360°

Steelcase Global Report

Engagement and the Global Workplace

Key findings to amplify the performance of people, teams and organizations

Steelcase®

About the Study

Steelcase partnered with global research firm Ipsos* for this unprecedented research effort to measure relevant dimensions of employee engagement and workplace satisfaction—both powerful indicators of worker wellbeing and organizational performance.

17 Countries
12,480 Participants
5 Key Findings

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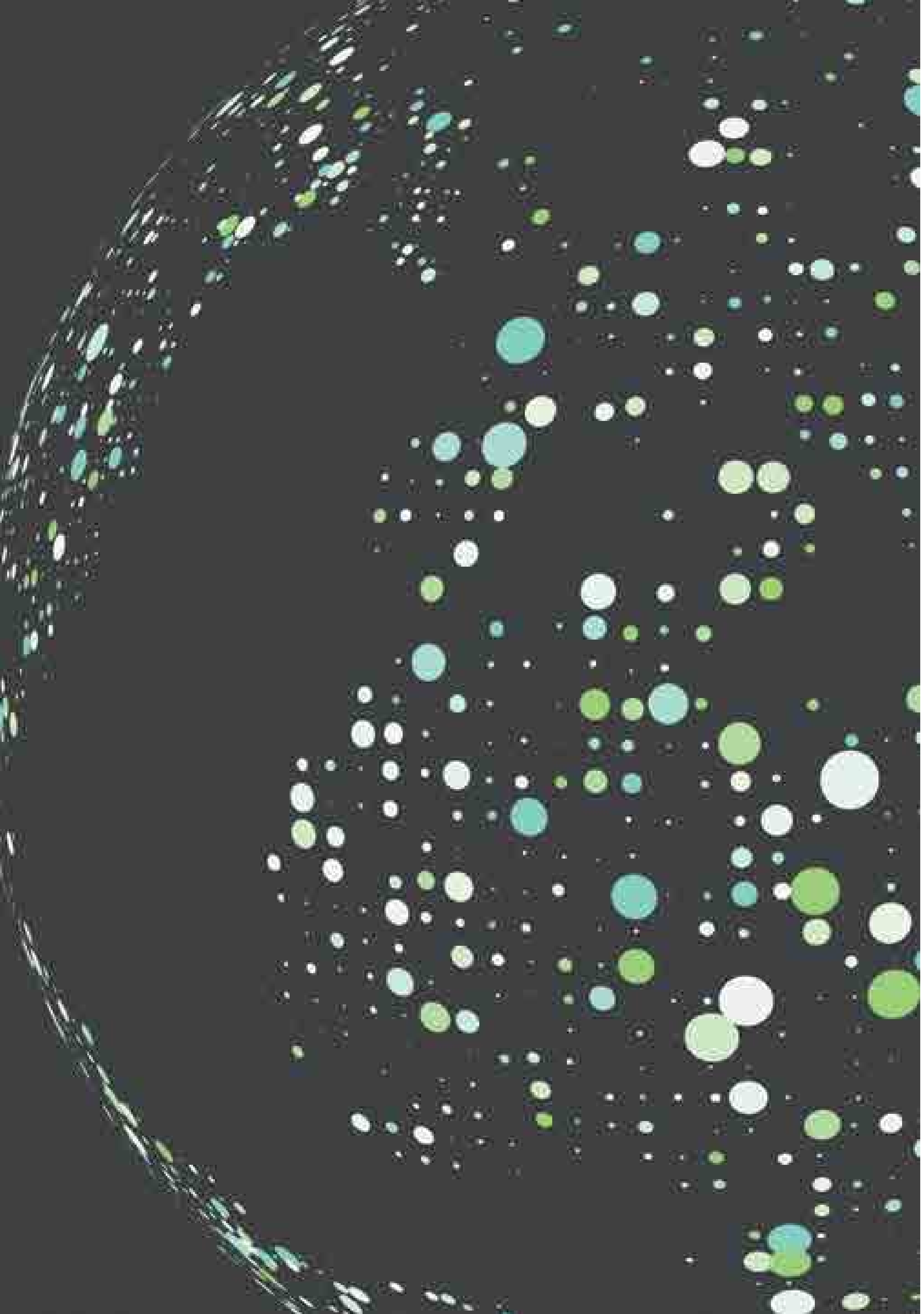
* For more information about Ipsos, see inside back cover.



Message From Jim Keane

CEO, Steelcase Inc.

The senior business leaders we work with tell us they are building cultures that lead to more resilient organizations—constantly responding to market conditions, while also reinventing and innovating ahead of the market.

This level of resiliency demands a group of employees who are highly engaged. Businesses need people who come to work energized, ready to generate new ideas, create new strategies and make meaningful progress every day. They can't afford anything less.

But the reality is there aren't as many highly engaged workers as organizations need. In fact, the number of disengaged office workers outnumbers the engaged, which has a direct impact on the bottom line. Solving for this level of disengagement is a complex, difficult task, and many organizations have studied a variety of ways to address this important issue.

At Steelcase, we've spent decades researching work and the workplace and that's helped us to understand how the work environment can shape the behaviors of people, reinforce culture and advance business results. Driven by this curiosity about work, workers and the workplace, we wanted to understand the relationship between employee engagement and the workplace.

The Steelcase Global Report is the first study that explores the relationship between employee engagement and how people feel about their workplace. Its key findings affirm our belief that the places where people work can influence not only productivity, but also shape employee attitudes and beliefs. It demonstrates that the workplace can be part of a holistic strategy to increase engagement.

Leading organizations know that complex problems require new ideas that challenge conventional thinking. I invite you to read this report, learn from our research and work with us to explore ways your workplace can help your people become more resilient and highly engaged.

Jim Keane

Understanding the Data

Use this legend to better understand the symbols and color coding used in the charts and graphics for easier interpretation of the data.

Color Code

- ● Highly Engaged and Highly Satisfied Workers
- ● Highly Disengaged and Highly Dissatisfied Workers
- ● Neutral Workers (Neither Engaged nor Disengaged)
- ● Global Average
- ● Country Average

Symbols

- ◉ *Noteworthy*
- ▲ Highest score in the study
- ▼ Lowest score in the study

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The study found that more than one-third of workers in 17 of the world's most important economies are disengaged.

Executive Summary

Employee engagement is a serious bottom-line issue. It fuels organizations during times of economic growth and, more critically, when market conditions are uncertain and volatile.

When workers become disengaged, it costs companies money, slows projects, drains resources and undermines company goals, as well as the efforts of their engaged counterparts. This is why employee engagement is one of the key issues facing leading global organizations today.

Organizations might be able to absorb the effects of a handful of disengaged workers, but many business leaders don't realize how significant the problem is. This study found that more than one-third of workers in 17 of the world's most important economies are disengaged and another third are somewhere in the middle, not working against their companies but not driving better business results either.

Like other complex problems facing business leaders today, employee engagement has many variables that are difficult to address and slow to change. Building on decades of primary research about work and the workplace, Steelcase partnered with global research firm Ipsos to understand how the places where people work impact employee engagement. We posed these questions:

Can the office be used as a strategic lever to impact engagement?

What kinds of changes to the work environment will make the biggest impact?

The findings of this study indicate that the work environment can either augment or hinder efforts to boost employee engagement. It also identifies areas of change to the workplace that can have the most positive impact. Here are the key findings:

1. Employee Engagement Positively Correlates with Workplace Satisfaction
2. Engaged Employees Have More Control Over Their Experiences at Work
3. Fixed Technology Exceeds Mobile 2:1
4. Traditional Workstyles Persist
5. Cultural Context Influences Engagement Levels

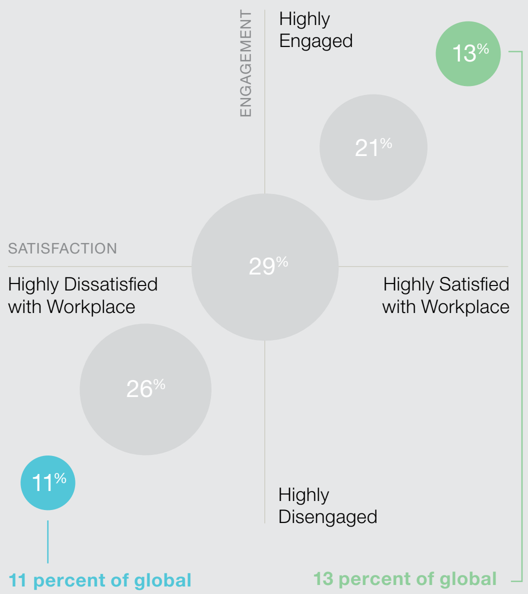
Key Finding

1. Employee Engagement Positively Correlates with Workplace Satisfaction

The data reveals high workplace satisfaction positively correlates with high employee engagement.

The data show that workers who are highly satisfied with various aspects of their workplace also demonstrate higher levels of engagement. Yet, only 13 percent of global workers are highly engaged and highly satisfied with their workplace. The inverse is true as well: 11 percent of employees are highly dissatisfied with their offices and are also highly disengaged.

The disturbing question raised by this data is given that a small number of people are doing the heavy lifting at work, could disengaged counterparts in effect cancel out their efforts? The positive finding, however, is the correlation between engagement and workplace satisfaction, which indicates that changing the work environment can be an important tool for organizations to deploy as part of a strategy to improve engagement.



11 percent of global workers are highly dissatisfied with their offices and are also highly disengaged

13 percent of global workers are highly engaged and highly satisfied with their workplace

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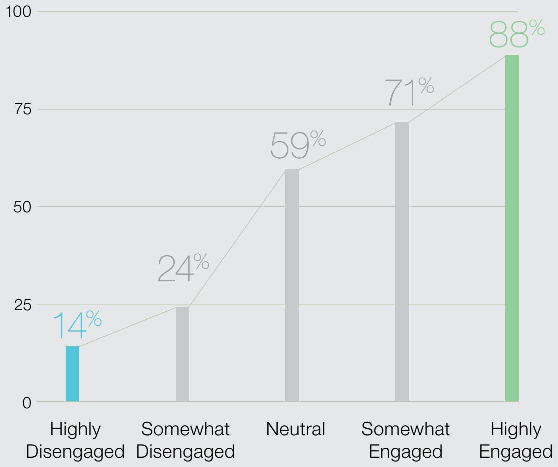
Key Finding

2. Engaged Employees Have More Control Over Their Experiences at Work

The data demonstrate a correlation between how much control employees have in their workplace and their engagement level.

Can you choose where to work within the office based on the task you are doing?



A distinguishing characteristic of engaged employees is that they have a greater degree of control over where and how they work, including access to privacy when they need it. They are empowered, both by organizational decisions and the spaces made available to them within their workplace, to make choices about where and how they work. This means they can manage their need for privacy so they can concentrate easily and work with teams without disruptions.

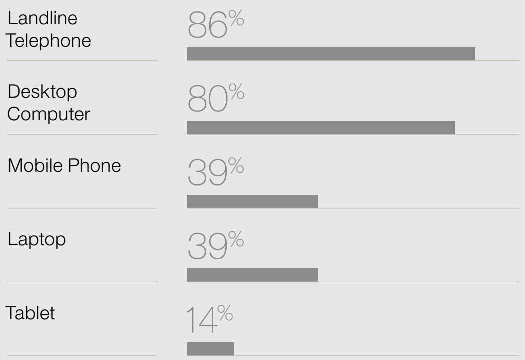
Engaged employees tend to work in organizations that support two-way communication: Real-time information about the company is available and people are able to freely express their ideas. This finding suggests that a key design principle for the workplace is to create a range of spaces—for groups and individuals, mobile and resident workers—and corresponding work policies that enable employees to make choices about the best ways to work.

Key Finding

3. Fixed Technology Exceeds Mobile 2:1

The vast majority of workers use fixed technology at work.

Does your employer equip you with:



Despite the high global adoption of mobile devices for personal use, the vast majority of study participants report that their organizations provide twice as much fixed technology versus mobile options for work. This may be the result of an intentional strategy based on the type of work people are doing, or it could reflect the challenges of keeping up with constantly changing technology. Either way, employee mobility, both inside and outside the office, and people's ability to fully utilize a range of spaces in the office is influenced by the organization's technology choices.

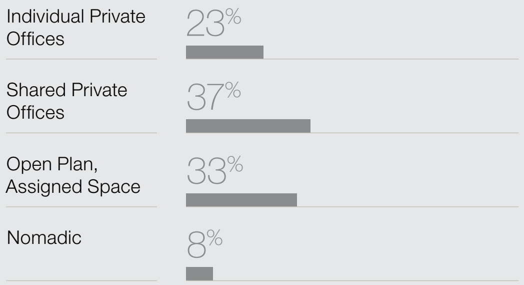
Some jobs require people to be at their desk most of the time, for which fixed technology is a viable solution. Others, whose jobs require increased collaboration, greater degrees of interaction and more information sharing, may find that mobile technology, or technology that allows them to access information throughout the workplace, can be an enabler. People who need access to digital information for their work may feel tied to their desks and less likely to engage with colleagues who aren't physically nearby. Given the changes in how people work, organizations will want to consider how their workplace and technology strategies align.

Key Finding

4. Traditional Workstyles Persist

Nearly two-thirds of employees say they work in either individual or shared private offices.

What type of workspace do you work in?



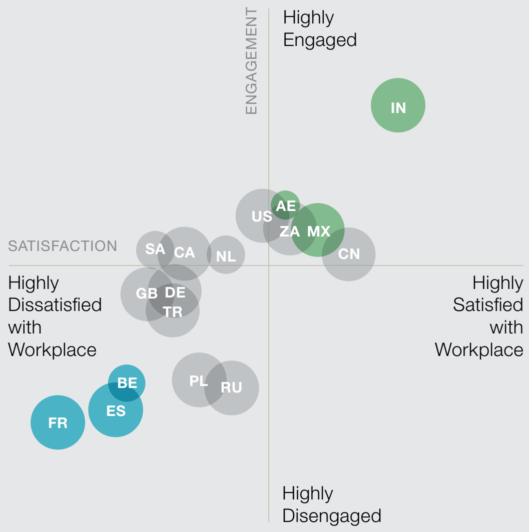
Media and popular culture may create the perception that workplaces have changed dramatically in the past decade and that offices are open, informal and collaborative. In some places this is true. But the reality for employees around the world is that most people work in traditional office environments, with an emphasis on hierarchy and desk-based individual work.

Workplace design and work experiences vary widely, even between neighboring countries, yet nearly two-thirds of employees say they work in either individual or shared private offices. Entirely open offices represent a significant portion—nearly one-fourth of the workplace landscape—but they certainly are not the norm. Neither extreme—entirely enclosed or open—is always the right solution and these findings suggest that organizations may not have adequately advanced their workplaces in ways that promote higher degrees of engagement.

Key Finding

5. Cultural Context Influences Engagement Levels

Cultural context can have a tremendous influence on engagement and workplace satisfaction.



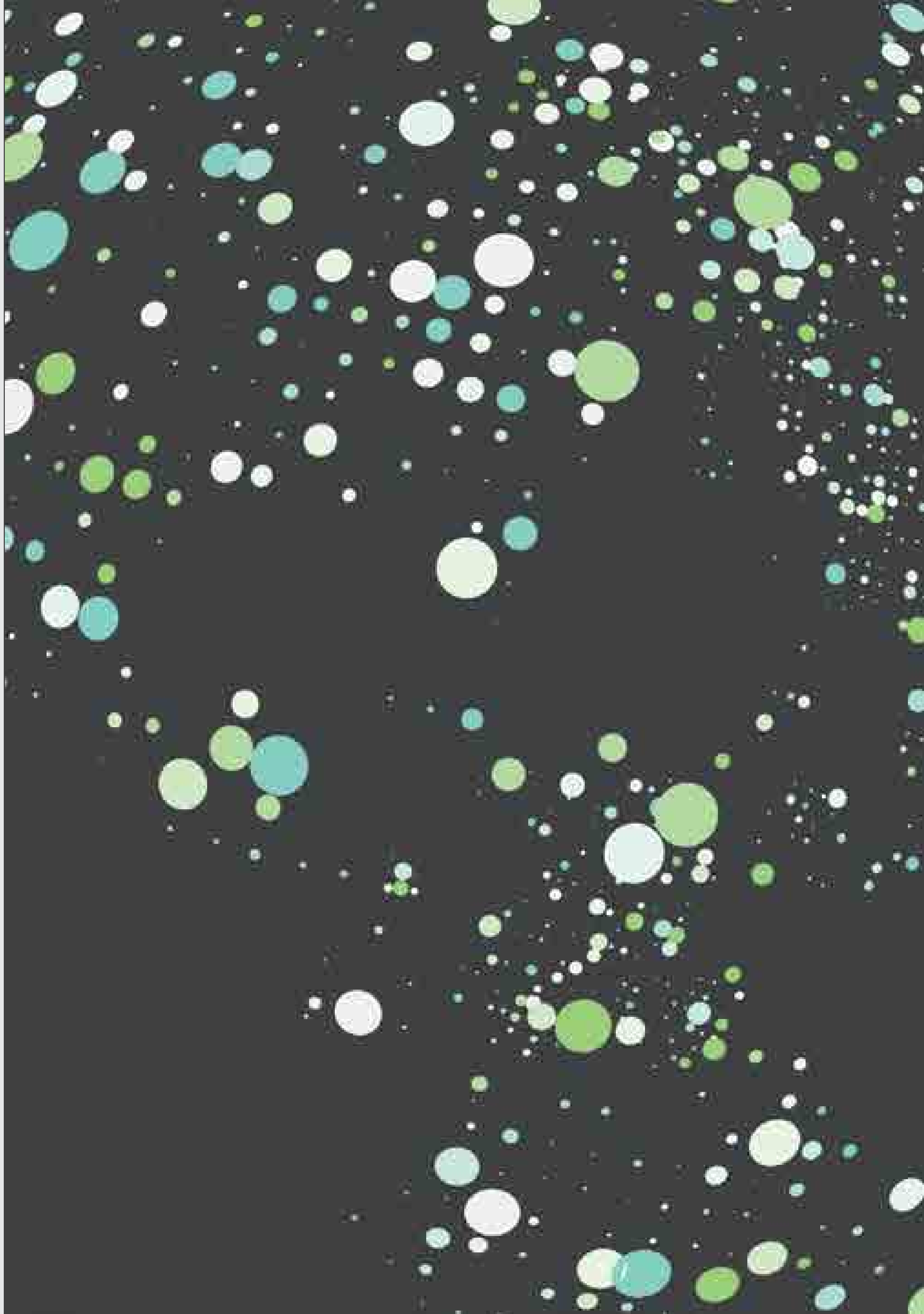
Exploring Contrasts: The Percentage of Highly Engaged and Highly Satisfied Employees at Opposite Ends of the Spectrum

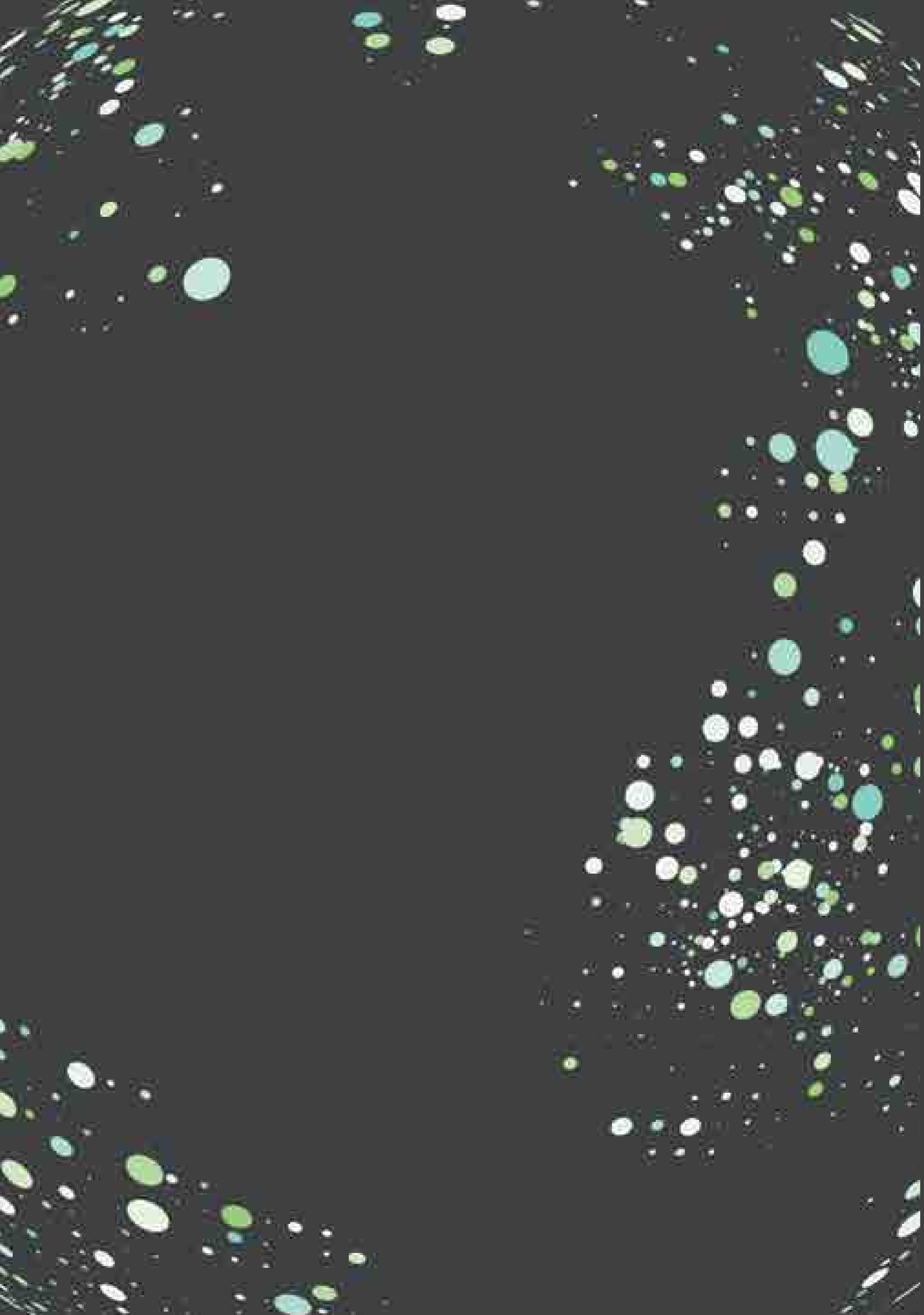
● **Highly Disengaged + Highly Dissatisfied**	● **Highly Engaged + Highly Satisfied**
5% France	28% India
7% Spain	22% Mexico
6% Belgium	20% United Arab Emirates

* For country abbreviation listing, see page 5.

The most highly engaged employees tend to hail from emerging economies and the least engaged often come from countries in well-established markets. Analysis of the data identified a pattern indicating that the country where employees live, its culture and the resulting expectations have an impact on how highly engaged and satisfied they are with their workplace. While there are exceptions to this pattern, the finding suggests cultural and economic context influence employee perceptions and attitudes about their organization and working environments.

This can impact whether employees find the places where they work highly satisfactory and their work highly engaging. This finding can be valuable to multinational organizations when considering the appropriate workplace design across different company locations.





Engagement and the Global Workplace

About the Study

Countries
17

Participants
12,480

Key Findings
5

Steelcase partnered with global research firm Ipsos for this unprecedented research effort to measure relevant dimensions of employee engagement and workplace satisfaction—both powerful indicators of worker and organizational wellbeing.

The number of participants affords the opportunity to identify macro trends, yet it's also a reflection of individuality: Each set of responses represents unique preferences and perspectives that defy stereotyping. Despite the differences among individuals, the data clearly identify broad patterns, yielding insights that deepen our understanding of people at work.

Study Demographics

Participants included office workers only, from companies with 100 employees or more.

Participants by Country

420	Belgium
802	Canada
803	China
824	France
803	Germany
802	India
796	Mexico
407	Netherlands
832	Poland
808	Russia
450	Kingdom of Saudi Arabia
802	South Africa
803	Spain
802	Turkey
701	United Arab Emirates
816	United Kingdom
809	United States

Gender

52% Male
48% Female

Age

42% 18–34
28% 35–44
20% 45–54
10% 55+

Job Title

10% Senior manager
28% Manager
23% Technician / associate
39% Clerk + service / sales

Industries

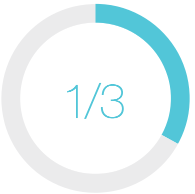
5%	Mining / Gas
12%	Industry (auto, good, oil, chemical and other)
3%	Energy
1%	Water Supply
4%	Transportation
5%	Telecommunications
9%	Retail
3%	Hospitality
8%	Banking / Finance
6%	Business Services
7%	Information Technology
34%	Public Sector*

* this includes respondents from public healthcare, education and government organizations

Engagement and the Global Workplace

CEOs of leading organizations recognize employee engagement is one of the most critical metrics for businesses today and that it has significant bottom-line implications. As competition becomes more global and intense, organizations need their employees to be more innovative, productive and resilient. In short, business leaders need a more highly engaged workforce.

The most engaged employees are positive and enthusiastic, creating new ideas, building deeper customer relationships and generating more profits. Disengaged employees, on the other hand, are a drag on the organization, sometimes actively working at cross-purposes with company goals.



Disengaged employees make up about one-third of the average workforce.

Some leaders believe that disengaged employees are a small group of disgruntled people who are difficult to change. It's tempting to regard these workers as a human resource nuisance and not a serious business issue. But what they may not realize is that disengaged employees make up 37 percent of the global workforce—and in some countries that number is much higher. Disengaged workers are the largest group of employees in this study, which implies that some organizations could be paying well over a third of their employees to come to work and undermine the efforts of the rest of the organization.

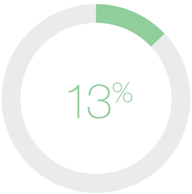
Increasing employee engagement is a complex challenge with many variables. Organizations can choose from diverse strategies to take on this issue, and Steelcase wanted to better understand how the workplace can help. As the world's leading provider of office environments, Steelcase has conducted ethnographic research over decades that indicate the workplace has a role to play in shaping employee beliefs and behaviors and, consequently, influencing engagement.

This new study, conducted in 17 countries around the world with 12,480 participants, is the first of its kind to explore the complex relationship between the workplace and employee engagement. Working together with Ipsos, one of the world's largest research firms, Steelcase explored what types of work environments people work in, how they feel about their workplace and their organization, and how various dimensions of the work experience might impact employee engagement.

The study uncovered five key findings that challenge many paradigms about how and where work happens around the world and also pointed to potential strategies for leading organizations around the world who choose to address the difficult challenge of increasing employee engagement.

Key Finding

1. Employee Engagement Positively Correlates with Workplace Satisfaction



The most engaged workers are the most satisfied with their work environment. Only 13 percent of global workers are highly engaged and highly satisfied.

The study found that employee satisfaction with their workplace is directly correlated with higher employee engagement. The most engaged workers are the most satisfied with their work environment. Not surprisingly, those employees who are dissatisfied with their workplace are the least engaged.

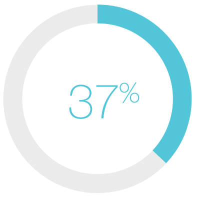
Engaged workers are the engine that propel an organization forward. These workers are not only more productive, they also generate more new ideas and fuel innovation. That makes them an especially valuable asset for every organization, but, unfortunately, they are in limited supply. The study concludes that, on average, only 13 percent of global workers are highly engaged and highly satisfied with their work environment. Combined with the 21 percent who are somewhat engaged and somewhat satisfied, this means only about one-third of the global workforce is fueling the organizational performance businesses need (Figure 1, page 23). This varies widely around the world; in some countries as few as five percent are highly engaged.

What sets engaged employees apart? They are considerably more likely to have positive sentiments towards their organization and the places where they work—rating most workplace satisfaction and engagement metrics in the 90th percentile. Ninety-eight percent feel their company is a good fit for them personally and feel a sense of connection with the company culture.

These workers report a congenial working atmosphere in which they can socialize with colleagues, share their ideas freely and feel a sense of belonging to the organization.

Highly engaged workers are also highly satisfied with various elements of their individual workspace, such as its size, furniture, lighting, ambient noise level and temperature. Their responses suggest they work in places where they also feel optimistic about what they can accomplish at work.

These employees also give their organization high scores for paying attention to their wellbeing. In fact, 93 percent say their company takes a genuine interest in their wellbeing and 94 percent say the company attaches great importance to the health and safety of its employees (Figure 5, page 27).



Thirty-seven percent of employees are either highly or somewhat disengaged at work.

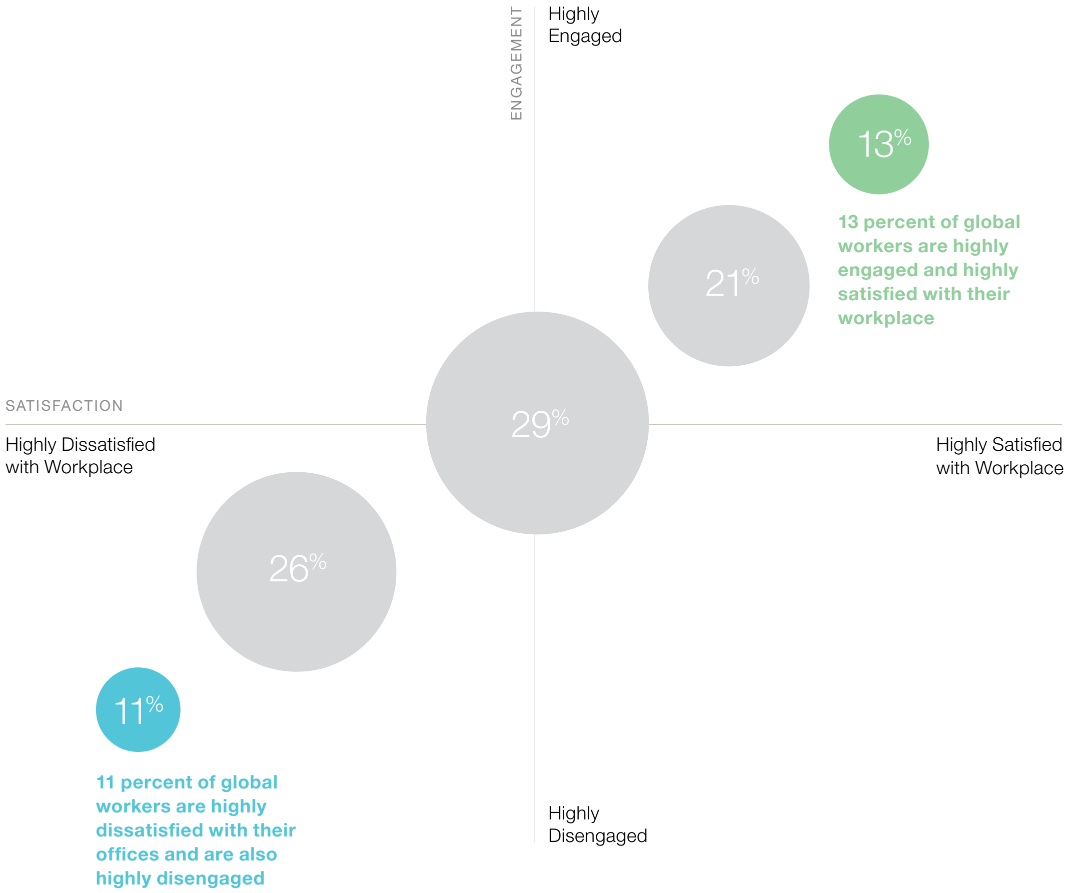
At the opposite end of the spectrum, disengaged workers outnumber their engaged colleagues, with over one-third (37 percent) scoring highly to somewhat disengaged and dissatisfied with their work environments. Only nine percent of these workers feel that their organization is genuinely interested in their wellbeing. A mere 10 percent feel that their employers recognize and value them (Figure 5, page 27).

Consistent with their feelings about the organization, disengaged and dissatisfied employees find little to like about their individual workspace or their workplace overall. They rate most aspects of their spaces in the 20th percentile. Specifically, only 25 percent are satisfied with the organization of their workspace and only 27 percent are satisfied with their furniture. Somewhat brighter spots for these employees are that 39 percent are satisfied with the lighting in their space and 41 percent are satisfied with their computer equipment (Figure 4, page 26).

About one-third of the global workforce falls somewhere in the middle range: possessing some degree of satisfaction with their workspace and somewhat engaged in the work they do. In general they say they like their working environment and are satisfied with the working atmosphere. Yet, as many business leaders know all too well, moderate engagement and satisfaction rarely breeds optimal productivity or competitive advantage. The untapped potential for improvement among the large group in the middle is tremendous.

Engagement + Workplace Satisfaction Cluster Analysis

FIGURE 1



13 percent of global workers are highly engaged and highly satisfied with their workplace

11 percent of global workers are highly dissatisfied with their offices and are also highly disengaged

The study plotted and then grouped all 12,480 respondents' answers to nine engagement metrics and 13 workplace satisfaction metrics.

This cluster analysis found a positive relationship between high engagement and high workplace satisfaction: That is, the most engaged workers are also the most satisfied with their workplace, and similarly the most disengaged employees are the most dissatisfied with their workplace.

This study aimed to understand the differences between the two groups of extreme responses: the most satisfied and engaged compared to the most dissatisfied and disengaged. It also explored how these groups feel about their organizations and workplaces. Responses to the specific engagement and workplace satisfaction metrics can be found on pages 24–25.

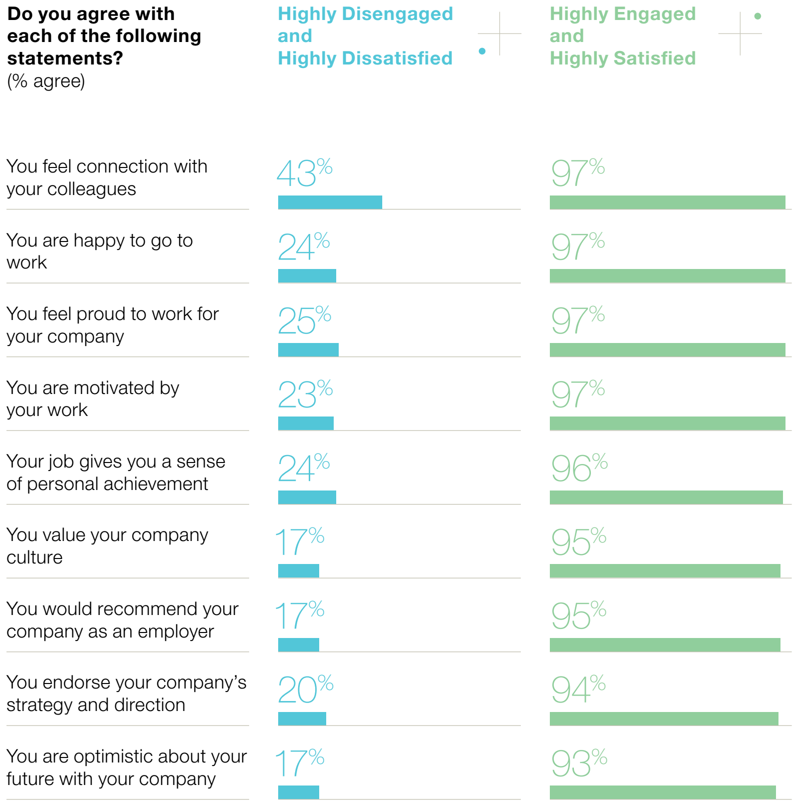
Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 2

These nine metrics were used to measure employee engagement and employee attitudes about their organization.

***Noteworthy:* The most engaged workers have positive perceptions about their organization and its culture and strategy.**



Do you agree with each of the following statements? (% agree)	Highly Disengaged and Highly Dissatisfied	Highly Engaged and Highly Satisfied
You feel connection with your colleagues	43%	97%
You are happy to go to work	24%	97%
You feel proud to work for your company	25%	97%
You are motivated by your work	23%	97%
Your job gives you a sense of personal achievement	24%	96%
You value your company culture	17%	95%
You would recommend your company as an employer	17%	95%
You endorse your company's strategy and direction	20%	94%
You are optimistic about your future with your company	17%	93%

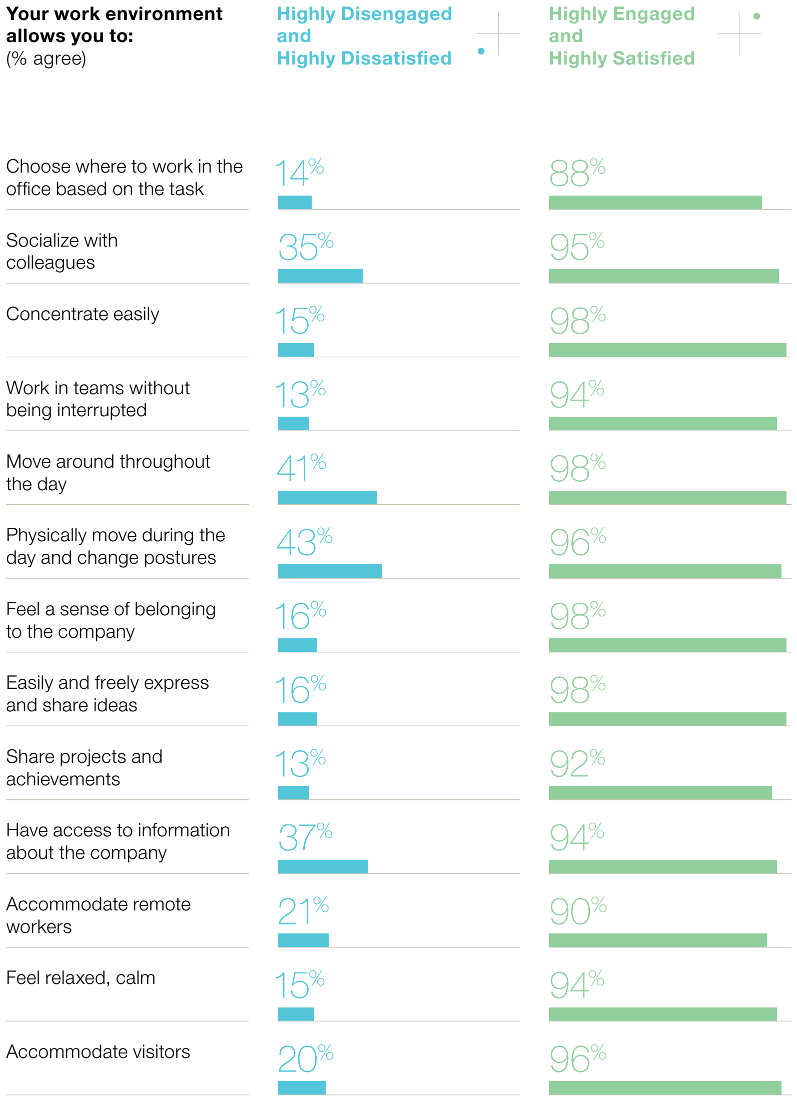
Workplace Satisfaction Metrics

Employee Attitudes Toward Work Environment

FIGURE 3

These 13 metrics were used to measure employee satisfaction with the physical work environment.

***Noteworthy:* The most satisfied workers enjoy a high degree of choice and control in their workplace and are able to work effectively both alone and in groups.**



Your work environment allows you to: (% agree)	Highly Disengaged and Highly Dissatisfied	Highly Engaged and Highly Satisfied
Choose where to work in the office based on the task	14%	88%
Socialize with colleagues	35%	95%
Concentrate easily	15%	98%
Work in teams without being interrupted	13%	94%
Move around throughout the day	41%	98%
Physically move during the day and change postures	43%	96%
Feel a sense of belonging to the company	16%	98%
Easily and freely express and share ideas	16%	98%
Share projects and achievements	13%	92%
Have access to information about the company	37%	94%
Accommodate remote workers	21%	90%
Feel relaxed, calm	15%	94%
Accommodate visitors	20%	96%

Satisfaction with Office Basics

Basic Attributes of the Physical Work Environment

FIGURE 4

◉ ***Noteworthy:* Highly engaged workers are also highly satisfied with their individual workspace, such as the size, furniture, lighting, ambient noise level and temperature.**

Are you satisfied with each of the following points in your workspace? (% satisfied)	**Highly Disengaged and Highly Dissatisfied**	**Highly Engaged and Highly Satisfied**
Ventilation	25%	94%
Office furniture	27%	95%
Size of your workspace	31%	97%
Temperature	30%	94%
Lighting	39%	98%
Computer, equipment	41%	96%
Ambient noise	22%	93%

Perception of Company

Company Culture

FIGURE 5

◉ ***Noteworthy:* The small group of highly engaged workers feel good about their organization, are satisfied with their company culture and like their work environment.**

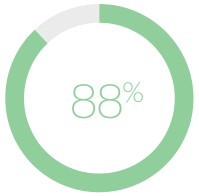
Would you say that your company? (% agree)	**Highly Disengaged and Highly Dissatisfied**	**Highly Engaged and Highly Satisfied**
Takes a genuine interest in the wellbeing of its employees	9%	93%
Attaches great importance to the health and safety of its employees	17%	94%
Is an appropriate place to work and fits within your lifestyle	11%	98%
Encourages teamwork and collaborative work	22%	96%
Gets the best out of you	19%	95%
Encourages you to use your initiative	14%	95%
Recognizes and values its employees	10%	93%

Key Finding

2. Engaged Employees Have More Control Over Their Experiences at Work

When exploring the differences between engaged and disengaged workers, a consistent theme emerged across diverse data: The more employees feel a sense of control over where and how they work, the more engaged and satisfied they are with their workplace.

The most highly engaged employees have greater flexibility to make choices about where and how they work. They can move around the office easily, change postures and choose where they want to work in the office based on the tasks they need to do.

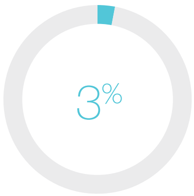


Highly engaged + highly satisfied employees can choose where they work in the office depending on the task at hand.

This flexibility empowers employees to manage their need for privacy throughout the day. Most noteworthy, 88% of highly engaged employees report they can choose where they work in the office depending on the task at hand (Figure 7, page 32). This means that if employees need to focus on an important project or get away for a few moments of rejuvenation, they are able to choose places that best support those behaviors, whether it be at their primary individual workspace or at other types of spaces throughout the office. Eighty-eight percent of highly engaged workers say they can concentrate easily, and 94 percent say they can work in teams without being disrupted (Figure 8, page 32), both of which reflect important aspects of privacy. More than half can work remotely two or more days per week if they choose, and they tend to have mobile technology to support working in diverse locations, which can also contribute to their ability to seek privacy when needed and feel greater control over their work (Figure 11, page 36).

Simply having the option to provide input about one's office furniture is a stronger indicator of high engagement and satisfaction than working in a private office. In fact, employees who could impact the decision about their furniture and choose from a range of options were more likely to be satisfied with a broad range of attributes about their personal workspace that might not seem related, such as room temperature, ambient noise levels, ventilation and technology equipment (Figure 6, page 31).

Having a range of spaces to accommodate different modes of work is key. Organizations that offer a broader range of spaces—for collaboration, socializing, focus, rejuvenation and privacy—tend to have more engaged employees.



Only three percent of highly disengaged workers are able to choose their office furniture from a range of options, but 29 percent of highly engaged workers have this opportunity.

The most disengaged employees have the least amount of choice and control over their working environment. The majority, 86 percent, are unable to choose to work in alternative settings based on the tasks they are doing. Eighty-seven percent of disengaged workers are frequently interrupted when they work in teams and only 15 percent say they can concentrate when doing individual work (Figure 8, page 32).

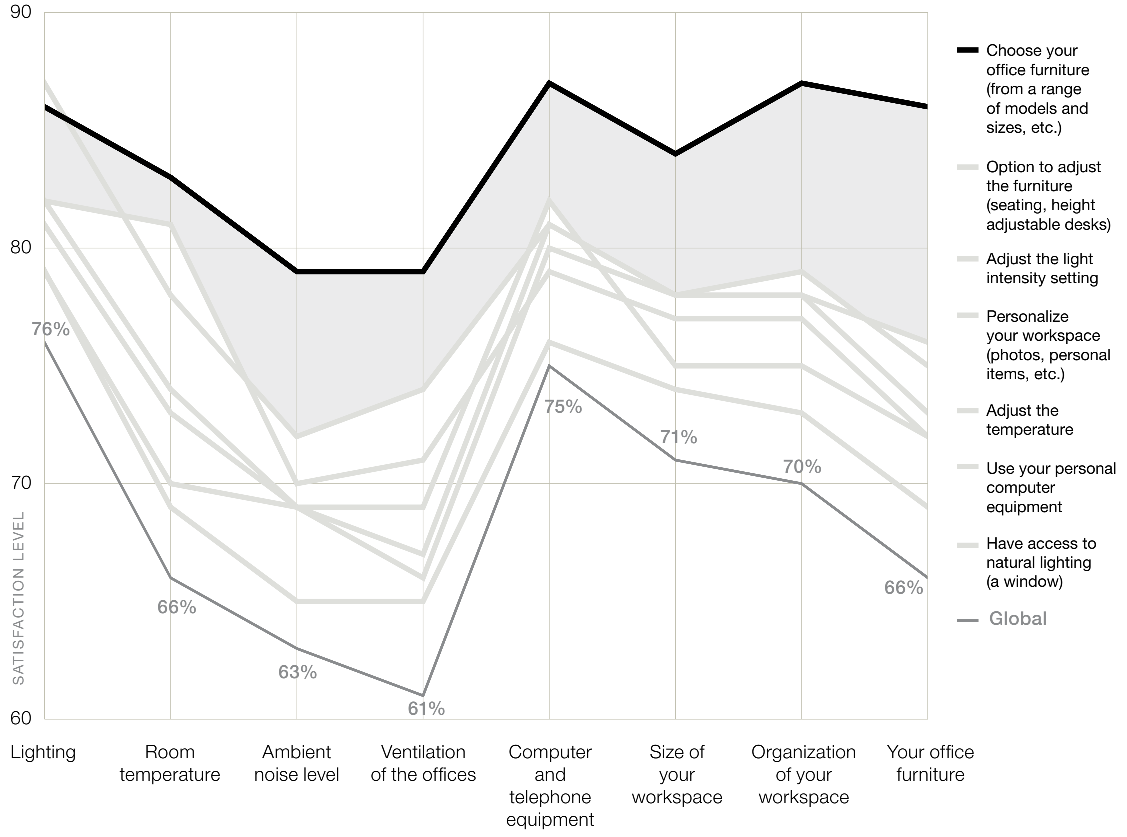
These disengaged employees tend to have only the option to work inside the office and often do not have their own workspace. While not having an assigned workspace does not inherently lead to disengagement, this finding suggests the possibility that these nomadic workers work in spaces that have not been designed to best support them and help them feel a part of the organization. In fact, they do not feel a sense of connection to their organization and only 35 percent feel they can have informal, relaxed conversations with their co-workers (Figure 3, page 25).

The implications of these findings help inform a number of strategies that organizations can undertake to address engagement. Clearly, providing employees with a greater sense of control over their physical environment and how they work is an opportunity to positively shape behaviors within the organization.

Control Over Workspace Basics

FIGURE 6

Are you satisfied with each of the following points in your workspace?
(% satisfied)



◉ ***Noteworthy:***
Giving people choices increases their overall satisfaction with a variety of workplace attributes, boosting their ratings above global averages—even for factors that are seemingly unrelated. The ability to choose one's office furniture (from a preselected range of options) had a significantly stronger halo effect than other choices, such as the ability to personalize one's workspace or having access to natural light (see vertical axis), and increased satisfaction with things such as temperature and ambient noise levels (see horizontal axis). The key insight: When people feel like they have choice and control over various aspects of their physical work environment, it leads to greater satisfaction overall. Giving people the ability to choose their own furniture is the most likely option to boost satisfaction with the workspace in general.

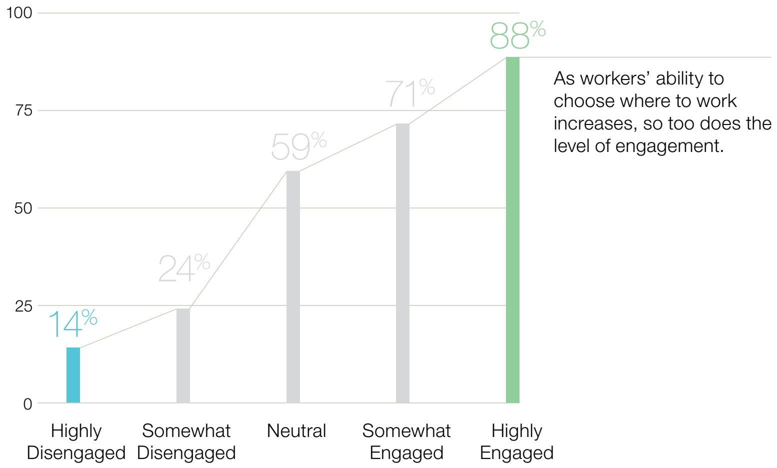
Choice + Control

Choice + Engagement

FIGURE 7

◉ ***Noteworthy:* As the degree of choice and control increases, employee engagement increases. The most engaged employees in the study have the greatest ability to choose where to work based on the task they are doing.**

Can you choose where to work within the office based on the task you are doing?

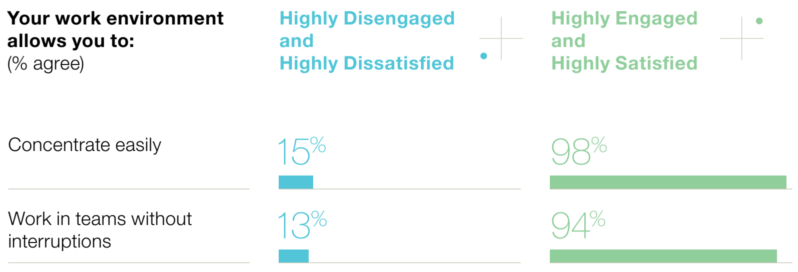


As workers' ability to choose where to work increases, so too does the level of engagement.

Focus

FIGURE 8

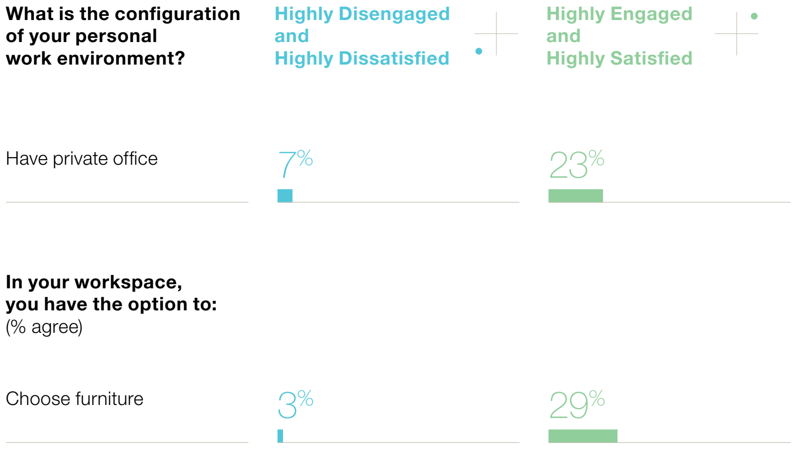
◉ ***Noteworthy:* The most engaged and satisfied workers overwhelmingly report having access to a variety of spaces and the autonomy to control their need for privacy.**



Private Offices vs. Furniture Choice

FIGURE 9

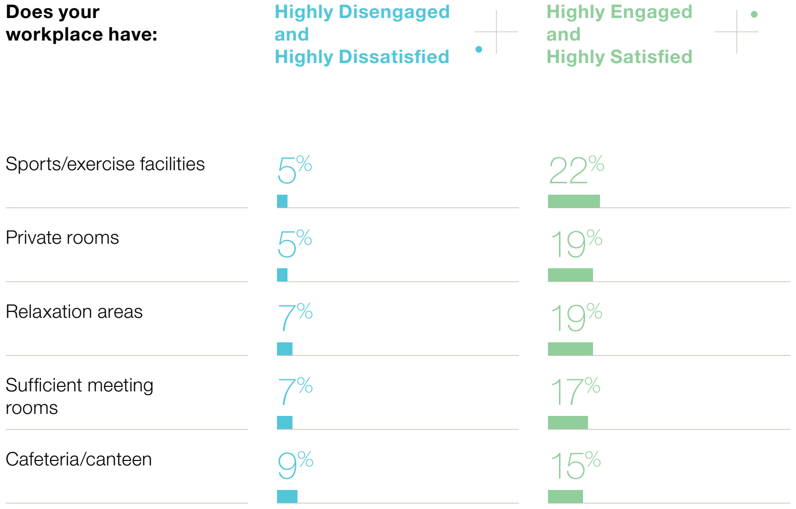
◉ ***Noteworthy:* The option to choose one's furniture is a higher indicator of engagement than having a private office.**



Access to Shared Areas

FIGURE 10

◉ ***Noteworthy:* Organizations that offer a range of spaces for workers to choose from have more engaged employees.**



Key Finding

3. Fixed Technology Exceeds Mobile 2:1

Employer-Provided Mobile Phones

of U.S. workers have employer-provided mobile phones, the lowest percentage of any country.

of Indian workers have employer-provided mobile phones, the highest percentage of any country.

