2016 Edenred-Ipsos Barometer
Understand and improve Wellbeing At Work

May 2016
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 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

1. USA
2. China
3. Japan
4. Germany
5. UK
6. France
7. Brazil
8. India
9. Italy
and Spain (14*)
Mexico (15)
Turkey (18)
Poland (23)
Belgium (25)
Chile (38)

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?

ENVIRONMENT + APPRECIATION + EMOTION = A POSITIVE EXPERIENCE AT WORK
HOW TO MEASURE WELLBEING AT WORK?

10 questions

**ENVIRONMENT**
- 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

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

**EMOTION**
- 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

Average positive scores among employees in 15 countries

<table>
<thead>
<tr>
<th>Aspect</th>
<th>% (absolutely + somewhat agree)</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have a <strong>clear idea</strong> of what is expected from you on the job</td>
<td>86</td>
</tr>
<tr>
<td>If you have problems, you can <strong>count on your colleagues</strong> to support you</td>
<td>78</td>
</tr>
<tr>
<td>The <strong>equipment</strong> and materials at your disposal are suitable</td>
<td>77</td>
</tr>
<tr>
<td>You have an <strong>interesting job</strong></td>
<td>73</td>
</tr>
<tr>
<td>You <strong>feel respected</strong> by your management</td>
<td>71</td>
</tr>
<tr>
<td>You are satisfied with the <strong>balance</strong> between your work and your private life</td>
<td>70</td>
</tr>
<tr>
<td>You <strong>enjoy</strong> coming at work in the morning</td>
<td>67</td>
</tr>
<tr>
<td>You feel <strong>confident</strong> about your personal future in your company</td>
<td>65</td>
</tr>
<tr>
<td>You work in a <strong>stimulating</strong> environment</td>
<td>61</td>
</tr>
<tr>
<td>Your management pays attention to your <strong>skills and training</strong></td>
<td>61</td>
</tr>
</tbody>
</table>

**Top scores = environment**

**Bottom scores = emotion...& appreciation**
WELLBEING AT WORK:
Global average score among employees 15 leading economies

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

- You have a clear idea of what is expected from you on the job: 86%
- If you have problems, you can count on your colleagues to support you: 78%
- The equipment and materials at your disposal are suitable: 77%
- You have an interesting job: 73%
- You feel respected by your management: 71%
- You are satisfied with the balance between your work and your private life: 70%
- You enjoy coming at work in the morning: 67%
- You feel confident about your personal future in your company: 65%
- You work in a stimulating environment: 61%
- Your management pays attention to your skills and training: 61%
## WELLBEING AT WORK:
### Breakdown by countries (1/2)

<table>
<thead>
<tr>
<th>Country</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>88</td>
</tr>
<tr>
<td>Mexico</td>
<td>81</td>
</tr>
<tr>
<td>USA</td>
<td>77</td>
</tr>
<tr>
<td>Chile</td>
<td>77</td>
</tr>
<tr>
<td>Brazil</td>
<td>77</td>
</tr>
<tr>
<td>Germany</td>
<td>74</td>
</tr>
<tr>
<td>UK</td>
<td>71</td>
</tr>
<tr>
<td>China</td>
<td>71</td>
</tr>
<tr>
<td>Poland</td>
<td>70</td>
</tr>
<tr>
<td>Belgium</td>
<td>70</td>
</tr>
<tr>
<td>Spain</td>
<td>68</td>
</tr>
<tr>
<td>France</td>
<td>67</td>
</tr>
<tr>
<td>Turkey</td>
<td>65</td>
</tr>
<tr>
<td>Italy</td>
<td>63</td>
</tr>
<tr>
<td>Japan</td>
<td>44</td>
</tr>
</tbody>
</table>

- **Countries above average score**
- **Countries below average score**

The pie chart shows that 71% of the countries have scores above the average.
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).
Score for Japan is lower in relation to the global average for this item

Score for Japan is higher in relation to the global average for this item

Countries positioning based on their relative scores by questions
### WELLBEING AT WORK: 4 countries profiles (2/3)

Higher results on*…

<table>
<thead>
<tr>
<th>Environment</th>
<th>Appreciation</th>
<th>Emotion</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAPAN (15**)</td>
<td>TURKEY (13)</td>
<td>CHINA (8)</td>
</tr>
<tr>
<td>ITALY (14)</td>
<td>POLAND (9)</td>
<td></td>
</tr>
<tr>
<td>SPAIN (11)</td>
<td>UK (7)</td>
<td>USA (3)</td>
</tr>
<tr>
<td>BELGIUM (10)</td>
<td>GERMANY (6)</td>
<td>FRANCE (12)</td>
</tr>
<tr>
<td>INDIA (1)</td>
<td>MEXICO (2)</td>
<td>BRAZIL (5)</td>
</tr>
<tr>
<td>CHILE (4)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

(**): country rank global wellbeing score
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 United Kingdom and a lack of appreciation in France, Germany and Belgium.

(*) independently of their usual way to answer surveys (after ‘neutralization’ of cultural bias)

(**): country rank global wellbeing score
Implementing Wellbeing at work
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?

#### Ranking of various HR policies based on their impact on wellbeing at work

<table>
<thead>
<tr>
<th>HR Policy</th>
<th>Impact Score</th>
<th>% of employees considering their company with an active policy in this domain</th>
</tr>
</thead>
<tbody>
<tr>
<td>The transmission and renewal of skills</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>The 'end of career' management</td>
<td>64</td>
<td></td>
</tr>
<tr>
<td>The working hours organization flexibility</td>
<td>72</td>
<td></td>
</tr>
<tr>
<td>The health at work</td>
<td>74</td>
<td></td>
</tr>
<tr>
<td>The digital culture</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>The consideration of employee diversity</td>
<td>81</td>
<td></td>
</tr>
<tr>
<td>The integration of young people in the company</td>
<td>76</td>
<td></td>
</tr>
</tbody>
</table>

- **Priorities** = avoid an unfavorable judgment on wellbeing
- **Fundamentals** = favor a favorable judgment on wellbeing
- **XX** = % of employees considering their company with an active policy in this domain
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 and 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)

- The transmission and renewal of skills
- The 'end of career' management
- The working hours organization flexibility
- The health at work
- The digital culture
- The consideration of employee diversity
- The integration of young people in the company

Score for UK is lower in relation to the global average for this item.
Score for Chile is higher in relation to the global average for this item.
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, United-Kingdom, 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 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).
As an unpredictable economy changes the rules, employee engagement is at the heart of sustainable performance.

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

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

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

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

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

astrid.delatude@edenred.com
julia.pironon@ipsos.com