfaction (56% very satisfied; +9%)
- more likely to believe employer considers them "very important" (42%; +10%)
- less likely to agree: "have applied for a new job" (30%; -8%)
- more likely to have taken action "to start your own business"

Ontario

- slightly more likely to agree "concerned about losing my job" (23%; +3%)
- less likely to agree "even if my company makes money, the average employee doesn't see any benefit" (35%; -5%)
- more likely to agree "employers are asking too much of employees" (38%; +6%)

Quebec

- less likely to be very satisfied with their job (41%; -6%)
- less likely to agree "would prefer to move within my company" (41%; -10%)
- less likely to rate employer as good/excellent for "recognizing employees who excel at their jobs" (25%; -19%)
- slightly less likely to rate company as an 'A' (20%; -6%)
- more likely to consider themselves "very successful" at their job (50%; +12%)
- more likely to agree that they could "act on their own" if they had a new idea (19%; +8%)
- more likely to agree "the last thing my employer wants is an employee with initiative, they just want us to do our jobs" (44%; +18%)

Atlantic

- more likely to feel satisfied because "I feel fortunate to have a job" (31%; +9%)
- generally less likely to be taking courses to upgrade skills
- more likely to rate company as an 'A' (34%; +8%)
- more likely to agree "it's getting harder and harder to make ends meet" (60%; +14%)
- more likely to agree "I'm in a dead-end job" (26%; +8%)



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