Access to mobile technology contributes to the employee engagement and satisfaction mix. The most highly engaged workers are more likely to have laptops, mobile phones and tablets than those that are deskbound by landline phones and desktop computers. Access to mobile technology also provides employees more choice and control over their work experience and gives them the freedom to choose where to work within the office based on the task they are doing.

The reality is that most of the world's workers either have jobs that require them to work at their individual workspace or they are tethered to their desks by technology. While recent reports suggest there are more mobile devices than people on the planet, organizations have leaned toward fixed technology solutions at a ratio of over 2:1. Eighty-six percent of global workers are provided landline phones and 80 percent have desktop computers. Only 39 percent of workers globally have employer-provided laptops and mobile phones while 14 percent have tablets (Figure 13, page 37).

Some of this may be attributed to "bring-your-own-device" programs: 54 percent of employees globally say they have the option to use their personal computer at work, but the responses were polarized with wide differences between countries where this is more or less common.

With limited access to mobile technology, it's not surprising to find the least common workstyle organizations embrace today is one that gives workers choices about where they want to work in the office based on the type of task they're doing. Only half of all employees globally have this kind of autonomy and control over their work. The lower level of mobile technology also impacts the opportunity to work outside the office. This study found the majority of employees never work remotely (Figure 11, page 36), although this workstyle varies widely and could be attributed to cultural preferences: French employees infrequently work outside the office, where in countries like India, China and South Africa this is far more common (Appendix F).

While the data revealed no correlation between employee engagement and the ability to work outside of the office, it did suggest that a lack of flexible work arrangements might be impacting how people feel about their work experience.

Organizations will want to align their workplace and technology strategies to support both resident and nomadic workers and give them the greatest sense of control over their workstyles, appropriate to the type of work they do.

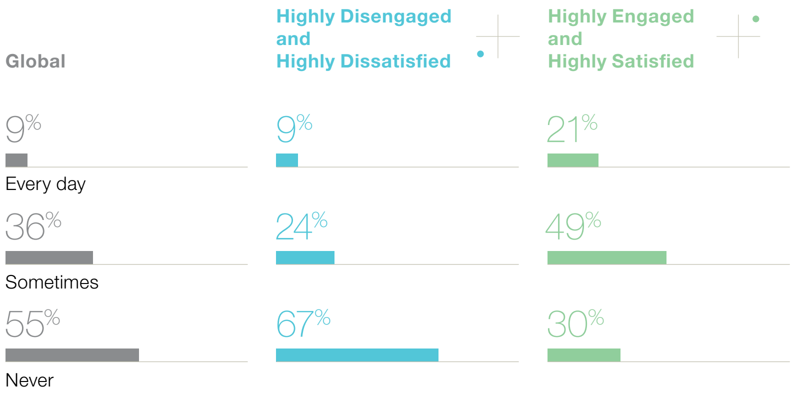
Employee Mobility

Remote Work

FIGURE 11

◉ ***Noteworthy:***
Equipped with mobile technology, the most engaged workers have freedom to work away from the office more often than the most disengaged workers.

How often can you work away from the office?

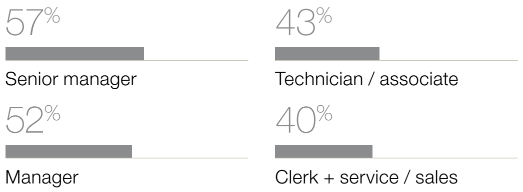


Hierarchy + Remote Work

FIGURE 12

◉ ***Noteworthy:***
Workers in more senior roles are more likely to work remotely.

Roles of employees who work remotely sometimes or every day:

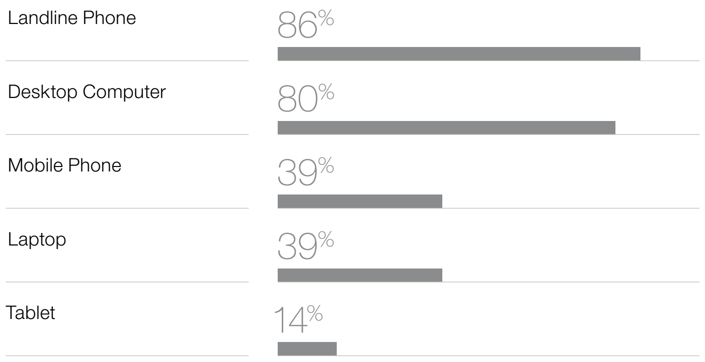


Fixed vs. Mobile Technology

FIGURE 13

◉ ***Noteworthy:***
Fixed technology is provided twice as frequently as mobile devices. Limited access to mobile technology impacts employees' ability to work in different spaces throughout the workplace.

Does your employer equip you with:



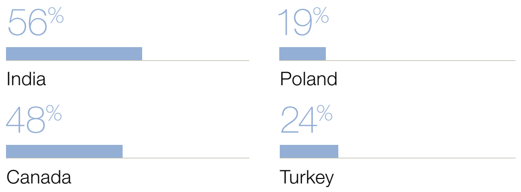
Access to Videoconferencing

FIGURE 14

◉ ***Noteworthy:***
The ability to connect with remote colleagues through videoconferencing equipment varies widely from country to country.

Countries *most likely* to use videoconferencing equipment:

Countries *least likely* to use videoconferencing equipment:



Key Finding

4. Traditional Workstyles Persist

Open-plan Adoption Varies by Country

In the United Kingdom 49 percent report working in open-plan workstations.

In Germany only 19 percent report working in open-plan workstations.

Despite the rise of collaborative work globally, more workplaces are configured with entirely private offices than those comprising completely open space configurations (31 percent vs. 23 percent). The majority of workplaces (46 percent) consists of both open and enclosed private spaces (Figure 15, page 40).

Office configuration ratios vary significantly by individual country. For example, in the United Kingdom nearly half (49 percent) report working in open-plan workstations and only 14 percent in individual offices, while in Germany the reverse is true—more than half (54 percent) report working in individual offices and only 19 percent in open plan.

Most employees (60 percent) are assigned to either an individual or shared private office Figure 16, page 41). Approximately one-third of employees have assigned workspaces in open environments, and a small fraction (8 percent) are nomadic workers who are not assigned to a specific space and who regularly work in different places in the office. Again, this varies significantly by country; workers in the Netherlands, United Kingdom and Belgium have sizable populations of mobile workers, while in China and Russia this practice is almost nonexistent.

Individual private offices continue to be a function of hierarchy: The higher people are in their organization, the more likely they are to have their own private office Figure 17, page 41).

Because private offices traditionally symbolize status and autonomy—and an implied level of control within many cultures and organizations—it's predictable that those with private offices are often more satisfied with their work environment overall.

Despite perceptions that work is more collaborative and mobile than ever before, the data show that traditional work environments, and corresponding traditional workstyles, are still more common. Ongoing research will be required to determine the rate of change, if any, happening around the world.

Companies seeking to compete in diverse world markets and become globally integrated are on the forefront of shaping organizational cultures. Employees who see how teammates work in different countries may form new ideas about how they want to work in the future. But there are still significant differences. As organizations seek to become more globally integrated, it will be important to understand these differences to successfully implement changes that can impact employee engagement.

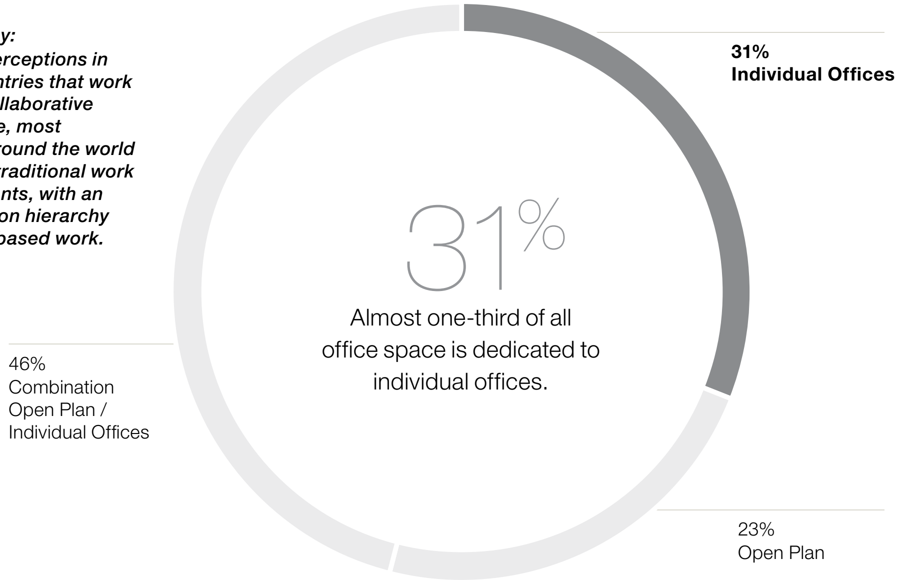
Office Configuration

Overall Office Layout

FIGURE 15

◉ ***Noteworthy:* Despite perceptions in some countries that work is more collaborative and mobile, most workers around the world remain in traditional work environments, with an emphasis on hierarchy and desk-based work.**

What is the configuration of your work environment?



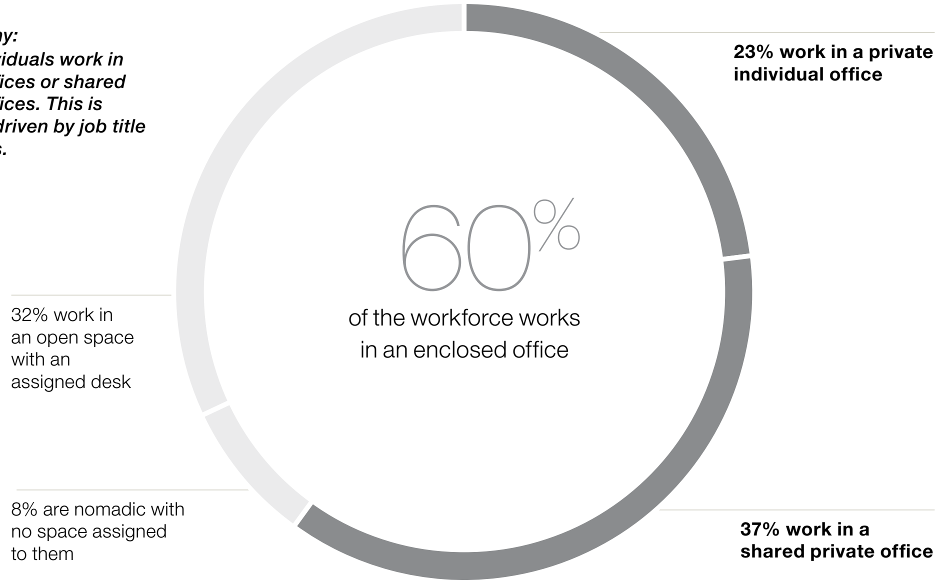
Where People Work

Individual Workspaces

FIGURE 16

◉ ***Noteworthy:* Most individuals work in private offices or shared private offices. This is primarily driven by job title and status.**

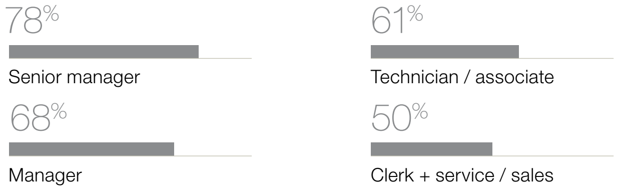
What is the configuration of your personal work environment?



Hierarchy and Office Space

FIGURE 17

◉ ***Noteworthy:* Workers in more senior roles are more likely to work in a private office.**



Key Finding

5. Cultural Context Influences Engagement Levels

The country an employee resides in and its cultural norms and economic factors have an impact on employee perspectives about work and the physical workplace. It can influence how satisfied employees are with the workplace and their overall engagement levels.

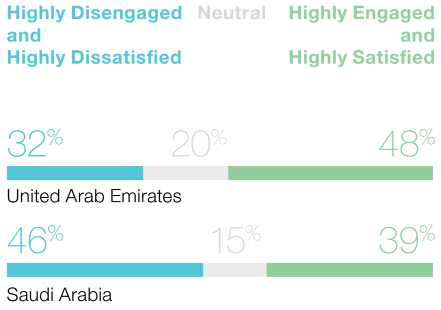
This study found the largest concentrations of the most satisfied and most engaged workers are in emerging-economy nations where opportunities are plentiful. Energetic, optimistic attitudes often prevail in these countries and workers are highly satisfied with their environments. At the same time, the data also exposes contrasts and polarization in some countries, which have high levels of both engaged and disengaged workers, with few people in the middle.

Countries that rank low on worker engagement and satisfaction tend to come from established economies with industrial and administrative traditions that often include hierarchical management styles and workplace norms. Workers in these groups often feel stressed and do not feel a sense of belonging to the company and its culture. Satisfaction with their working environment is low.

These findings are important for global organizations that are exploring workplace strategies in different countries and regions. A key insight to this finding is that one solution may not be right for all locations. It is important that organizations consider the cultural context that can influence engagement levels and explore workplace design solutions that best match the needs of people in diverse cultures.

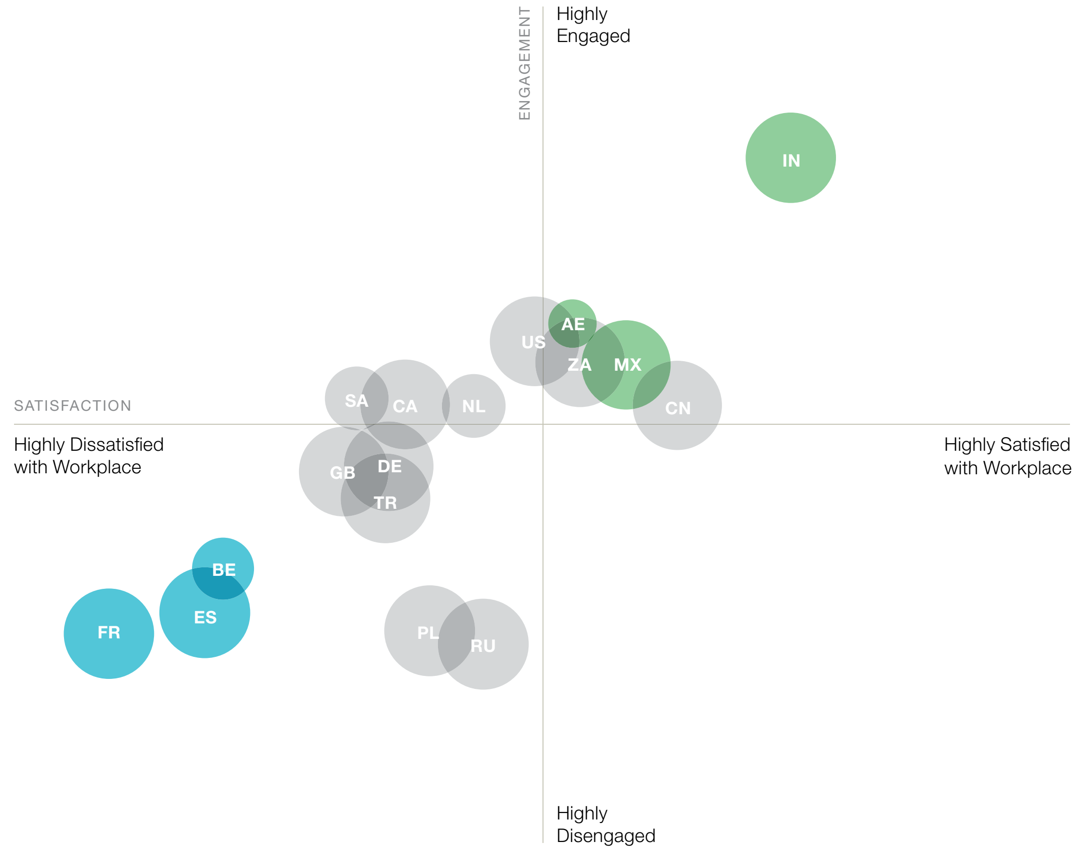
Polarized Workforces

While engagement levels are somewhat evenly distributed in some countries, workers in United Arab Emirates and Kingdom of Saudi Arabia are more polarized—most employees are either engaged or disengaged and fewer are neutral.



Engagement Levels by Country

FIGURE 18



The chart above plots each country's average positive response to nine engagement metrics and 13 workplace satisfaction metrics.

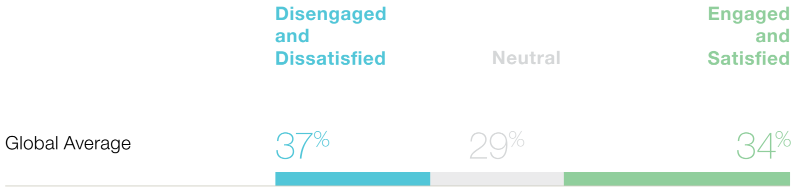
* For country abbreviation listing, see page 5.

Exploring Contrasts: The Percentage of Highly Engaged and Highly Satisfied Employees at Opposite Ends of the Spectrum

● **Highly Disengaged + Highly Dissatisfied**	● **Highly Engaged + Highly Satisfied**
5% France	28% India
7% Spain	22% Mexico
6% Belgium	20% United Arab Emirates

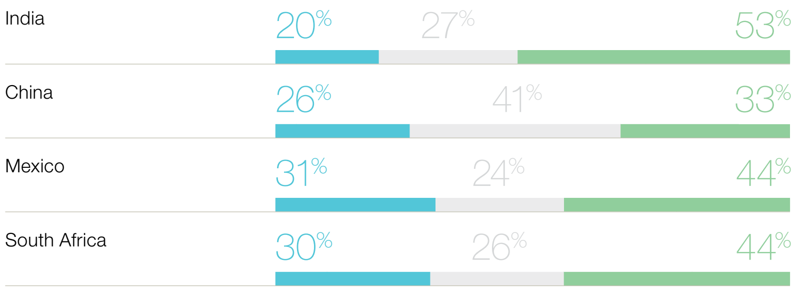
Engagement Differences Between Emerging and Established Economies

FIGURE 19



Emerging Economies

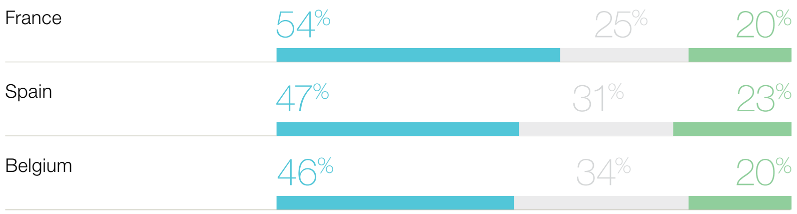
◉ ***Noteworthy:* Engagement levels are higher in emerging market economies, possibly an influence of different attitudes and expectations in different cultures.**



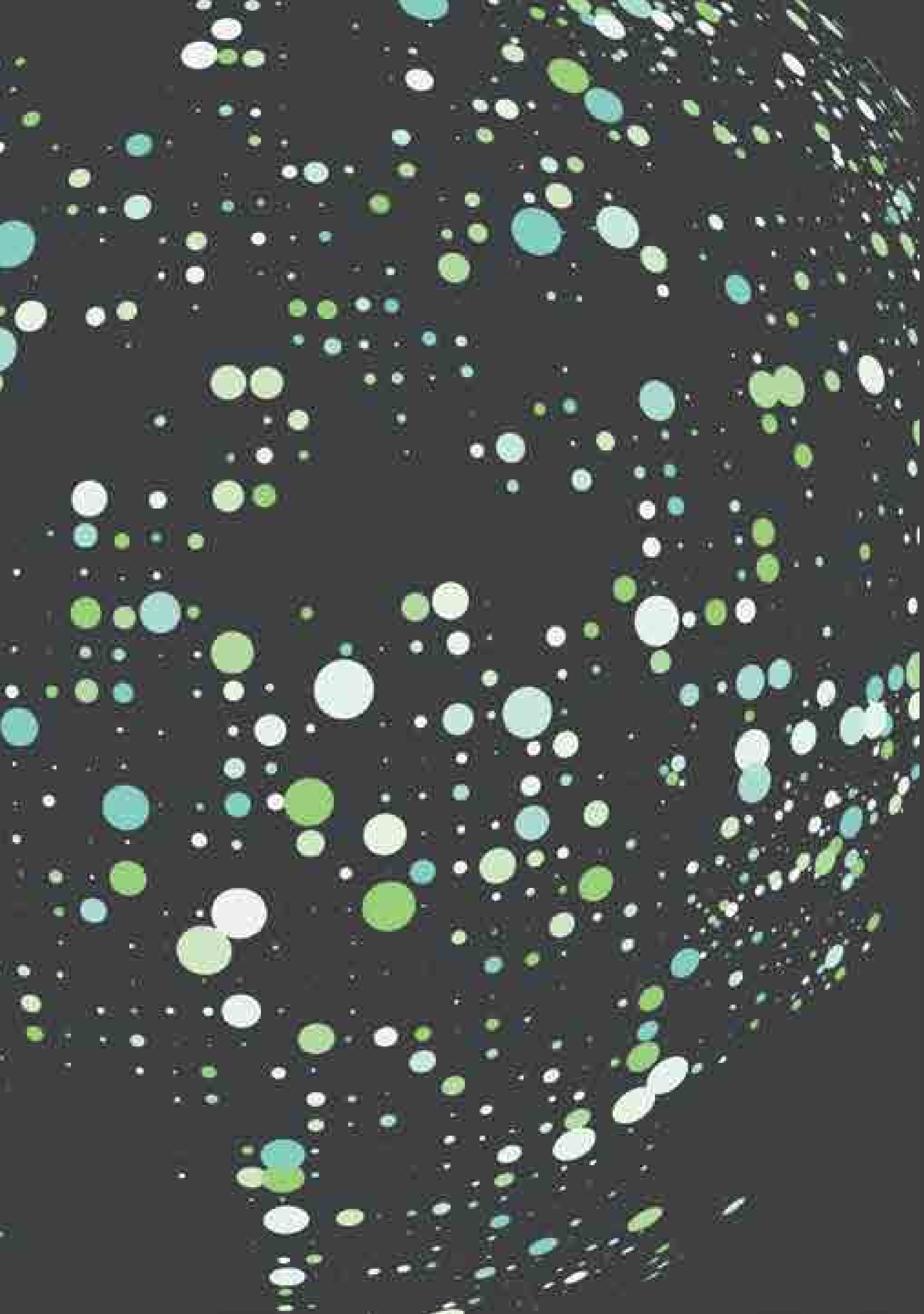
Percentages do not total 100% due to rounding.

Established Economies

◉ ***Noteworthy:* Engagement levels dip in established markets where employees may have different expectations than those in emerging economies.**



Percentages do not total 100% due to rounding.



The Resilient Workplace

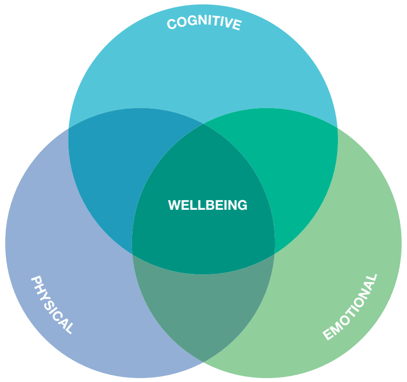
How The Physical Environment Can Help

Every country has unique characteristics, and no two organizations are alike. Through ongoing research and exploration via behavioral prototypes, Steelcase has uncovered two key design principles that can help organizations create resilient and cost effective workplaces that address the issue of employee engagement.

1. Design for physical, cognitive and emotional wellbeing
2. Create an ecosystem of spaces

Design Principle

1. Design for Physical, Cognitive and Emotional Wellbeing



Designing workplaces to support the holistic wellbeing of people can amplify employee engagement and satisfaction.

To foster employee engagement the workplace needs to be designed to support employee wellbeing. The study explored broad dimensions of holistic wellbeing that address the physical, cognitive and emotional needs of people. These specific components of wellbeing are integral to employee satisfaction with their work environment and engagement.

When organizations understand this connection between wellbeing and engagement, it can inform and guide design direction for places that can impact engagement.

**Physical:
Be Healthier**

Support movement throughout the day and encourage healthy postures that help people stay comfortable and energized.

**Cognitive:
Think Better**

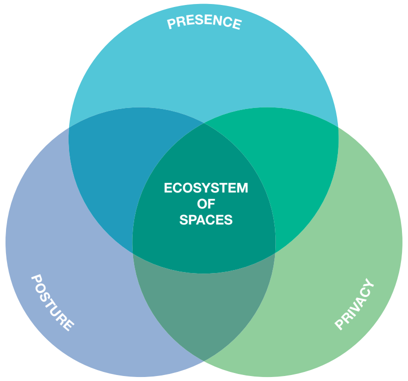
Support the need for focus and rejuvenation through spaces where individuals and teams can think clearly, concentrate easily, solve problems and generate new ideas.

**Emotional:
Feel Better**

Support the social nature of work by creating spaces that nurture a sense of belonging and foster connections between people and the organization.

Design Principle

2. Create an Ecosystem of Spaces



A workplace ecosystem supports employee wellbeing by providing individuals and groups with a range of options within the workplace that consider the following:

People at work need to focus, collaborate, rejuvenate, socialize and learn throughout their day. No single type of space can effectively support the diverse needs of individuals and groups. The workplace should be designed as an ecosystem of interconnected zones and settings that are destinations where people have choice and control over where and how they work.

An ecosystem of spaces enables an organization to be more resilient. It uses real estate more efficiently and cost effectively, making it easier for organizations to experiment with different types of spaces and evolve the workplace over time.

**Posture:
Movement + Variety**

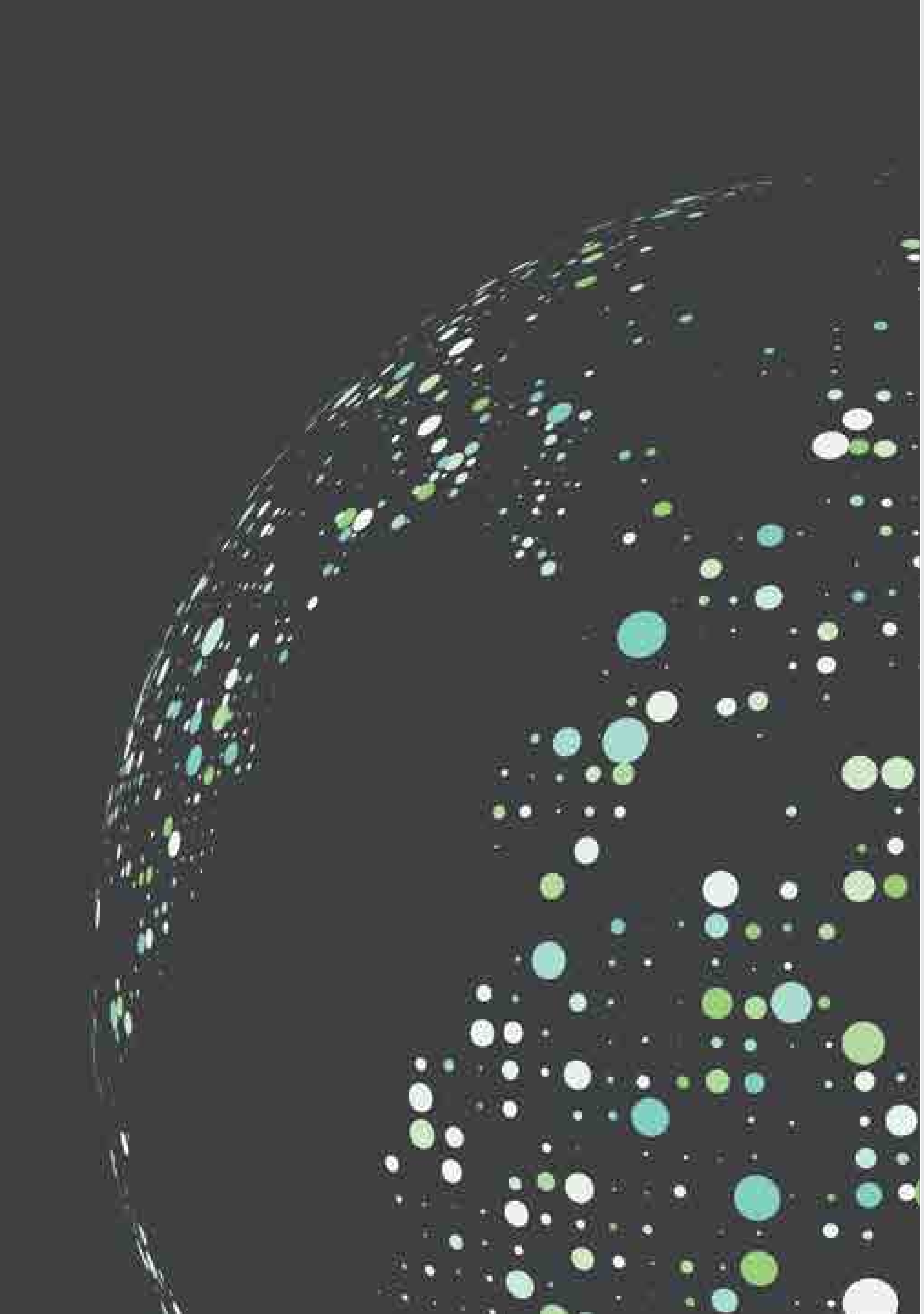
The workplace should encourage regular movement throughout the day and offer options for people to work in sitting, standing or lounge postures.

**Presence:
Digital + Analog
Physical + Virtual**

Spaces should enable quality interactions with teams that are both local and distributed across continents and time zones, supporting both digital and analog communication.

**Privacy:
Focus + Rejuvenation**

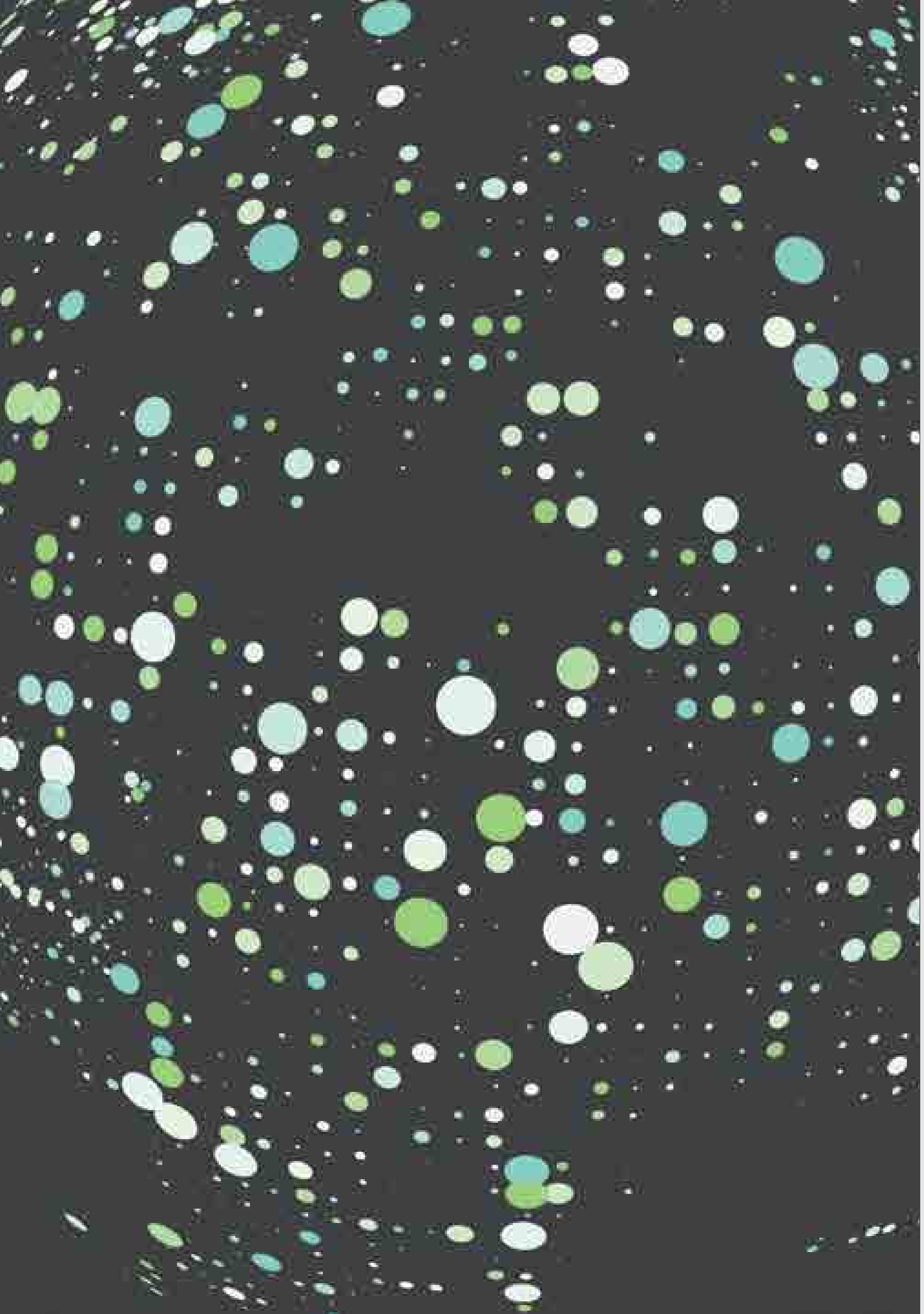
The work environment should provide places that offer varying ways to achieve privacy, in both open and enclosed spaces. Privacy is important to all workers and a vital component of both focus and rejuvenation, which are essential to employee engagement.



The Opportunity

The findings in the study underscore that various aspects of wellbeing impact employee engagement. A work environment that meets employees' most basic physical, cognitive and emotional needs is an essential building block for employee engagement. When those needs aren't met, it can communicate to people that they aren't highly valued and make it difficult to create enthusiasm and motivation for the organization's goals.

Reversing conditions of disengagement takes insight, investment and sustained effort, but the opportunities for organizations that face the problem head-on are tremendous. Throughout the world an office renaissance is underway. Leading organizations are beginning to recognize that their physical workplaces are investments they can leverage to more effectively implement strategies, build brand and support a vibrant culture of engagement. These top-performing companies are ideally positioned to attract and engage the best talent, outperform competitors and thrive. ○



Dive Deeper

To learn more about Steelcase workplace research and insights visit: **steelcase.com/insights**

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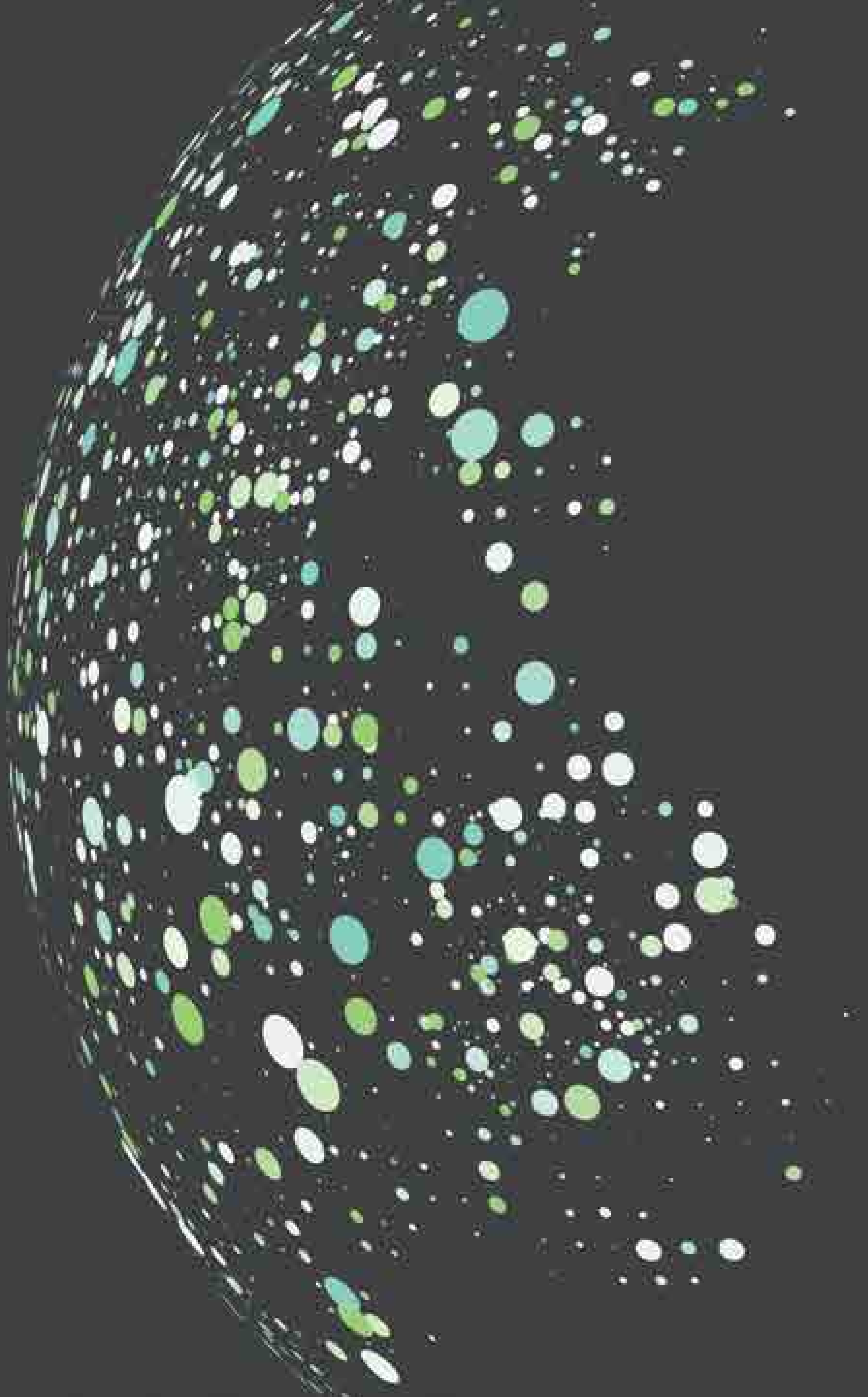


Exploring Engagement Around the World

An Exploration of 17 Countries

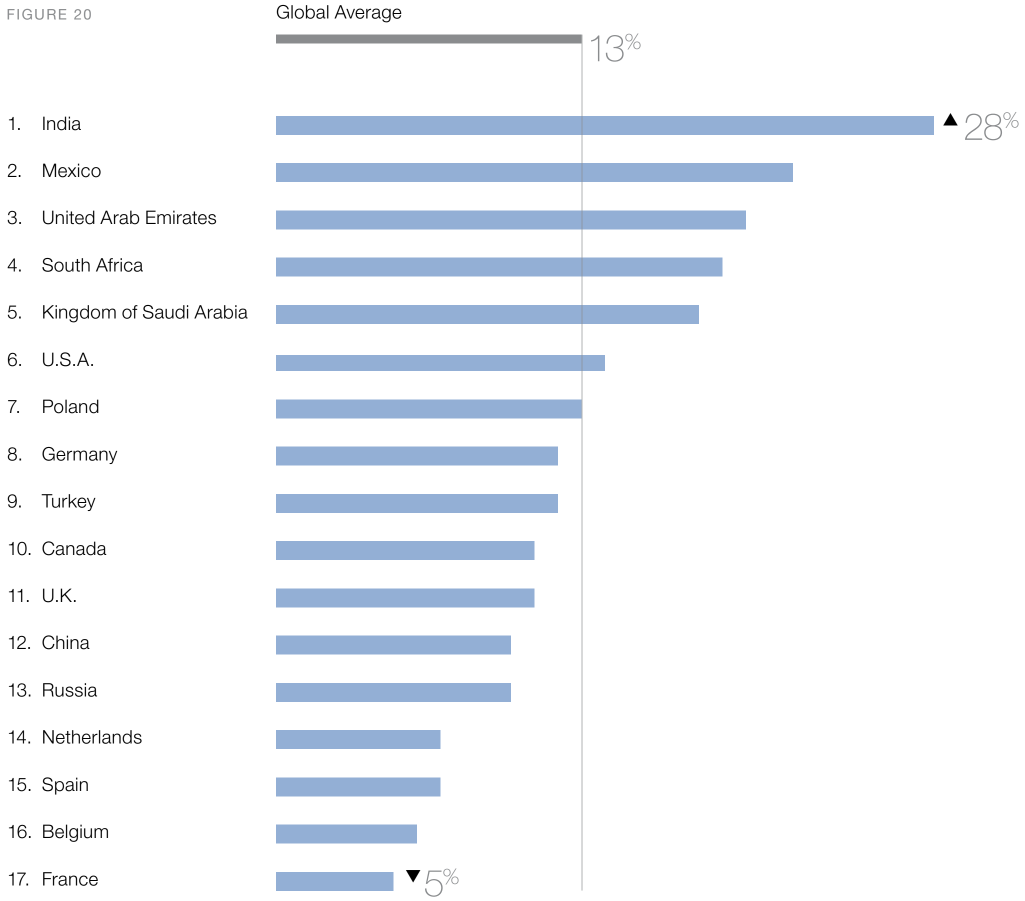
Globally, this study finds satisfaction with the workplace directly correlates with higher employee engagement—in other words, the most engaged workers are also the most satisfied with their work environment. This can be an important insight for leaders who want to improve employee engagement in their organization but have not considered the role the workplace can play.

Looking at the detailed findings from each surveyed country reveals distinct differences: cultural diversity, dissimilar work environments and distinct workplace experiences. At the same time, the data make certain commonalities among engaged and satisfied workers throughout the world clearer. Understanding both—differences and similarities—can help point the way for leaders who want to leverage their workplace to help inspire meaningful work and high engagement in their organization.

Highly Engaged and Highly Satisfied Workers by Country

FIGURE 20

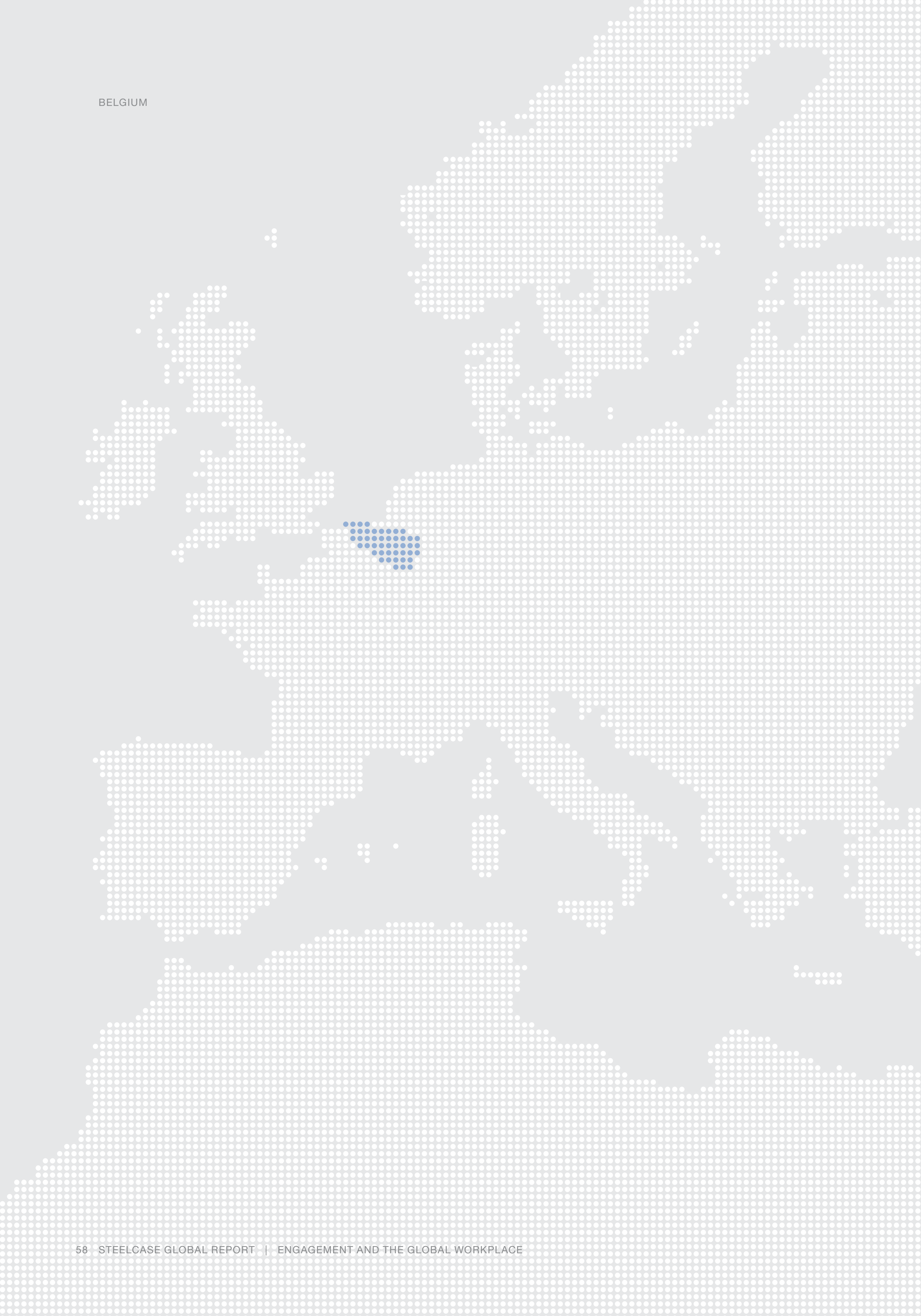
Percentage of workers who are highly engaged and highly satisfied



▲ Highest score in the study
▼ Lowest score in the study

Exploring Engagement Around the World

58 Belgium BE
68 Canada CA
78 China CN
88 France FR
98 Germany DE
108 India IN
118 Mexico MX
128 Netherlands NL
138 Poland PL
148 Russia RU
158 Kingdom of Saudi Arabia SA
168 South Africa ZA
178 Spain ES
188 Turkey TR
198 United Arab Emirates AE
208 United Kingdom GB
218 United States US



Belgium

	Belgium	Global
Highly Engaged and Highly Satisfied	6%	13%
Highly Disengaged and Highly Dissatisfied	14%	11%

Participants	420			
Gender	44% Male	56% Female		
Age	31% 18–34	28% 35–44	28% 45–54	13% 55+
Job Title	9% Senior manager	27% Manager		
	17% Technician / associate	47% Clerk + service / sales		

The Workplace in Belgium

Belgium has some of the most open environments in the world and twice the global average of nomadic workers.

Office layouts are an almost even mix of entirely open-plan spaces, all private offices and a combination of both. While most workers report that their assigned workspace is a private or shared office, Belgians rank third in the world for the number of nomadic workers.

As a densely populated country, Belgium actively supports worker mobility initiatives to encourage remote work options. Workers report less availability of areas to be alone, relax or be physically active than the global average.

Key ◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-BE

◉ ***Noteworthy:* Belgium has the third-highest number of open offices in this study.**

Which of the following describes your office layout?	Belgium	Global
Entirely Open Plan	32%	23%
Entirely Individual Offices	32%	31%
Combination Open Plan and Individual Offices	37%	46%

Individual Workspaces

FIGURE 2-BE

◉ ***Noteworthy:* While more than half of employees work in individual or shared private offices, Belgium has the third-highest number of nomadic workers in the world.**

Which of the following describes your individual workspace?	Belgium	Global
Individual Private Office	21%	23%
Shared Private Office	36%	37%
Open Plan, Assigned Space	27%	33%
Nomadic	16%	8%

Access to Shared Areas

FIGURE 3-BE

◉ Noteworthy:
With the exception of meeting rooms and canteens, workplaces have a limited range of shared spaces.

Does your workplace have: (% agree)	Belgium	Global
Sufficient Meeting Rooms	69%	70%
Cafeteria / Canteen	75%	61%
Private Space	45%	53%
Relaxation Areas	28%	45%
Sports / Exercise Facilities	16%	22%

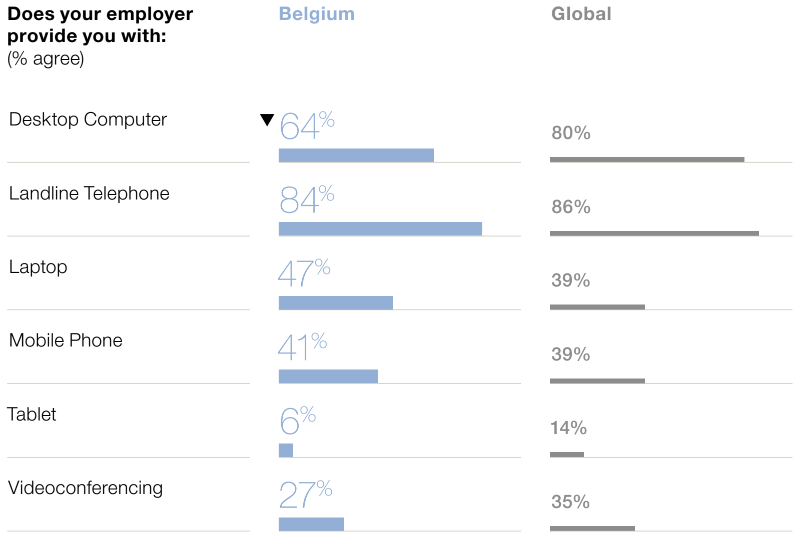
Technology + Remote Work

Technology at Work

FIGURE 4-BE

◉ ***Noteworthy:* Belgians are least likely in the world to have desktop computers and the third-most-likely to have laptops.**

Does your employer provide you with:
(% agree)

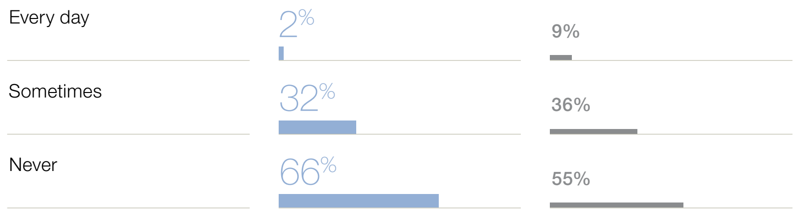


Remote Work

FIGURE 5-BE

◉ ***Noteworthy:* Like many of their European neighbors, about a third of Belgian employees work remotely sometimes.**

How often do you work away from the office?



▼ Lowest score in the study

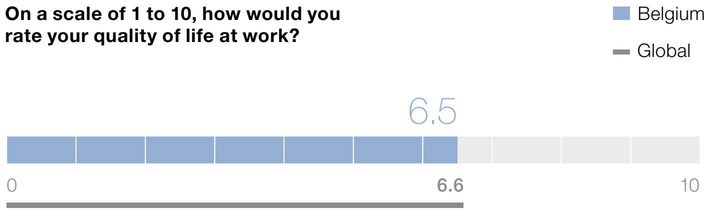
How Workers Feel

Quality of Life at Work

FIGURE 6-BE

◉ ***Noteworthy:* Belgian workers give negative scores to both their organization and their workplace.**

On a scale of 1 to 10, how would you rate your quality of life at work?

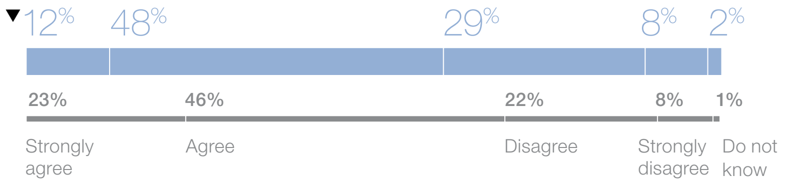


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-BE

Do you like your work environment?
(% agree)



Perception of Company Culture

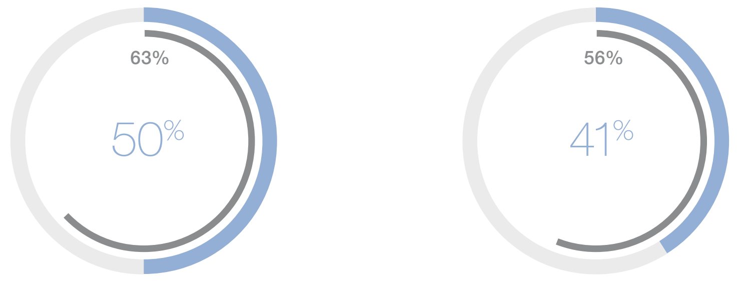
FIGURE 8-BE

◉ ***Noteworthy:* Belgian workers say their organizations fall short of their expectations on various attributes of corporate culture.**

Would you say that your company:
(% agree)

Gets the best out of you

Recognizes and values its employees



See Appendix J for all culture metrics.

▼ Lowest score in the study

The Link Between Engagement and Workplace Satisfaction

Belgian workers are significantly more disengaged than the global average, with 46 percent either highly or somewhat disengaged. Correspondingly, there are far fewer highly engaged and engaged employees than average. Workers rate their organization below average on all but two engagement metrics (Figure 10-BE), with particularly low scores when asked if they value the company's culture or endorse the organization's strategy and direction. They also give their organizations some of the lowest scores globally on recognizing and valuing employees and taking a genuine interest in employee wellbeing.

In terms of their satisfaction with the workplace, Belgian employees do not give positive feedback. Workers give their company below-average scores on their ability to concentrate easily or work in teams without disruptions. This feedback suggests that they may struggle to find privacy in offices that tend to be entirely open. They are more likely than average to describe their offices as impersonal or ugly and less likely to say it is innovative or nice-looking (Appendix L).

Also, Belgians rank their companies the third-lowest in the world for being an appropriate place to work that fits their lifestyle (Appendix H).

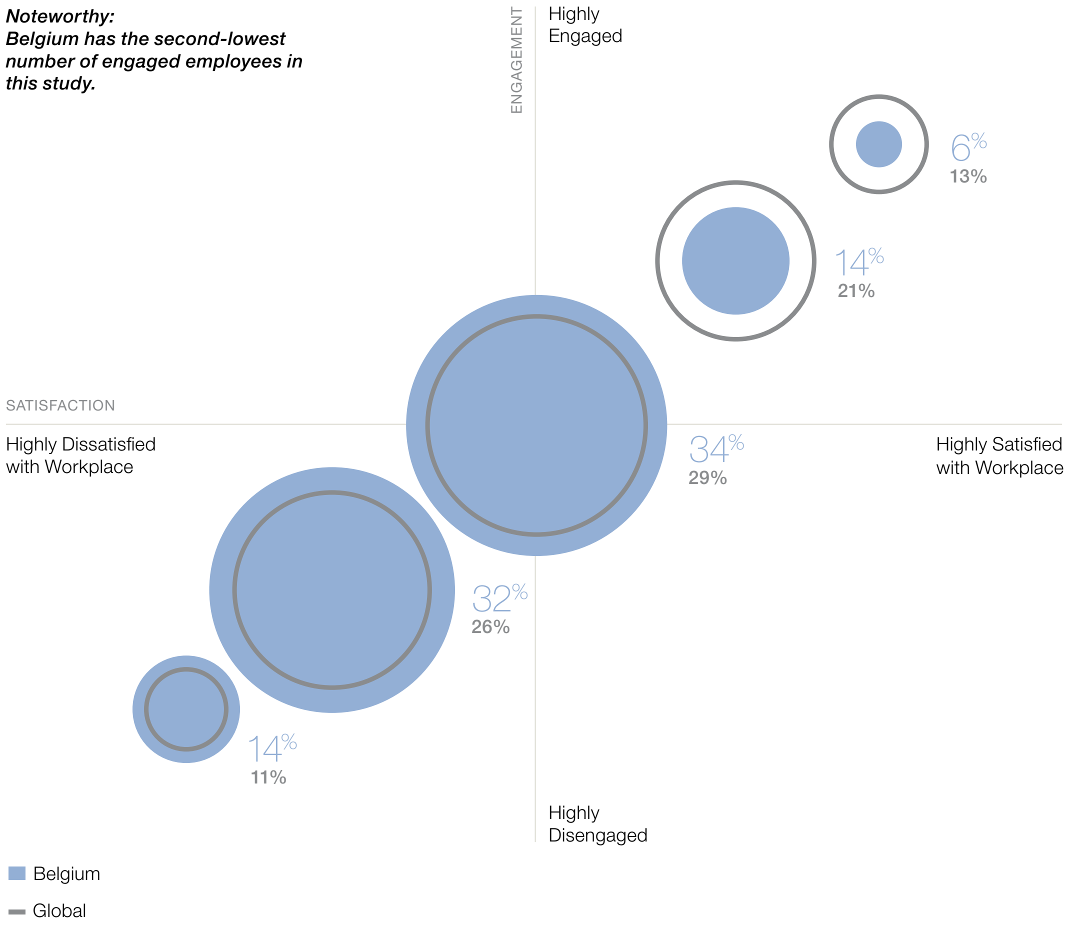
Belgian workers' responses suggest they do not feel the organization cares about them. This is an area where Belgian leaders can focus improvements that could result in increased engagement. In particular, companies may want to consider offering a range of spaces that better enable people to focus on their individual or group work. With more nomadic workers, it's important to provide spaces that allow them to be effective and transition between activities or tasks easily. Shared spaces can be hubs for meeting informally with leaders, socializing and learning about what's happening in the company. This can help employees develop deeper connections with the organization.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-BE

Noteworthy:
Belgium has the second-lowest number of engaged employees in this study.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-BE

◉ ***Noteworthy:* Many Belgian employees are motivated by their work and optimistic about their future with their company, yet fewer value the organization's culture, strategy and direction.**

Do you agree with each of the following statements? (% agree)	**Belgium**	**Global**
You feel connection with your colleagues	72%	76%
You are happy to go to work	70%	71%
You feel proud to work for your company	67%	69%
You are motivated by your work	69%	68%
Your job gives you a sense of personal achievement	61%	67%
You would recommend your company as an employer	56%	63%
You value your company culture	51%	63%
You endorse your company's strategy and direction	50%	63%
You are optimistic about your future with your company	62%	60%

Workplace Satisfaction Metrics

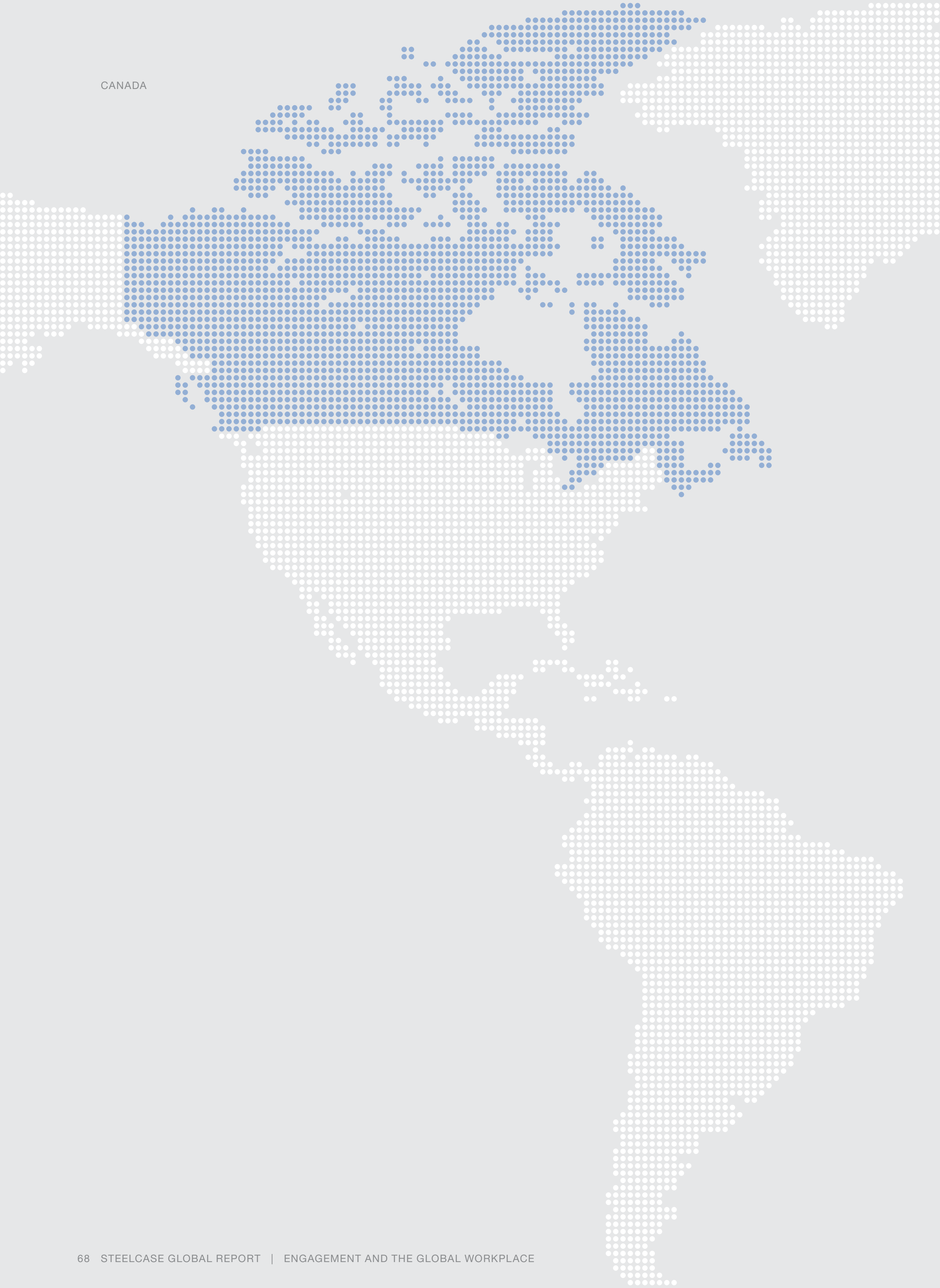
Employee Attitudes Toward Work Environment

FIGURE 11-BE

◉ ***Noteworthy:* Workers in Belgium say their offices do not help them to focus, share their ideas or feel a sense of belonging to their organization.**

Does your work environment allow you to: (% agree)	**Belgium**	**Global**
Choose where to work in the office based on the task	44%	51%
Socialize with colleagues	78%	75%
Concentrate easily	54%	66%
Work in teams without being interrupted	47%	58%
Move around throughout the day	79%	77%
Physically move during the day and change postures	▼ 67%	75%
Feel a sense of belonging to the company	49%	66%
Easily and freely express and share ideas	62%	66%
Share projects and achievements	51%	61%
Have access to information about the company	64%	70%
Accommodate remote workers	42%	56%
Feel relaxed, calm	52%	59%
Accommodate visitors	59%	66%

▼ Lowest score in the study



Canada

	Canada	Global
Highly Engaged and Highly Satisfied	11%	13%
Highly Disengaged and Highly Dissatisfied	10%	11%

Participants	802			
Gender	38% Male	62% Female		
Age	27% 18–34	24% 35–44	29% 45–54	20% 55+
Job Title	10% Senior manager		25% Manager	
	23% Technician / associate		42% Clerk + service / sales	

The Workplace in Canada

Canadian workplaces are generally open environments with some enclosed spaces. It is rare to find workplaces designed with entirely private offices.

While there is a diverse mix in workplaces, the majority of Canadians (78 percent), work in either open plan or a combination of open plan and individual offices. Nearly half of workers have assigned workstations in open-plan environments and a comparatively large number of Canadians (31 percent) work in private offices, significantly higher than the global average. Only 17 percent work in shared private offices, a trend that is less common in Canada than the rest of the world (37 percent globally). Seven percent of workers are mobile with an unassigned workstation, which suggests that the trend of "hot desking" or "hoteling" is not pervasive. This current reality of Canadian office design is contrary to what seems to be a common perception that most Canadians work entirely in open spaces.

Canadian offices tend to have a range of spaces where employees can do focused individual work, socialize with colleagues or seek privacy.

With real estate readily available in most parts of Canada, organizations are able to provide a broad range of shared spaces and private offices.

Key
◉ *Noteworthy*
▲ Highest score in the study
▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-CA

◉ ***Noteworthy:* Despite common perceptions, the number of entirely open-plan offices in Canada closely mirrors the global average.**

Which of the following describes your office layout?	**Canada**	**Global**
Entirely Open Plan	25%	23%
Entirely Individual Offices	22%	31%
Combination Open Plan and Individual Offices	53%	46%

Individual Workspaces

FIGURE 2-CA

◉ ***Noteworthy:* Shared private offices, common in Europe, never got traction in Canada where only 17 percent of employees work in this type of space.**

Which of the following describes your individual workspace?	**Canada**	**Global**
Individual Private Office	31%	23%
Shared Private Office	17%	37%
Open Plan, Assigned Space	▲ 46%	33%
Nomadic	7%	8%

Access to Shared Areas

FIGURE 3-CA

◉ ***Noteworthy:* Canadian organizations provide a broader range of shared spaces than many other countries.**

Does your workplace have: (% agree)	**Canada**	**Global**
Sufficient Meeting Rooms	72%	70%
Cafeteria / Canteen	55%	61%
Private Space	65%	53%
Relaxation Areas	57%	45%
Sports / Exercise Facilities	29%	22%

▲ Highest score in the study

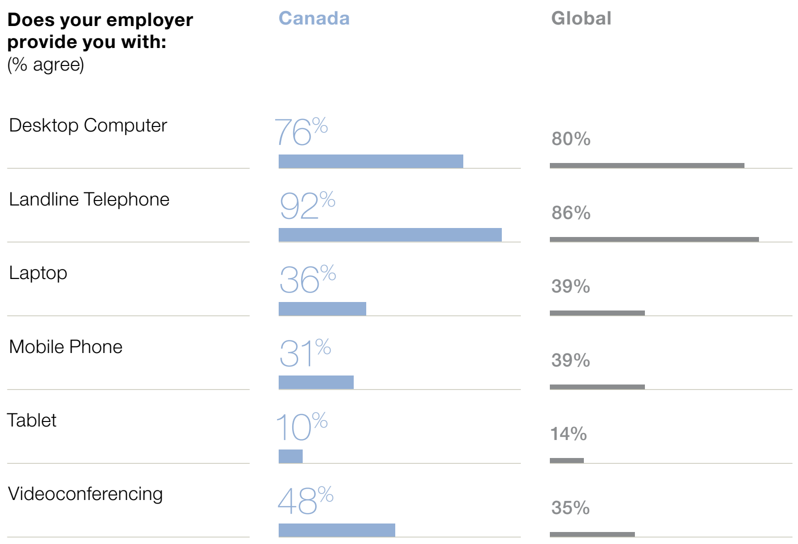
Technology + Remote Work

Technology at Work

FIGURE 4-CA

***Noteworthy:* Workers in Canada lag global averages for access to mobile technology.**

Does your employer provide you with:
(% agree)

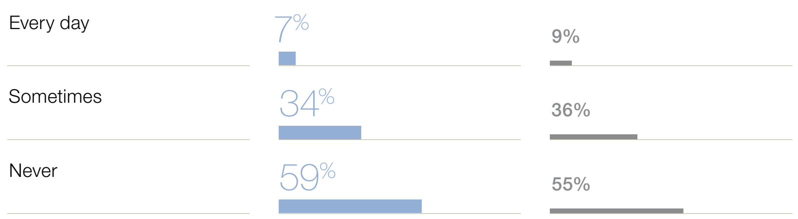


Remote Work

FIGURE 5-CA

***Noteworthy:* Fewer Canadian workers work remotely than the global average, possibly due to lack of access to mobile technology.**

How often do you work away from the office?



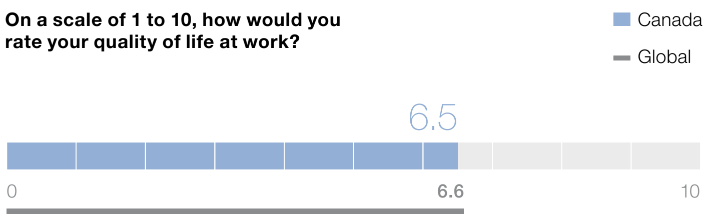
How Workers Feel

Quality of Life at Work

FIGURE 6-CA

***Noteworthy:* Canadians give moderate scores to their work environments, but rate organizational culture high.**

On a scale of 1 to 10, how would you rate your quality of life at work?

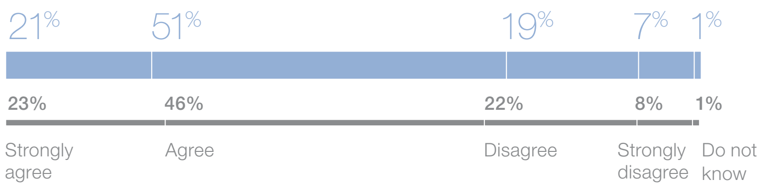


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-CA

Do you like your work environment?
(% agree)

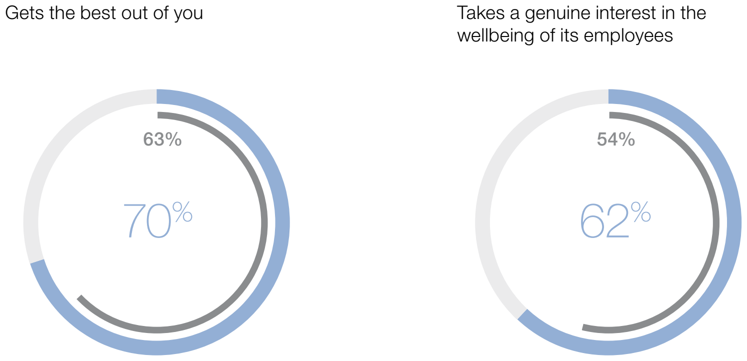


Perception of Company Culture

FIGURE 8-CA

***Noteworthy:* The work culture in Canada is positive. Workers rate their organizations third-highest in the world for encouraging teamwork and collaboration and taking interest in the wellbeing of their employees.**

Would you say that your company:
(% agree)


Gets the best out of you

Takes a genuine interest in the wellbeing of its employees

See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

Canadian workers for the most part follow global averages in terms of engagement and satisfaction with their workplace, although the number of workers who fall in the middle is higher than average. Canadian workers score above global averages on all nine engagement metrics (Figure 10-CA) and many report that their jobs motivate them and give them a sense of personal achievement. They are happy to go to work and optimistic about their future with their company. Seventy-eight percent say their company is an appropriate place for them and fits their lifestyle, which is the third-highest ranking in the study.

Canadians give higher than average scores to some aspects of their workplace experience, including access to real-time information about the company and their ability to express their ideas, socialize and move around easily throughout the day. However, in other areas, Canadian workers are far less satisfied with their workplace experience, falling below global averages on more than half of the 13 workplace satisfaction metrics (Figure 11-CA, page 77). They register particularly low in their ability to choose where to work depending on the task. Also, they are more likely to describe their workplace as bureaucratic, and less likely to say it is convivial or innovative.

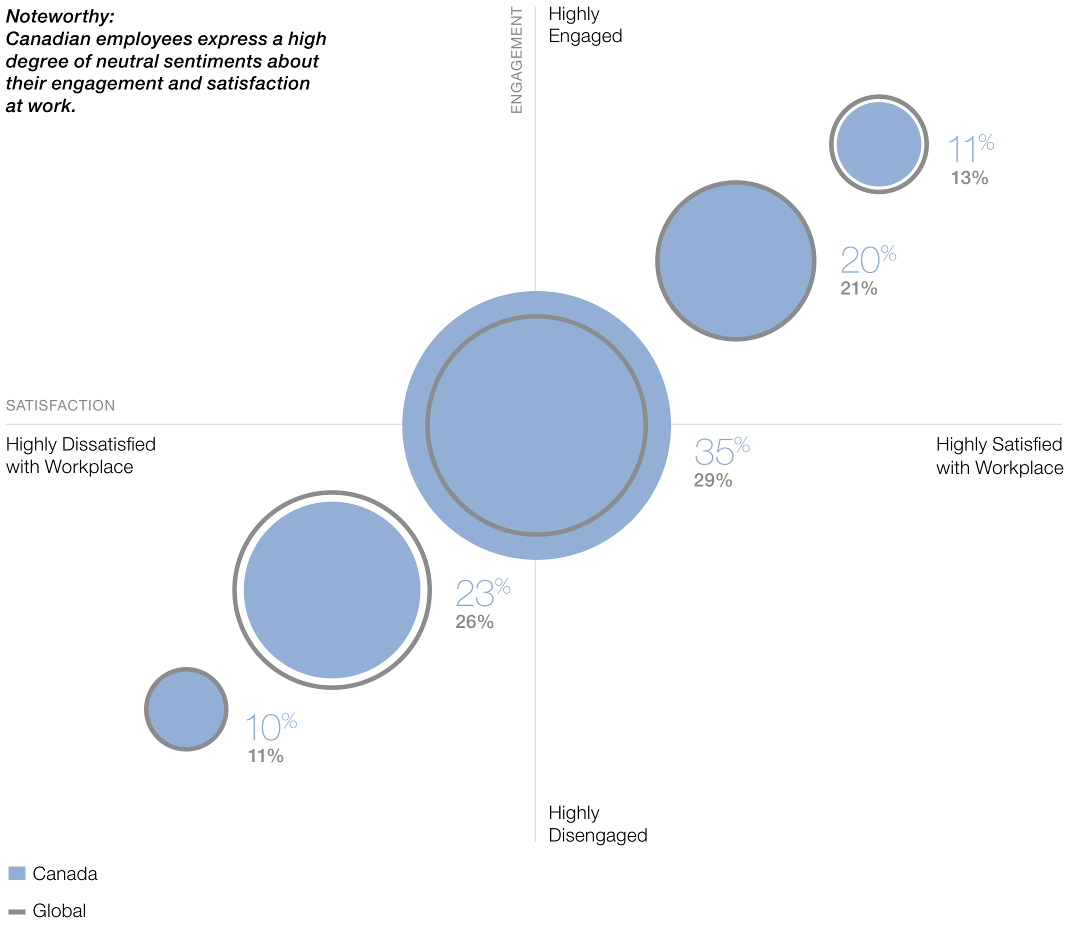
While there are many positives, the large number of employees who are neutral on their engagement and satisfaction levels is a risk for Canadian leaders who need a highly motivated workforce. The data suggest that organizations could improve satisfaction significantly if they give workers more control over where and how they work. They can do this by providing more options for spaces that promote autonomy and informality and allowing people to choose from diverse places within the office to work.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-CA

Noteworthy:
Canadian employees express a high degree of neutral sentiments about their engagement and satisfaction at work.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-CA

◉ ***Noteworthy:* Canadian workers give their employers high scores on most engagement metrics, especially their willingness to recommend the company to friends and family.**

Do you agree with each of the following statements? (% agree)	**Canada**	**Global**
You feel connection with your colleagues	77%	76%
You are happy to go to work	75%	71%
You feel proud to work for your company	73%	69%
You are motivated by your work	68%	68%
Your job gives you a sense of personal achievement	72%	67%
You would recommend your company as an employer	71%	63%
You value your company culture	67%	63%
You endorse your company's strategy and direction	68%	63%
You are optimistic about your future with your company	67%	60%

Workplace Satisfaction Metrics

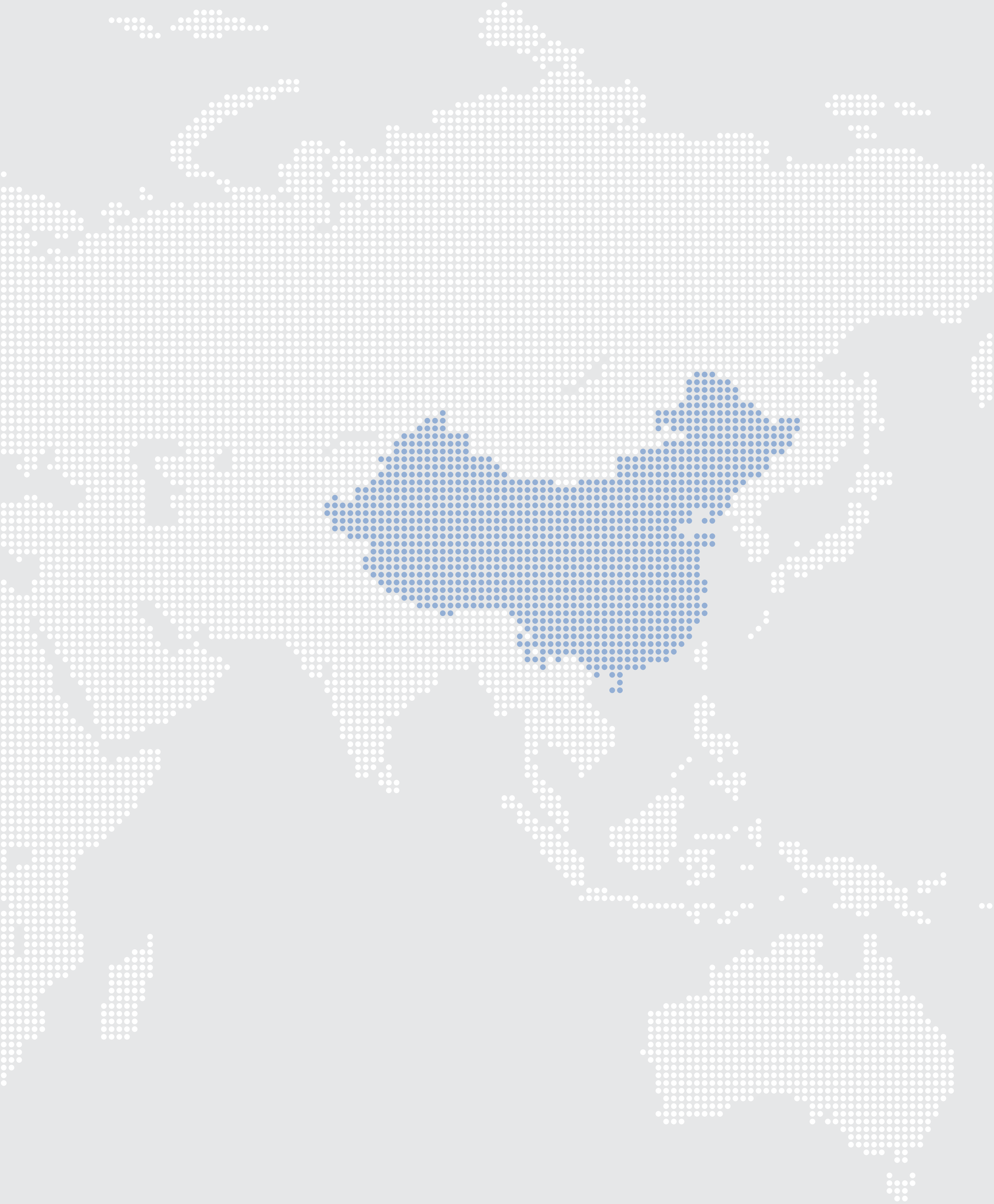
Employee Attitudes Toward Work Environment

FIGURE 11-CA

◉ ***Noteworthy:* Workers in Canada are less likely than average to have the option to choose where in the office to work based on what they need to accomplish.**

Does your work environment allow you to: (% agree)	**Canada**	**Global**
Choose where to work in the office based on the task	41%	51%
Socialize with colleagues	78%	75%
Concentrate easily	65%	66%
Work in teams without being interrupted	52%	58%
Move around throughout the day	81%	77%
Physically move during the day and change postures	72%	75%
Feel a sense of belonging to the company	65%	66%
Easily and freely express and share ideas	69%	66%
Share projects and achievements	59%	61%
Have access to information about the company	78%	70%
Accommodate remote workers	49%	56%
Feel relaxed, calm	56%	59%
Accommodate visitors	65%	66%

CA



China

	China	Global
Highly Engaged and Highly Satisfied	10%	13%
Highly Disengaged and Highly Dissatisfied	4%	11%

Participants	803			
Gender	55% Male	45% Female		
Age	64% 18–34	29% 35–44	6% 45–54	1% 55+
Job Title	22% Senior manager	37% Manager		
	24% Technician / associate	17% Clerk + service / sales		

The Workplace in China

Chinese workplaces are predominately a mixture of both open and private spaces, yet there are more entirely open offices than the global average. China ranks fourth in the world, a tie with the Netherlands, in the number of open-plan offices and is significantly below the global average for offices comprised primarily of private offices. The majority of workers say they share an office or have an assigned workspace in an open-plan configuration and the number of employees in private offices is well below the global average, on par with countries such as the Netherlands and the U.K.

While a far larger country, China is densely populated with limited real estate. Surprisingly, employees report access to a sufficient number of ancillary spaces when seeking places to rejuvenate, focus or connect with colleagues.

Key ◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-CN

◉ ***Noteworthy:* Chinese workplaces consist of a mixture of open and enclosed spaces, with significantly more entirely open offices than the global norm.**

Which of the following describes your office layout?	China	Global
Entirely Open Plan	28%	23%
Entirely Individual Offices	24%	31%
Combination Open Plan and Individual Offices	48%	46%

Individual Workspaces

FIGURE 2-CN

◉ ***Noteworthy:* While Chinese offices have more open office configurations than the global average, 56 percent of employees work in either individual or shared private offices.**

Which of the following describes your individual workspace?	China	Global
Individual Private Office	▼ 11%	23%
Shared Private Office	45%	37%
Open Plan, Assigned Space	42%	33%
Nomadic	▼ 2%	8%

Access to Shared Areas

FIGURE 3-CN

◉ ***Noteworthy:* Despite real estate constraints, Chinese offices have a range of spaces available to employees, well above the global averages.**

Does your workplace have: (% agree)	China	Global
Sufficient Meeting Rooms	77%	70%
Cafeteria / Canteen	61%	61%
Private Space	70%	53%
Relaxation Areas	67%	45%
Sports / Exercise Facilities	30%	22%

▼ Lowest score in the study

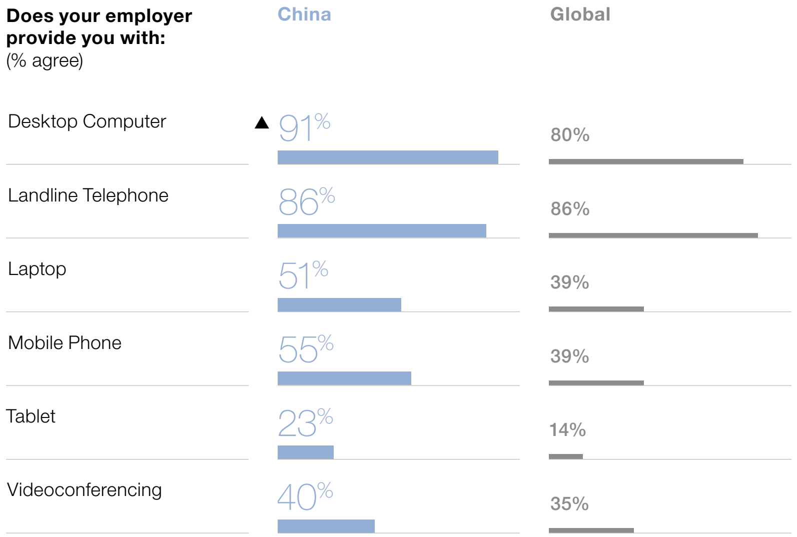
Technology + Remote Work

Technology at Work

FIGURE 4-CN

***Noteworthy:* Chinese organizations rank second only to Indian organizations for providing laptops and mobile phones to workers.**

Does your employer provide you with:
(% agree)

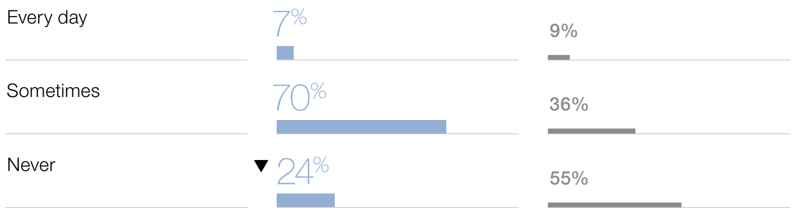


Remote Work*

FIGURE 5-CN

***Noteworthy:* The investment in mobile technology makes it possible for most employees to work in alternate locations on occasion.**

How often do you work away from the office?



*Percentages do not total 100% due to rounding.

▼ Lowest score in the study

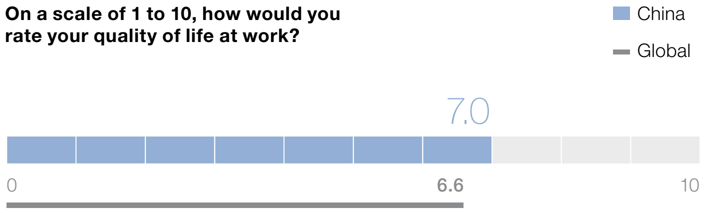
How Workers Feel

Quality of Life at Work

FIGURE 6-CN

***Noteworthy:* Chinese employees give their workplaces high scores for quality of life at work, ranking third-highest globally behind Mexico and India.**

On a scale of 1 to 10, how would you rate your quality of life at work?

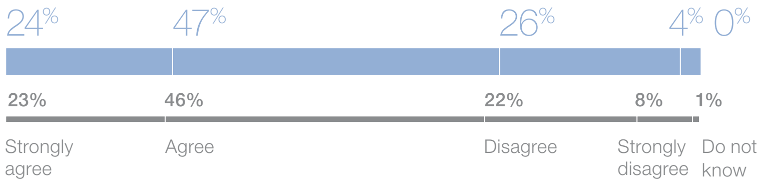


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-CN

Do you like your work environment?
(% agree)

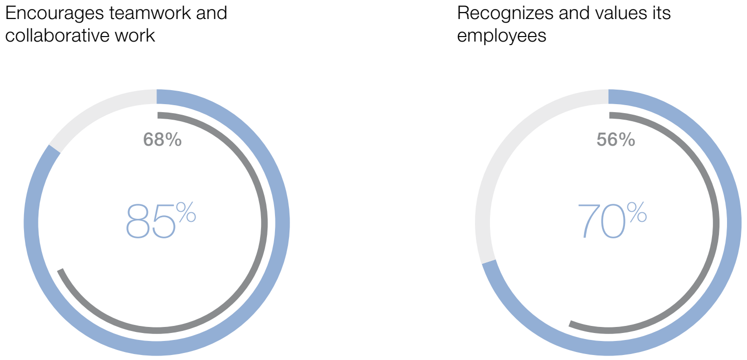


Perception of Company Culture

FIGURE 8-CN

***Noteworthy:* China scores the highest in encouraging teamwork and collaboration and second-highest in recognizing and valuing employees.**

Would you say that your company:
(% agree)



Encourages teamwork and collaborative work

Recognizes and values its employees

See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

Despite the positive perceptions in so many areas, China's level of engaged workers is concerning. While the number of disengaged employees is lower than the global average, the largest group of employees is in the middle, neither strongly engaged or disengaged. This is the second-highest number of neutral employees in the study, just one percentage point behind the Netherlands. Some factors that pulled engagement levels down include employees' lower levels of pride to work for their company and their feelings about being happy to go to work.

Satisfaction with the workplace is mostly positive, and Chinese employees are the most likely to describe their workplace as "calming" (Appendix L). An area of concern is employees' reported inability to move around the office easily throughout the day, below the global average.

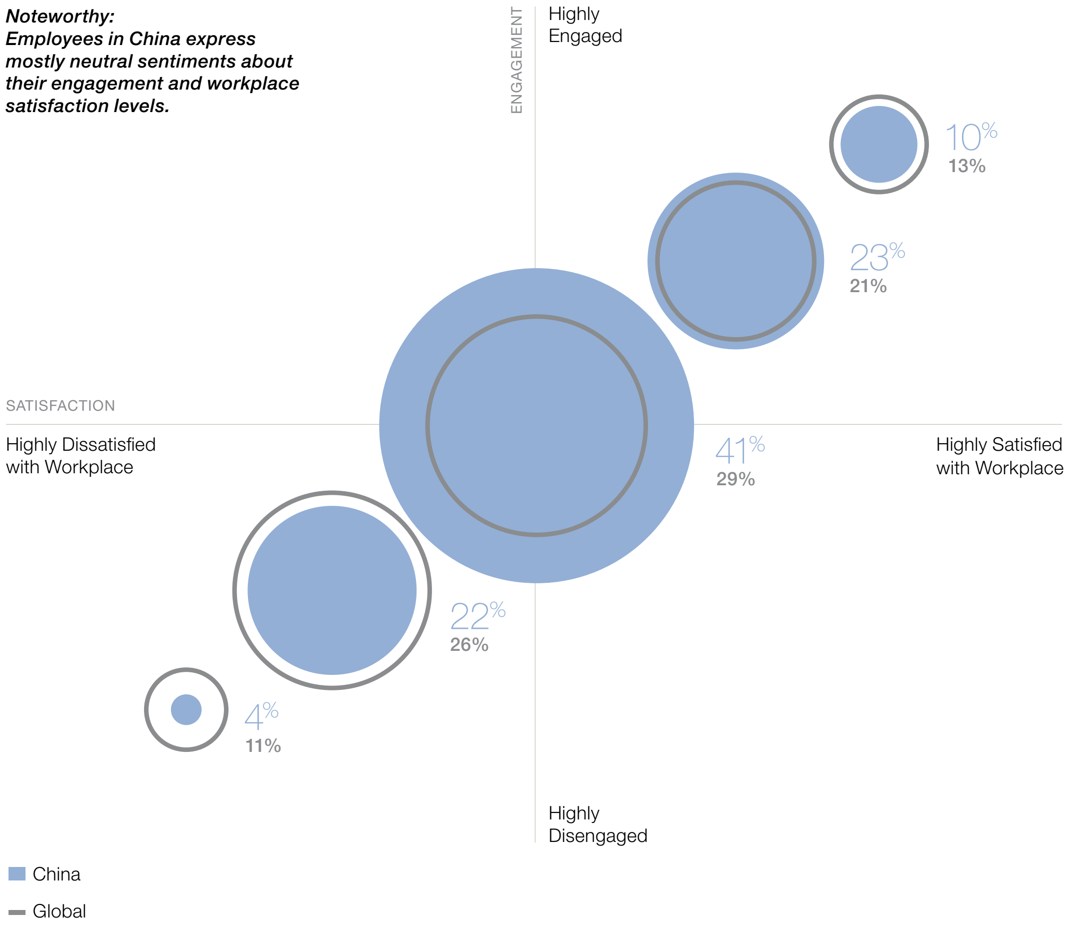
The large number of neutral employees is a risk for organizations that want to innovate and compete effectively, and affording workers a higher level of control over how they work can be a viable strategy to begin addressing this issue. Chinese leaders could initially consider creating physical environments that are destinations where employees want to come work and can feel a sense of pride in the company.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-CN

***Noteworthy:* Employees in China express mostly neutral sentiments about their engagement and workplace satisfaction levels.**



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-CN

◉ ***Noteworthy:* Chinese employees feel good about their individual contributions and relationships with colleagues. Tepid feelings about company culture moderate overall engagement levels.**

Do you agree with each of the following statements? (% agree)	**China**	**Global**
You feel connection with your colleagues	84%	76%
You are happy to go to work	68%	71%
You feel proud to work for your company	65%	69%
You are motivated by your work	75%	68%
Your job gives you a sense of personal achievement	72%	67%
You would recommend your company as an employer	67%	63%
You value your company culture	65%	63%
You endorse your company's strategy and direction	74%	63%
You are optimistic about your future with your company	68%	60%

Workplace Satisfaction Metrics

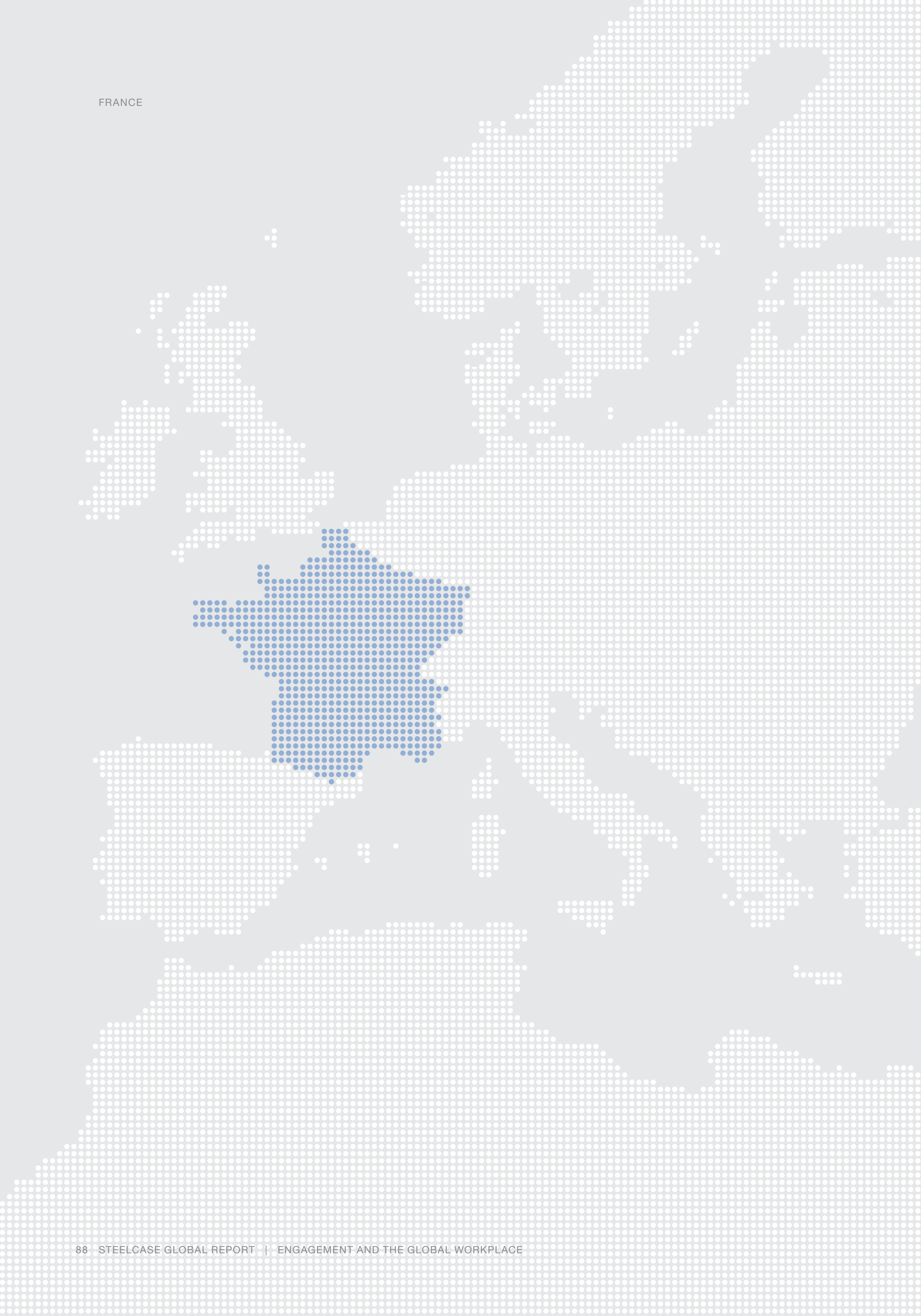
Employee Attitudes Toward Work Environment

FIGURE 11-CN

◉ ***Noteworthy:* Chinese employees have a greater ability to choose where to work within their work environment than employees in other countries.**

Does your work environment allow you to: (% agree)	**China**	**Global**
Choose where to work in the office based on the task	▲ 70%	51%
Socialize with colleagues	83%	75%
Concentrate easily	77%	66%
Work in teams without being interrupted	69%	58%
Move around throughout the day	74%	77%
Physically move during the day and change postures	▲ 83%	75%
Feel a sense of belonging to the company	75%	66%
Easily and freely express and share ideas	68%	66%
Share projects and achievements	76%	61%
Have access to information about the company	82%	70%
Accommodate remote workers	71%	56%
Feel relaxed, calm	69%	59%
Accommodate visitors	80%	66%

▲ Highest score in the study



France

	France	**Global**
Highly Engaged and Highly Satisfied	▼ 5%	13%
Highly Disengaged and Highly Dissatisfied	18%	11%

Participants	824			
Gender	46% Male	54% Female		
Age	28% 18–34	28% 35–44	29% 45–54	15% 55+
Job Title	10% Senior manager	25% Manager		
	31% Technician / associate	34% Clerk + service / sales		

▼ Lowest score in the study

The Workplace in France

Organizations in France primarily have traditional offices, with an almost even split between workplaces comprising of entirely individual offices and those that blend open plan and individual offices. The French share similarities with their German neighbors in this regard, with most employees working in an individual office or sharing a private office with colleagues.

In contrast to other Western European neighbors such as Belgium, the U.K. and the Netherlands, less than a quarter work in an entirely open plan. These patterns may be shifting as the number of nomadic workers in France is slightly higher than the global average.

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-FR

◉ ***Noteworthy:* Most employees in France work in individual or shared private offices.**

Which of the following describes your office layout?	**France**	**Global**
Entirely Open Plan	24%	23%
Entirely Individual Offices	37%	31%
Combination Open Plan and Individual Offices	39%	46%

Individual Workspaces

FIGURE 2-FR

◉ ***Noteworthy:* The number of nomadic workers is above the global average, consistent with neighboring Belgium and the Netherlands.**

Which of the following describes your individual workspace?	**France**	**Global**
Individual Private Office	28%	23%
Shared Private Office	36%	37%
Open Plan, Assigned Space	24%	33%
Nomadic	12%	8%

Access to Shared Areas

FIGURE 3-FR

◉ ***Noteworthy:* French organizations emphasize having spaces for relaxation, while other shared spaces are less common.**

Does your workplace have: (% agree)	**France**	**Global**
Sufficient Meeting Rooms	68%	70%
Cafeteria / Canteen	59%	61%
Private Space	45%	53%
Relaxation Areas	53%	45%
Sports / Exercise Facilities	▼ 12%	22%

▼ Lowest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-FR

◉ ***Noteworthy:***
French employers are one of the least likely to provide laptops or mobile phones to employees. This tends to reinforce traditional behaviors within the culture.

Does your employer provide you with:
(% agree)

	France	Global
Desktop Computer	81%	80%
Landline Telephone	89%	86%
Laptop	29%	39%
Mobile Phone	28%	39%
Tablet	▼ 6%	14%
Videoconferencing	33%	35%

Remote Work

FIGURE 5-FR

◉ ***Noteworthy:***
French employees are the least likely in the world to work away from the office. This reflects the importance of separating work and and personal life in French culture.

How often do you work away from the office?

	France	Global
Every day	2%	9%
Sometimes	19%	36%
Never	▲ 79%	55%

▲ Highest score in the study
▼ Lowest score in the study

How Workers Feel

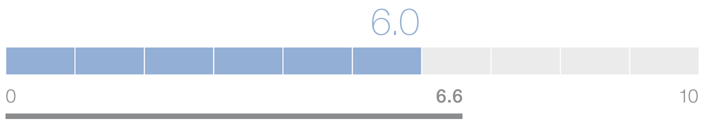
Quality of Life at Work

FIGURE 6-FR

◉ ***Noteworthy:***
French employees rate their quality of life at work the lowest of any country in this study. Both the workplace environment and the company culture receive strong criticism.

On a scale of 1 to 10, how would you rate your quality of life at work?

🟦 France
▬ Global

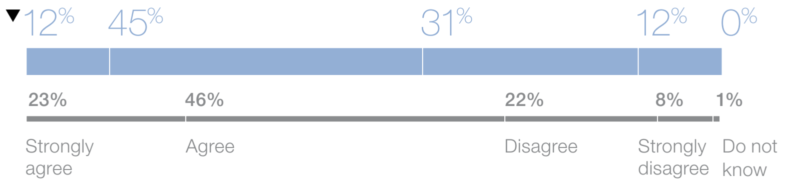


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-FR

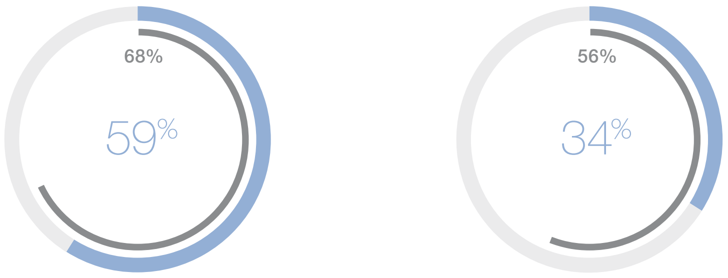
Do you like your work environment?
(% agree)



Perception of Company Culture

FIGURE 8-FR

Would you say that your company:
(% agree)



Encourages teamwork and collaborative work

Recognizes and values its employees

◉ ***Noteworthy:***
Indicators of how much companies in France care about their employees rank lowest in this study.

See Appendix J for all culture metrics.

▼ Lowest score in the study

The Link Between Engagement and Workplace Satisfaction

With low scores on many facets of work, it's not surprising that France's levels of engagement and satisfaction with the workplace are low. In fact, France has the most disengaged workers of all countries in this study, at an alarming 54 percent. With only five percent of the workforce highly engaged, it is extremely challenging for them to counterbalance the majority of disengaged or neutral employees.

French employees score their organizations below average on all engagement and workplace satisfaction metrics (Figure 11-FR). They gave particularly low scores to their ability to choose where to work in the office based on the task at hand. Other areas of significant concern are employees not feeling a connection with colleagues, valuing the culture or endorsing the company's strategy and direction. They are most likely to describe their workplaces as "impersonal" (Appendix L).

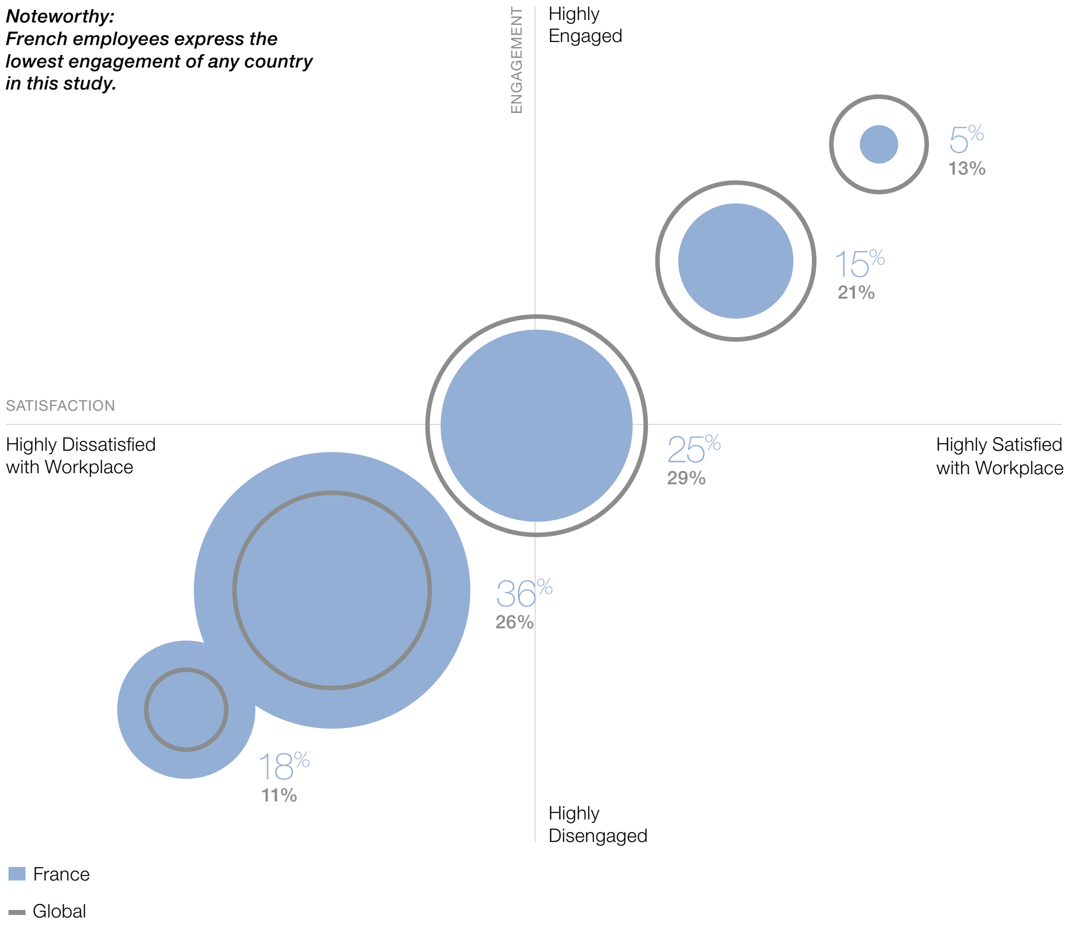
French leaders have an opportunity to build higher levels of engagement and may want to consider strategies to help employees feel a greater sense of control over their physical workplace and overall experience at work. Providing workers with more diverse work environments and allowing them to choose the spaces that are best for them to work can be a viable strategy. Organizations in France may want to design areas for people to come together informally, develop relationships and feel a deeper sense of connection to the company.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-FR

Noteworthy:
French employees express the lowest engagement of any country in this study.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-FR

◉ ***Noteworthy:* French employees rate every engagement metric below global averages.**

Do you agree with each of the following statements? (% agree)	France	Global
You feel connection with your colleagues	69%	76%
You are happy to go to work	65%	71%
You feel proud to work for your company	63%	69%
You are motivated by your work	▼ 65%	68%
Your job gives you a sense of personal achievement	▼ 57%	67%
You would recommend your company as an employer	54%	63%
You value your company culture	▼ 49%	63%
You endorse your company's strategy and direction	▼ 47%	63%
You are optimistic about your future with your company	49%	60%

▼ Lowest score in the study

Workplace Satisfaction Metrics

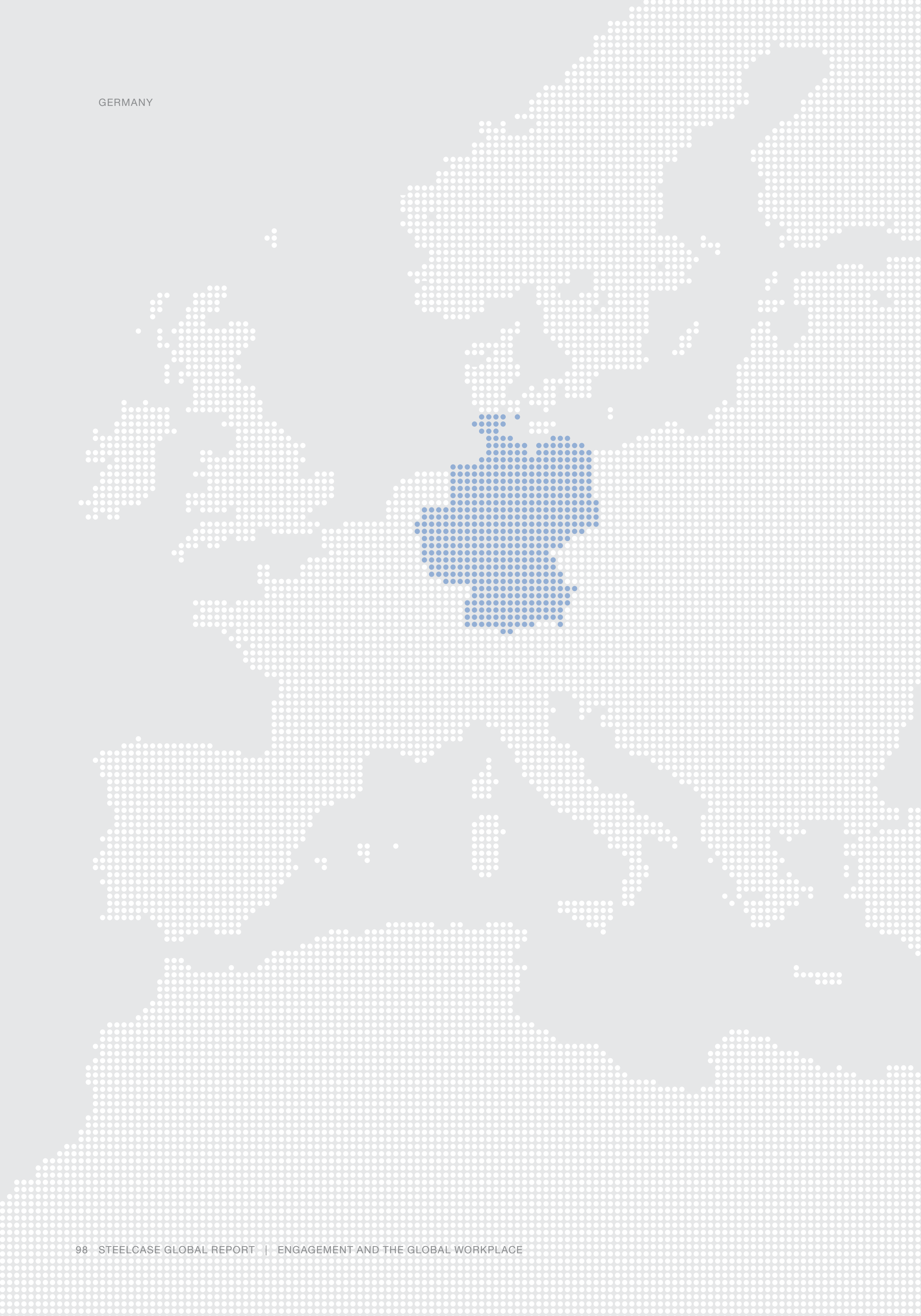
Employee Attitudes Toward Work Environment

FIGURE 11-FR

◉ ***Noteworthy:* French employees feel a lack of control over key aspects of their work experience and stress levels run high.**

Does your work environment allow you to: (% agree)	France	Global
Choose where to work in the office based on the task	▼ 37%	51%
Socialize with colleagues	74%	75%
Concentrate easily	▼ 51%	66%
Work in teams without being interrupted	▼ 44%	58%
Move around throughout the day	74%	77%
Physically move during the day and change postures	68%	75%
Feel a sense of belonging to the company	52%	66%
Easily and freely express and share ideas	▼ 55%	66%
Share projects and achievements	48%	61%
Have access to information about the company	58%	70%
Accommodate remote workers	▼ 36%	56%
Feel relaxed, calm	▼ 37%	59%
Accommodate visitors	56%	66%

▼ Lowest score in the study



Germany

	Germany	Global
Highly Engaged and Highly Satisfied	12%	13%
Highly Disengaged and Highly Dissatisfied	12%	11%

Participants	803			
Gender	44% Male	56% Female		
Age	32% 18–34	26% 35–44	28% 45–54	14% 55+
Job Title	5% Senior manager	30% Manager		
	21% Technician / associate	44% Clerk + service / sales		

The Workplace in Germany

Private offices dominate the German workplace landscape. This form of office design has deep cultural roots, and open work environments are, not surprisingly, far less common. Most people occupy shared private offices, supporting small groups of employees together in a single, enclosed space. Only 18 percent of workers have assigned spaces in an open-plan office, and a small minority are nomadic workers who can work in a variety of spaces and do not have an assigned workspace.

In general, real estate is focused on individual workspaces and meeting rooms, while less space is allocated for areas where employees can seek privacy, rejuvenate or exercise. Buildings and workplace floorplans in Germany are designed to offer most employees ample access to natural light (Appendix D).

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-DE

◉ ***Noteworthy:* Germany has the largest number of workplaces comprising entirely of individual offices in this study.**

Which of the following describes your office layout?	**Germany**	**Global**
Entirely Open Plan	19%	23%
Entirely Individual Offices	▲ 54%	31%
Combination Open Plan and Individual Offices	27%	46%

Individual Workspaces

FIGURE 2-DE

◉ ***Noteworthy:* Nearly three-fourths of German workers are assigned to individual or shared private offices.**

Which of the following describes your individual workspace?	**Germany**	**Global**
Individual Private Office	25%	23%
Shared Private Office	50%	37%
Open Plan, Assigned Space	18%	33%
Nomadic	7%	8%

Access to Shared Areas

FIGURE 3-DE

◉ ***Noteworthy:* German workers report that they have less access to alternative spaces for privacy, rejuvenation or exercise than the global average.**

Does your workplace have: (% agree)	**Germany**	**Global**
Sufficient Meeting Rooms	70%	70%
Cafeteria / Canteen	62%	61%
Private Space	44%	53%
Relaxation Areas	29%	45%
Sports / Exercise Facilities	15%	22%

▲ Highest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-DE

◉ ***Noteworthy:* The majority of German employees use fixed technology but score above the global average for use of employer-provided laptops, which allow them to choose from a variety of places to work. Lower levels of mobile phone use, however, may constrain flexibility.**

Does your employer provide you with: (% agree)	**Germany**	**Global**
Desktop Computer	80%	80%
Landline Telephone	▲ 94%	86%
Laptop	45%	39%
Mobile Phone	33%	39%
Tablet	9%	14%
Videoconferencing	26%	35%

Remote Work

FIGURE 5-DE

◉ ***Noteworthy:* Germany ranks third for the number of workers who never work away from the office.**

How often do you work away from the office?	**Germany**	**Global**
Every day	3%	9%
Sometimes	31%	36%
Never	67%	55%

▲ Highest score in the study

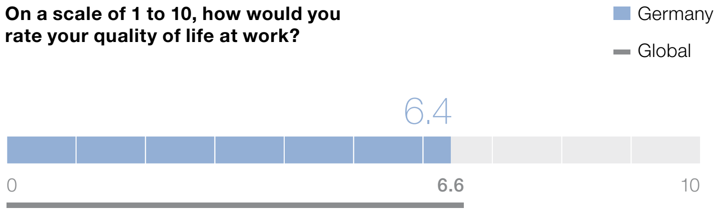
How Workers Feel

Quality of Life at Work

FIGURE 6-DE

◉ ***Noteworthy:* German employees give low scores for their quality of life at work, ranking in the bottom third of the study.**

On a scale of 1 to 10, how would you rate your quality of life at work?

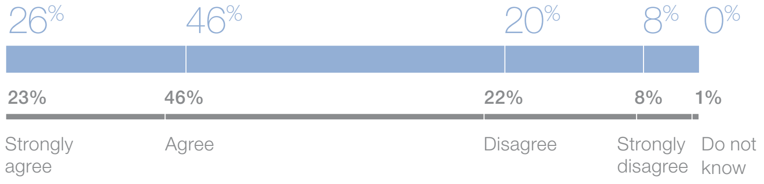


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-DE

Do you like your work environment?
(% agree)

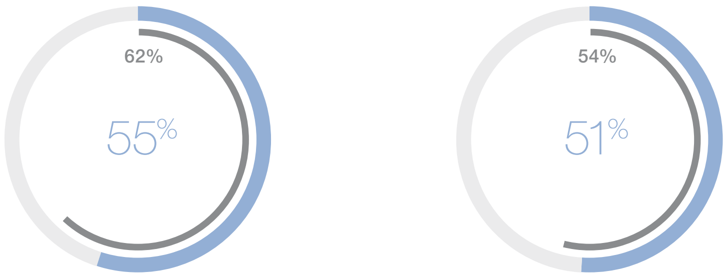


Perception of Company Culture

FIGURE 8-DE

◉ ***Noteworthy:* German workers give their employers lower-than-average scores for fostering cultures that lead to engagement. Only about half believe their company takes a genuine interest in their wellbeing or encourages them to use their initiative.**

Would you say that your company:
(% agree)


Encourages you to use your initiative

Takes a genuine interest in the wellbeing of employees

See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

German workers are the most engaged and satisfied of any European country. However, they score below global averages on many engagement metrics and most workplace satisfaction metrics.

Germans rank fifth (tied with Canada) in the number of people who agree that they like their offices. This may be influenced by the fact that most Germans work in individual offices or shared offices that enable them to concentrate more easily, personalize their workplace and have more control over their environment (Appendix D).

Germans are more likely than the global average to describe their workplaces as “convivial” (Appendix L). Yet Germans were more likely than the global average to rate their workplaces as “stressful,” “constricting” and “impersonal,” and less likely to describe them as “calming,” “innovative” or “stimulating” (Appendix L).

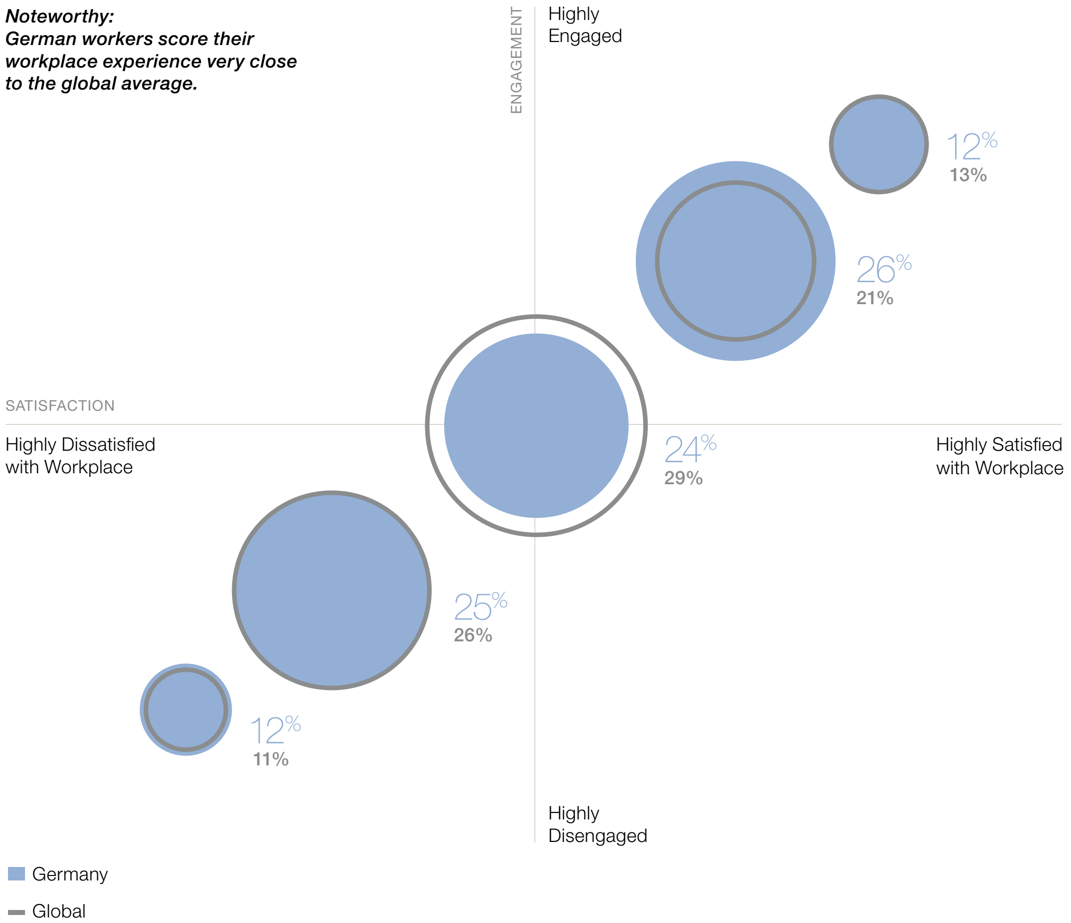
To boost engagement levels in Germany, leaders may want to consider ways to create a more diverse range of spaces from which employees can choose to work and implement a technology strategy to support that behavior. German employees rate their ability to choose where they want to work and their ability to access private spaces below the global average. This could indicate that the majority of employees who occupy shared private offices may not feel they have adequate options for privacy. Giving employees more choices for where they want to work can enable higher levels of control over their work experience, which can support efforts to improve engagement.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-DE

***Noteworthy:* German workers score their workplace experience very close to the global average.**



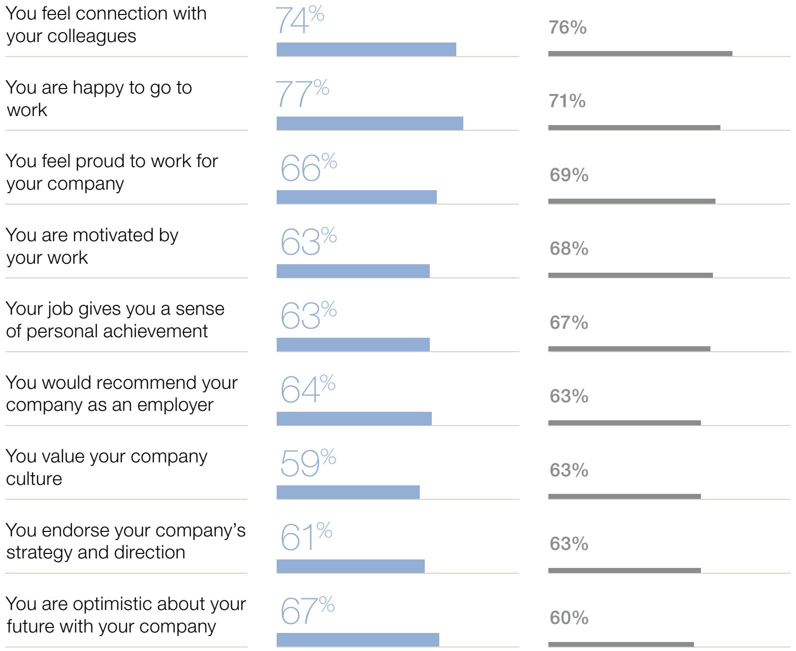
This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-DE

Noteworthy: *Although Germans report they are happy to go to work, they score below the norm when asked if they are motivated by their work, value their company culture or get a sense of personal achievement from their jobs.*



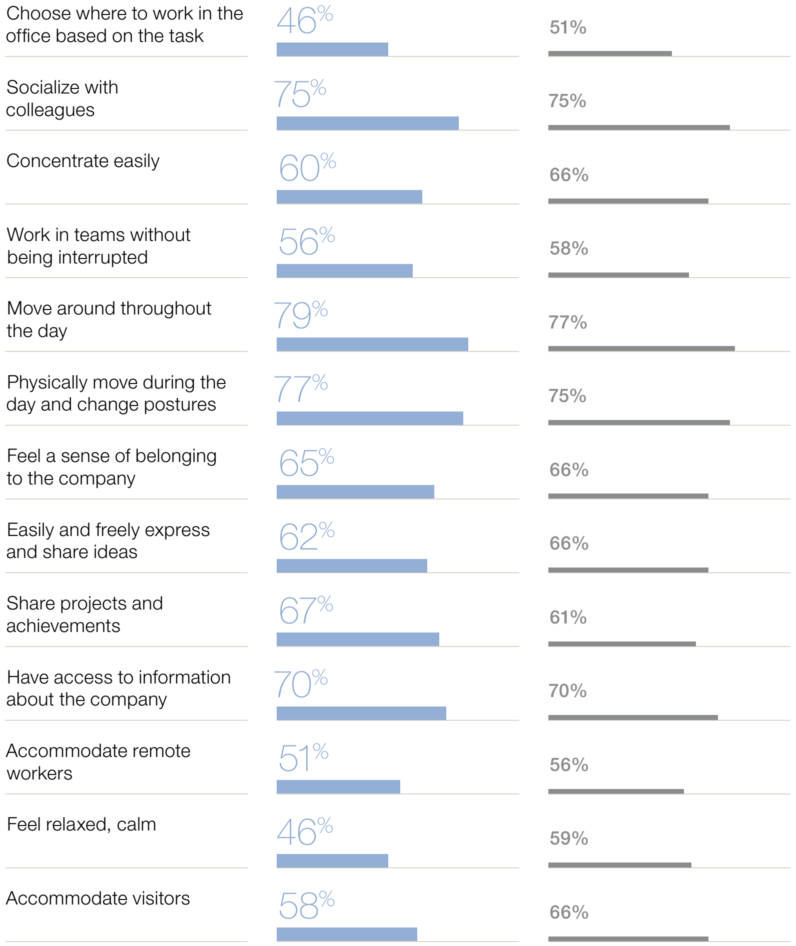
Do you agree with each of the following statements? (% agree)	Germany	Global
You feel connection with your colleagues	74%	76%
You are happy to go to work	77%	71%
You feel proud to work for your company	66%	69%
You are motivated by your work	63%	68%
Your job gives you a sense of personal achievement	63%	67%
You would recommend your company as an employer	64%	63%
You value your company culture	59%	63%
You endorse your company's strategy and direction	61%	63%
You are optimistic about your future with your company	67%	60%

Workplace Satisfaction Metrics

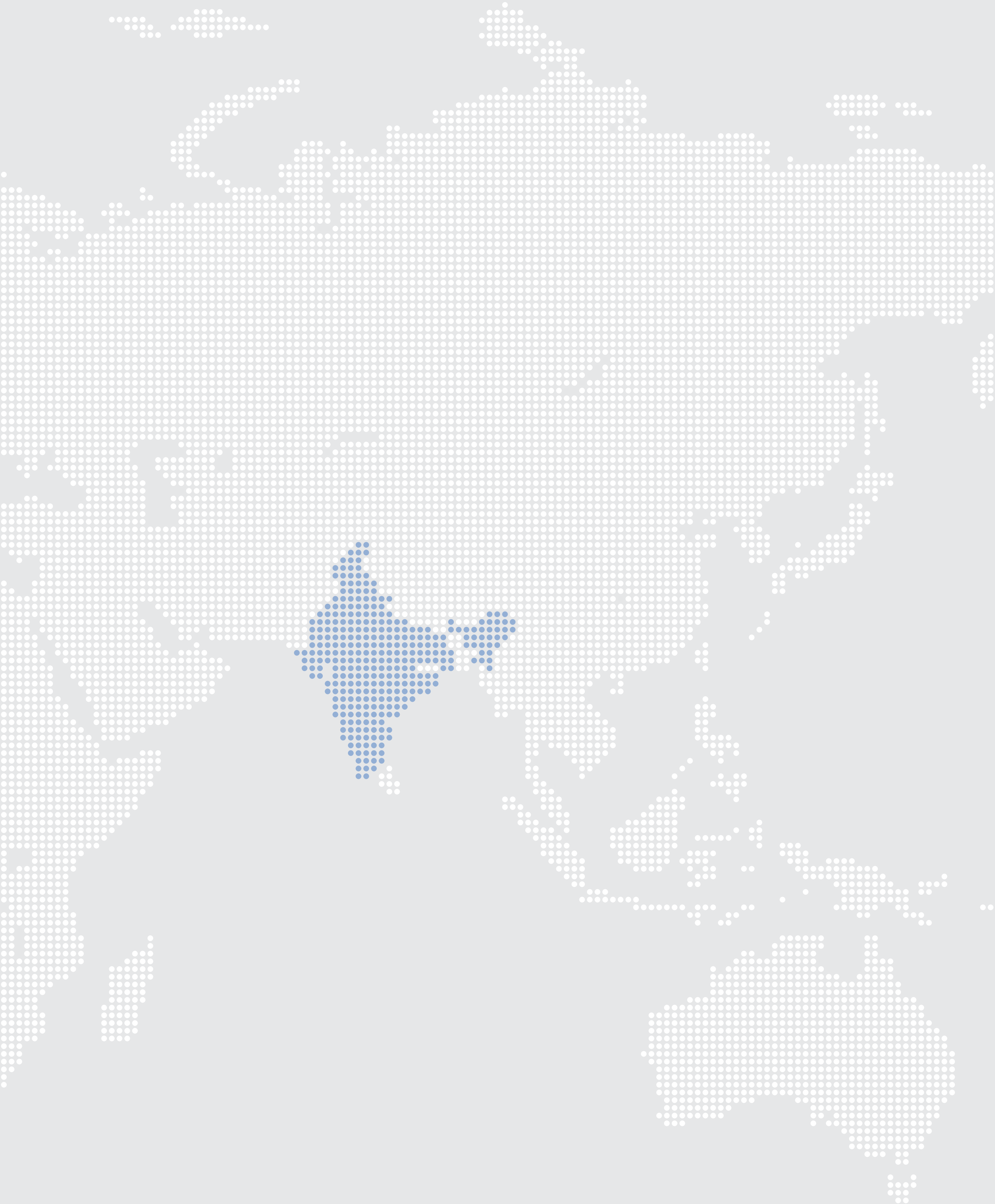
Employee Attitudes Toward Work Environment

FIGURE 11-DE

Noteworthy: *For almost every workplace satisfaction metric, Germans rate their offices below the global average.*



Does your work environment allow you to: (% agree)	Germany	Global
Choose where to work in the office based on the task	46%	51%
Socialize with colleagues	75%	75%
Concentrate easily	60%	66%
Work in teams without being interrupted	56%	58%
Move around throughout the day	79%	77%
Physically move during the day and change postures	77%	75%
Feel a sense of belonging to the company	65%	66%
Easily and freely express and share ideas	62%	66%
Share projects and achievements	67%	61%
Have access to information about the company	70%	70%
Accommodate remote workers	51%	56%
Feel relaxed, calm	46%	59%
Accommodate visitors	58%	66%



India

IN

	India	Global
Highly Engaged and Highly Satisfied	28%	13%
Highly Disengaged and Highly Dissatisfied	4%	11%

Participants	802			
Gender	67% Male	33% Female		
Age	48% 18–34	32% 35–44	14% 45–54	6% 55+
Job Title	18% Senior manager 19% Technician / associate		53% Manager 10% Clerk + service / sales	

The Workplace in India

Workplaces in India tend to be enclosed, private offices for individual work, combined with adequate shared spaces.

Most work environments are a blend of individual offices and open plan (49 percent), and a large number are entirely private offices (37 percent). Just 14 percent are configured to be entirely open plan. Only Mexico, the United Arab Emirates and Saudi Arabia have fewer. Seventy percent of India's employees occupy either a private or shared private office at work. Culturally, having a workspace of one's own, even if it is compact and modest, is a signal of belonging and importance, which may explain the overall high degree of workplace satisfaction.

For employees in one of the world's most densely populated countries, the workplace can often feel like a haven from the congestion of everyday life at home and on busy streets. In fact, 73 percent of Indians say their work environment allows them to feel relaxed and calm, which is significantly higher than in most other countries (Appendix L).

Indian workplaces are adequately equipped with shared spaces, such as meeting rooms and cafeterias or canteens. Indian employees also have the most access to sports or exercise facilities (43 percent compared to 22 percent globally).

India is noteworthy for its extremely positive employee perceptions about the workplace. While the places where people work may not be better than offices in other countries, many Indian employees' expectations may be shaped by their comparatively modest living conditions.

Key

◉ ***Noteworthy***

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-IN

◉ ***Noteworthy: Most offices in India are comprised of enclosed spaces and open-plan workstations.***

Which of the following describes your office layout?	**India**	**Global**
Entirely Open Plan	14%	23%
Entirely Individual Offices	37%	31%
Combination Open Plan and Individual Offices	49%	46%

Individual Workspaces

FIGURE 2-IN

◉ ***Noteworthy: Individual and shared private offices are more common in India than open plan workspaces or nomadic work.***

Which of the following describes your individual workspace?	**India**	**Global**
Individual Private Office	29%	23%
Shared Private Office	41%	37%
Open Plan, Assigned Space	27%	33%
Nomadic	3%	8%

Access to Shared Areas

FIGURE 3-IN

◉ ***Noteworthy: Indian workers give positive scores to the range of spaces offered by their employers.***

Does your workplace have: (% agree)	**India**	**Global**
Sufficient Meeting Rooms	▲ 83%	70%
Cafeteria / Canteen	▲ 82%	61%
Private Space	▲ 71%	53%
Relaxation Areas	62%	45%
Sports / Exercise Facilities	▲ 43%	22%

▲ Highest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-IN

◉ ***Noteworthy:***
Employer-provided mobile technology in the workplace is higher than in any other country in this study.

Does your employer provide you with: (% agree)	**India**	**Global**
Desktop Computer	84%	80%
Landline Telephone	87%	86%
Laptop	▲ 56%	39%
Mobile Phone	▲ 64%	39%
Tablet	▲ 27%	14%
Videoconferencing	▲ 56%	35%

Remote Work

FIGURE 5-IN

◉ ***Noteworthy:***
Indian employees say they work remotely far more often than their counterparts in other countries.

How often do you work away from the office?	India	Global
Every day	20%	9%
Sometimes	55%	36%
Never	25%	55%

▲ Highest score in the study

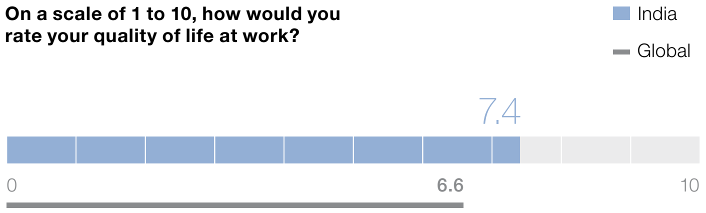
How Workers Feel

Quality of Life at Work

FIGURE 6-IN

◉ ***Noteworthy:***
Indian workers rate their quality of life at work unusually high. Only Mexican workers rank higher on this important attribute.

On a scale of 1 to 10, how would you rate your quality of life at work?

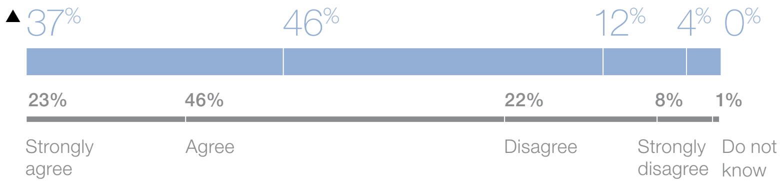


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-IN

Do you like your work environment?
(% agree)

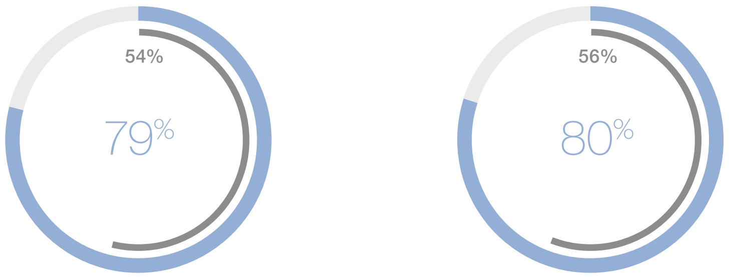


Perception of Company Culture

FIGURE 8-IN

◉ ***Noteworthy:***
Indian workers rate their organizations well above the global average for key aspects of company culture.

Would you say that your company:
(% agree)



Takes a genuine interest in the wellbeing of employees

Recognizes and values its employees

See Appendix J for all culture metrics.

▲ Highest score in the study

The Link Between Engagement and Workplace Satisfaction

Indians overwhelmingly rank as the most engaged and satisfied among those included in this study. They are happy to go to work, value their company culture and feel a sense of connection to colleagues. They describe their offices as innovative (Appendix L). One area of concern, however, is employees' ability to move around their workplace easily throughout the day.

Indian workers' generally positive sentiments may reflect a passion for the opportunities available to workers in a growth market. In India's highly competitive and fluid job market, providing a desirable workplace can be a powerful strategy for attracting, retaining and engaging the talent that can help an organization thrive.

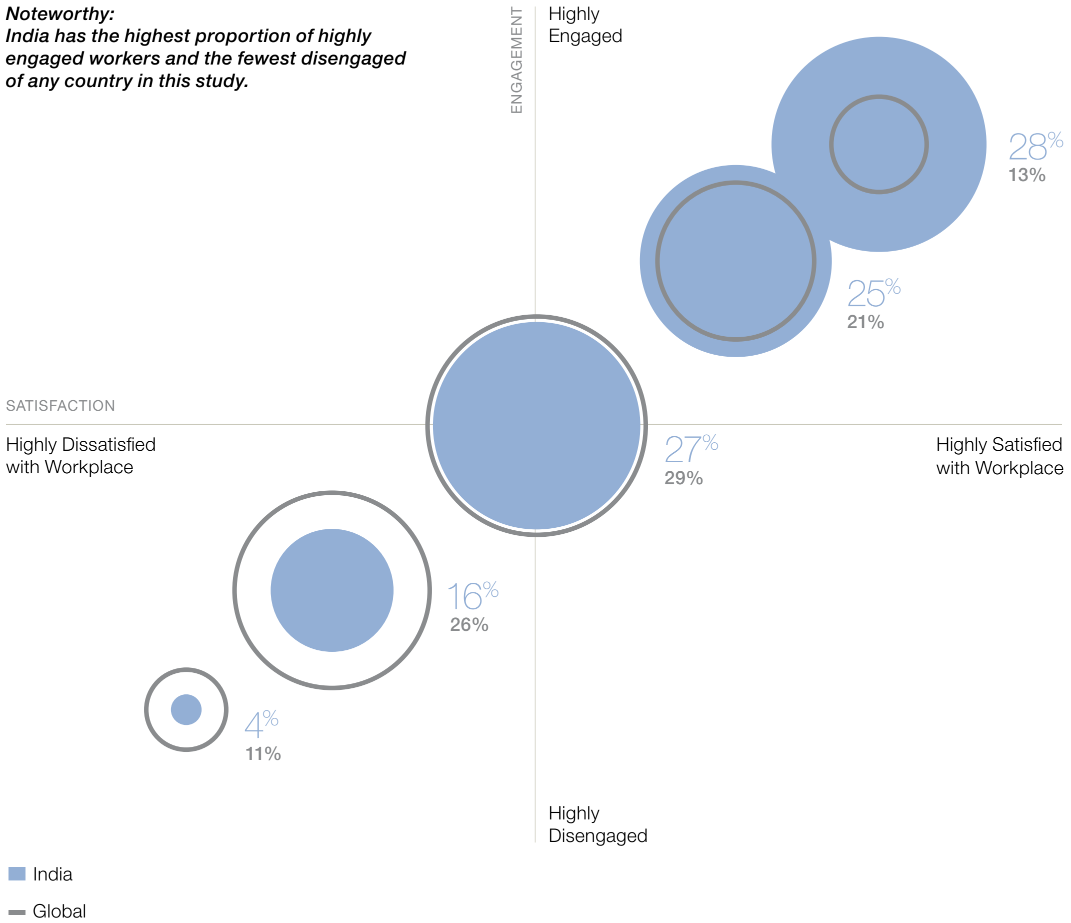
With this in mind, companies that want to compete on a global scale can leverage their workplace to shape new employee behaviors to reinforce their brand and organizational culture. Steelcase observational research in India suggests that employees are looking for ways to seek greater levels of privacy and more agile ways to collaborate with one or two colleagues near their workstation or with larger groups in informal settings. Even in compact workplaces, organizations may want to explore ways to provide a more diverse range of spaces to provide employees a greater sense of choice and control. This, in turn, can become a competitive advantage for the company.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-IN

***Noteworthy:* India has the highest proportion of highly engaged workers and the fewest disengaged of any country in this study.**



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-IN

◉ ***Noteworthy:*** *Indian workers rank well above global averages on all engagement metrics, scoring higher than all other countries in this study.*

Do you agree with each of the following statements? (% agree)	**India**	**Global**
You feel connection with your colleagues	▲ 88%	76%
You are happy to go to work	▲ 85%	71%
You feel proud to work for your company	▲ 83%	69%
You are motivated by your work	▲ 83%	68%
Your job gives you a sense of personal achievement	▲ 82%	67%
You would recommend your company as an employer	▲ 80%	63%
You value your company culture	▲ 85%	63%
You endorse your company's strategy and direction	▲ 82%	63%
You are optimistic about your future with your company	▲ 82%	60%

▲ Highest score in the study

Workplace Satisfaction Metrics

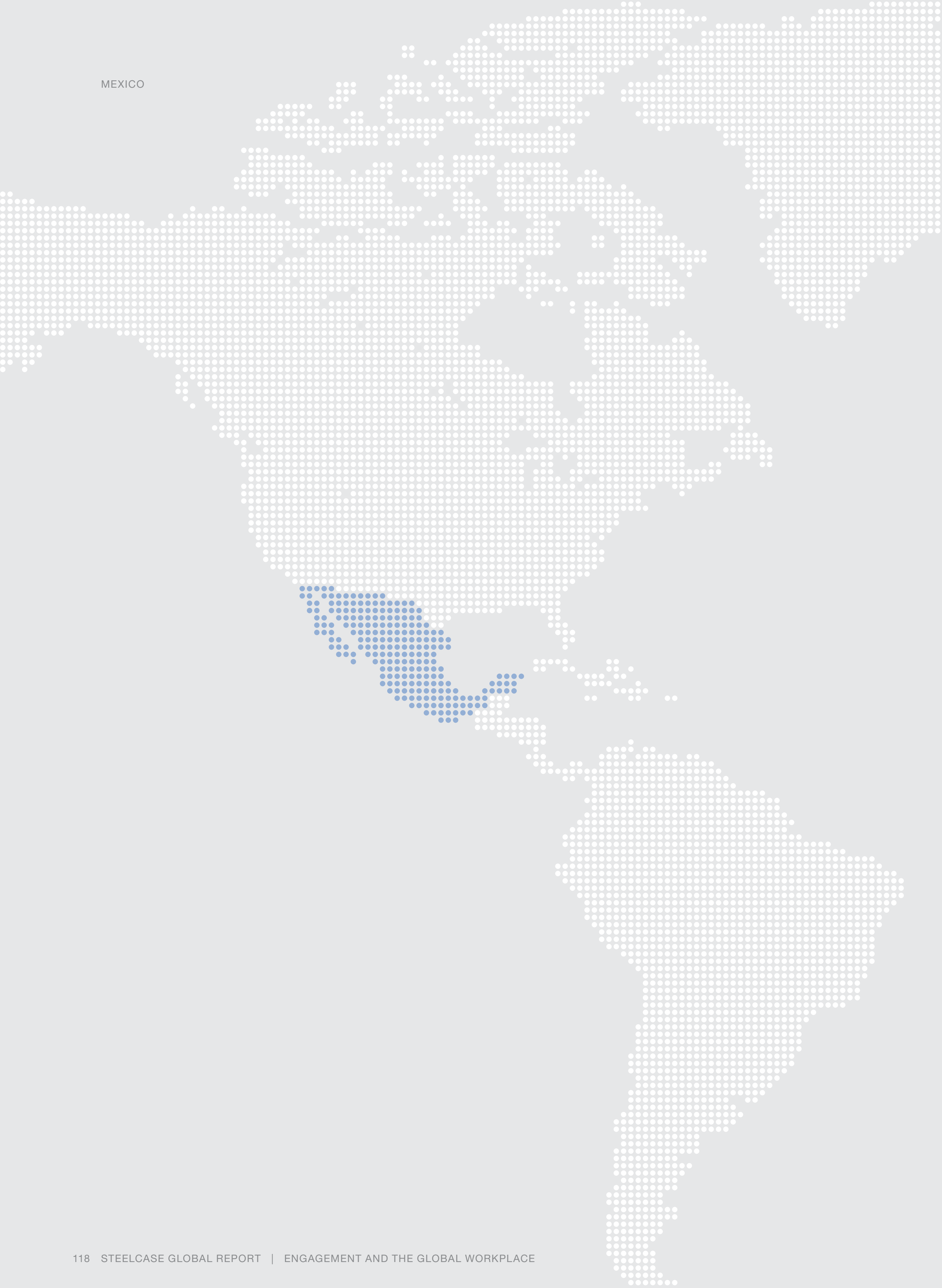
Employee Attitudes Toward Work Environment

FIGURE 11-IN

◉ ***Noteworthy:*** *Indian employees rate every workplace satisfaction metric significantly above global averages, except for being able to move around throughout the day.*

Does your work environment allow you to: (% agree)	**India**	**Global**
Choose where to work in the office based on the task	69%	51%
Socialize with colleagues	82%	75%
Concentrate easily	▲ 81%	66%
Work in teams without being interrupted	▲ 79%	58%
Move around throughout the day	76%	77%
Physically move during the day and change postures	78%	75%
Feel a sense of belonging to the company	▲ 80%	66%
Easily and freely express and share ideas	▲ 81%	66%
Share projects and achievements	78%	61%
Have access to information about the company	78%	70%
Accommodate remote workers	67%	56%
Feel relaxed, calm	▲ 73%	59%
Accommodate visitors	77%	66%

▲ Highest score in the study



Mexico

	Mexico	Global
Highly Engaged and Highly Satisfied	22%	13%
Highly Disengaged and Highly Dissatisfied	6%	11%

Participants	796			
Gender	52% Male	48% Female		
Age	48% 18–34	30% 35–44	16% 45–54	6% 55+
Job Title	6% Senior manager	15% Manager		
	29% Technician / associate	50% Clerk + service / sales		

The Workplace in Mexico

Office layouts in Mexico are almost always a blend of open and private offices. Only 10 percent of organizations have adopted entirely open-plan work environment (Figure 1-MX), which is well below the global average. Most employees either share a private office or have an assigned space in open environments, and the adoption of nomadic workstyles is low. Hierarchy is an important part of the work culture, yet only 20 percent of employees occupy private offices, slightly below global averages and perhaps signaling the start of a shift.

Mexican offices are far less likely than the global average to include shared spaces such as relaxation areas and meeting rooms. Although overall sentiment about the workplace is mostly positive, employees are less enthusiastic about their individual workspace, rating their office furniture and the size of their workspace lower than global averages (Appendix K). Workers are more likely than average to say their offices are stimulating and less likely to describe them as impersonal (Appendix L).

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-MX

◉ ***Noteworthy:** Work environments in Mexico are predominantly a combination of open plan and individual offices.*

Which of the following describes your office layout?		**Mexico**	**Global**
Entirely Open Plan		10%	23%
Entirely Individual Offices		27%	31%
Combination Open Plan and Individual Offices	▲	63%	46%

Individual Workspaces

FIGURE 2-MX

◉ ***Noteworthy:** The majority of Mexicans work in either a private or shared private office.*

Which of the following describes your individual workspace?	**Mexico**	**Global**
Individual Private Office	20%	23%
Shared Private Office	39%	37%
Open Plan, Assigned Space	36%	33%
Nomadic	5%	8%

Access to Shared Areas

FIGURE 3-MX

◉ ***Noteworthy:** Mexican workers rank least likely to have a sufficient number of meeting spaces. They also fall below the global average in access to private spaces and spaces to relax and rejuvenate.*

Does your workplace have: (% agree)		**Mexico**	**Global**
Sufficient Meeting Rooms	▼	60%	70%
Cafeteria / Canteen		74%	61%
Private Space		50%	53%
Relaxation Areas		32%	45%
Sports / Exercise Facilities		22%	22%

▲ Highest score in the study

▼ Lowest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-MX

◉ ***Noteworthy:* Employer-provided mobile technology adoption in the workplace is high and access to videoconferencing equipment is above average.**

Does your employer provide you with: (% agree)	**Mexico**	**Global**
Desktop Computer	78%	80%
Landline Telephone	77%	86%
Laptop	40%	39%
Mobile Phone	47%	39%
Tablet	19%	14%
Videoconferencing	41%	35%

Remote Work

FIGURE 5-MX

◉ ***Noteworthy:* The majority of Mexicans work in the office exclusively—Mexico has the fourth-highest number of employees in the world who never work remotely (67 percent).**

How often do you work away from the office?	**Mexico**	**Global**
Every day	10%	9%
Sometimes	23%	36%
Never	67%	55%

How Workers Feel

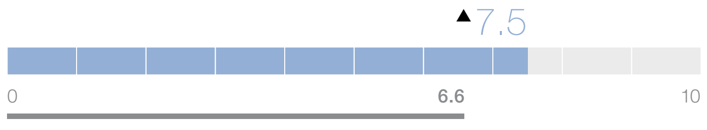
Quality of Life at Work

FIGURE 6-MX

◉ ***Noteworthy:* Mexican employees report the highest quality of life at work among all 17 countries included in the study.**

On a scale of 1 to 10, how would you rate your quality of life at work?

🟦 Mexico
▬ Global

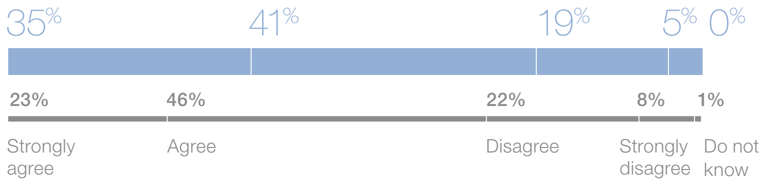


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-MX

Do you like your work environment?
(% agree)



Perception of Company Culture

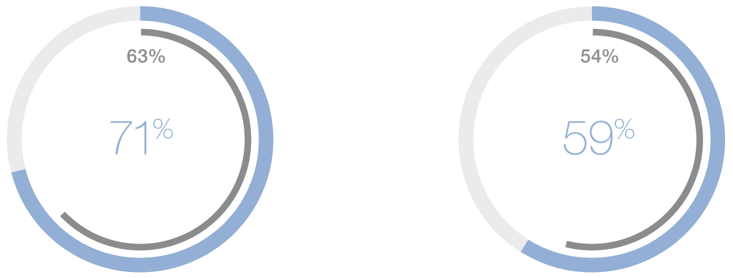
FIGURE 8-MX

◉ ***Noteworthy:* Mexican employees report high regard for how their organization treats them, some of the highest scores in the study.**

Would you say that your company:
(% agree)

Gets the best out of you

Takes a genuine interest in the wellbeing of employees



See Appendix J for all culture metrics.

▲ Highest score in the study

The Link Between Engagement and Workplace Satisfaction

Mexican workers are some of the most engaged in the world. They score above global averages on nearly every engagement metric and are highly satisfied with their workplace experience. In fact, only India has more highly engaged employees than Mexico. Notably, 81 percent of Mexican workers report they are generally happy to go to work and 78 percent say their job gives them a sense of personal satisfaction. They frequently describe their workplaces as “stimulating” (Appendix L).

Yet, despite these positive sentiments, organizations in Mexico may want to consider why employees rate their sense of connection with colleagues lower than the global average, and why they are less likely to say the company encourages teamwork and collaboration.

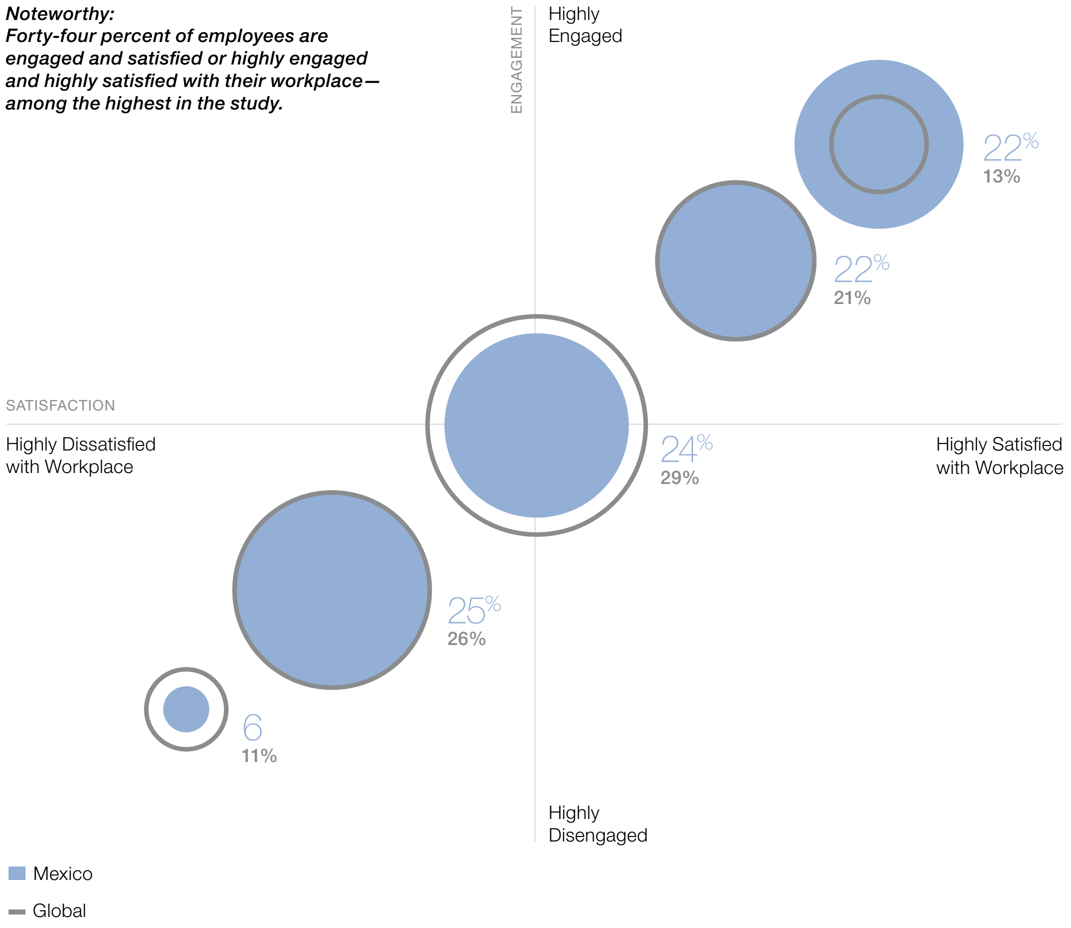
The data show that sufficient meeting spaces are less prevalent in Mexico, as are other shared spaces. This could be limiting employees’ ability to collaborate and build trust relationships with colleagues. As the country’s economy grows and companies compete on a global scale, the ability to have employees working effectively as a team becomes even more critical. Companies may want to explore ways to offer a range of spaces that support collaborative behaviors.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-MX

◉ ***Noteworthy:***
Forty-four percent of employees are engaged and satisfied or highly engaged and highly satisfied with their workplace—among the highest in the study.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-MX

◉ ***Noteworthy:* Mexican employees score above global averages on nearly every engagement metric.**

Do you agree with each of the following statements? (% agree)	Mexico	Global
You feel connection with your colleagues	73%	76%
You are happy to go to work	81%	71%
You feel proud to work for your company	74%	69%
You are motivated by your work	70%	68%
Your job gives you a sense of personal achievement	78%	67%
You would recommend your company as an employer	70%	63%
You value your company culture	66%	63%
You endorse your company's strategy and direction	58%	63%
You are optimistic about your future with your company	64%	60%

Workplace Satisfaction Metrics

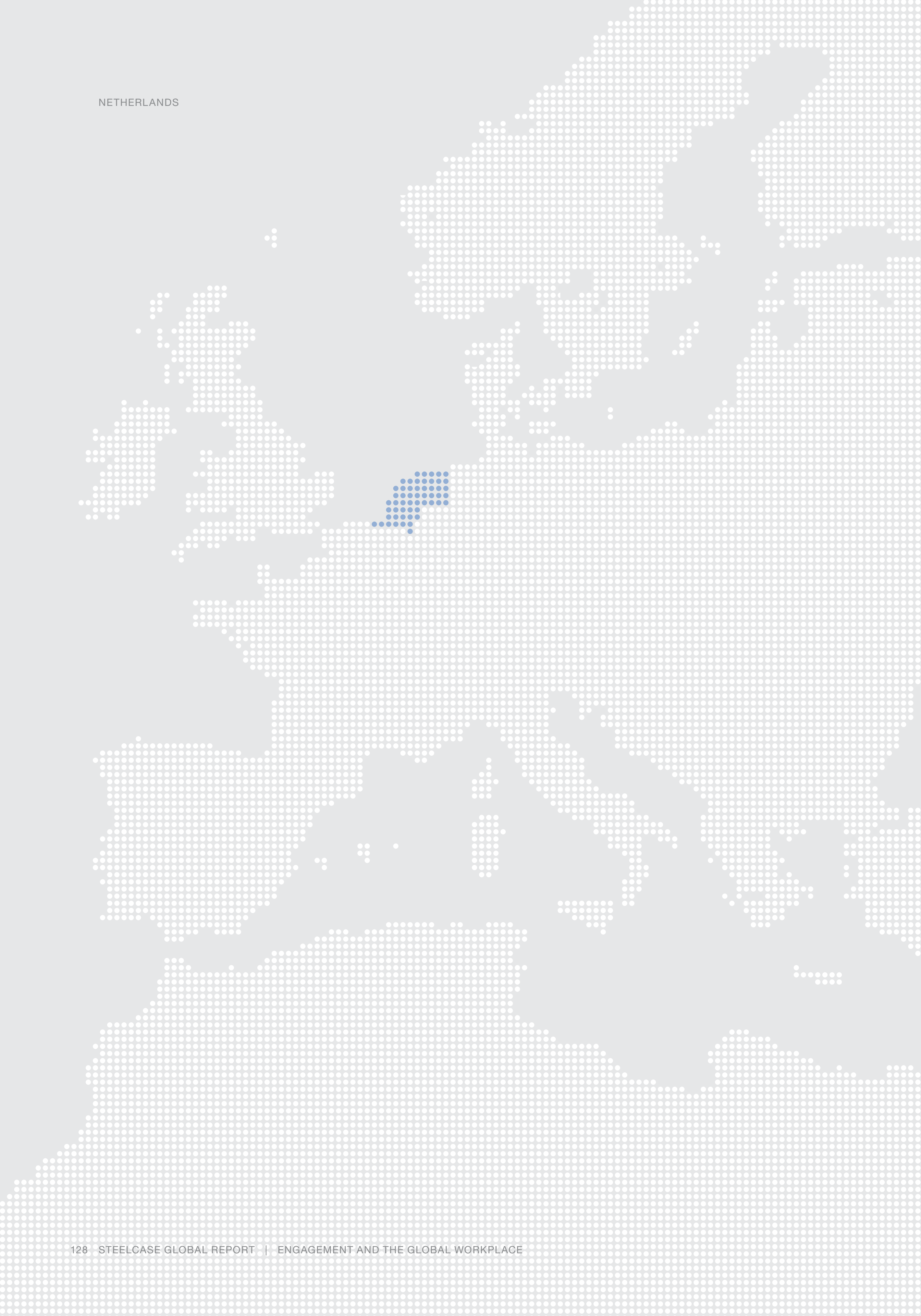
Employee Attitudes Toward Work Environment

FIGURE 11-MX

◉ ***Noteworthy:* Mexican employees are generally satisfied with their work environments, scoring above average on most workplace satisfaction metrics.**

Does your work environment allow you to: (% agree)	Mexico	Global
Choose where to work in the office based on the task	54%	51%
Socialize with colleagues	77%	75%
Concentrate easily	75%	66%
Work in teams without being interrupted	64%	58%
Move around throughout the day	82%	77%
Physically move during the day and change postures	81%	75%
Feel a sense of belonging to the company	74%	66%
Easily and freely express and share ideas	69%	66%
Share projects and achievements	65%	61%
Have access to information about the company	68%	70%
Accommodate remote workers	66%	56%
Feel relaxed, calm	65%	59%
Accommodate visitors	76%	66%

MX



Netherlands

	Netherlands	**Global**
Highly Engaged and Highly Satisfied	7%	13%
Highly Disengaged and Highly Dissatisfied	5%	11%

Participants	407			
Gender	52% Male	48% Female		
Age	25% 18–34	29% 35–44	31% 45–54	15% 55+
Job Title	9% Senior manager		30% Manager	
	24% Technician / associate		37% Clerk + service / sales	

The Workplace in the Netherlands

Offices in the Netherlands are some of the most likely to reflect new workplace strategies.

The data show Dutch offices to be some of the most progressive in this study. While there is a diverse mix of work environments, the Dutch lead the world in their emphasis on shared open spaces and mobility within the office. More Dutch workers than anywhere else in the world are mobile within the office, without an assigned desk. At the same time, more than one-third of organizations (36 percent) consist of entirely private offices.

Work environments are functional, flexible and democratic in their design. Ninety-four percent of workers say they have exposure to natural light in the office, tied with Germany in highest ranking for this attribute. A very high number, 86 percent, are able to adjust their furniture to suit their needs. Extensive health and safety regulations assure access to daylight, low noise levels and supportive ergonomics, indicative of the premium placed on wellbeing in the Dutch workplace. The ability to personalize their space is below the global average, however, possibly due to the large number of workers with unassigned workspaces (Appendix D).

Workers in the Netherlands are some of the most likely to say that they have access to a variety of shared spaces that support focused work and social activity. However, they are less likely to have spaces for recreation—which may be a result of being a geographically small country with limited real estate and high numbers of people who cycle to work.

Key ◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-NL

◉ ***Noteworthy:* Dutch workplaces lead the world in their emphasis on shared open-plan spaces yet there are still many workplaces that consist of entirely individual offices.**

Which of the following describes your office layout?	**Netherlands**	**Global**
Entirely Open Plan	28%	23%
Entirely Individual Offices	36%	31%
Combination Open Plan and Individual Offices	36%	46%

Individual Workspaces

FIGURE 2-NL

◉ ***Noteworthy:* More Dutch workers than anywhere else in the world are mobile within the office, with no assigned desk.**

Which of the following describes your individual workspace?	**Netherlands**	**Global**
Individual Private Office	▼ 11%	23%
Shared Private Office	40%	37%
Open Plan, Assigned Space	27%	33%
Nomadic	▲ 22%	8%

Access to Shared Areas

FIGURE 3-NL

◉ ***Noteworthy:* Although most Dutch workers believe their organization is interested in their wellbeing, an almost equal number do not believe their company gets the best out of them.**

Does your workplace have: (% agree)	**Netherlands**	**Global**
Sufficient Meeting Rooms	74%	70%
Cafeteria / Canteen	80%	61%
Private Space	64%	53%
Relaxation Areas	35%	45%
Sports / Exercise Facilities	19%	22%

▲ Highest score in the study

▼ Lowest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-NL

Noteworthy:
The Dutch are using far fewer-than-average desktop computers and landline phones at work. The adoption of mobile technology is consistent with the bias in Dutch office design toward greater mobility and shared spaces.

Does your employer provide you with: (% agree)	**Netherlands**	**Global**
Desktop Computer	74%	80%
Landline Telephone	▼ 70%	86%
Laptop	39%	39%
Mobile Phone	47%	39%
Tablet	11%	14%
Videoconferencing	31%	35%

Remote Work

FIGURE 5-NL

Noteworthy:
Despite being adopters of mobile technology, work still happens primarily in the office in the Netherlands. A significantly higher-than-average number of employees never work remotely.

How often do you work away from the office?	**Netherlands**	**Global**
Every day	3%	9%
Sometimes	32%	36%
Never	65%	55%

▼ Lowest score in the study

How Workers Feel

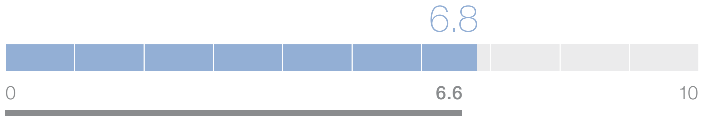
Quality of Life at Work

FIGURE 6-NL

Noteworthy:
Dutch workers rate their quality of life at work above average. This is moderated by fairly high expectations of their employers and work environments.

On a scale of 1 to 10, how would you rate your quality of life at work?

🟦 Netherlands
▬ Global

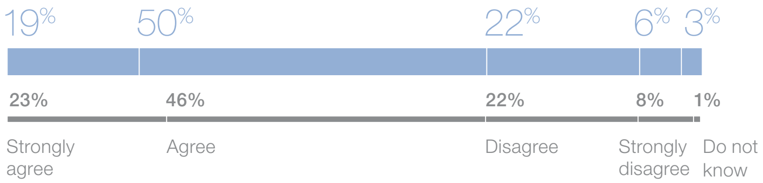


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-NL

Do you like your work environment?
(% agree)



Perception of Company Culture

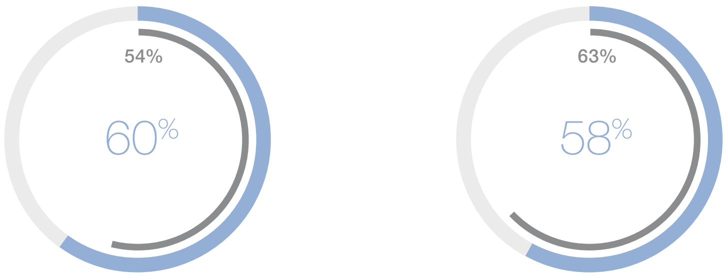
FIGURE 8-NL

Noteworthy:
Although most Dutch workers believe their organization is interested in their wellbeing, an almost equal number don't believe their company gets the best out of them.

Would you say that your company:
(% agree)

Takes a genuine interest in the wellbeing of employees

Gets the best out of you



See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

Overall, workers in the Netherlands are less satisfied with their workplace and less engaged than the global average, and the number of highly engaged workers is below average. Fortunately, so is the number of highly disengaged employees. Dutch workers score above the global averages on most engagement metrics with significantly higher scores for being happy to go to work, feeling motivated and attaining a sense of personal achievement from their work. Yet they were less likely than average to feel a sense of connection to the company culture, to be able to share individual or team work, and to be able to collaborate without interruptions (Figure 6-NL). The number of workers who say they like their office is close to the global average, but they are less likely to describe it as "nice-looking" and are more likely to say it is "ugly" (Appendix L).

The Netherlands also has the highest number of workers in the world with neutral engagement and workplace satisfaction levels. While it's possible that this is due to cultural norms and higher-than-average expectations, the data signal a need for organizations to address employees' attitudes and beliefs about their work experience.

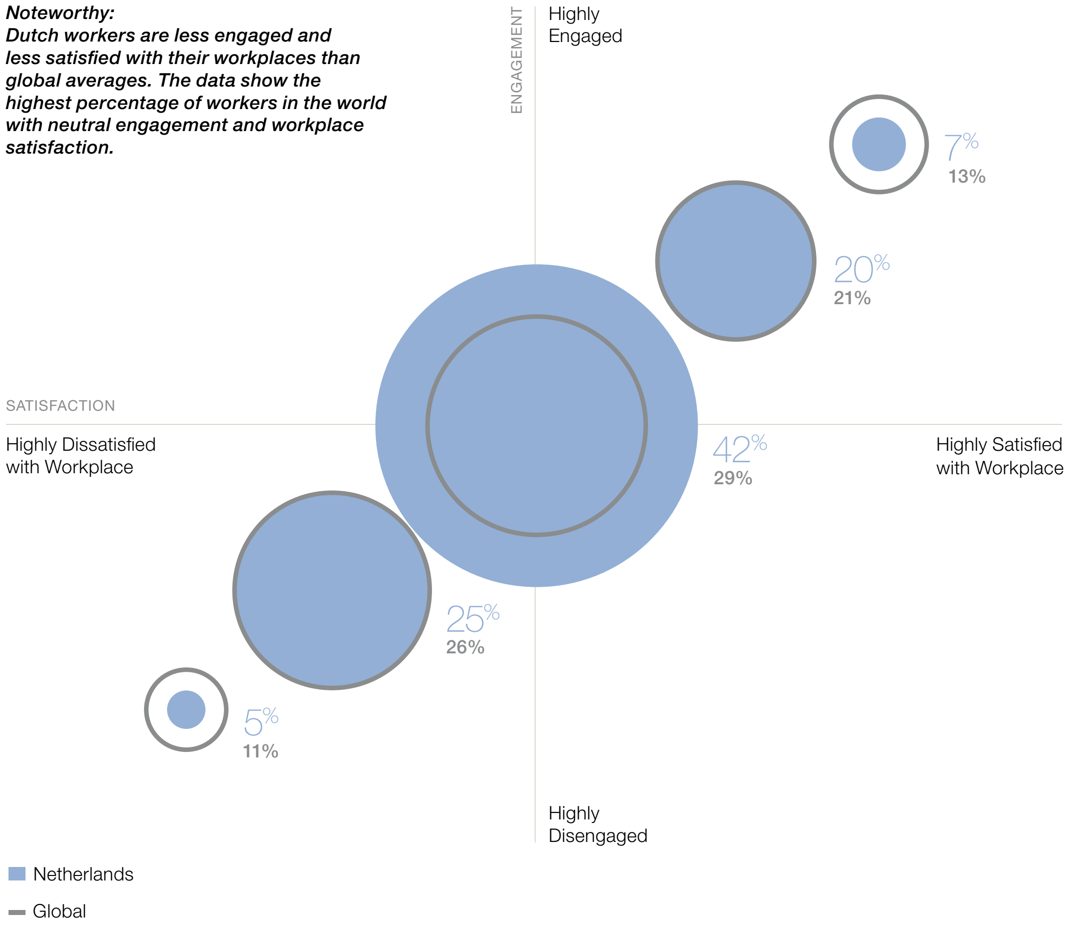
To develop strategies for increasing employee engagement, organizations may want to focus on creating a diverse range of spaces for collaboration that can help people build deeper connections with colleagues and the company overall. These spaces can be designed to help people share their ideas and work progress, and also allow teams to work with fewer disruptions.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-NL

***Noteworthy:* Dutch workers are less engaged and less satisfied with their workplaces than global averages. The data show the highest percentage of workers in the world with neutral engagement and workplace satisfaction.**



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-NL

◉ ***Noteworthy:* Dutch workers score above global averages on almost all engagement metrics.**

Do you agree with each of the following statements? (% agree)	**Netherlands**	**Global**
You feel connection with your colleagues	76%	76%
You are happy to go to work	81%	71%
You feel proud to work for your company	71%	69%
You are motivated by your work	79%	68%
Your job gives you a sense of personal achievement	78%	67%
You would recommend your company as an employer	65%	63%
You value your company culture	64%	63%
You endorse your company's strategy and direction	62%	63%
You are optimistic about your future with your company	63%	60%

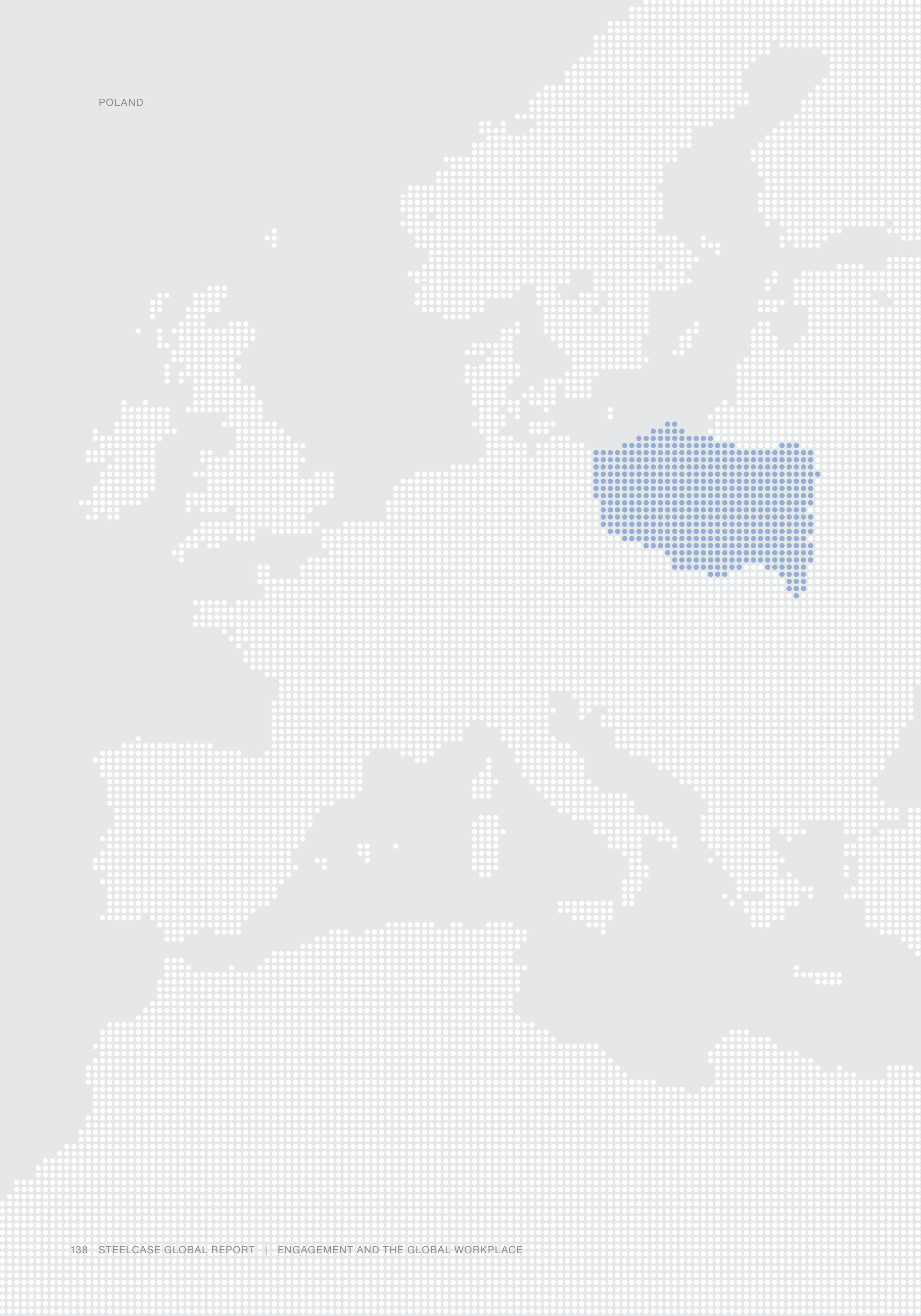
Workplace Satisfaction Metrics

Employee Attitudes Toward Work Environment

FIGURE 11-NL

◉ ***Noteworthy:* Dutch workers rate their workplace experience positively, scoring near or just above global averages on most metrics.**

Does your work environment allow you to: (% agree)	**Netherlands**	**Global**
Choose where to work in the office based on the task	52%	51%
Socialize with colleagues	79%	75%
Concentrate easily	70%	66%
Work in teams without being interrupted	57%	58%
Move around throughout the day	83%	77%
Physically move during the day and change postures	79%	75%
Feel a sense of belonging to the company	73%	66%
Easily and freely express and share ideas	69%	66%
Share projects and achievements	59%	61%
Have access to information about the company	70%	70%
Accommodate remote workers	63%	56%
Feel relaxed, calm	63%	59%
Accommodate visitors	64%	66%



Poland

	Poland	**Global**
Highly Engaged and Highly Satisfied	13%	13%
Highly Disengaged and Highly Dissatisfied	11%	11%

Participants	832			
Gender	44% Male	56% Female		
Age	42% 18–34	30% 35–44	20% 45–54	8% 55+
Job Title	4% Senior manager	27% Manager		
	24% Technician / associate	45% Clerk + service / sales		

The Workplace in Poland

The tradition of private offices remains strong in Poland. The majority of workplaces are designed with all individual offices or a combination of individual offices and open-plan spaces. Most people work in shared private offices; less than one-quarter have an assigned workspace in an open-plan environment. It's less common for organizations to offer team spaces, spaces for recreation, rejuvenation or moments of privacy. Polish workplaces offer the fewest spaces for employees to relax or rejuvenate in the study (Figure 3-PL).

Polish workers are equal to the global norm for agreeing that they like their offices, but they are least likely in the world to say their workplace is "nice looking," and the most common term workers use to describe their office is "stressful" (Appendix L).

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout*

FIGURE 1-PL

◉ ***Noteworthy:* Entirely open-plan workplaces exist in only one-fifth of all Polish organizations.**

Which of the following describes your office layout?	**Poland**	**Global**
Entirely Open Plan	20%	23%
Entirely Individual Offices	40%	31%
Combination Open Plan and Individual Offices	41%	46%

*Percentages do not total 100% due to rounding.

Individual Workspaces

FIGURE 2-PL

◉ ***Noteworthy:* The vast majority of Polish employees work in either an individual or shared private office.**

Which of the following describes your individual workspace?	**Poland**	**Global**
Individual Private Office	26%	23%
Shared Private Office	45%	37%
Open Plan, Assigned Space	23%	33%
Nomadic	6%	8%

Access to Shared Areas

FIGURE 3-PL

◉ ***Noteworthy:* Polish workplaces are less likely than the global average to offer a range of shared public spaces.**

Does your workplace have: (% agree)	**Poland**	**Global**
Sufficient Meeting Rooms	64%	70%
Cafeteria / Canteen	42%	61%
Private Space	42%	53%
Relaxation Areas	▼ 19%	45%
Sports / Exercise Facilities	13%	22%

▼ Lowest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-PL

Noteworthy:
Mobile technology adoption in Polish workplaces is higher than the global norm, but fixed technologies still dominate.

Does your employer provide you with: (% agree)	**Poland**	**Global**
Desktop Computer	76%	80%
Landline Telephone	82%	86%
Laptop	42%	39%
Mobile Phone	47%	39%
Tablet	12%	14%
Videoconferencing	▼ 19%	35%

Remote Work

FIGURE 5-PL

Noteworthy:
Work happens primarily in the office, while adoption of mobile technology is higher than average (see above), suggesting that organizations may be encouraging greater mobility within the workplace.

How often do you work away from the office?	**Poland**	**Global**
Every day	6%	9%
Sometimes	34%	36%
Never	60%	55%

▼ Lowest score in the study

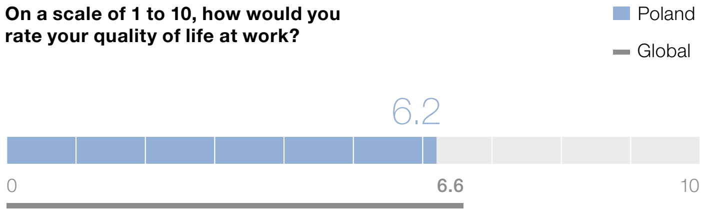
How Workers Feel

Quality of Life at Work

FIGURE 6-PL

Noteworthy:
Poland lags all but two countries in this study when it comes to quality of life at work. Only France and the Kingdom of Saudi Arabia scored lower.

On a scale of 1 to 10, how would you rate your quality of life at work?

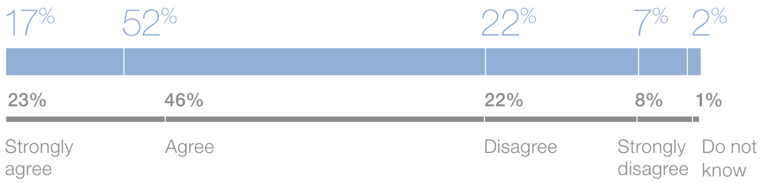


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-PL

Do you like your work environment?
(% agree)

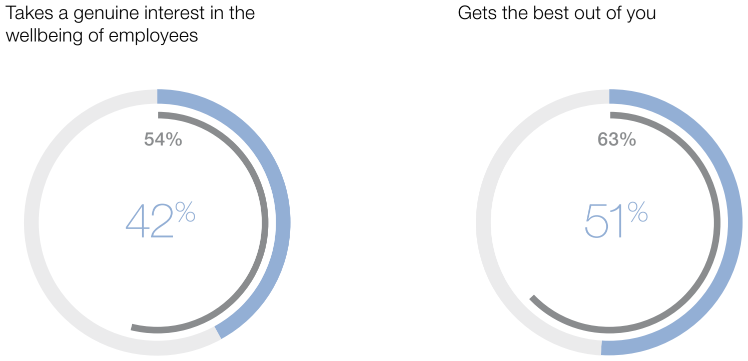


Perception of Company Culture

FIGURE 8-PL

Noteworthy:
Polish workers rank significantly below the global average on corporate culture metrics and rank second lowest in the world (tied with Belgium) in reporting if their company gets the best out of them.

Would you say that your company:
(% agree)


Takes a genuine interest in the wellbeing of employees

Gets the best out of you

See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

While overall engagement and satisfaction levels are close to global averages, digging deeper in the data shows that Polish workers rank their organizations below average on nearly all engagement metrics, indicating many opportunities for improvement. Notably, workers scored the lowest among all 17 nations in optimism about their future with their company, and they tied with Russia for being least likely to recommend their company as an employer and feeling a sense of connection with colleagues (Figure 6-PL). Polish workers also score well below average on their ability to easily share information and accomplishments (Figure 6-PL).

Conversely, these negative sentiments are moderated by more neutral-to-positive attitudes about their workplaces. In this regard, Poland and its neighbor Russia are outliers in the study, with higher workplace satisfaction levels than engagement. Polish leaders may want to explore this dichotomy more deeply in their own organizations to better inform their strategy for addressing employee engagement. Ironically, although Polish workers are less likely to say they have a sense of connection with colleagues, they are more likely to say they feel belonging with the culture.

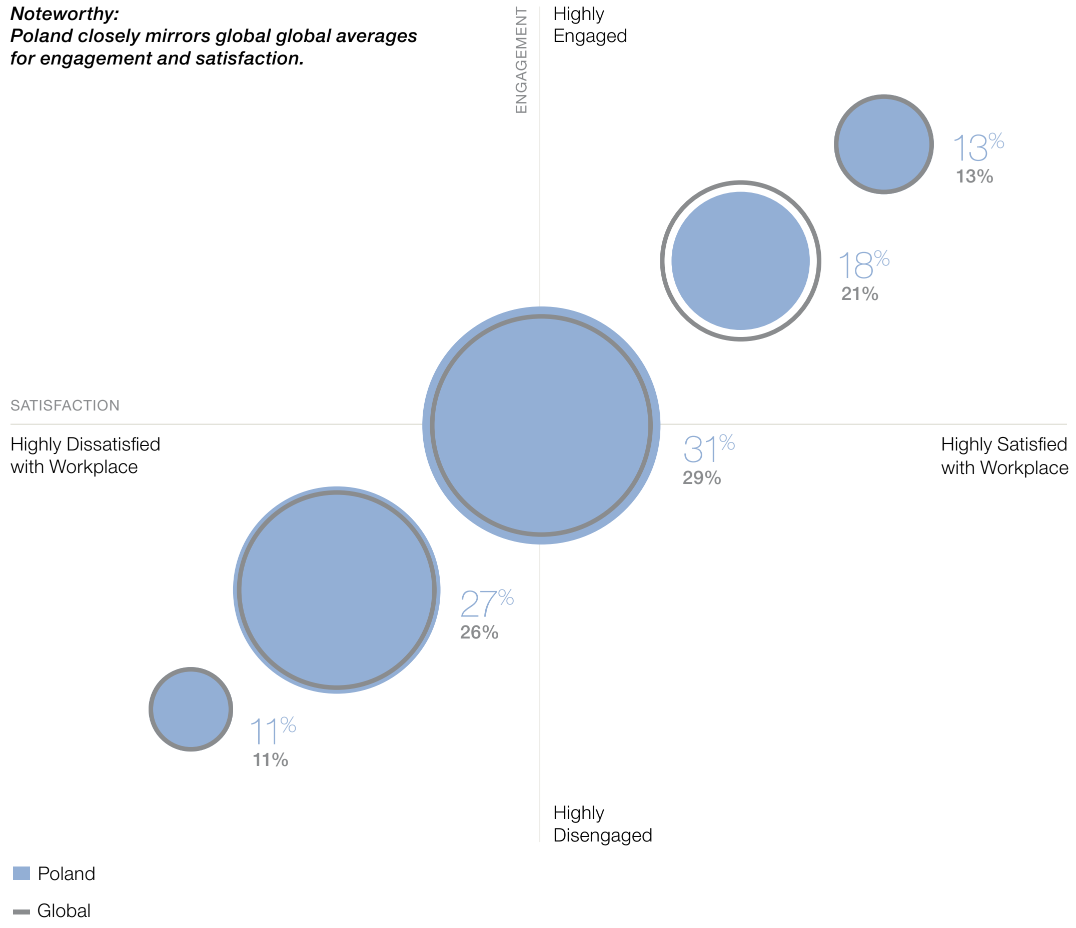
For organizations that seek to tap into Poland's well-educated and ambitious workforce, finding ways to make workers feel more valued as meaningful contributors to the organization's progress and success seems an open opportunity. One strategy could be to create relaxed spaces where employees can gather with leaders and co-workers to collaborate and share information about projects and the company overall. Designing places where people feel a sense of pride in the company and want to work can help improve engagement levels.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-PL

◉ ***Noteworthy:***
Poland closely mirrors global global averages for engagement and satisfaction.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-PL

◉ ***Noteworthy:* Workers in Poland score far below global averages on all engagement metrics—some of which are the lowest in the study.**

Do you agree with each of the following statements? (% agree)	**Poland**	**Global**
You feel connection with your colleagues	68%	76%
You are happy to go to work	61%	71%
You feel proud to work for your company	▼ 59%	69%
You are motivated by your work	58%	68%
Your job gives you a sense of personal achievement	56%	67%
You would recommend your company as an employer	▼ 50%	63%
You value your company culture	56%	63%
You endorse your company's strategy and direction	53%	63%
You are optimistic about your future with your company	▼ 44%	60%

▼ Lowest score in the study

Workplace Satisfaction Metrics

Employee Attitudes Toward Work Environment

FIGURE 11-PL

◉ ***Noteworthy:* Polish workers score close to global averages for most workplace satisfaction metrics and are among the most likely to say they feel relaxed and calm at work, just slightly lagging India.**

Does your work environment allow you to: (% agree)	**Poland**	**Global**
Choose where to work in the office based on the task	50%	51%
Socialize with colleagues	73%	75%
Concentrate easily	68%	66%
Work in teams without being interrupted	57%	58%
Move around throughout the day	82%	77%
Physically move during the day and change postures	79%	75%
Feel a sense of belonging to the company	68%	66%
Easily and freely express and share ideas	60%	66%
Share projects and achievements	54%	61%
Have access to information about the company	67%	70%
Accommodate remote workers	53%	56%
Feel relaxed, calm	72%	59%
Accommodate visitors	61%	66%

Russia

	Russia	**Global**
Highly Engaged and Highly Satisfied	10%	13%
Highly Disengaged and Highly Dissatisfied	11%	11%

Participants	808			
Gender	38% Male	62% Female		
Age	39% 18–34	25% 35–44	27% 45–54	9% 55+
Job Title	12% Senior manager	35% Manager		
	28% Technician / associate	25% Clerk + service / sales		

The Workplace in Russia

Traditional workplaces persist in Russia, where most office layouts are comprised of entirely individual offices or combination open plan and individual offices.

Russian employees work predominantly in either an individual private office (22 percent) or shared private office with colleagues (49 percent), but this is evolving as leaders in multinational and regional companies explore new ways of working. Today, Russian workplaces rank third-highest for office configurations with all private offices; yet a slight majority of organizations have a combination of private and open-plan workplaces. The vast majority of employees work in assigned workstations; only two percent of workers are nomadic in Russia.

Few Russian workplaces provide employees with shared spaces such as social hubs, private spaces or spaces for rejuvenation and exercise.

Despite its vast territories, urban real estate is expensive, especially in Moscow. Open-plan environments offer leaders cost savings and the opportunity to introduce a dramatically different workstyle compared to the traditional layout in which enclosed rooms line long hallways and the size and location of each office reflects hierarchy.

Key

◉ ***Noteworthy***

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-RU

◉ ***Noteworthy:***
Only Turkey and Germany have more entirely individual office layouts than Russia.

Which of the following describes your office layout?	**Russia**	**Global**
Entirely Open Plan	16%	23%
Entirely Individual Offices	40%	31%
Combination Open Plan and Individual Offices	44%	46%

Individual Workspaces

FIGURE 2-RU

◉ ***Noteworthy:***
Russia is tied with China as the place where nomadic work is the least common.

Which of the following describes your individual workspace?	**Russia**	**Global**
Individual Private Office	22%	23%
Shared Private Office	49%	37%
Open Plan, Assigned Space	26%	33%
Nomadic	▼ 2%	8%

Access to Shared Areas

FIGURE 3-RU

◉ ***Noteworthy:***
Few Russians report working in offices with a range of spaces available to them, especially private spaces, social hubs or spaces for rejuvenation and exercise.

Does your workplace have: (% agree)	**Russia**	**Global**
Sufficient Meeting Rooms	68%	70%
Cafeteria / Canteen	57%	61%
Private Space	39%	53%
Relaxation Areas	28%	45%
Sports / Exercise Facilities	19%	22%

▼ Lowest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-RU

◉ ***Noteworthy:***
Russian organizations are the least likely in the world to provide laptops to workers, and one of the least likely to offer mobile phones.

Does your employer provide you with:
(% agree)

	Russia	Global
Desktop Computer	▲ 91%	80%
Landline Telephone	89%	86%
Laptop	▼ 22%	39%
Mobile Phone	28%	39%
Tablet	6%	14%
Videoconferencing	25%	35%

Remote Work

FIGURE 5-RU

◉ ***Noteworthy:***
Remote work in Russia is limited and mirrors global averages.

How often do you work away from the office?

	Russia	Global
Every day	7%	9%
Sometimes	38%	36%
Never	55%	55%

▲ Highest score in the study
▼ Lowest score in the study

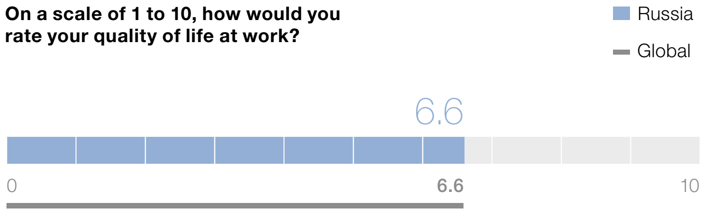
How Workers Feel

Quality of Life at Work

FIGURE 6-RU

◉ ***Noteworthy:***
Russian workers match the global average for their quality of life at work.

On a scale of 1 to 10, how would you rate your quality of life at work?

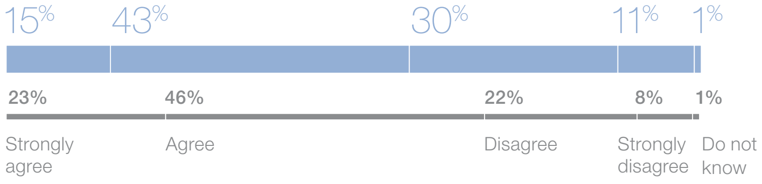


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-RU

Do you like your work environment?
(% agree)

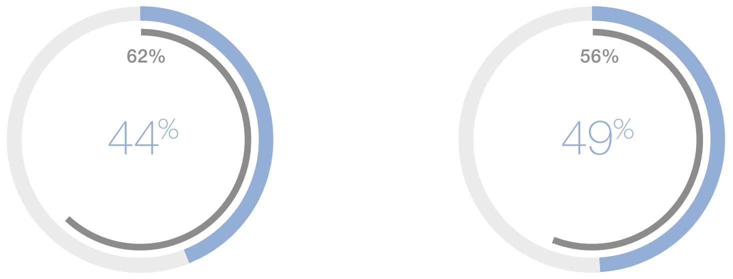


Perception of Company Culture

FIGURE 8-RU

◉ ***Noteworthy:***
Russians generally don’t have positive assessments of their corporate culture, and the country’s employers rank last in the world for attaching great importance to the health and safety of employees.

Would you say that your company:
(% agree)


Attaches great importance to the health and safety of its employees

Recognizes and values its employees

See Appendix J for all culture metrics.

RU

The Link Between Engagement and Workplace Satisfaction

Russian workers follow close to global averages for overall engagement and workplace satisfaction levels. On key engagement metrics, however, Russian employees were less positive, consistently ranking below global averages. Only 51 percent said they were generally happy to go to work, 20 points lower than the global average, illustrating the biggest gap between Russian workers and their global counterparts (Figure 10-RU). They tied with Poland in ranking their organizations lowest in the study for feeling a sense of connection to colleagues and recommending the company as an employer. A bright spot in this feedback: A high percentage of Russians feel a sense of belonging to the company and its culture (Figure 11-RU).

As in Poland, negative sentiments are somewhat moderated by more neutral and positive attitudes about the workplace. While the data reveal that Russian workers have areas of satisfaction with their workplaces, they are less likely to say they like their offices (Figure 7-RU). Other areas of concern is that workers report they have less access to real-time information about the company, which may explain why only a little over half of Russians are optimistic about the future of their company (Figure 10-RU).

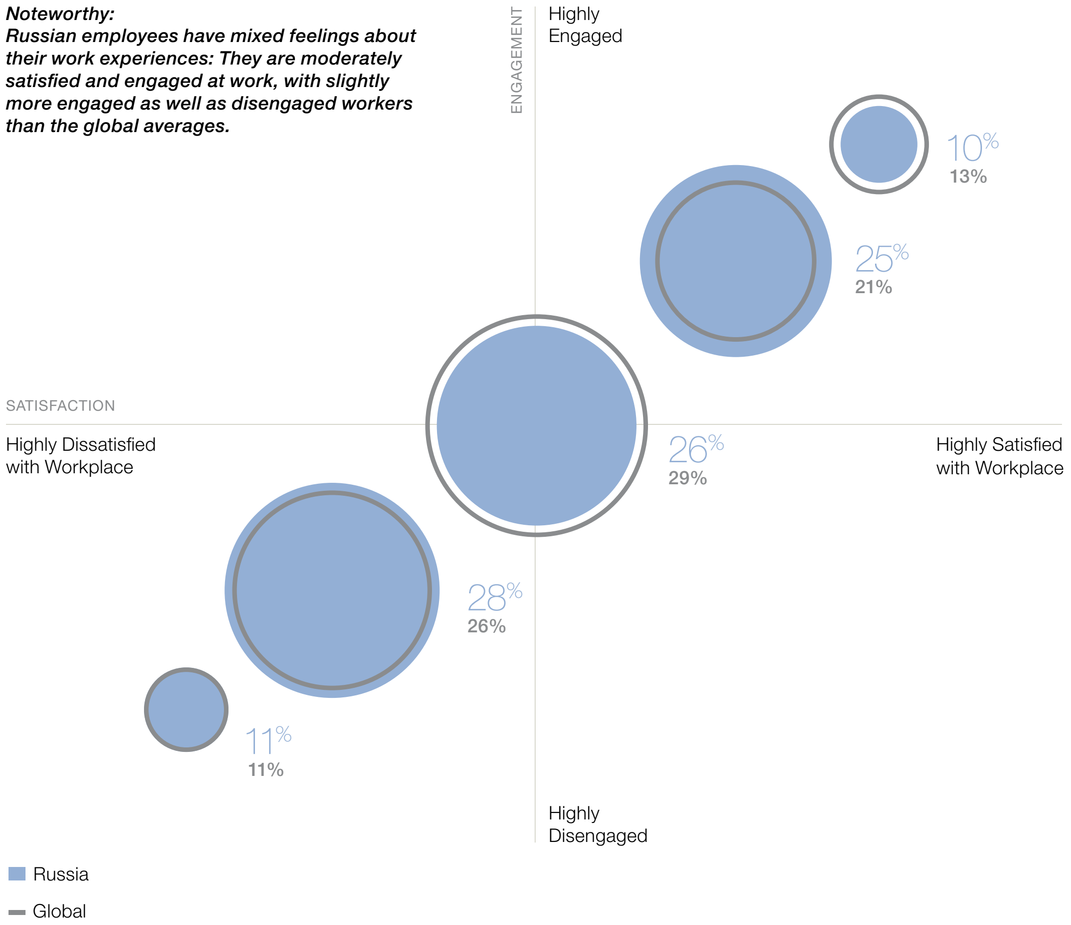
These findings suggest an opportunity for Russian leaders to develop better relationships with their workers and instill a sense of optimism in the workplace. A strategy to consider is creating inviting spaces where employees want to work, with emphasis on areas to gather, socialize and collaborate. These areas can include displays where organizations can share information about the brand and strategy, and employees can learn more about other areas in the company.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-RU

◉ ***Noteworthy:***
Russian employees have mixed feelings about their work experiences: They are moderately satisfied and engaged at work, with slightly more engaged as well as disengaged workers than the global averages.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-RU

◉ ***Noteworthy:* Despite moderate engagement levels overall, Russians score below the global average on every engagement metric.**

Do you agree with each of the following statements? (% agree)		**Russia**	**Global**
You feel connection with your colleagues		68%	76%
You are happy to go to work	▼	51%	71%
You feel proud to work for your company		60%	69%
You are motivated by your work		65%	68%
Your job gives you a sense of personal achievement		57%	67%
You would recommend your company as an employer	▼	50%	63%
You value your company culture		50%	63%
You endorse your company's strategy and direction		55%	63%
You are optimistic about your future with your company		52%	60%

▼ Lowest score in the study

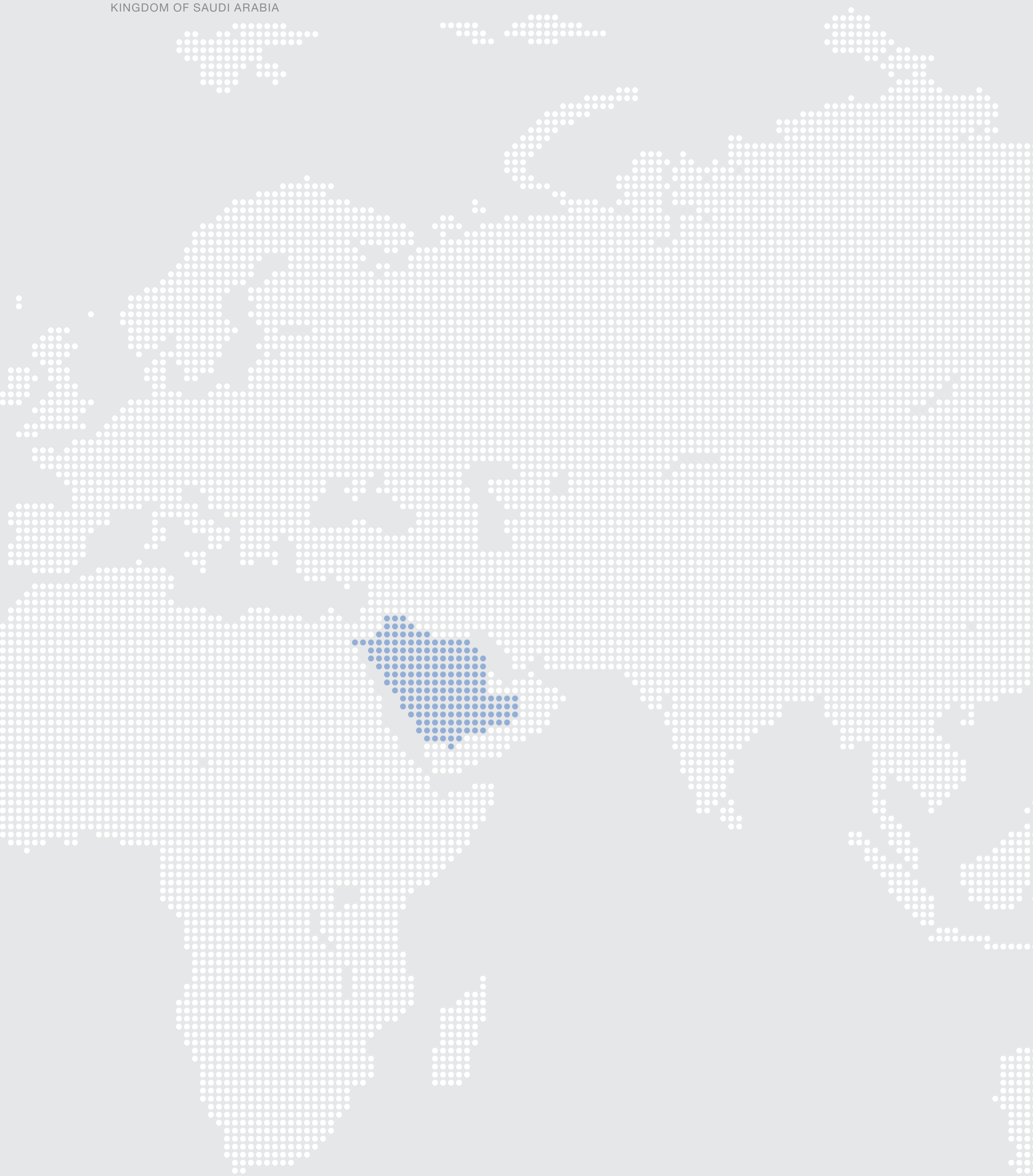
Workplace Satisfaction Metrics

Employee Attitudes Toward Work Environment

FIGURE 11-RU

◉ ***Noteworthy:* Russians rate their workplace experience near the global norm for most metrics, but fall far below the global average for feeling relaxed or calm at work.**

Does your work environment allow you to: (% agree)	**Russia**	**Global**
Choose where to work in the office based on the task	51%	51%
Socialize with colleagues	79%	75%
Concentrate easily	66%	66%
Work in teams without being interrupted	62%	58%
Move around throughout the day	75%	77%
Physically move during the day and change postures	78%	75%
Feel a sense of belonging to the company	73%	66%
Easily and freely express and share ideas	68%	66%
Share projects and achievements	66%	61%
Have access to information about the company	61%	70%
Accommodate remote workers	59%	56%
Feel relaxed, calm	49%	59%
Accommodate visitors	65%	66%



Kingdom of Saudi Arabia

	Saudi Arabia	**Global**
Highly Engaged and Highly Satisfied	18%	13%
Highly Disengaged and Highly Dissatisfied	22%	11%

Participants	450			
Gender	85% Male	15% Female		
Age	63% 18–34	30% 35–44	7% 45–54	0% 55+
Job Title	5% Senior manager	12% Manager		
	29% Technician / associate	54% Clerk + service / sales		

SA

The Workplace in the Kingdom of Saudi Arabia

Traditional space planning prevails in Saudi Arabian offices. Managers and executives have their own private offices and most employees work in shared private offices. Open-plan design is not currently embraced by the vast majority of organizations—only eight percent of offices are completely open, which is significantly less than most countries and the lowest score in this study. Due to cultural traditions, men and women work separately, which may help explain the emphasis on designing workplaces as a series of enclosed spaces.

Shared spaces such as meetings rooms, social hubs, cafeterias/canteens or private spaces for focus or rest are far less common in Saudi Arabia than in other countries.

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-SA

◉ ***Noteworthy:* Saudi Arabia has the fewest entirely open-plan offices in the study.**

Which of the following describes your office layout?	Saudi Arabia	Global
Entirely Open Plan	▼ 8%	23%
Entirely Individual Offices	39%	31%
Combination Open Plan and Individual Offices	53%	46%

Individual Workspaces

FIGURE 2-SA

◉ ***Noteworthy:* Individual private offices and shared private offices dominate the office landscape in Saudi Arabia.**

Which of the following describes your individual workspace?	Saudi Arabia	Global
Individual Private Office	21%	23%
Shared Private Office	▲ 56%	37%
Open Plan, Assigned Space	▼ 16%	33%
Nomadic	7%	8%

Access to Shared Areas

FIGURE 3-SA

◉ ***Noteworthy:* Saudi Arabian employees report their facilities lack a range of spaces that can serve as alternatives to assigned individual workspaces.**

Does your workplace have: (% agree)	Saudi Arabia	Global
Sufficient Meeting Rooms	60%	70%
Cafeteria / Canteen	55%	61%
Private Space	42%	53%
Relaxation Areas	33%	45%
Sports / Exercise Facilities	21%	22%

▲ Highest score in the study

▼ Lowest score in the study

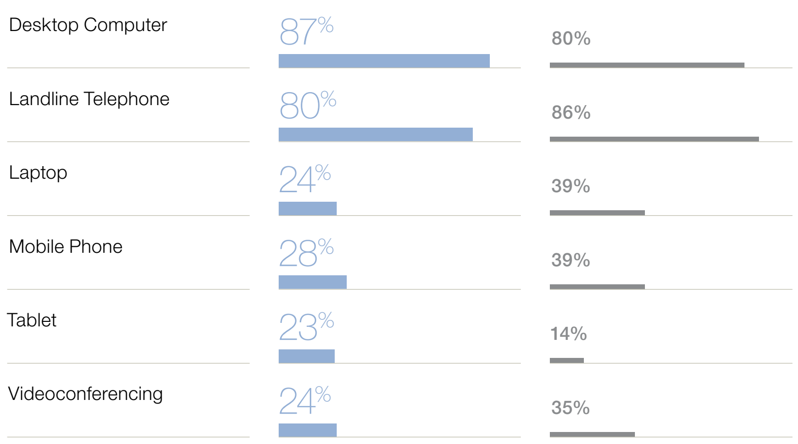
Technology + Remote Work

Technology at Work

FIGURE 4-SA

◉ ***Noteworthy:* Mobile technologies are rarely provided but a significantly higher-than-average amount of workers are able to use their personal computers at work (Appendix D).**

Does your employer provide you with:
(% agree)

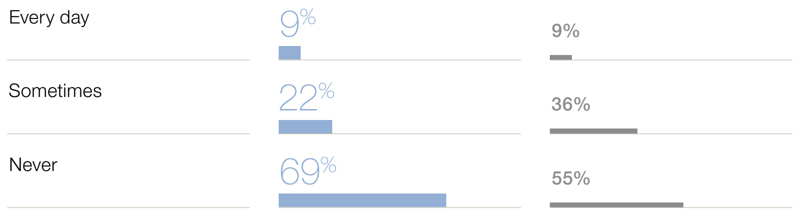


Remote Work

FIGURE 5-SA

◉ ***Noteworthy:* Remote work in Saudi Arabia is very uncommon. Only in France it is less common.**

How often do you work away from the office?



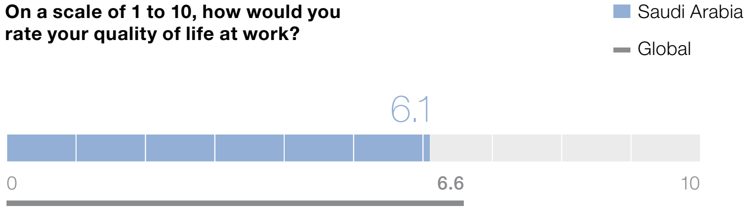
How Workers Feel

Quality of Life at Work

FIGURE 6-SA

◉ ***Noteworthy:* Saudi Arabian workers rank next to last, scoring only higher than France on this important indicator.**

On a scale of 1 to 10, how would you rate your quality of life at work?

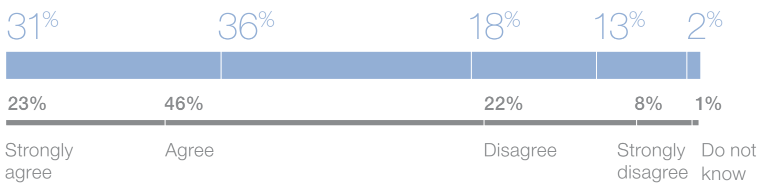


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-SA

Do you like your work environment?
(% agree)



Perception of Company Culture

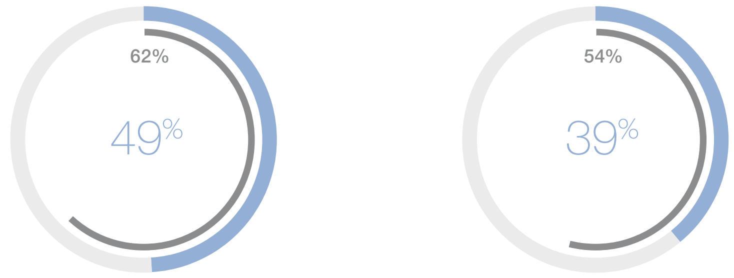
FIGURE 8-SA

◉ ***Noteworthy:* Saudi Arabian workers score their organizations below average on company culture metrics, which may suggest a disconnect between leaders and employees.**

Would you say that your company:
(% agree)

Encourages you to use your initiative

Takes a genuine interest in the wellbeing of its employees



See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

The data indicate that Saudi Arabia is a work culture of contrasts with polarized employee engagement and workplace satisfaction levels. Although 39 percent of workers are highly engaged and highly satisfied or engaged and satisfied—five percentage points above the global average—on the opposite end of the spectrum, 46 percent are highly disengaged and highly dissatisfied or disengaged and dissatisfied, far exceeding the global average of 37 percent. What's more, the amount of highly disengaged and highly dissatisfied workers is double the global average. The potential for this group to influence others as a toxic force in their organizations is substantial.

A particularly strong signal to consider is that only 49 percent of Saudi Arabian workers think that their company is encouraging employees' initiative, and nearly half (47 percent) say their company is not an appropriate place for them to work and does not fit their lifestyle. This could translate into untapped potential and possible employee turnover.

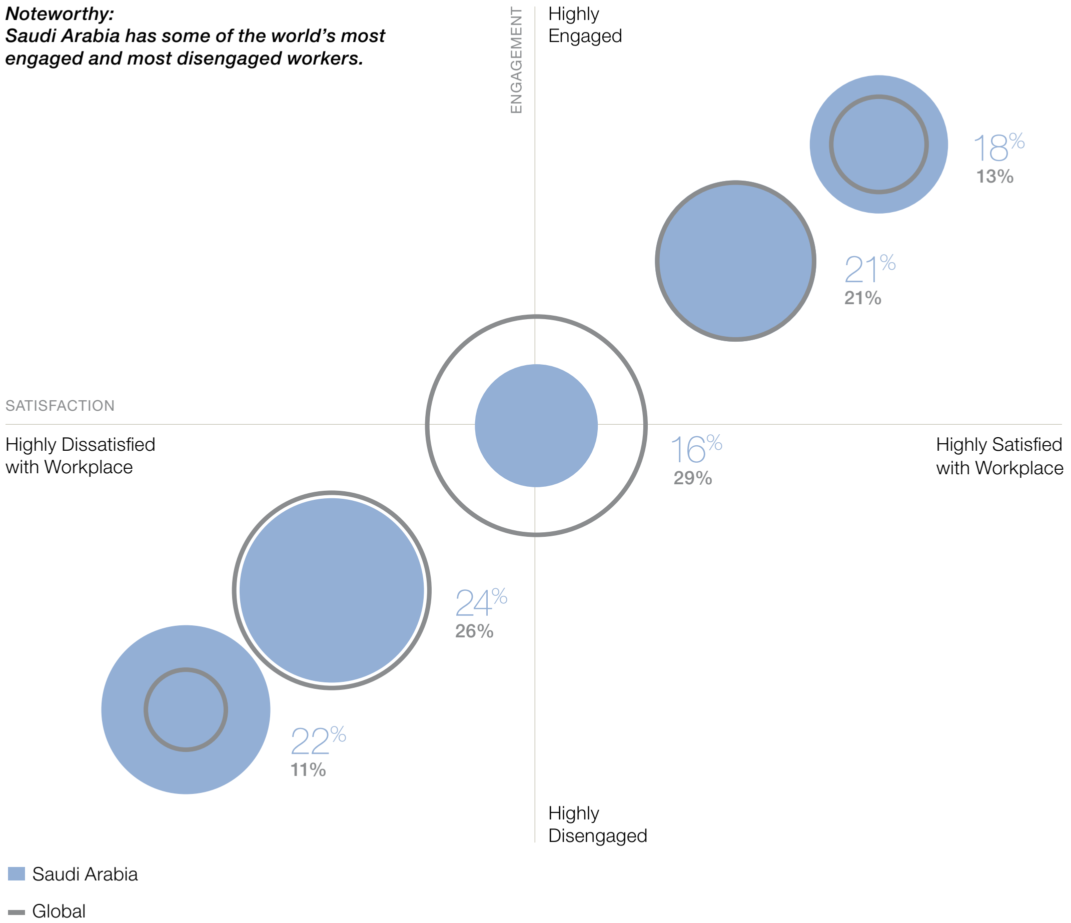
Some immediate areas where Saudi organizations could focus would be to address concerns employees express about their individual workspaces regarding size, organization of the space, the furniture, ambient noise levels and personalization (Appendix D, K). Employees also rank the focus on teamwork and collaboration below average, and do not feel the company cares about their wellbeing. This could be an opportunity to create spaces that promote more interaction as well as areas for rejuvenation and respite.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-SA

Noteworthy:* *Saudi Arabia has some of the world's most engaged and most disengaged workers.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-SA

◉ ***Noteworthy:* Although Saudi workers rank most engagement metrics near or above the global norm, they fall below global averages for recommending their company as an employer and gaining a sense of personal achievement from their jobs.**

Do you agree with each of the following statements? (% agree)	**Saudi Arabia**	**Global**
You feel connection with your colleagues	78%	76%
You are happy to go to work	70%	71%
You feel proud to work for your company	70%	69%
You are motivated by your work	73%	68%
Your job gives you a sense of personal achievement	59%	67%
You would recommend your company as an employer	60%	63%
You value your company culture	65%	63%
You endorse your company's strategy and direction	82%	63%
You are optimistic about your future with your company	59%	60%

Workplace Satisfaction Metrics

Employee Attitudes Toward Work Environment

FIGURE 11-SA

◉ ***Noteworthy:* Saudi Arabian workers' perceptions of their workplace vary. Areas of concern include the ability to share projects and achievements, move around throughout the day and feel relaxed and calm.**

Does your work environment allow you to: (% agree)	**Saudi Arabia**	**Global**
Choose where to work in the office based on the task	52%	51%
Socialize with colleagues	69%	75%
Concentrate easily	71%	66%
Work in teams without being interrupted	59%	58%
Move around throughout the day	69%	77%
Physically move during the day and change postures	76%	75%
Feel a sense of belonging to the company	61%	66%
Easily and freely express and share ideas	60%	66%
Share projects and achievements	51%	61%
Have access to information about the company	54%	70%
Accommodate remote workers	58%	56%
Feel relaxed, calm	40%	59%
Accommodate visitors	67%	66%

South Africa

	South Africa	Global
Highly Engaged and Highly Satisfied	19%	13%
Highly Disengaged and Highly Dissatisfied	10%	11%

Participants	802			
Gender	47% Male	53% Female		
Age	46% 18–34	31% 35–44	18% 45–54	5% 55+
Job Title	9% Senior manager	22% Manager		
	26% Technician / associate	43% Clerk + service / sales		

The Workplace in South Africa

South Africa's offices are significantly more open than most global counterparts, ranking second in this study, behind the U.K. (see Appendix A for global comparisons). Correspondingly, the majority of workers have an assigned workspace in an open-plan environment. Along with the United States, Canada, the United Kingdom and Spain, almost half of South Africa's workforce is assigned to open-plan environments. This group of countries represent the places in which the largest portions of offices workers occupy spaces in the open plan. Interestingly, the levels of workplace satisfaction are higher in South Africa, the U.S. and Canada (Appendix N), possibly indicating that it is not the open-plan per se, but how it is implemented that impacts satisfaction levels.

Most South African workplaces have shared spaces where workers can seek privacy or meet with colleagues. This range of spaces may impact the generally positive workplace satisfaction metrics (Figure 11-ZA). However, employers are less likely to provide a cafeteria or canteen.

Key
◉ *Noteworthy*
▲ Highest score in the study
▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-ZA

◉ ***Noteworthy:* Significantly fewer people than the global average work in private offices in South Africa.**

Which of the following describes your office layout?	South Africa	Global
Entirely Open Plan	36%	23%
Entirely Individual Offices	18%	31%
Combination Open Plan and Individual Offices	46%	46%

Individual Workspaces

FIGURE 2-ZA

◉ ***Noteworthy:* Shared private offices are a relatively minor part of the office landscape compared to the rest of the world.**

Which of the following describes your individual workspace?	South Africa	Global
Individual Private Office	25%	23%
Shared Private Office	24%	37%
Open Plan, Assigned Space	44%	33%
Nomadic	7%	8%

Access to Shared Areas

FIGURE 3-ZA

◉ ***Noteworthy:* Most South African workers report having access to meeting rooms, private spaces and spaces for rejuvenation.**

Does your workplace have: (% agree)	South Africa	Global
Sufficient Meeting Rooms	75%	70%
Cafeteria / Canteen	51%	61%
Private Space	55%	53%
Relaxation Areas	53%	45%
Sports / Exercise Facilities	17%	22%

Technology + Remote Work

Technology at Work

FIGURE 4-ZA

Noteworthy: *Fewer South African workers are using desktop computers than the global average and slightly more are using laptop computers, suggesting opportunity for workers to be more mobile. However the prevalence of landline phones and lower availability of mobile phones may limit employees' options.*

Does your employer provide you with: (% agree)	**South Africa**	**Global**
Desktop Computer	73%	80%
Landline Telephone	90%	86%
Laptop	42%	39%
Mobile Phone	32%	39%
Tablet	13%	14%
Videoconferencing	39%	35%

Remote Work

FIGURE 5-ZA

Noteworthy: *Significantly more South African employees work remotely than the global norm. This may be possible because 63 percent are able to use their own computer equipment for work (Appendix D).*

How often do you work away from the office?	**South Africa**	**Global**
Every day	▲ 29%	9%
Sometimes	40%	36%
Never	31%	55%

▲ Highest score in the study

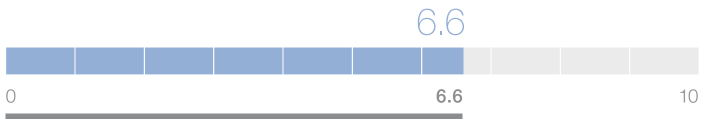
How Workers Feel

Quality of Life at Work

FIGURE 6-ZA

Noteworthy: *South African workers match the global average for their quality of life at work.*

On a scale of 1 to 10, how would you rate your quality of life at work?

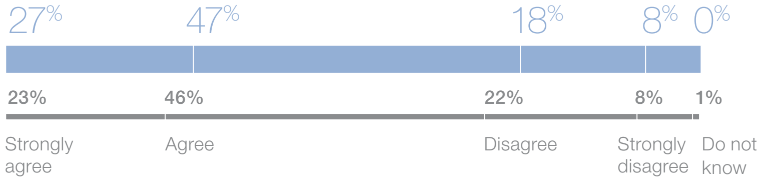


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-ZA

Do you like your work environment?
(% agree)

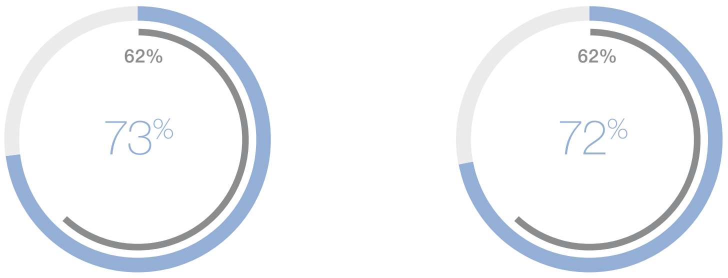


Perception of Company Culture

FIGURE 8-ZA

Noteworthy: *South African companies exceed global norms on company culture metrics.*

Would you say that your company:
(% agree)



Attaches great importance to the health and safety of its employees

Encourages you to use your initiative

See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

South Africans' generally positive experiences at work drive higher-than-average engagement. The country has the fourth-highest amount of highly engaged workers in this study. In particular, they are proud to work for their organization, value its culture and endorse its direction. Workers score above global averages for all but one workplace satisfaction metric: the ability to choose where to work in the office based on the task at hand (Figure 11-ZA). This represents an opportunity to improve satisfaction levels overall and possibly cause fewer employees to leave the office and work remotely.

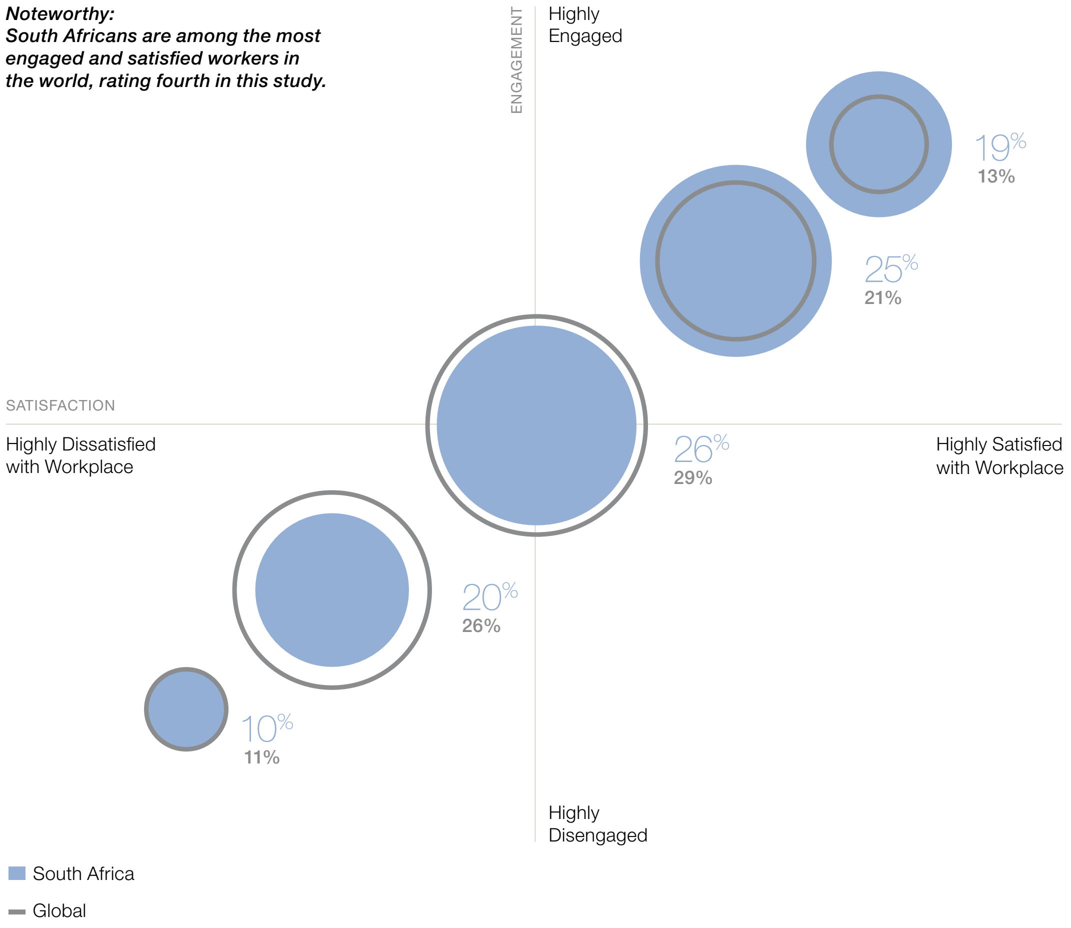
While there are many positives, the data show room for improvement. With the exception of having significantly more access to company information, certain aspects of South Africans' workplace experiences are only slightly above global norms. Providing more mobile technologies will enable employees to work in a variety of places within the office and still stay connected to their information. In addition, companies can provide a greater range of spaces for collaboration, socializing, rejuvenation and focused individual work. This will give employees more choices and a higher sense of control, and may lead to even stronger engagement.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-ZA

***Noteworthy:* South Africans are among the most engaged and satisfied workers in the world, rating fourth in this study.**



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-ZA

Noteworthy:
South Africans' scores on almost every engagement metric are above the global average.

Do you agree with each of the following statements? (% agree)	**South Africa**	**Global**
You feel connection with your colleagues	78%	76%
You are happy to go to work	75%	71%
You feel proud to work for your company	76%	69%
You are motivated by your work	70%	68%
Your job gives you a sense of personal achievement	69%	67%
You would recommend your company as an employer	69%	63%
You value your company culture	72%	63%
You endorse your company's strategy and direction	74%	63%
You are optimistic about your future with your company	62%	60%

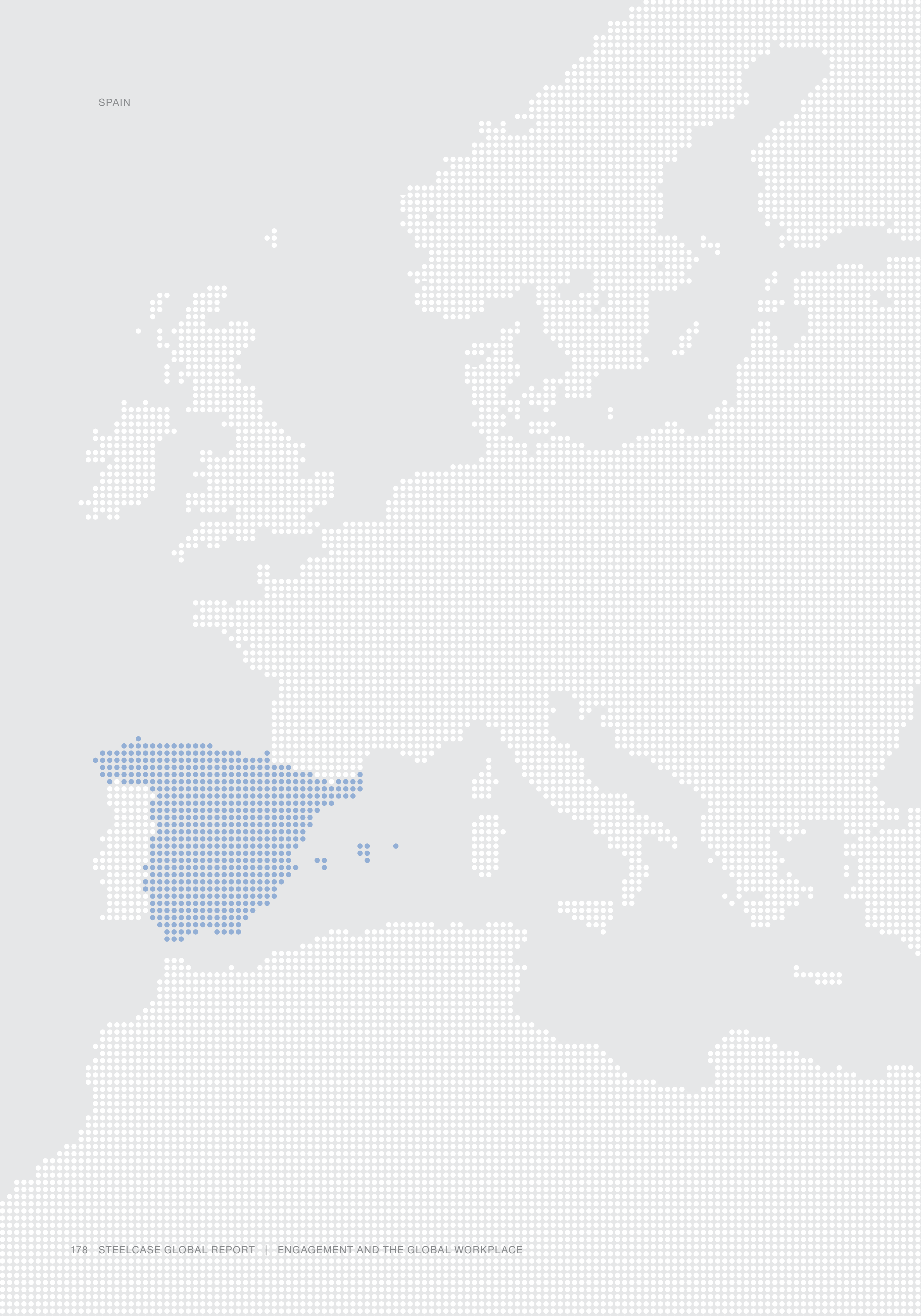
Workplace Satisfaction Metrics

Employee Attitudes Toward Work Environment

FIGURE 11-ZA

Noteworthy:
Generally, South Africans score all engagement metrics near or above the global norms.

Does your work environment allow you to: (% agree)	**South Africa**	**Global**
Choose where to work in the office based on the task	50%	51%
Socialize with colleagues	76%	75%
Concentrate easily	70%	66%
Work in teams without being interrupted	61%	58%
Move around throughout the day	81%	77%
Physically move during the day and change postures	78%	75%
Feel a sense of belonging to the company	66%	66%
Easily and freely express and share ideas	68%	66%
Share projects and achievements	66%	61%
Have access to information about the company	82%	70%
Accommodate remote workers	63%	56%
Feel relaxed, calm	66%	59%
Accommodate visitors	72%	66%



Spain

	Spain	**Global**
Highly Engaged and Highly Satisfied	7%	13%
Highly Disengaged and Highly Dissatisfied	15%	11%

Participants	803			
Gender	48% Male	52% Female		
Age	34% 18–34	32% 35–44	24% 45–54	10% 55+
Job Title	5% Senior manager 18% Technician / associate		29% Manager 48% Clerk + service / sales	

The Workplace in Spain

Fifty-one percent of offices in Spain offer a mix of open plan and private offices, the largest percentage among the European countries in this study. As well, there are more offices configured with entirely open spaces than entirely private offices, suggesting a potential shift toward new workstyles. Private offices continue to be important for leaders, but more than half of Spanish employees have an assigned seat or are nomadic in open work areas, where benching workstations are the norm.

Compared to global averages, Spanish workers report slightly less access to shared spaces such as private spaces and areas for rest or recreation.

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-ES

◉ ***Noteworthy:***
Spain leads European countries for having the largest percentage of workplaces that are a combination of open plan and individual offices.

Which of the following describes your office layout?	**Spain**	**Global**
Entirely Open Plan	26%	23%
Entirely Individual Offices	23%	31%
Combination Open Plan and Individual Offices	51%	46%

Individual Workspaces

FIGURE 2-ES

◉ ***Noteworthy:***
The majority of Spanish employees work in the open plan, either at an assigned space or as nomads.

Which of the following describes your individual workspace?	**Spain**	**Global**
Individual Private Office	18%	23%
Shared Private Office	30%	37%
Open Plan, Assigned Space	45%	33%
Nomadic	7%	8%

Access to Shared Areas

FIGURE 3-ES

◉ ***Noteworthy:***
Overall, Spanish employees have less access to shared spaces than the global average.

Does your workplace have: (% agree)	**Spain**	**Global**
Sufficient Meeting Rooms	68%	70%
Cafeteria / Canteen	62%	61%
Private Space	51%	53%
Relaxation Areas	44%	45%
Sports / Exercise Facilities	16%	22%

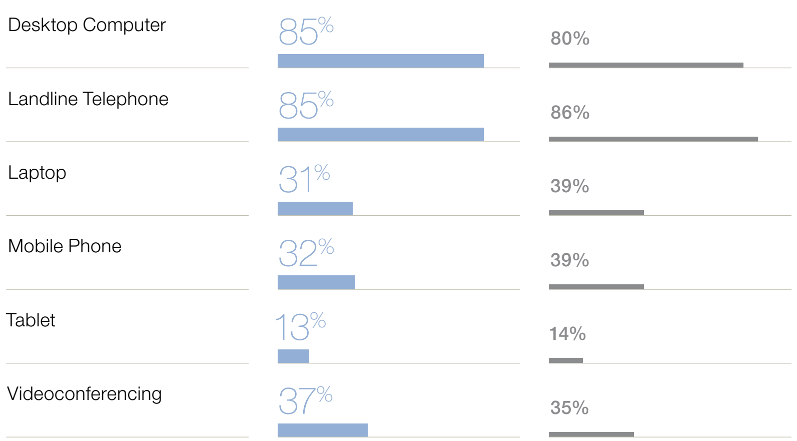
Technology + Remote Work

Technology at Work

FIGURE 4-ES

◉ ***Noteworthy:*** ***Fewer than one-third of employees have an employer-provided laptop or mobile phone at work.***

Does your employer provide you with:
(% agree)

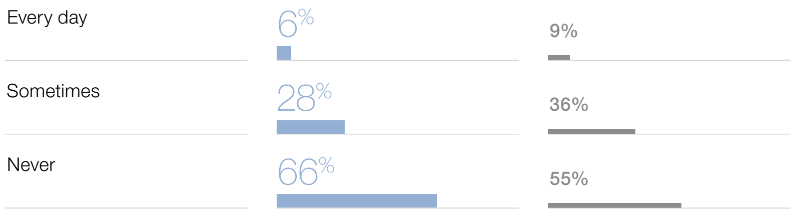


Remote Work

FIGURE 5-ES

◉ ***Noteworthy:*** ***The lack of mobile technology correlates with levels of remote work in Spain that are well below global averages.***

How often do you work away from the office?



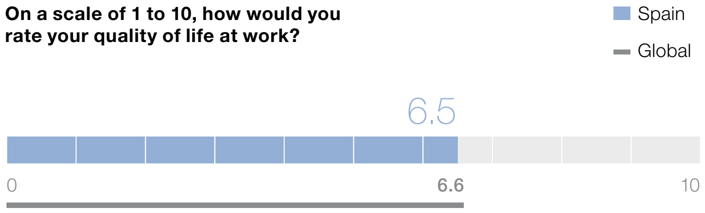
How Workers Feel

Quality of Life at Work

FIGURE 6-ES

◉ ***Noteworthy:*** ***The majority of Spanish workers rank their quality of life at work below the global average.***

On a scale of 1 to 10, how would you rate your quality of life at work?

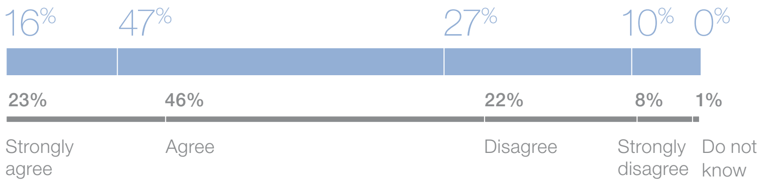


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-ES

Do you like your work environment?
(% agree)

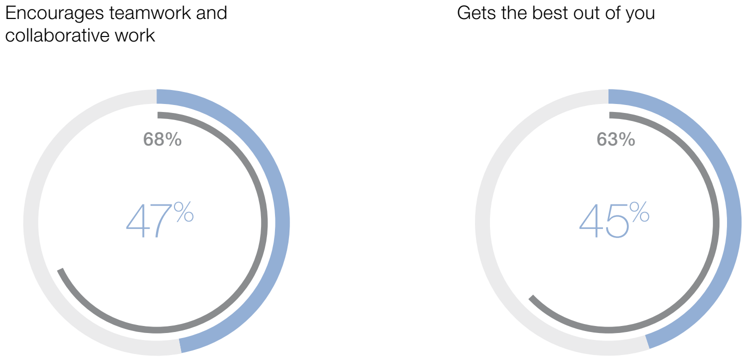


Perception of Company Culture

FIGURE 8-ES

◉ ***Noteworthy:*** ***Spanish workers rate their organizations below global averages on cultural attributes, and they rank the lowest on believing their employer encourages teamwork and collaboration and gets the best out of them.***

Would you say that your company:
(% agree)



See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

Engagement and workplace satisfaction levels in Spain are low, consistent with their neighbors France and Belgium. Only seven percent of employees are highly engaged, and the percentage of highly disengaged workers outnumbers them 2:1. They rank below global averages on all engagement metrics. Particularly alarming when compared to workers in all other countries in the study, Spanish employees rank the lowest in terms of being motivated by their work, valuing their company culture, and endorsing its strategy and direction (Figure 10-ES).

Spain also ranks well below global averages on all workplace satisfaction metrics. It's noteworthy that few Spanish workers are able to choose where they work within the office based on the task at hand. Compared to the global average, they are also less able to move around the office easily throughout the day. Along with low levels of employer-provided mobile technology, this data suggest that many are tethered to their desks without a sense of empowerment and control in their workplace.

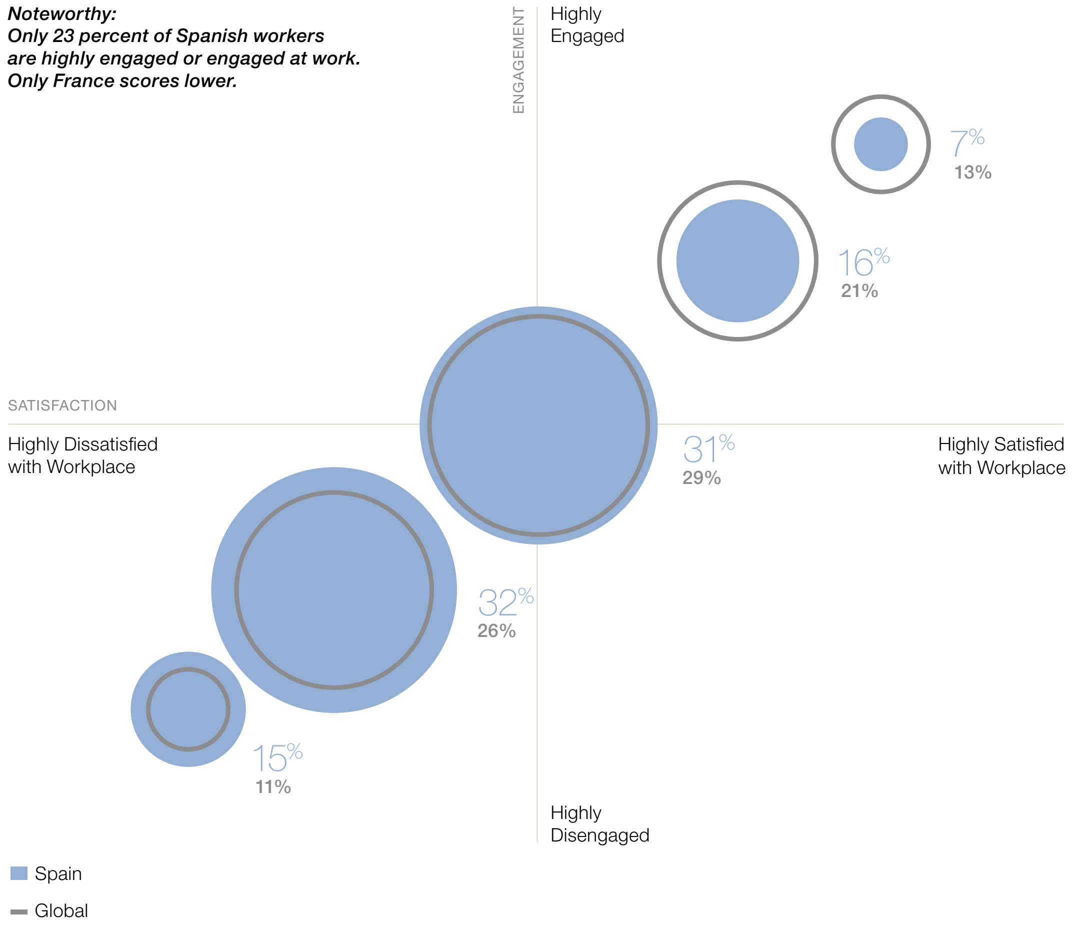
The opportunity to strengthen Spanish workers' satisfaction and engagement is significant. Organizations that desire more engaged workers may want to explore a more participative approach to work combined with a more transparent and collaborative workplace that offers employees a greater range of diverse spaces. Employees also express a need for greater control over their privacy so they can concentrate and work with teammates without disruptions. These appear to be vital steps for tapping the potential of Spanish workers who may be ready for change.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-ES

***Noteworthy:* Only 23 percent of Spanish workers are highly engaged or engaged at work. Only France scores lower.**



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-ES

Noteworthy:
Spanish workers fall below global averages in every metric of engagement.

Do you agree with each of the following statements? (% agree)	**Spain**	**Global**
You feel connection with your colleagues	74%	76%
You are happy to go to work	69%	71%
You feel proud to work for your company	64%	69%
You are motivated by your work	▼ 55%	68%
Your job gives you a sense of personal achievement	62%	67%
You would recommend your company as an employer	61%	63%
You value your company culture	46%	63%
You endorse your company's strategy and direction	42%	63%
You are optimistic about your future with your company	51%	60%

▼ Lowest score in the study

Workplace Satisfaction Metrics

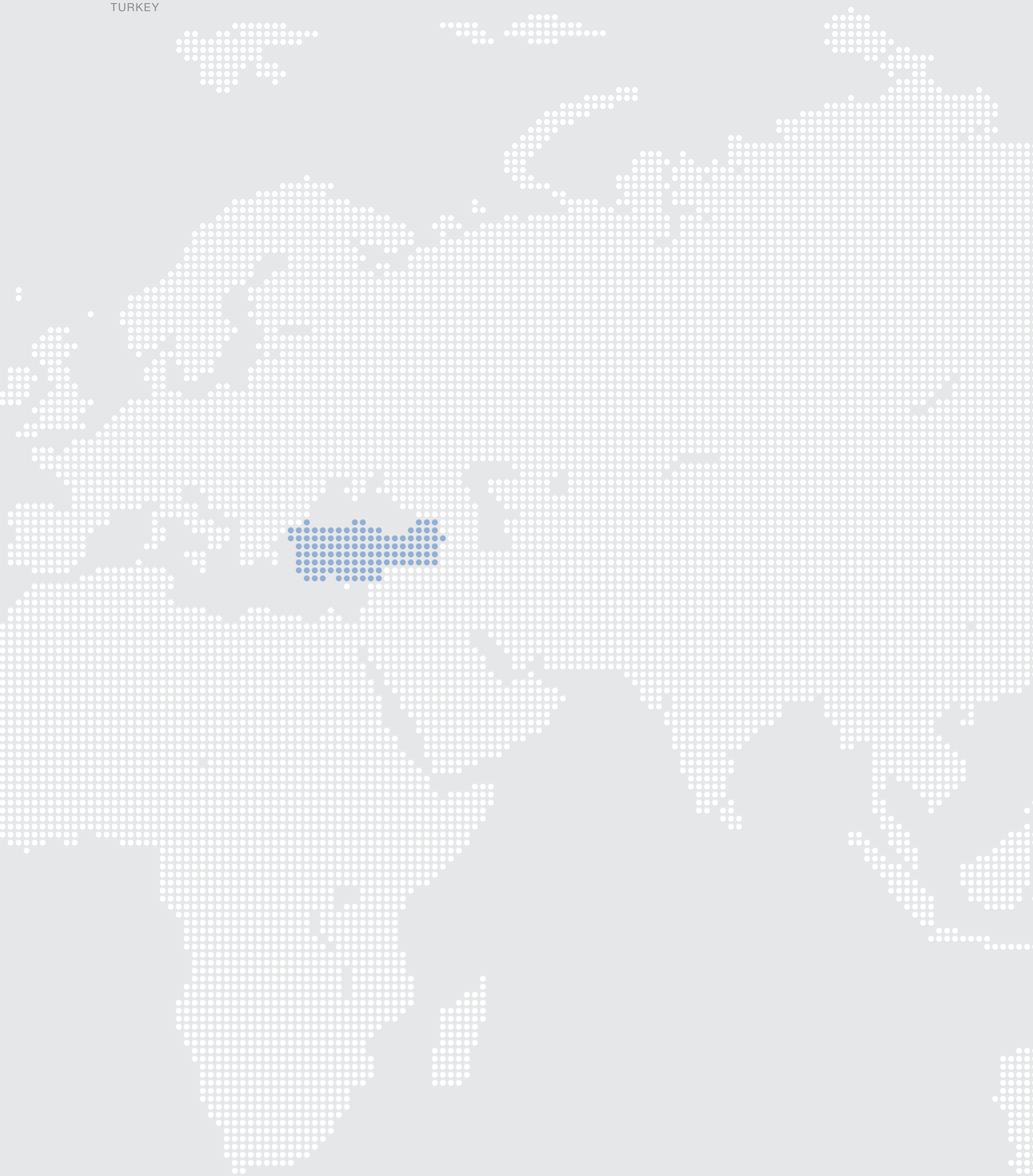
Employee Attitudes Toward Work Environment

FIGURE 11-ES

Noteworthy:
Spanish workers rate all but one workplace satisfaction metric below the global average. Particularly concerning is the lowest level of ability to move and change postures throughout the day within this study.

Does your work environment allow you to: (% agree)	**Spain**	**Global**
Choose where to work in the office based on the task	38%	51%
Socialize with colleagues	70%	75%
Concentrate easily	56%	66%
Work in teams without being interrupted	48%	58%
Move around throughout the day	▼ 65%	77%
Physically move during the day and change postures	▼ 67%	75%
Feel a sense of belonging to the company	56%	66%
Easily and freely express and share ideas	58%	66%
Share projects and achievements	▼ 47%	61%
Have access to information about the company	56%	70%
Accommodate remote workers	49%	56%
Feel relaxed, calm	62%	59%
Accommodate visitors	62%	66%

▼ Lowest score in the study



Turkey

	Turkey	Global
Highly Engaged and Highly Satisfied	12%	13%
Highly Disengaged and Highly Dissatisfied	15%	11%

Participants	802			
Gender	69% Male	31% Female		
Age	57% 18–34	30% 35–44	12% 45–54	1% 55+
Job Title	10% Senior manager	26% Manager		
	15% Technician / associate	49% Clerk + service / sales		

The Workplace in Turkey

Most workplaces in Turkey remain traditional. Though there are significant differences between indigenous and international companies, private offices dominate, comprising 41 percent of office layouts. Entirely open-plan office configurations (19 percent) are less common than in other parts of the world; 40 percent are a mix of private offices and open plan.

The vast majority of employees work in either individual private offices (27 percent) or shared private offices (47 percent). Compared to global averages, these metrics underscore that many offices in Turkey remain very traditional environments. But in some parts of the country, most notably Istanbul, Steelcase's observational researchers report that open offices are an emerging trend, with more spaces that support collaboration and informal exchanges among workers. The majority of Turkish workers in this study, however, report they have little access to shared spaces for focus work or rejuvenation.

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-TR

◉ ***Noteworthy: Entirely open-plan offices are not the norm in Turkey, but many layouts combine open plan and private offices.***

Which of the following describes your office layout?	Turkey	Global
Entirely Open Plan	19%	23%
Entirely Individual Offices	41%	31%
Combination Open Plan and Individual Offices	40%	46%

Individual Workspaces

FIGURE 2-TR

◉ ***Noteworthy: Almost three-quarters of all workers in Turkey work in an individual or shared private office.***

Which of the following describes your individual workspace?	Turkey	Global
Individual Private Office	27%	23%
Shared Private Office	47%	37%
Open Plan, Assigned Space	20%	33%
Nomadic	6%	8%

Access to Shared Areas

FIGURE 3-TR

◉ ***Noteworthy: Turkish workers report below-average access to shared spaces where they can focus or relax.***

Does your workplace have: (% agree)	Turkey	Global
Sufficient Meeting Rooms	62%	70%
Cafeteria / Canteen	57%	61%
Private Space	▼ 32%	53%
Relaxation Areas	36%	45%
Sports / Exercise Facilities	22%	22%

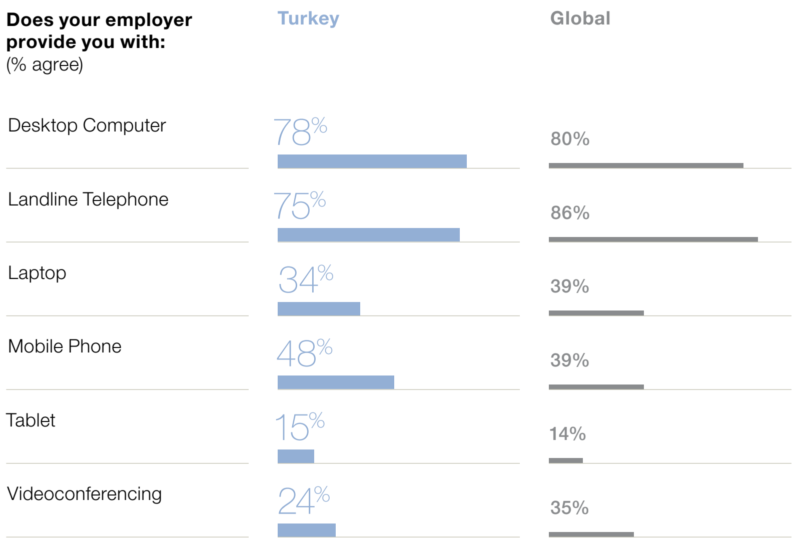
▼ Lowest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-TR

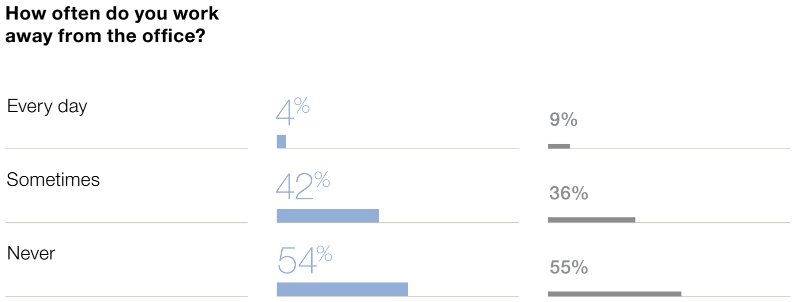
***Noteworthy:* Nearly half of Turkish workers report using mobile phones provided by their employer—third highest in the study.**



Remote Work

FIGURE 5-TR

***Noteworthy:* Almost half of employees are able to work away from the office sometimes, which combined with higher adoption of employer-provided mobile phones, may suggest a shift toward greater mobility.**

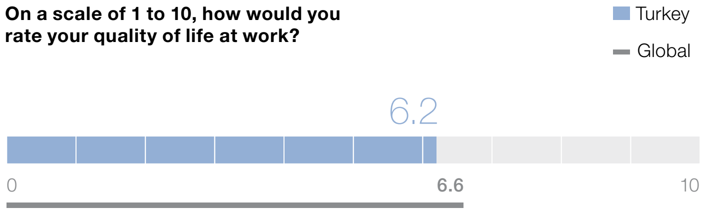


How Workers Feel

Quality of Life at Work

FIGURE 6-TR

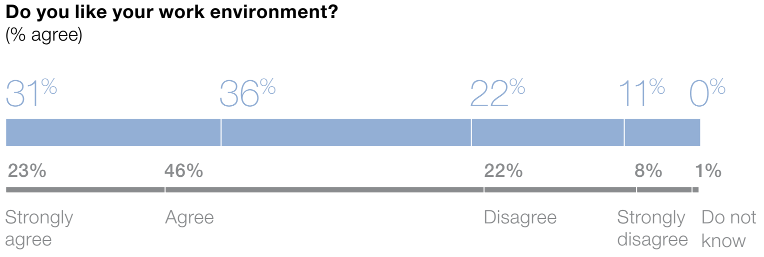
***Noteworthy:* Turkey falls below the global average for quality of life at work—putting it at par with Poland. Only France and Saudi Arabia score lower.**



Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

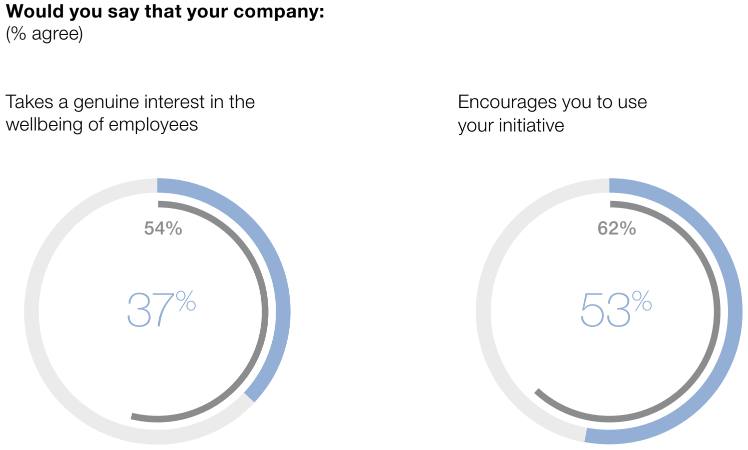
FIGURE 7-TR



Perception of Company Culture

FIGURE 8-TR

***Noteworthy:* Important aspects of organizational culture show opportunity for improvement.**



See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

Engagement and workplace satisfaction levels among Turkish workers closely mirror global averages, but fewer workers are neutral and more are highly disengaged. Employees report mixed reactions to a range of metrics, suggesting a broad range of experiences among study participants. Although they are more likely than average to value their company culture, on all other engagement metrics they are less positive.

Turkish workers state both positive and negative reactions to their workplace. On one hand, Turkey ranks lowest among all countries in the study in terms of workers' ability to socialize and have informal, relaxed conversations with colleagues, but they also score high on their ability to choose where to work within the office, despite reporting a lack of access to shared spaces (Figure 3-TR). This seemingly contradictory data may be a result of the emerging trend toward more open plan environments in Istanbul (third highest in the study, tied with Spain). Employees report that they like their offices overall, but also describe them as "bureaucratic." They are also less satisfied with aspects of their individual workspace, including the size of their space, how it's organized and the furniture (Appendix K).

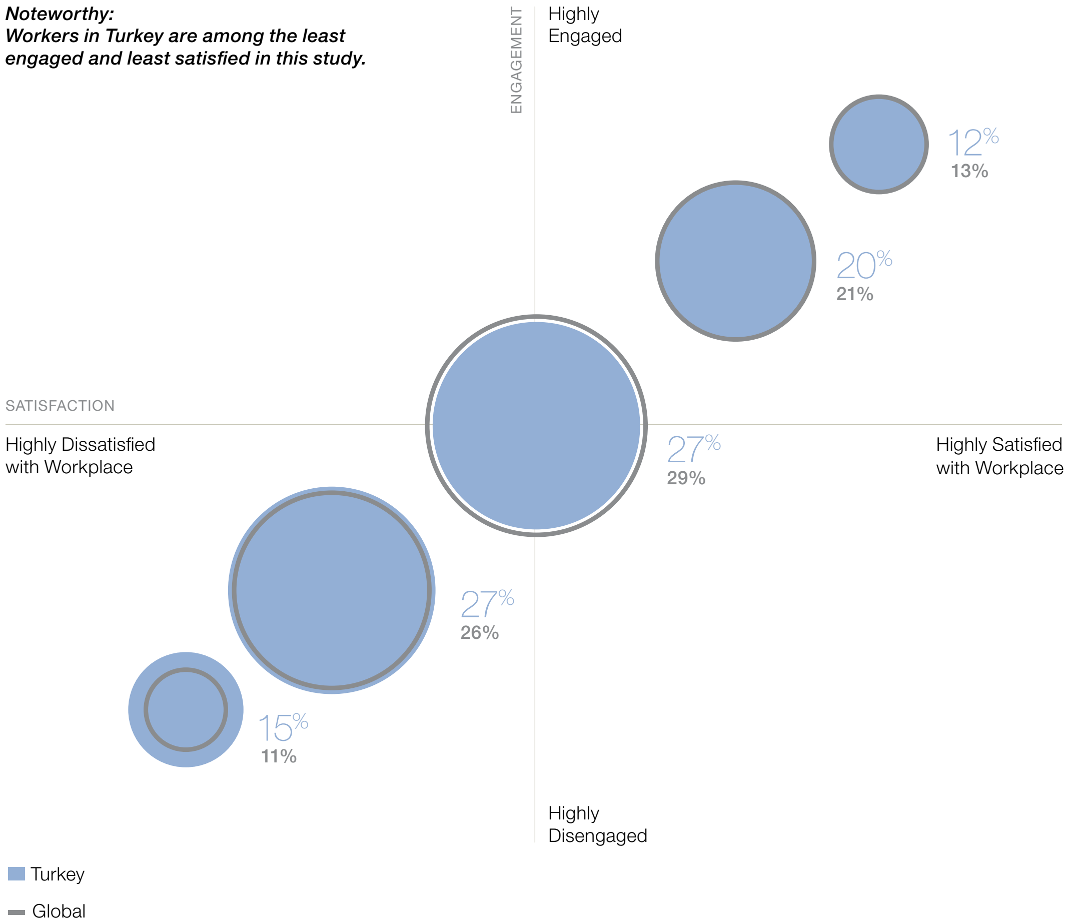
While Turkey is noted for its economic growth potential, strengthening engagement is critical to organizations' success here. It will be important for leaders to consider a variety of strategies to shift employees toward higher levels of engagement. This could include focusing on making individual workspaces more effective and creating shared spaces where colleagues can build a tighter sense of connection, such as as a café that can also be used for informal meetings.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-TR

Noteworthy:
Workers in Turkey are among the least engaged and least satisfied in this study.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-TR

◉ ***Noteworthy:* Turkish workers score below the global average for all but one engagement metric: valuing company culture.**

Do you agree with each of the following statements? (% agree)	**Turkey**	**Global**
You feel connection with your colleagues	72%	76%
You are happy to go to work	65%	71%
You feel proud to work for your company	67%	69%
You are motivated by your work	58%	68%
Your job gives you a sense of personal achievement	62%	67%
You would recommend your company as an employer	61%	63%
You value your company culture	67%	63%
You endorse your company's strategy and direction	58%	63%
You are optimistic about your future with your company	54%	60%

Workplace Satisfaction Metrics

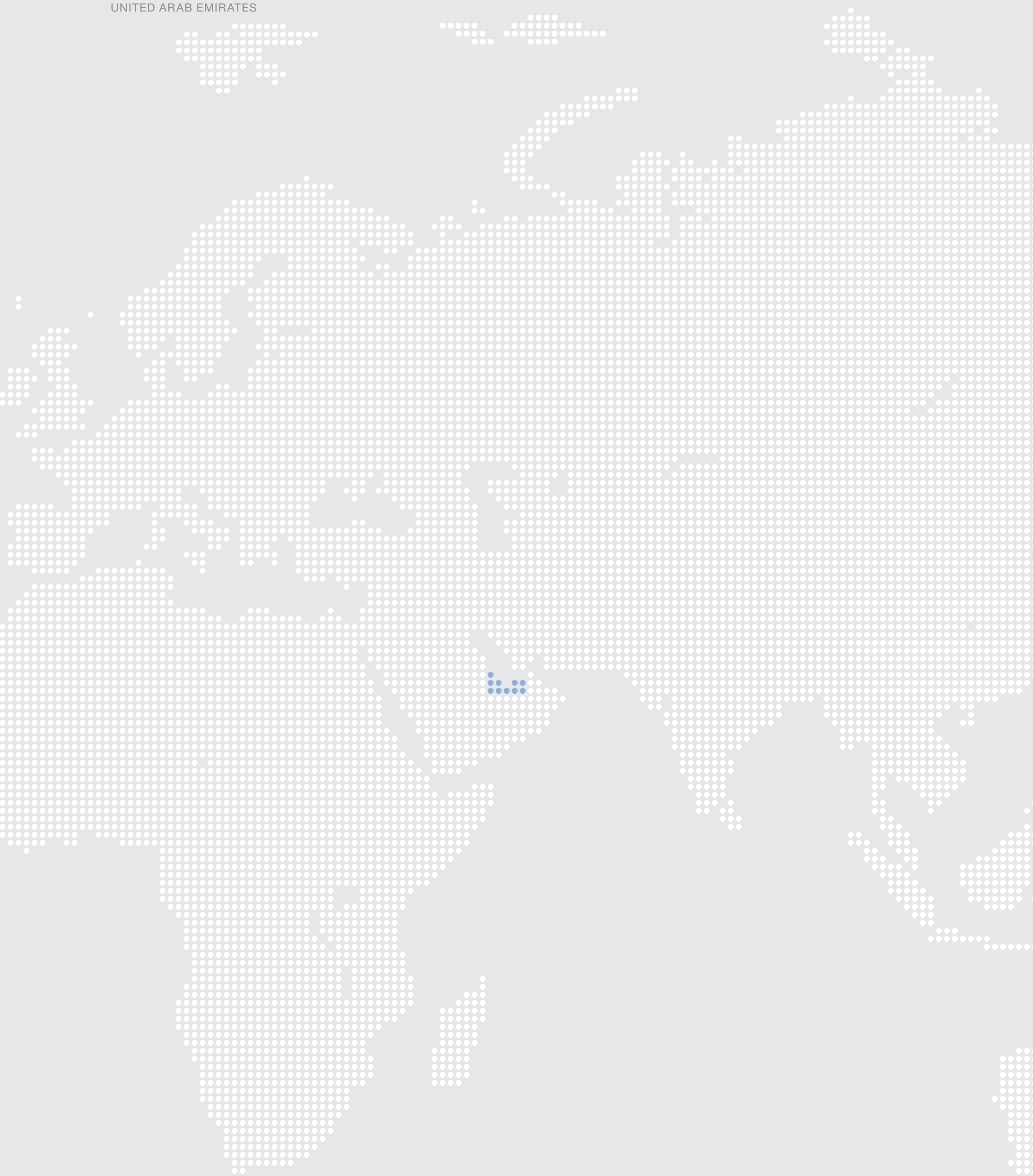
Employee Attitudes Toward Work Environment

FIGURE 11-TR

◉ ***Noteworthy:* Turkish workers report below-global norms on three-quarters of the workplace satisfaction metrics. They score lowest for the ability to socialize and have informal conversations. Yet they far exceed the global average for the ability to choose where to work based on the task they are doing.**

Does your work environment allow you to: (% agree)	**Turkey**	**Global**
Choose where to work in the office based on the task	61%	51%
Socialize with colleagues	▼ 61%	75%
Concentrate easily	62%	66%
Work in teams without being interrupted	59%	58%
Move around throughout the day	70%	77%
Physically move during the day and change postures	73%	75%
Feel a sense of belonging to the company	59%	66%
Easily and freely express and share ideas	64%	66%
Share projects and achievements	58%	61%
Have access to information about the company	63%	70%
Accommodate remote workers	60%	56%
Feel relaxed, calm	61%	59%
Accommodate visitors	60%	66%

▼ Lowest score in the study



United Arab Emirates

	United Arab Emirates	**Global**
Highly Engaged and Highly Satisfied	20%	13%
Highly Disengaged and Highly Dissatisfied	5%	11%

Participants	701			
Gender	81% Male	19% Female		
Age	65% 18–34	27% 35–44	7% 45–54	1% 55+
Job Title	6% Senior manager	23% Manager		
	27% Technician / associate	44% Clerk + service / sales		

AE

The Workplace in the United Arab Emirates

Offices in the United Arab Emirates are primarily traditional, with the vast majority of office layouts comprising of private offices. Few organizations (11 percent) embrace entirely open-plan spaces compared to the global average of 23 percent (Figure 1-AE).

The majority of employees work either in a private office or a shared private office, with 52 percent of Emirati employees working in shared private offices, compared to the global norm 37 percent (Figure 2-AE).

Although most Emirati workers say they like their offices, they report below-average satisfaction levels for a variety of factors, including office furniture, workplace size and ambient noise level (Appendix K). They also report below-average access to shared spaces such as meeting rooms and social hubs (Figure 3-AE).

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-AE

◉ ***Noteworthy:* Entirely open-plan offices are rare in the U.A.E.; the majority of workplaces consist of both open-plan and private spaces.**

Which of the following describes your office layout?	**United Arab Emirates**	**Global**
Entirely Open Plan	11%	23%
Entirely Individual Offices	32%	31%
Combination Open Plan and Individual Offices	57%	46%

Individual Workspaces

FIGURE 2-AE

◉ ***Noteworthy:* The majority of workers in the U.A.E. share private offices, far more than the global average.**

Which of the following describes your individual workspace?	**United Arab Emirates**	**Global**
Individual Private Office	18%	23%
Shared Private Office	52%	37%
Open Plan, Assigned Space	22%	33%
Nomadic	8%	8%

Access to Shared Areas

FIGURE 3-AE

◉ ***Noteworthy:* Emirati workers report having less-than-average access to shared spaces, especially those that support focus and rejuvenation.**

Does your workplace have: (% agree)	**United Arab Emirates**	**Global**
Sufficient Meeting Rooms	66%	70%
Cafeteria / Canteen	56%	61%
Private Space	47%	53%
Relaxation Areas	37%	45%
Sports / Exercise Facilities	24%	22%

Technology + Remote Work

Technology at Work

FIGURE 4-AE

Noteworthy:* *Opportunity exists for technology investments to support greater mobility within the office. The prevalence of mobile phones and laptops lags global averages, but tablet use is high.

Does your employer provide you with:
(% agree)

	United Arab Emirates	Global
Desktop Computer	83%	80%
Landline Telephone	82%	86%
Laptop	29%	39%
Mobile Phone	34%	39%
Tablet	22%	14%
Videoconferencing	25%	35%

Remote Work*

FIGURE 5-AE

Noteworthy:* *The lack of mobile technology prohibits most employees from working away from the office. However almost twice the global average report they work outside the office every day.

How often do you work away from the office?

	United Arab Emirates	Global
Every day	16%	9%
Sometimes	30%	36%
Never	55%	55%

*Percentages do not total 100% due to rounding.

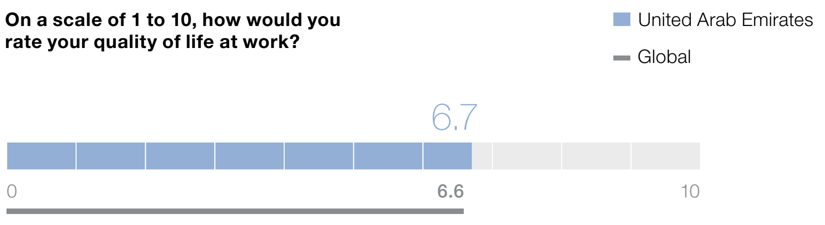
How Workers Feel

Quality of Life at Work

FIGURE 6-AE

Noteworthy:* *Emirati workers score their quality of life at work slightly above the global average, and most say they like their offices.

On a scale of 1 to 10, how would you rate your quality of life at work?

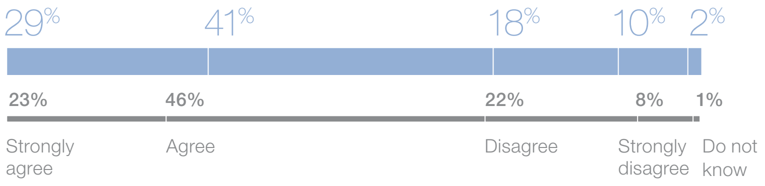


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-AE

Do you like your work environment?
(% agree)



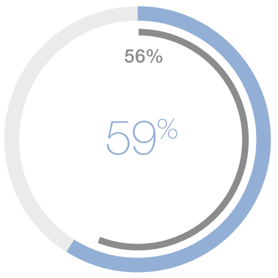
Perception of Company Culture

FIGURE 8-AE

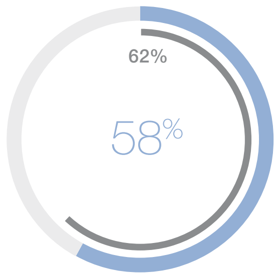
Noteworthy:* *Emirati workers attribute below average scores to their organizations for creating an engaging work culture.

Would you say that your company:
(% agree)

Recognizes and values its employees



Encourages you to use your initiative



See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

Emirati workers' engagement and workplace satisfaction levels are significantly above global averages. The number of highly disengaged employees is also lower than the global average—a distinct difference from its neighbor, Saudi Arabia, where the workforce is much more polarized. In fact, U.A.E. ranks just below India in the combined number of engaged and highly engaged employees.

Many Emirati workers give their company high scores for its strategy and direction, feeling a connection with colleagues and being happy to go to work. At the same time, they are less enthusiastic about their jobs giving them a sense of personal satisfaction, which might indicate a need for their employers to think about ways to make work more meaningful. Overall, employees report they like their workplaces and describe them as "nice looking" (Appendix L). Yet many Emirati employees say their workplaces don't allow workers to share projects and achievements, have access to real-time information about the company, or feel relaxed and calm at work (Figure 11-AE).

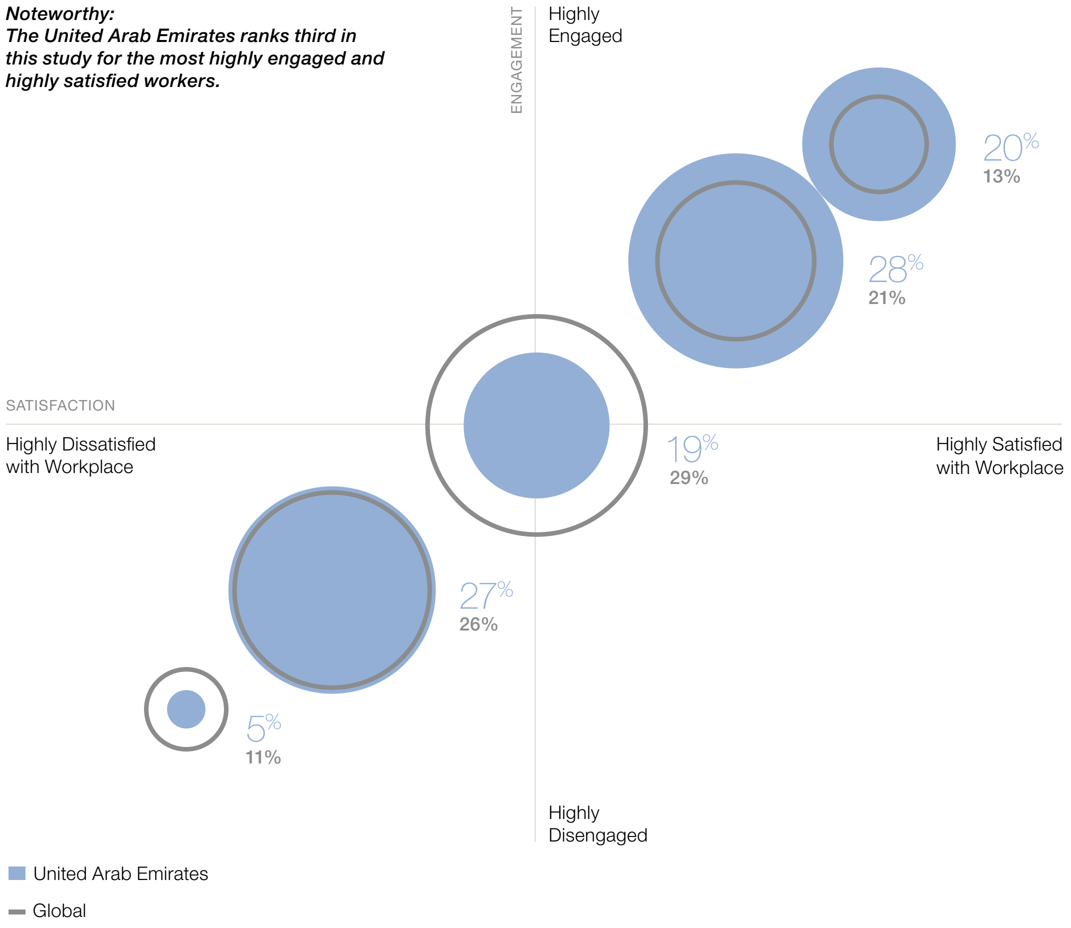
In order to increase employee engagement, leaders may want to focus on individual workspaces, where employees were unsatisfied with many aspects, such as size, organization of the space, furniture, ambient noise levels and the ability to personalize their space. This could send a message to employees that their organization is genuinely concerned about their wellbeing, which was an area where workers scored their companies quite low, compared to other countries.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-AE

Noteworthy:
The United Arab Emirates ranks third in this study for the most highly engaged and highly satisfied workers.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-AE

***Noteworthy:* Emirati workers score engagement metrics above global averages, except for one: Emirati workers do not feel their job gives them a sense of personal achievement.**

Do you agree with each of the following statements? (% agree)	**United Arab Emirates**	**Global**
You feel connection with your colleagues	78%	76%
You are happy to go to work	73%	71%
You feel proud to work for your company	73%	69%
You are motivated by your work	72%	68%
Your job gives you a sense of personal achievement	64%	67%
You would recommend your company as an employer	63%	63%
You value your company culture	70%	63%
You endorse your company's strategy and direction	80%	63%
You are optimistic about your future with your company	62%	60%

Workplace Satisfaction Metrics

Employee Attitudes Toward Work Environment

FIGURE 11-AE

***Noteworthy:* Emirati workers rate more than half the workplace satisfaction metrics below global norms, which represent areas for improvement.**

Does your work environment allow you to: (% agree)	**United Arab Emirates**	**Global**
Choose where to work in the office based on the task	55%	51%
Socialize with colleagues	72%	75%
Concentrate easily	72%	66%
Work in teams without being interrupted	62%	58%
Move around throughout the day	72%	77%
Physically move during the day and change postures	76%	75%
Feel a sense of belonging to the company	64%	66%
Easily and freely express and share ideas	64%	66%
Share projects and achievements	55%	61%
Have access to information about the company	61%	70%
Accommodate remote workers	58%	56%
Feel relaxed, calm	48%	59%
Accommodate visitors	67%	66%

United Kingdom

	United Kingdom	**Global**
Highly Engaged and Highly Satisfied	11%	13%
Highly Disengaged and Highly Dissatisfied	12%	11%

Participants	816			
Gender	46% Male	54% Female		
Age	35% 18–34	25% 35–44	25% 45–54	15% 55+
Job Title	9% Senior manager 20% Technician / associate		33% Manager 38% Clerk + service / sales	

The Workplace in the United Kingdom

The United Kingdom leads the world for open-plan offices and has more than twice the number of nomadic workers than the global average.

Due to high real estate costs, especially in London, United Kingdom businesses are advocates of open-plan offices. Almost half (49 percent) of all U.K. offices are open-plan configurations, which is more than double the global average of 23 percent (Figure 1-GB).

Correspondingly, the number of all private office configurations in the U.K. is less than half the global average. Most workers (45 percent) have assigned workspaces in open-plan settings. However, because businesses are eager to maximize density to control costs, workplaces can be very crowded.

Compared to the global average, the U.K. has more than double the number of workers with no assigned workspace percent (Figure 2-GB).

Workers report they have sufficient access to spaces for privacy, yet they rate their ability to concentrate below the global average, possibly indicating that these private spaces aren't being used for focus work. Workers rate their access to sufficient meeting rooms and canteens below the global average, which may be indicative of real estate constraints (Figure 3-GB).

Key

◉ *Noteworthy*

▲ Highest score in the study

▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-GB

◉ ***Noteworthy:* Almost half of all workplaces in the U.K. are entirely open plan—more than double the global average.**

Which of the following describes your office layout?		**United Kingdom**	**Global**
Entirely Open Plan	▲	49%	23%
Entirely Individual Offices	▼	14%	31%
Combination Open Plan and Individual Offices		37%	46%

Individual Workspaces

FIGURE 2-GB

◉ ***Noteworthy:* The U.K. has more than double the number of nomadic workers compared to the global average.**

Which of the following describes your individual workspace?	**United Kingdom**	**Global**
Individual Private Office	12%	23%
Shared Private Office	26%	37%
Open Plan, Assigned Space	45%	33%
Nomadic	17%	8%

Access to Shared Areas

FIGURE 3-GB

◉ ***Noteworthy:* The U.K. falls below the global average for offering access to meeting rooms and cafeteria/canteen spaces but exceeds global averages for areas for rejuvenation and exercise.**

Does your workplace have: (% agree)		**United Kingdom**	**Global**
Sufficient Meeting Rooms		63%	70%
Cafeteria / Canteen		58%	61%
Private Space		64%	53%
Relaxation Areas	▲	71%	45%
Sports / Exercise Facilities		23%	22%

▲ Highest score in the study

▼ Lowest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-GB

◉ ***Noteworthy:*** ***Despite having higher-than-average unassigned workstations, U.K. organizations seem to lack access to mobile technology to support nomadic workstyles.***

Does your employer provide you with:
(% agree)

	United Kingdom	Global
Desktop Computer	77%	80%
Landline Telephone	91%	86%
Laptop	39%	39%
Mobile Phone	38%	39%
Tablet	12%	14%
Videoconferencing	39%	35%

Remote Work*

FIGURE 5-GB

◉ ***Noteworthy:*** ***While mobile technology is limited, workers are slightly more likely than the global average to work remotely.***

How often do you work away from the office?

	United Kingdom	Global
Every day	9%	9%
Sometimes	38%	36%
Never	52%	55%

*Percentages do not total 100% due to rounding.

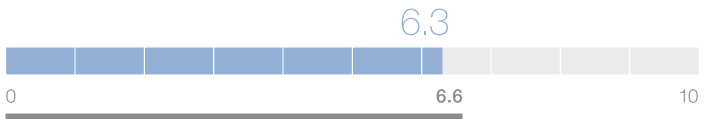
How Workers Feel

Quality of Life at Work

FIGURE 6-GB

◉ ***Noteworthy:*** ***U.K. employees are less satisfied with the quality of their life at work, falling several points below the global average.***

On a scale of 1 to 10, how would you rate your quality of life at work?

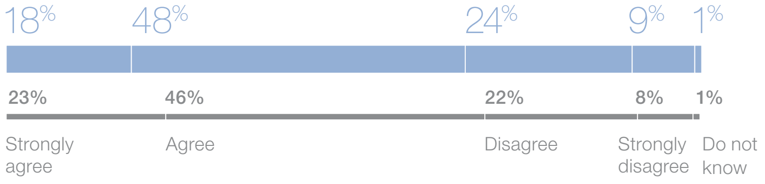


Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-GB

Do you like your work environment?
(% agree)

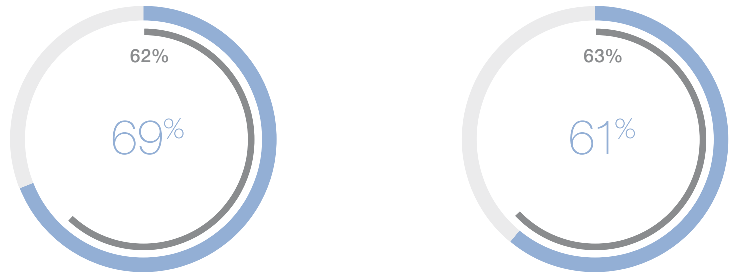


Perception of Company Culture

FIGURE 8-GB

◉ ***Noteworthy:*** ***Over two-thirds of U.K. workers believe their employers care about their health and safety, six out of every 10 say their company gets the best out of them.***

Would you say that your company:
(% agree)


Attaches great importance to the health and safety of its employees

Gets the best out of you

See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

The engagement level of U.K. workers is close to global norms, but suffers from mixed feelings regarding engagement and workplace satisfaction metrics. Although most are generally happy to go to work, enjoy connecting with colleagues and get a sense of personal achievement from the work they do, they don't value their company culture as much as workers in other countries and are less likely to recommend their company as an employer. They are also less optimistic about their future with the company (Figure 10-GB).

The lack of a range of spaces in U.K. offices may take a toll on worker engagement and satisfaction. The U.K. has by far the most entirely open office configurations anywhere in the world, and also ranks as one of the lowest countries for workers who report being able to concentrate easily and work in teams without being interrupted. This suggests that people are struggling to manage their need for privacy, and are not able to focus. Workers in the U.K. also say they are less likely to be able to choose where they want to work in the office, which may leave them feeling a lack of control over their daily work experience. While the data show U.K. workers have access to spaces for relaxation (Figure 3-GB), workers say they are less likely to feel relaxed and calm at work, which may stem from feeling a lack of control and having less access to alternative spaces.

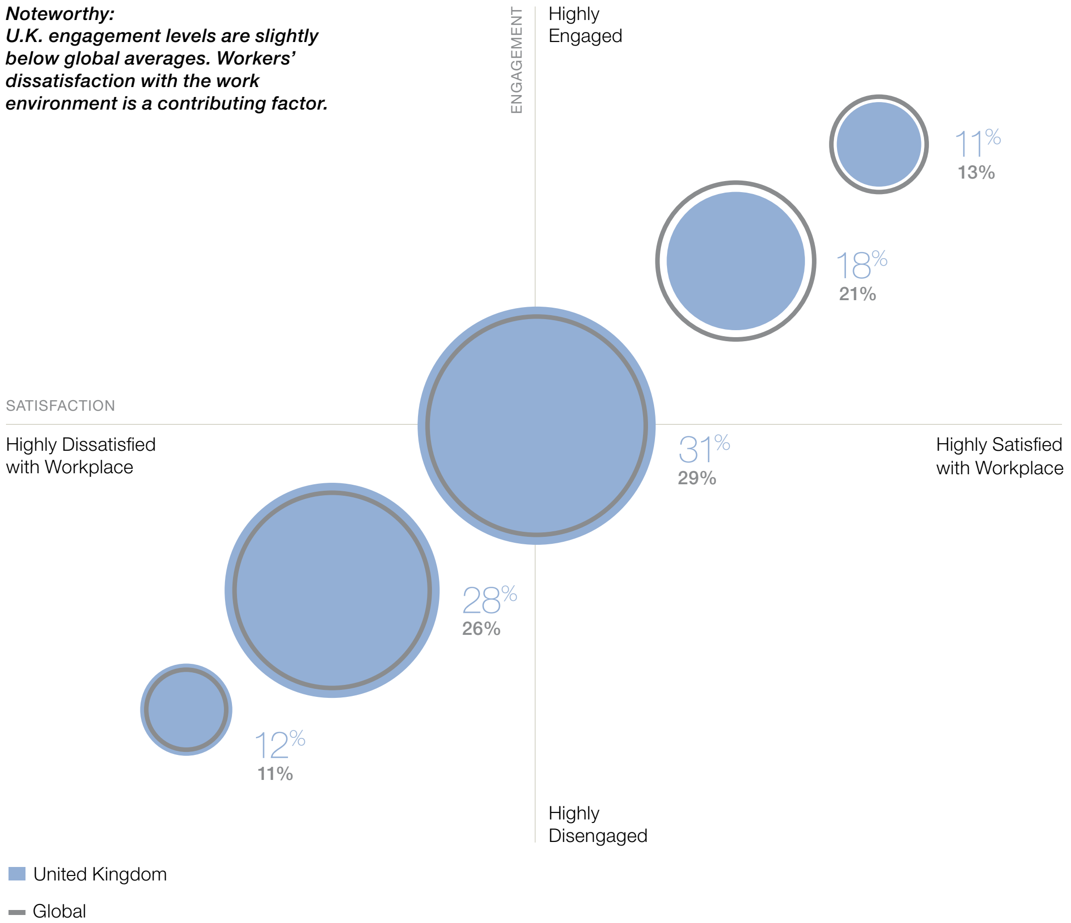
In a fluid and competitive job market like that in the U.K., investing in a range of spaces can help give employees more choices and control of their work experience. These spaces could include a range of enclosed spaces for individual or group work, to help add balance to primarily open environments. Providing employees with more control in the workplace may provide a clear advantage for building engagement and loyalty.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-GB

◉ ***Noteworthy:***
U.K. engagement levels are slightly below global averages. Workers' dissatisfaction with the work environment is a contributing factor.



This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-GB

◉ ***Noteworthy:* Although the U.K. mirrors global norms on most engagement metrics, they only rank 12th in the study overall.**

Do you agree with each of the following statements? (% agree)	**United Kingdom**	**Global**
You feel connection with your colleagues	79%	76%
You are happy to go to work	74%	71%
You feel proud to work for your company	68%	69%
You are motivated by your work	66%	68%
Your job gives you a sense of personal achievement	71%	67%
You would recommend your company as an employer	62%	63%
You value your company culture	61%	63%
You endorse your company's strategy and direction	66%	63%
You are optimistic about your future with your company	56%	60%

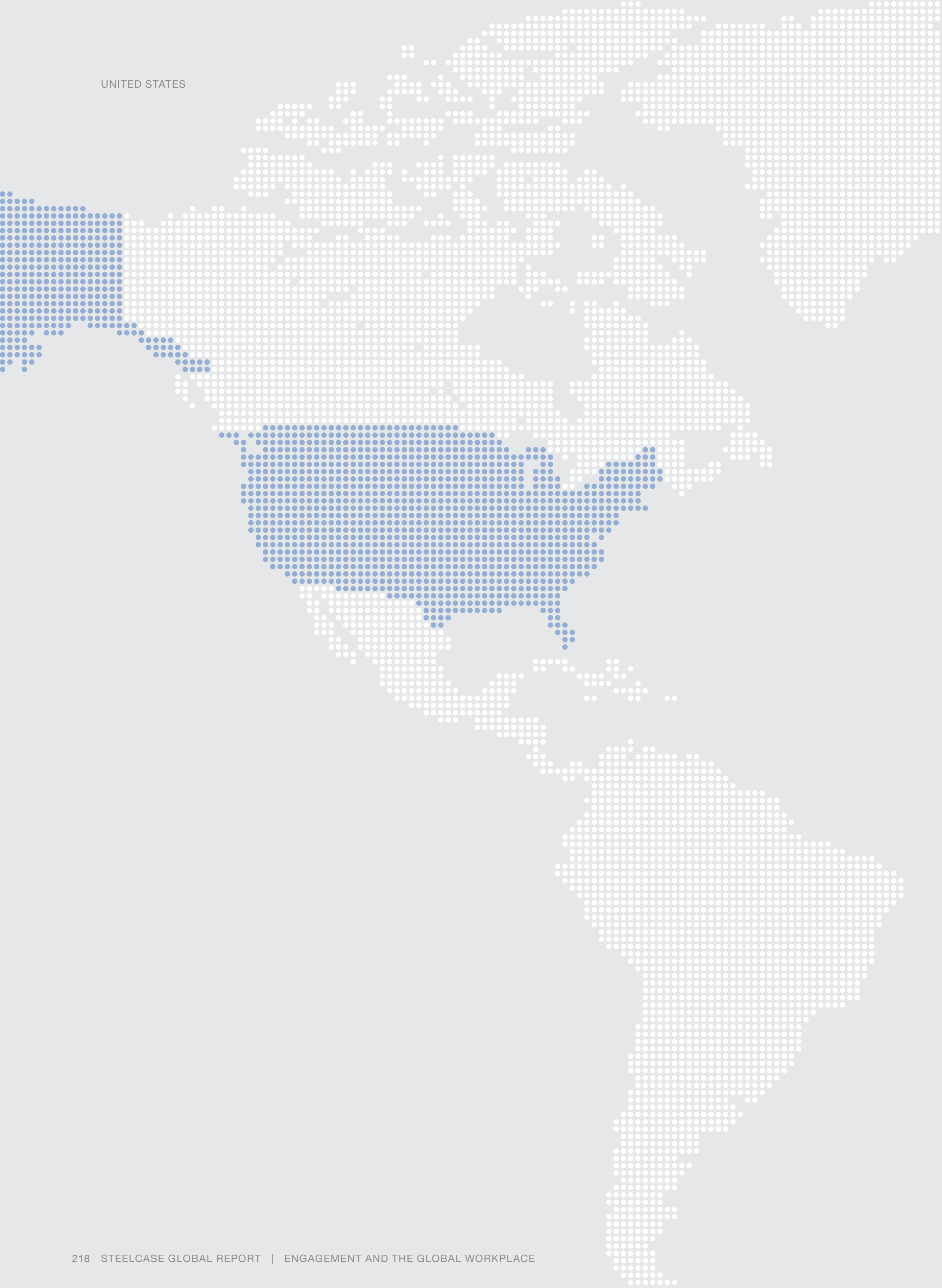
Workplace Satisfaction Metrics

Employee Attitudes Toward Work Environment

FIGURE 11-GB

◉ ***Noteworthy:* The U.K. falls below the global norm on almost all workplace satisfaction metrics.**

Does your work environment allow you to: (% agree)	**United Kingdom**	**Global**
Choose where to work in the office based on the task	41%	51%
Socialize with colleagues	73%	75%
Concentrate easily	57%	66%
Work in teams without being interrupted	50%	58%
Move around throughout the day	80%	77%
Physically move during the day and change postures	70%	75%
Feel a sense of belonging to the company	60%	66%
Easily and freely express and share ideas	64%	66%
Share projects and achievements	59%	61%
Have access to information about the company	77%	70%
Accommodate remote workers	50%	56%
Feel relaxed, calm	55%	59%
Accommodate visitors	61%	66%



United States

	United States	Global
Highly Engaged and Highly Satisfied	14%	13%
Highly Disengaged and Highly Dissatisfied	9%	11%

Participants	809			
Gender	44% Male	56% Female		
Age	34% 18–34	22% 35–44	25% 45–54	19% 55+
Job Title	19% Senior manager	13% Manager		
	15% Technician / associate	53% Clerk + service / sales		

The Workplace in the United States

While many believe that entirely open spaces are the norm in American companies, the majority of workplaces are actually a blend of open and enclosed spaces.

Although 21 percent of all office space is entirely open plan in the United States, countries such as the United Kingdom and South Africa have much more office space dedicated to open-plan design (46 percent and 36 percent respectively). Today, 77 percent of American workplaces are either entirely open-plan offices or a combination of open-plan and individual offices. Most workers have an assigned personal workstation in an open-plan area (Figure 1-US, Figure 2-US). Only five percent of American workers are nomadic (compared to a global average of eight percent).

Somewhat surprisingly, there is also a large percentage of employees (35 percent) who occupy private offices, significantly higher than the global average. Shared private offices and unassigned seating, also known as "hot desking" or "hoteling," are far less common than in other parts of the world.

Most U.S. workers report access to a sufficient number of shared spaces for focus work, rest and social activities.

Key

◉ *Noteworthy*

▲ Highest score in the study

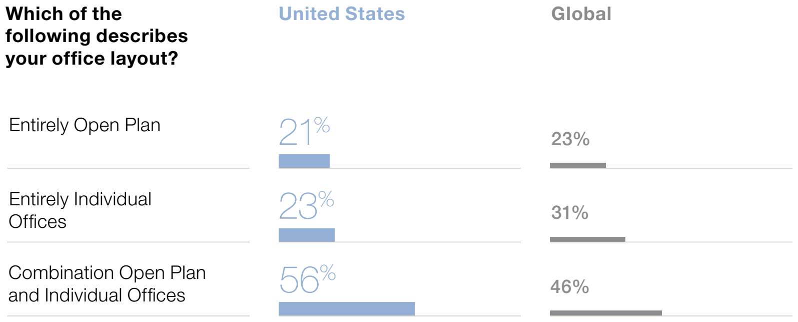
▼ Lowest score in the study

Office Space

Overall Office Layout

FIGURE 1-US

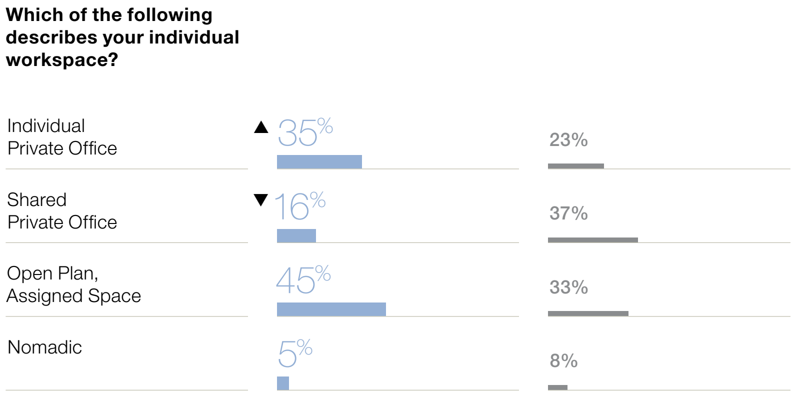
◉ ***Noteworthy:* Almost one quarter of space in American workplaces is dedicated to private offices.**



Individual Workspaces

FIGURE 2-US

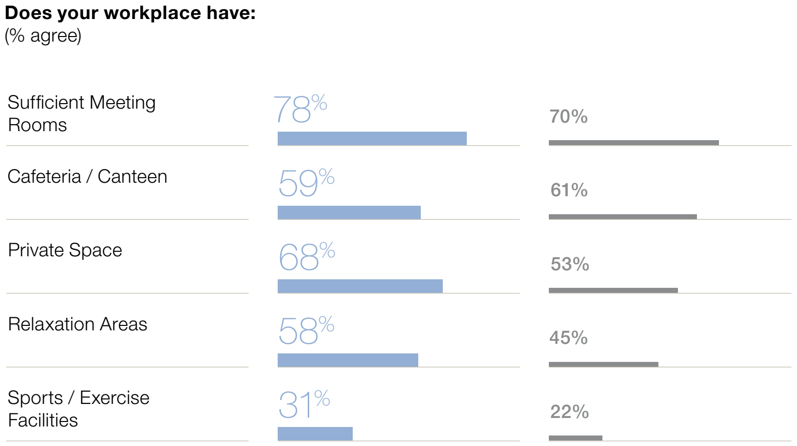
◉ ***Noteworthy:* Shared private offices and unassigned seating are far less common than in other parts of the world.**



Access to Shared Areas

FIGURE 3-US

◉ ***Noteworthy:* American workplaces rate slightly above global averages for employee access to shared spaces.**



▲ Highest score in the study

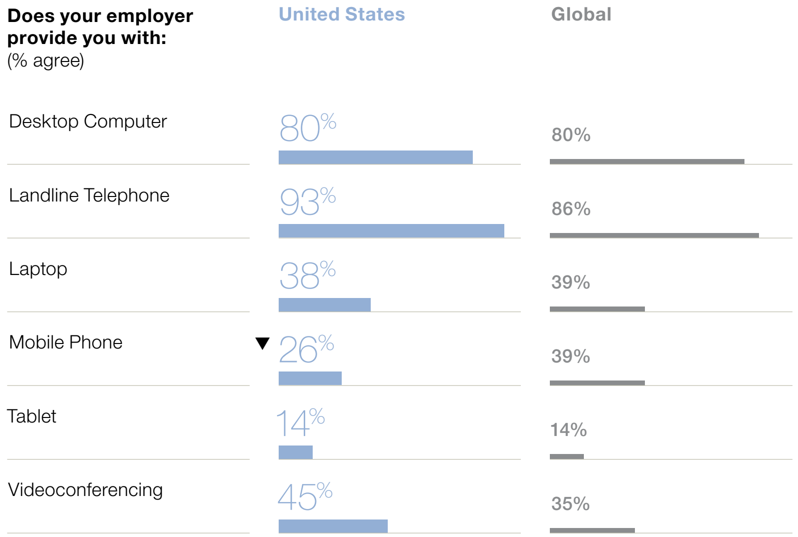
▼ Lowest score in the study

Technology + Remote Work

Technology at Work

FIGURE 4-US

◉ ***Noteworthy:* American workers continue to use landline phones—the second-highest of any country. They are also the least likely to be provided a mobile phone by their employer.**

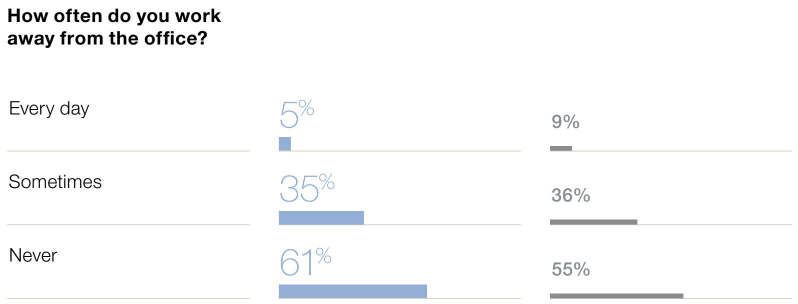


Does your employer provide you with:
(% agree)

Remote Work*

FIGURE 5-US

◉ ***Noteworthy:* Remote work is moderately accepted in the United States, perhaps an indication that offices are generally well equipped for resident workers and compare favorably to working remotely.**



How often do you work away from the office?

*Percentages do not total 100% due to rounding.

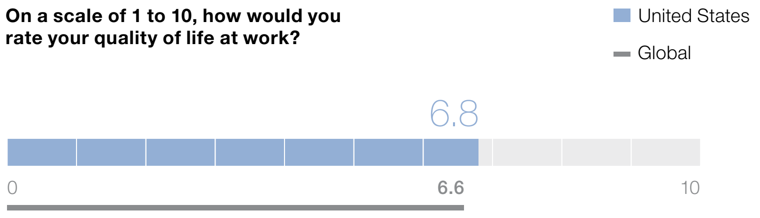
▼ Lowest score in the study

How Workers Feel

Quality of Life at Work

FIGURE 6-US

◉ ***Noteworthy:* American workers express positive sentiments about their quality of life at work, ranking it slightly above the global average.**

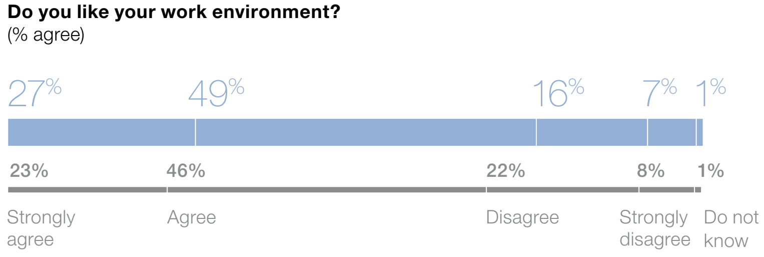


On a scale of 1 to 10, how would you rate your quality of life at work?

Country averages range from 6.0 to 7.5 on a 10-point scale.

Perception of Working Environment

FIGURE 7-US

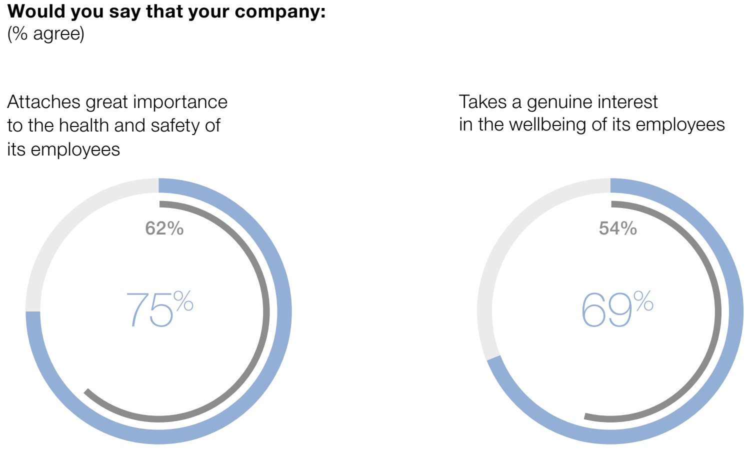


Do you like your work environment?
(% agree)

Perception of Company Culture

FIGURE 8-US

◉ ***Noteworthy:* American workers rank corporate culture metrics above the global averages, clearly expressing they feel their organizations care about them.**



Would you say that your company:
(% agree)

See Appendix J for all culture metrics.

The Link Between Engagement and Workplace Satisfaction

American workers score engagement and workplace satisfaction metrics above global averages, ranking sixth-highest in this study. They give their employers generally positive ratings for a variety of engagement metrics, particularly when it comes to endorsing the company's strategy and direction and valuing the company culture (Figure 10-US).

While mostly positive, their satisfaction with the workplace is close to global averages, which brings U.S. scores slightly below the most highly engaged countries such as India and Mexico. While American workers may have higher expectations than some of their counterparts in other countries, the lower score may also be attributed to the fact that few American workers are able to choose where to work in the office based on the task at hand.

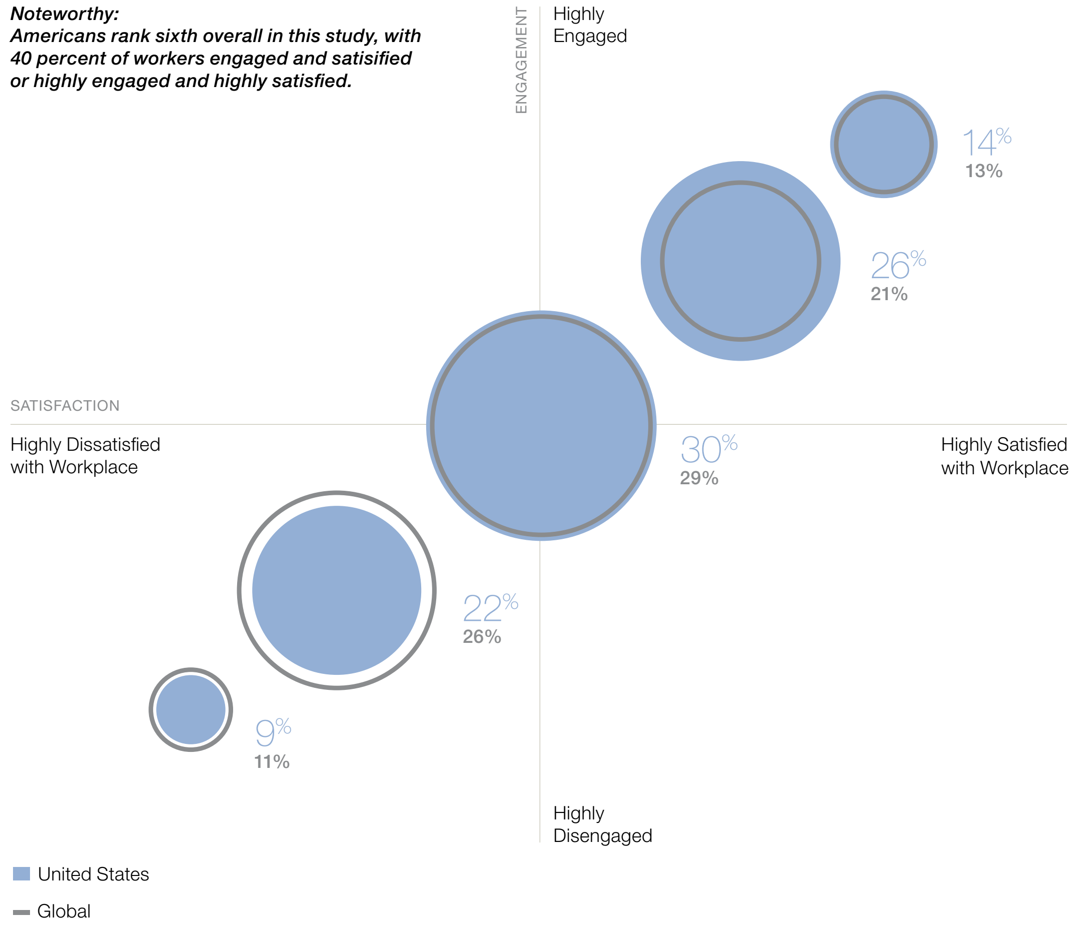
Despite slightly higher-than-average engagement levels, U.S. business leaders realize they need to boost employee engagement if they want to compete effectively on the global playing field. An important strategy to accomplish this might be to provide employees with a broader range of spaces that accommodate different modes of work, and also provide the freedom to choose the best place to support what they need to accomplish. Providing employees with more choice and control over where and how they work is one of the keys to boosting employee engagement.

To learn how to use the workplace to help boost employee engagement, see The Resilient Workplace, page 46.

Engagement + Satisfaction Cluster Analysis

FIGURE 9-US

***Noteworthy:* Americans rank sixth overall in this study, with 40 percent of workers engaged and satisified or highly engaged and highly satisfied.**



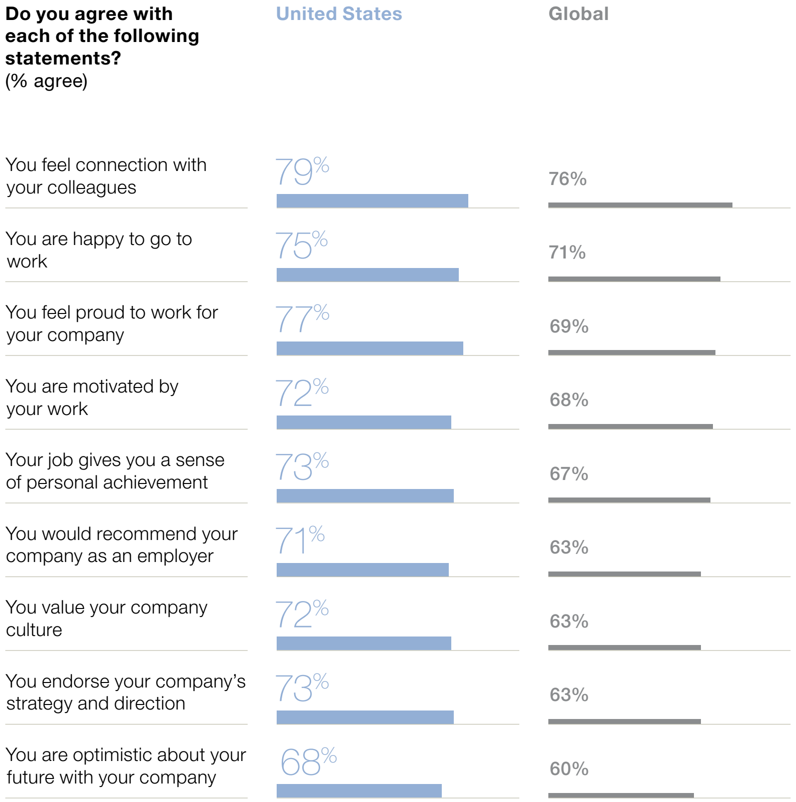
This cluster analysis is derived from data on the following two pages.

Workplace Engagement Metrics

Employee Attitudes Toward Company

FIGURE 10-US

***Noteworthy:* American workers are among the most engaged in the world and score above the global average on every engagement metric.**



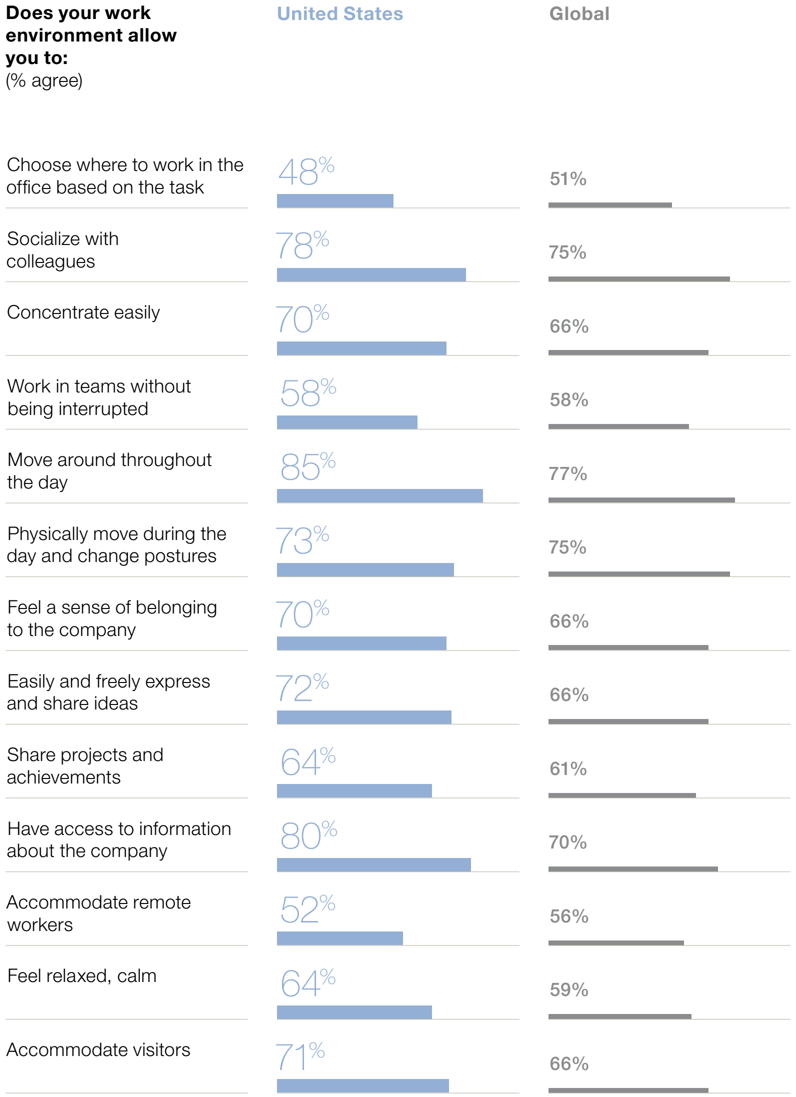
Do you agree with each of the following statements? (% agree)	**United States**	**Global**
You feel connection with your colleagues	79%	76%
You are happy to go to work	75%	71%
You feel proud to work for your company	77%	69%
You are motivated by your work	72%	68%
Your job gives you a sense of personal achievement	73%	67%
You would recommend your company as an employer	71%	63%
You value your company culture	72%	63%
You endorse your company's strategy and direction	73%	63%
You are optimistic about your future with your company	68%	60%

Workplace Satisfaction Metrics

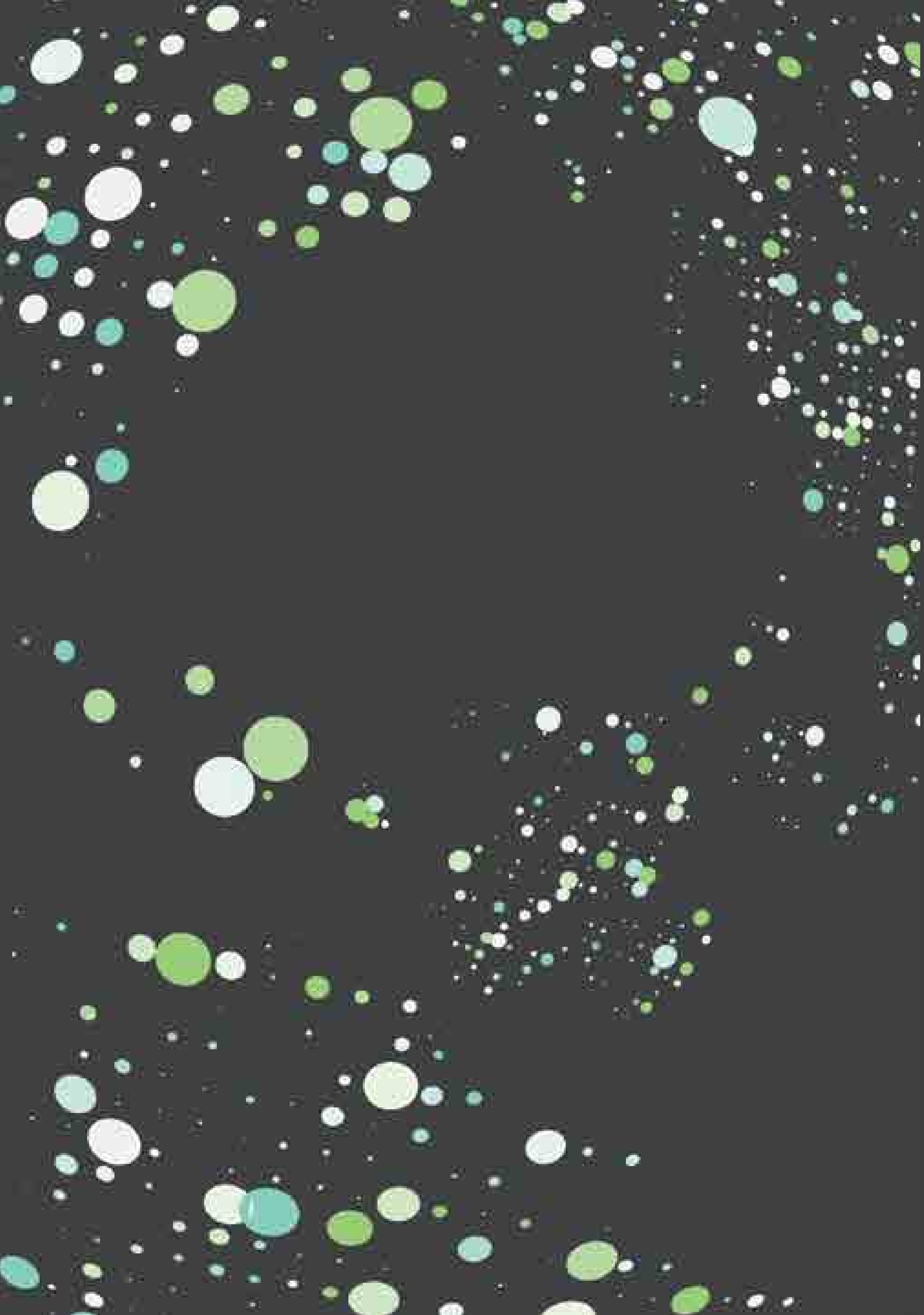
Employee Attitudes Toward Work Environment

FIGURE 11-US

***Noteworthy:* American workers are among the most satisfied in the world and score above the global averages for most workplace experience metrics, but score below the global norm for the ability to choose where to work, physically move during the day and accommodate remote workers.**



Does your work environment allow you to: (% agree)	**United States**	**Global**
Choose where to work in the office based on the task	48%	51%
Socialize with colleagues	78%	75%
Concentrate easily	70%	66%
Work in teams without being interrupted	58%	58%
Move around throughout the day	85%	77%
Physically move during the day and change postures	73%	75%
Feel a sense of belonging to the company	70%	66%
Easily and freely express and share ideas	72%	66%
Share projects and achievements	64%	61%
Have access to information about the company	80%	70%
Accommodate remote workers	52%	56%
Feel relaxed, calm	64%	59%
Accommodate visitors	71%	66%



Appendix

Survey Sampling + Methodology

Steelcase partnered with the global marketing research firm Ipsos to conduct an intensive study of 12,480 office workers in 17 countries on four continents throughout 2014. This online survey-based research effort measured relevant dimensions of employee engagement and workplace satisfaction—both powerful indicators of worker and organizational wellbeing. The quantitative data from this study was then synthesized with findings of Steelcase's ongoing qualitative research and insights about the workplace and people at work around the world.

Within each of the 17 participating countries, an online survey was administered to a representative sampling of office workers who worked in companies with more than 100 employees and spent the majority of their working hours onsite at a company facility. The sampling in each country included workers in these job categories:

- Senior manager
- Manager
- Technician / associate
- Clerk + service / sales

To ensure the sampling within each country was representative, the data were weight-adjusted based on International Labour Organization and Eurostat statistics.

The online survey comprised 20 close-ended questions and two open-ended questions, all translated into the primary language of each participating country. Eight of the close-ended questions focused on demographics: company type and size, position, gender, age, industry and level of worker mobility. The remaining 14 questions focused on workplace experiences and indicators of engagement.

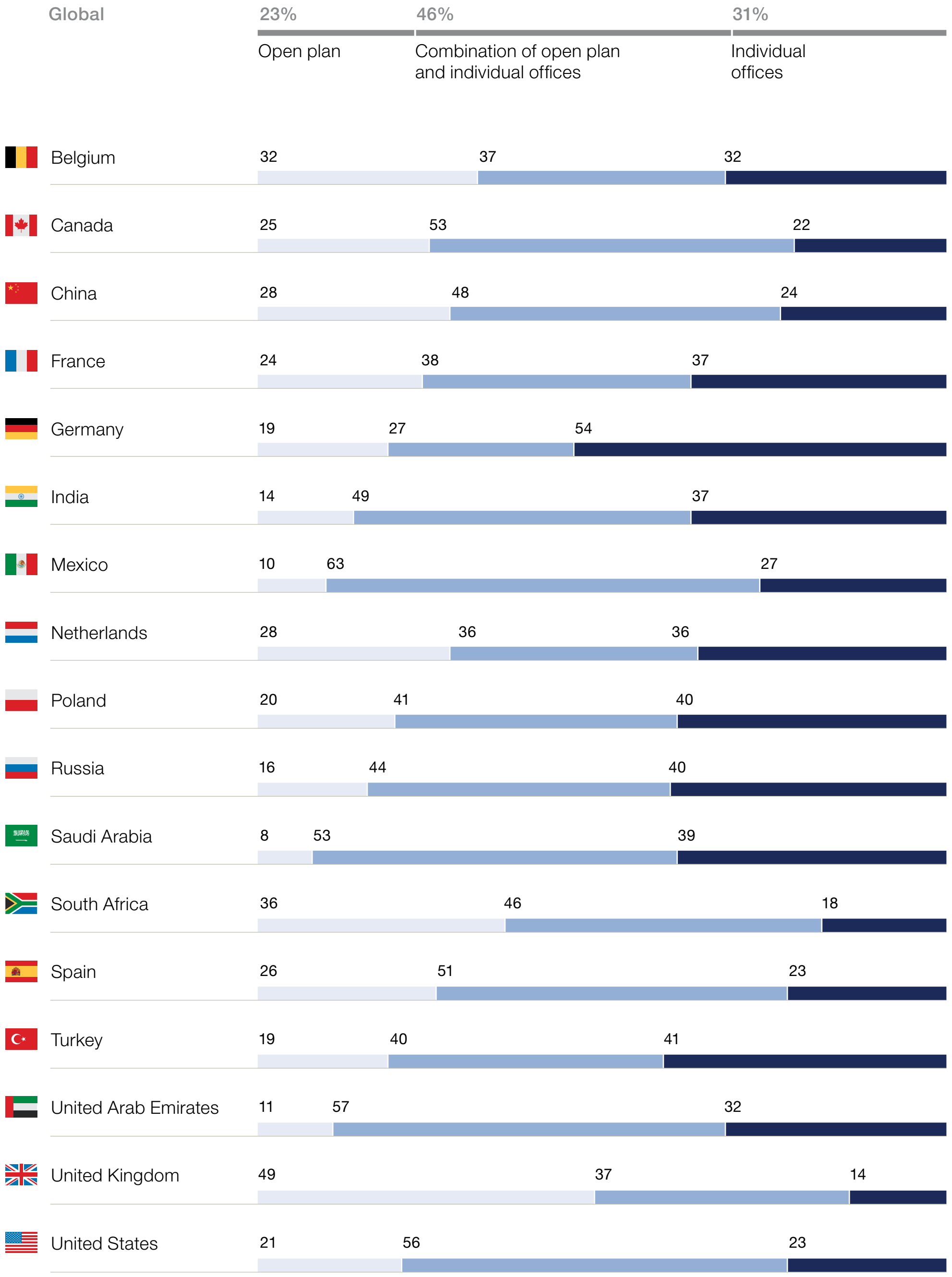
The survey questions were formulated in large part from findings of an in-depth meta-analysis conducted by Steelcase researchers, which identified six dimensions of worker wellbeing: mindfulness, vitality, belonging, meaning, authenticity and optimism. Key insights from other Steelcase multinational research projects were also factored into the development of the survey tool, the analysis of the data and the synthesis of the overall findings.

To uncover broad trends and understand important nuances, Ipsos and Steelcase researchers analyzed the data on multiple levels: by title/job type, age, individual worksetting (private, shared private, open plan, unassigned) and degree of remote work/mobility—to identify which factors exerted the most influence across countries as well as within each one. In addition to looking at the responses from each country individually, researchers also looked at the data as a whole to identify macro patterns and provide a global comparison point.

Country	Symbol	Region	Number of Participants	Engagement Ranking
Belgium	BE	Europe	420	16
Canada	CA	Americas	802	10
China	CN	Asia	803	12
France	FR	Europe	824	17
Germany	DE	Europe	803	8
India	IN	Asia	802	1
Mexico	MX	Americas	796	2
Netherlands	NL	Europe	407	14
Poland	PL	Europe	832	7
Russia	RU	Europe	808	13
Saudi Arabia	SA	Middle East	450	5
South Africa	ZA	Africa	802	4
Spain	ES	Europe	803	15
Turkey	TR	Europe/Asia	802	9
United Arab Emirates	AE	Middle East	701	3
United Kingdom	GB	Europe	816	11
United States	US	Americas	809	6

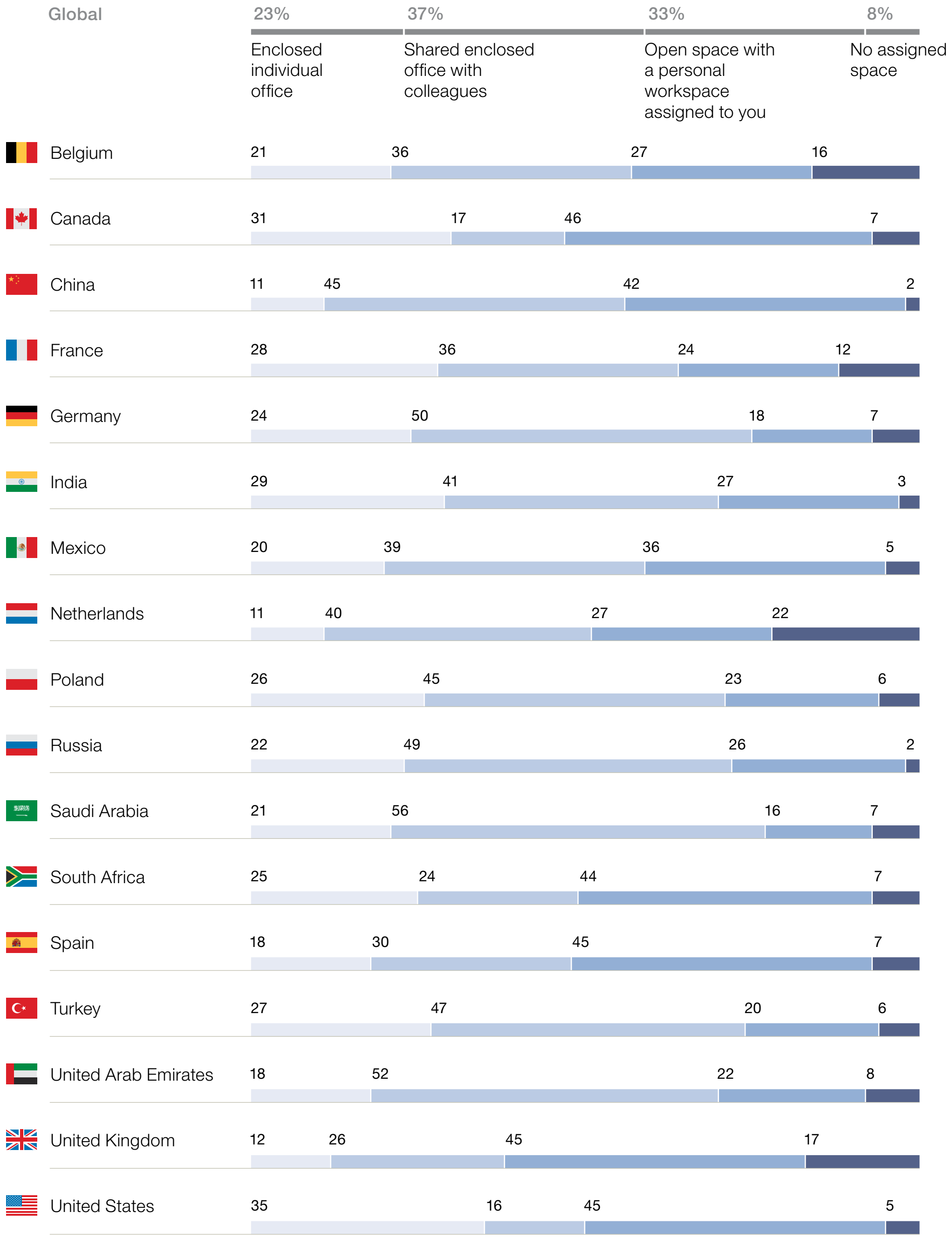
A: Overall Office Layout

Which of the following describes your office layout?



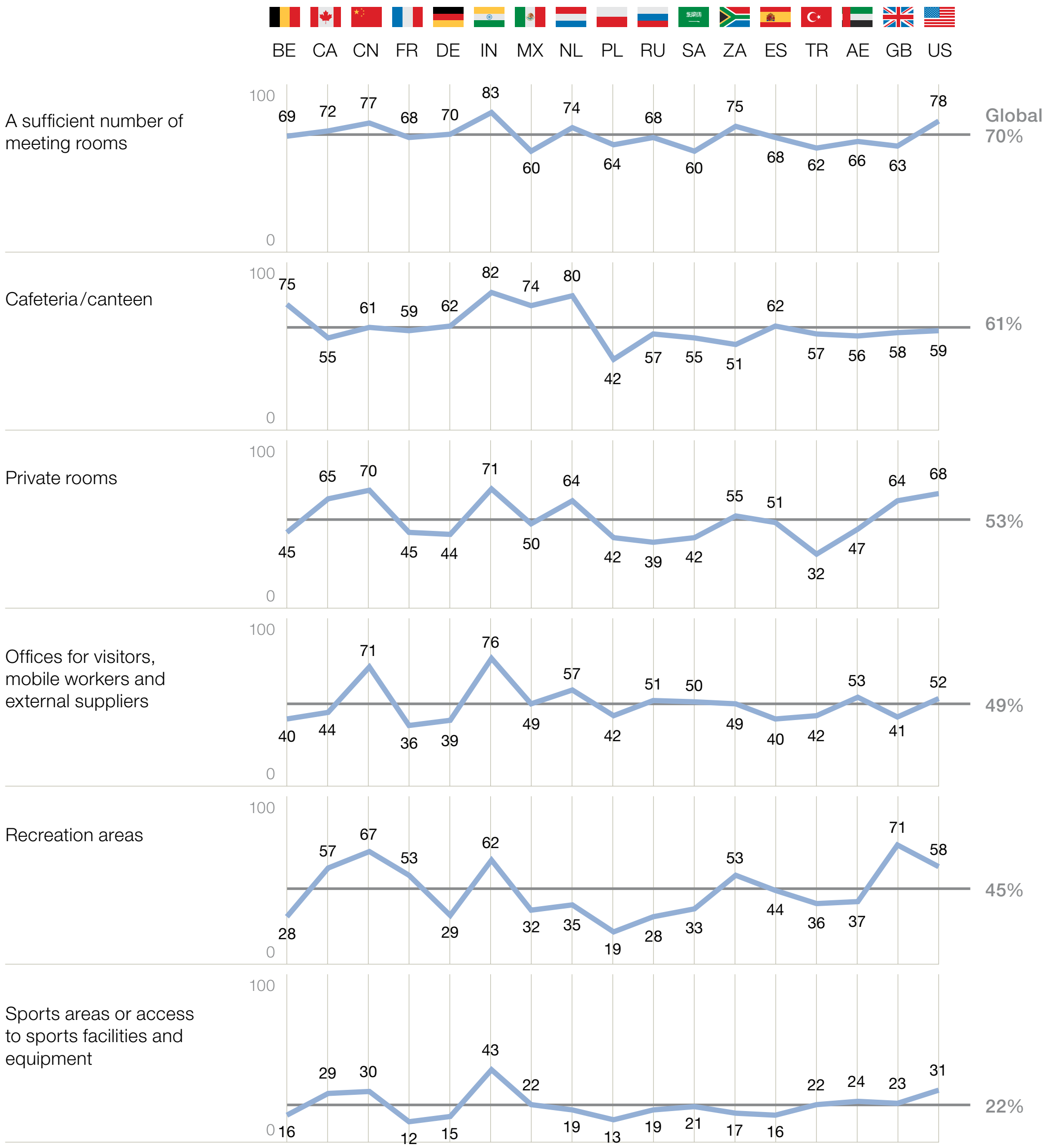
B: Individual Workspaces

Which of the following describes your individual workspace?



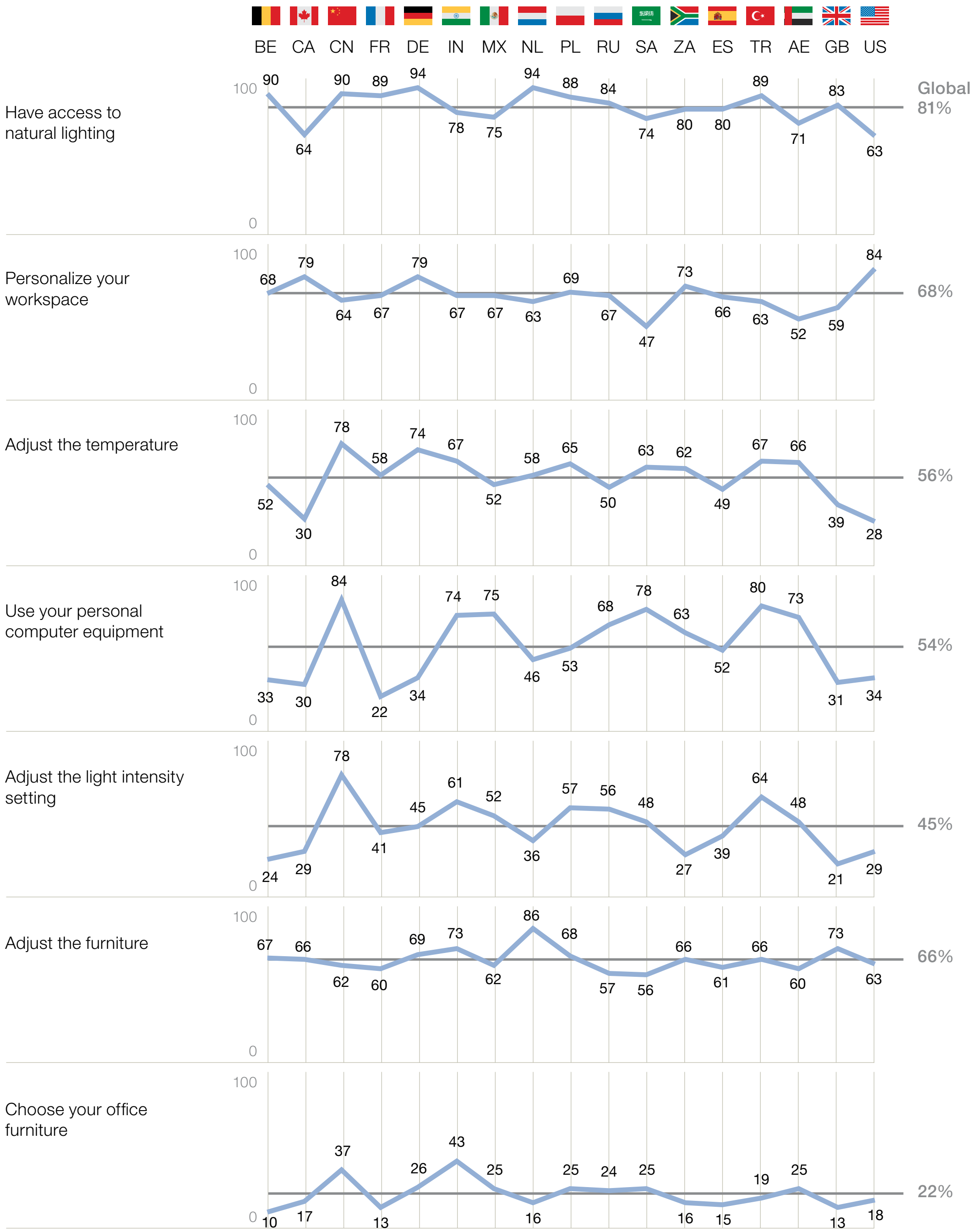
C: Access to Shared Areas

Does your workplace have:
(% agree)



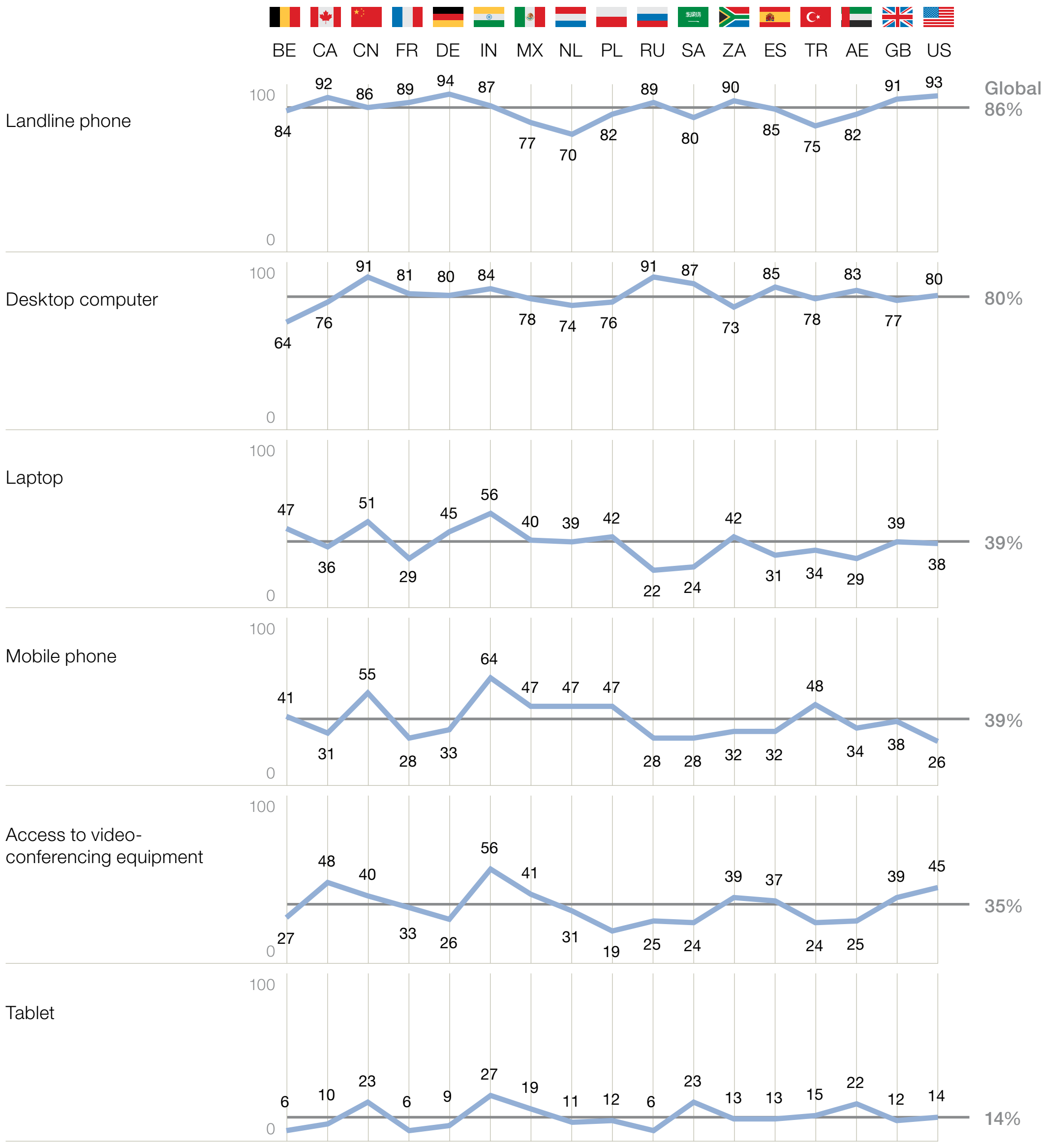
D: Control Over Workspace Basics

Does your work environment allow you to:
(% agree)



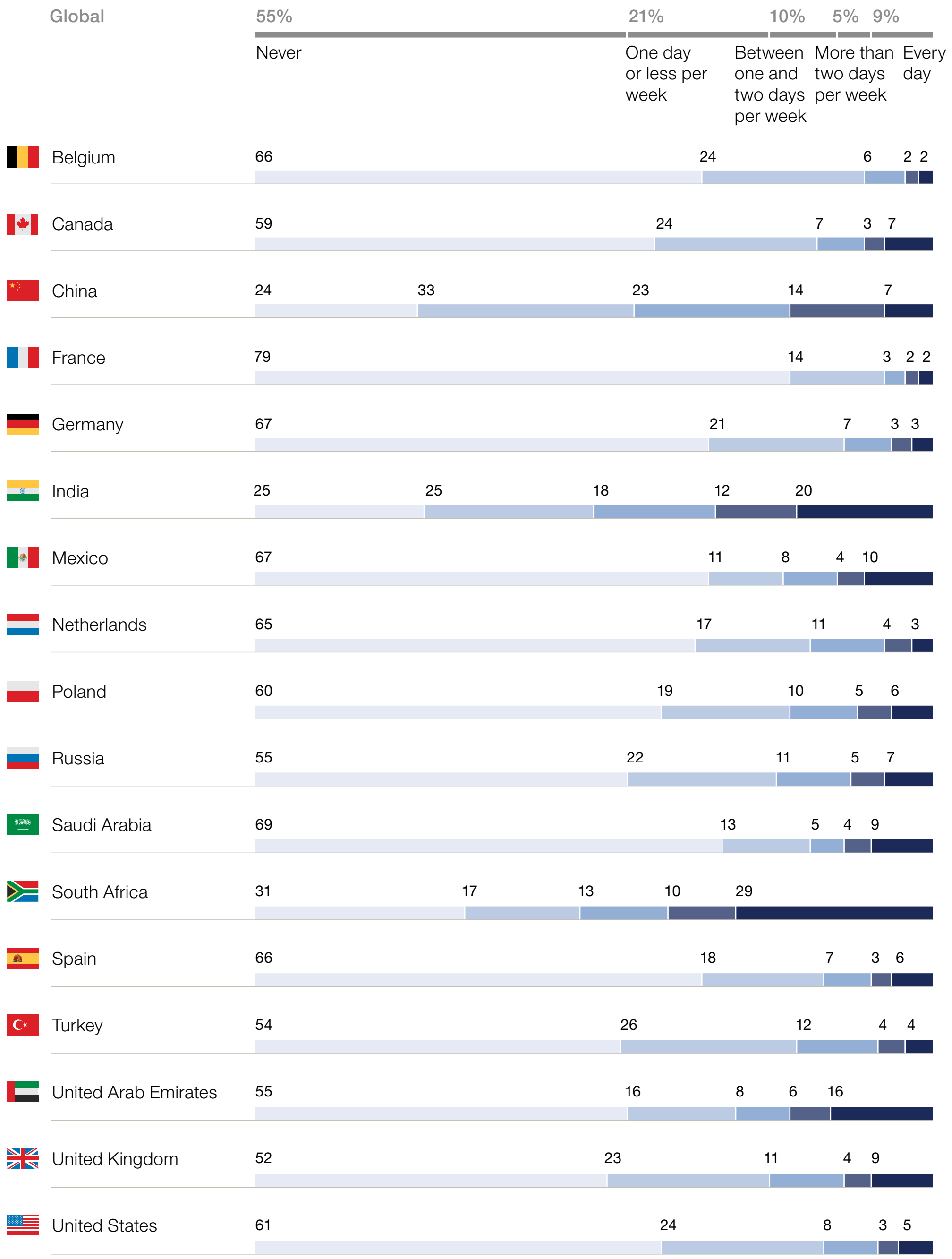
E: Fixed vs. Mobile Technology

Does your employer provide you with:
(% agree)



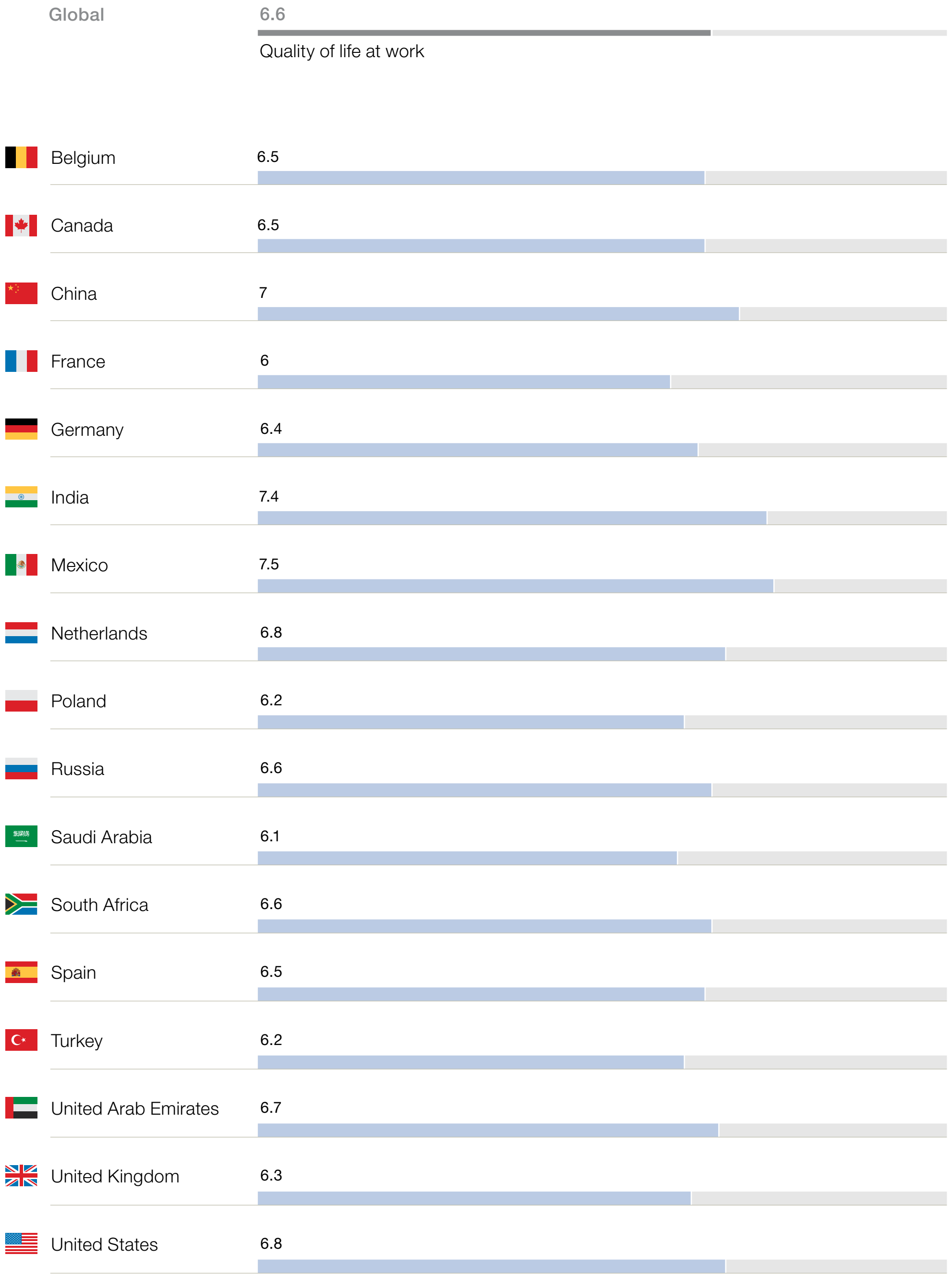
F: Remote Work Adoption

How often do you work away from the office?



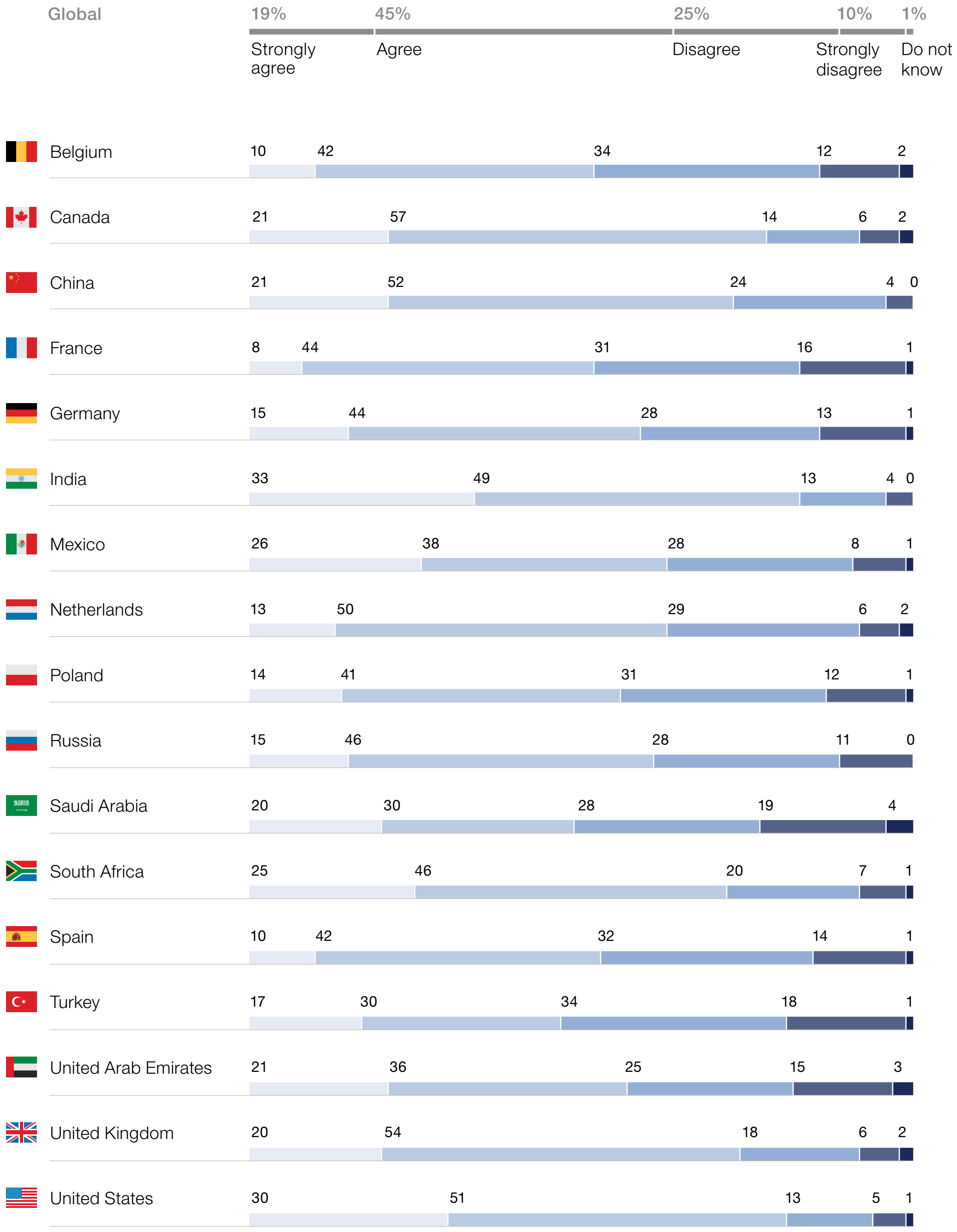
G: Quality of Life at Work

On a scale of 1 to 10, how would you rate your quality of life at work?



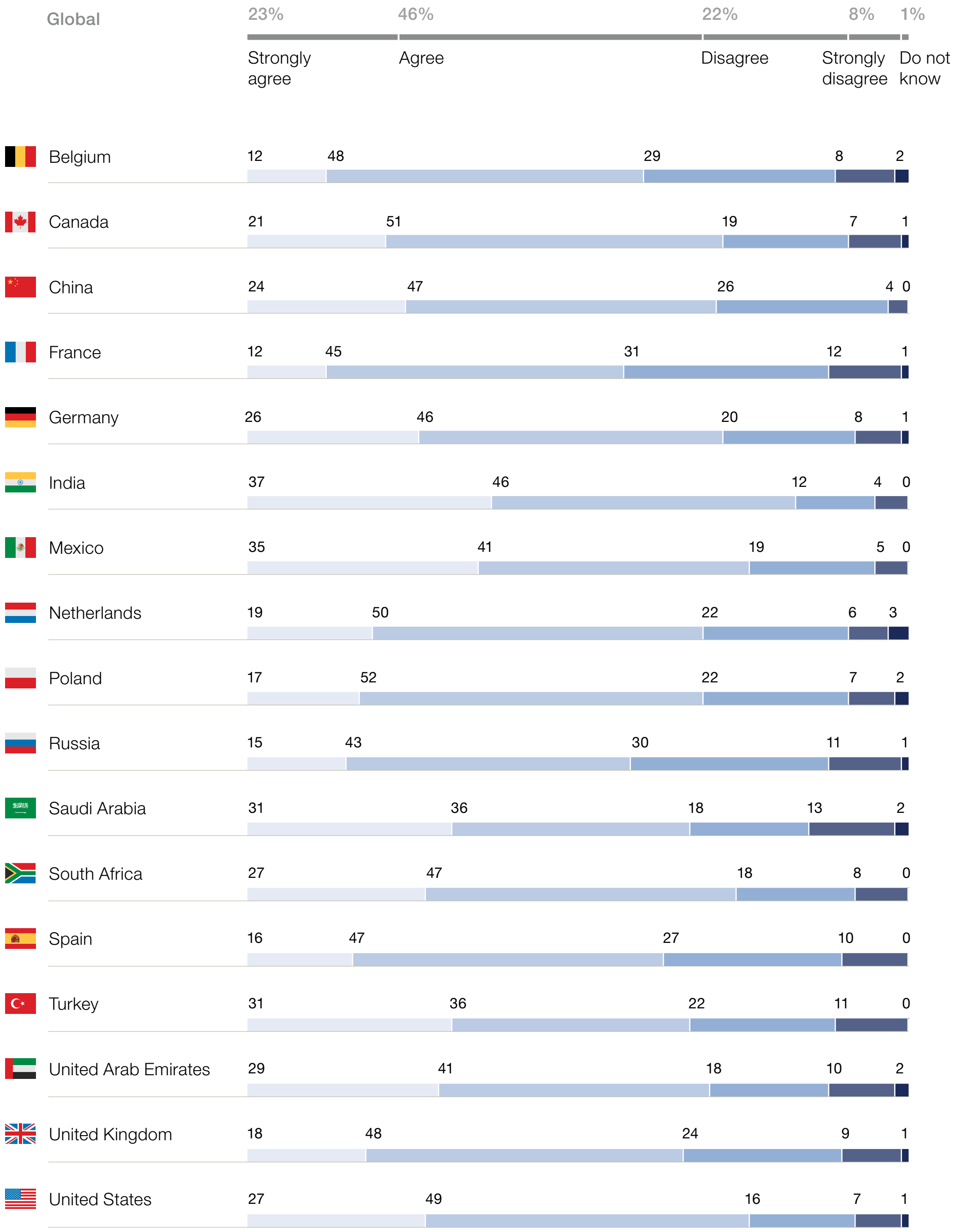
H: Organizational Fit

Would you say your company is an appropriate place for you to work and fits in with your lifestyle? (% agree)



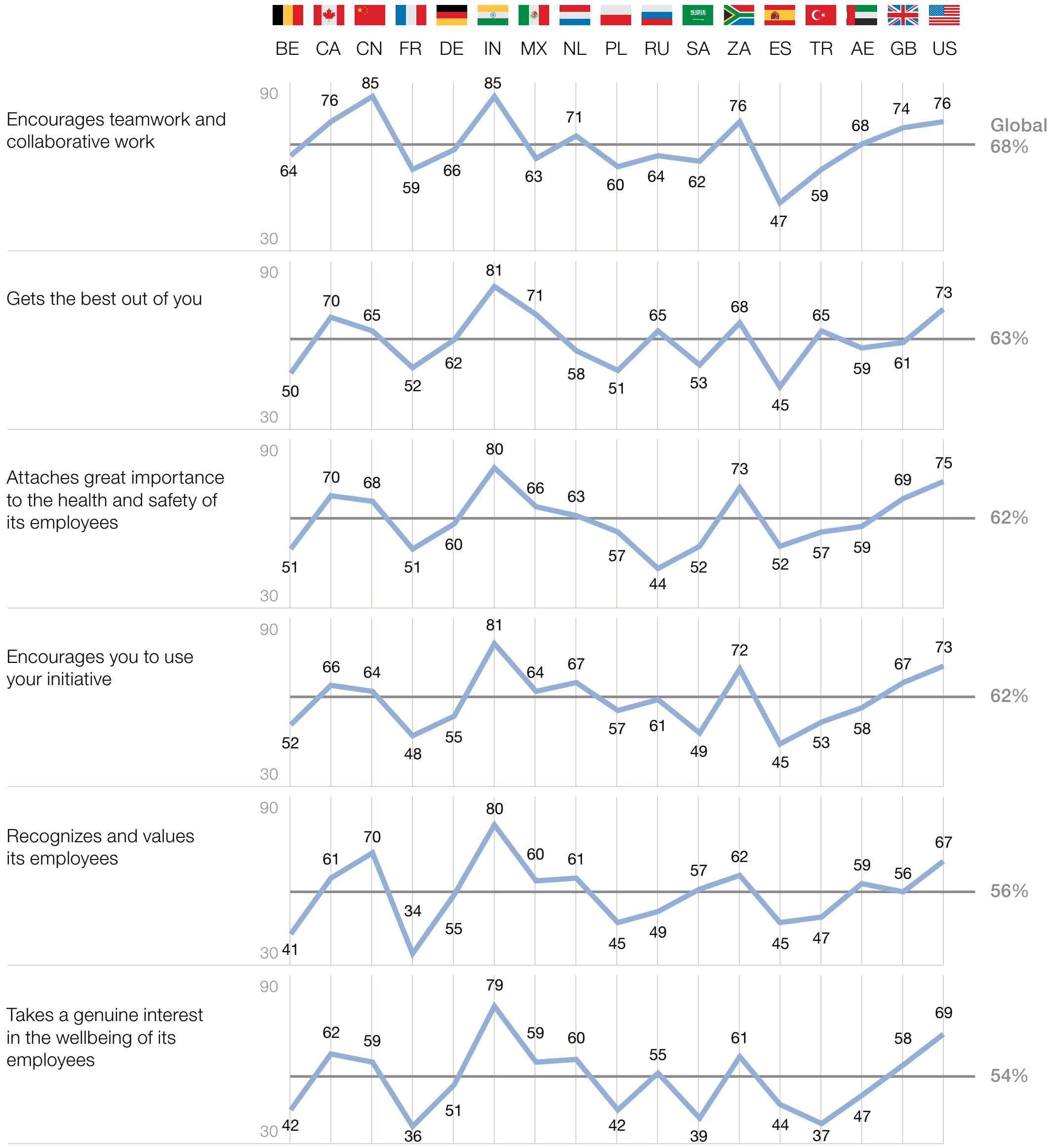
I: Perception of the Work Environment

Do you like your work environment?
(% agree)



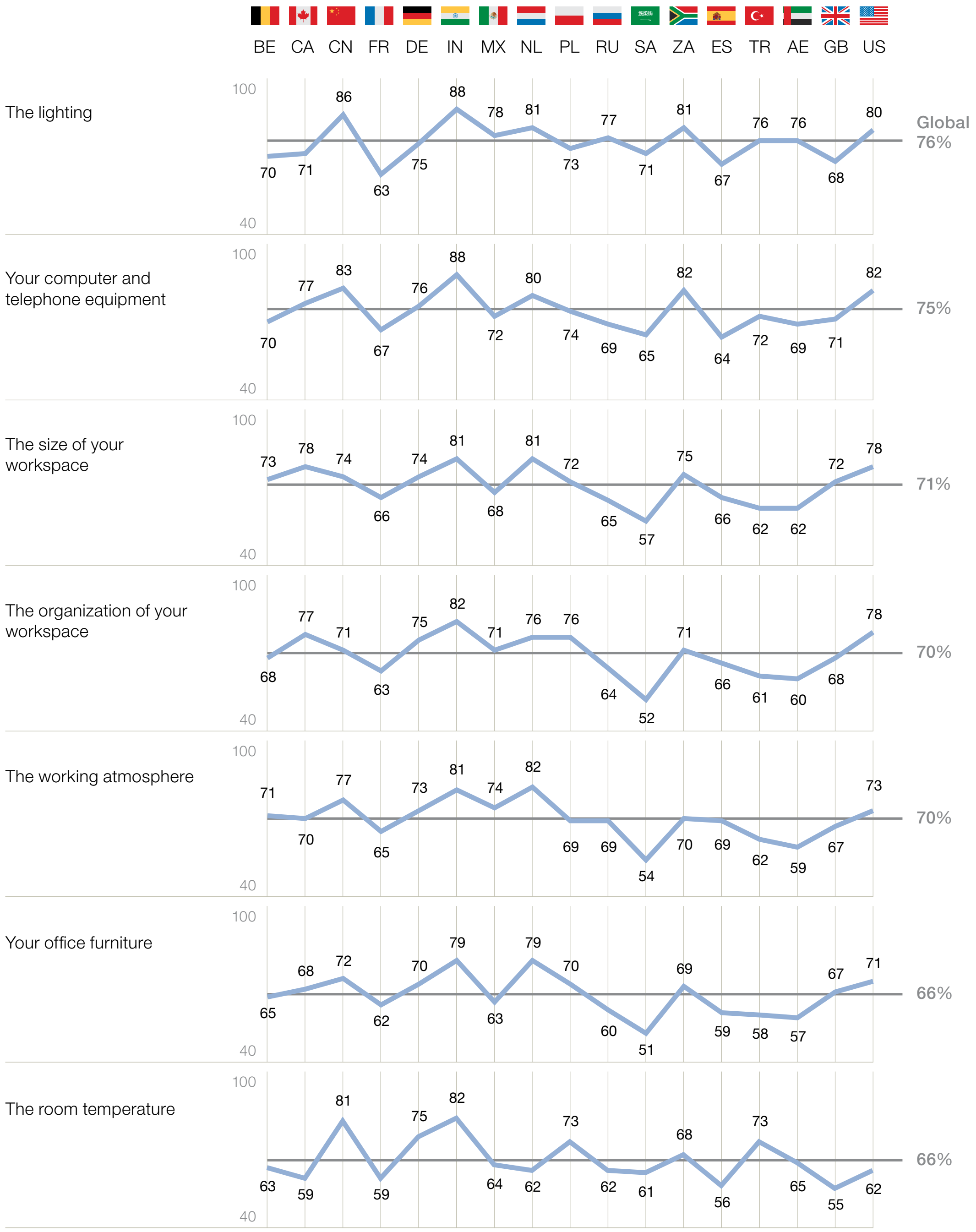
J: Perception of Company Culture

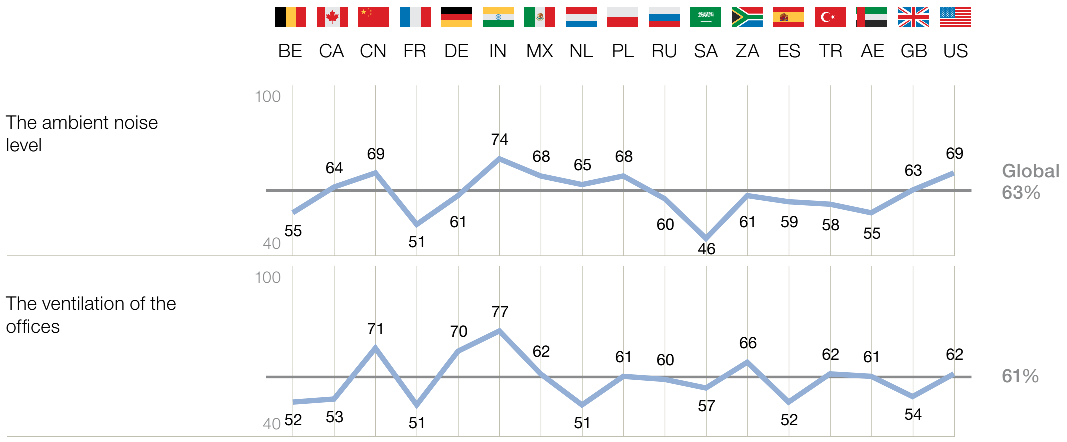
Would you say that your company:
(% agree)



K: Satisfaction with Workspace Basics

Are you satisfied with the following in your workspace? (% agree)



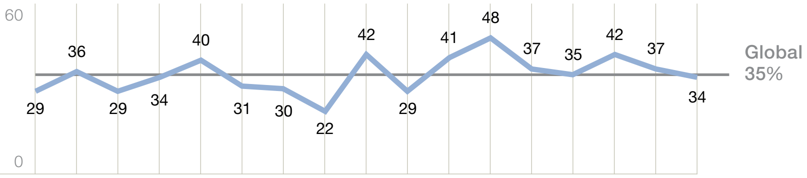


L: Workplace Descriptors

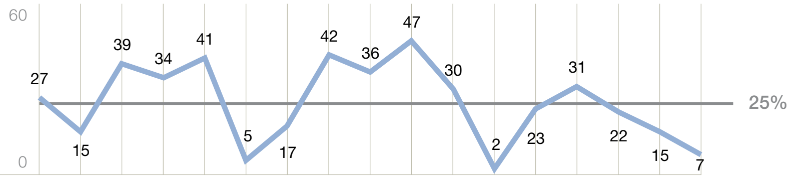
What adjectives would you use to describe your workplace?

BE CA CN FR DE IN MX NL PL RU SA ZA ES TR AE GB US

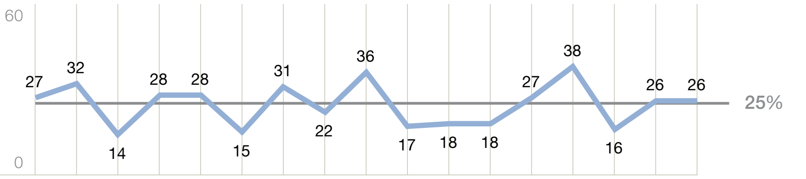
Stressful



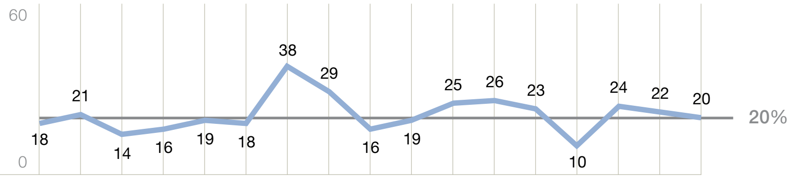
Convivial



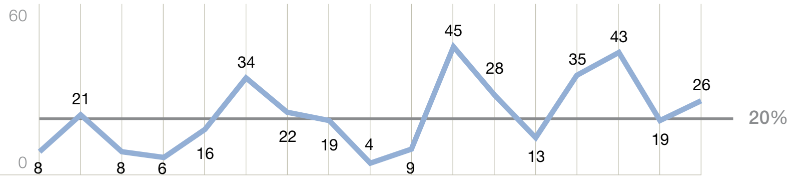
Bureaucratic



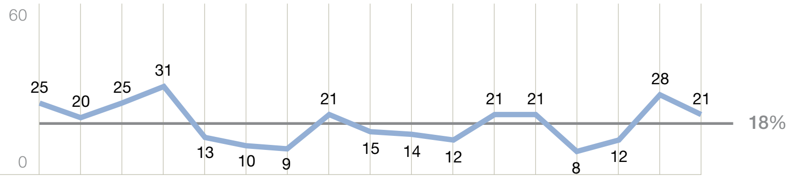
Stimulating



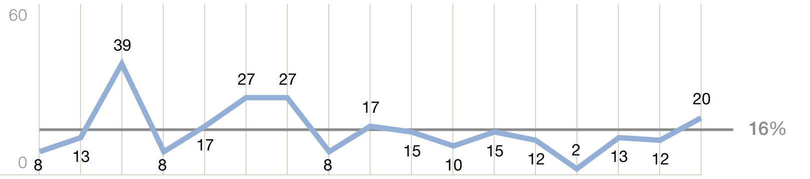
Nice-looking



Impersonal

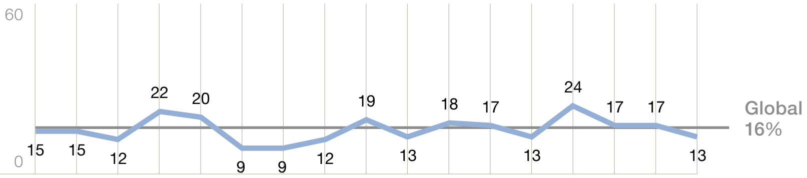


Authentic

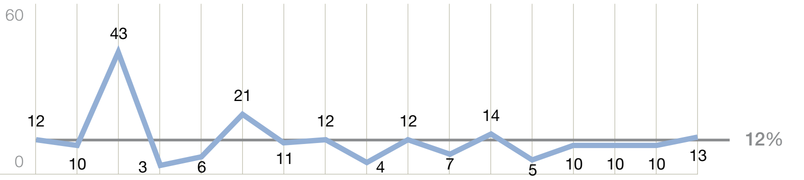


BE CA CN FR DE IN MX NL PL RU SA ZA ES TR AE GB US

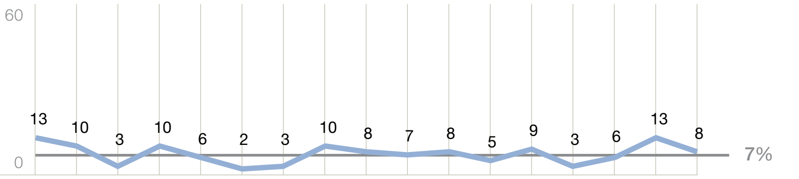
Constricting



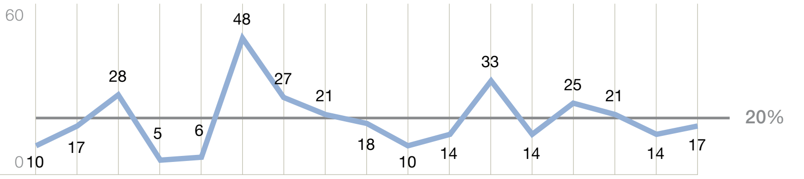
Calming



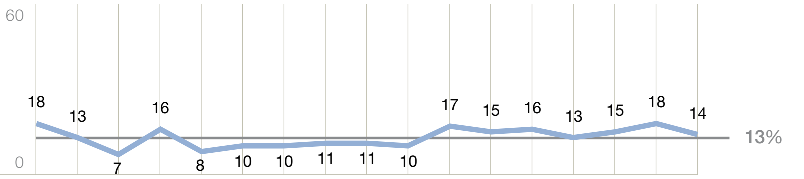
Ugly



Innovative

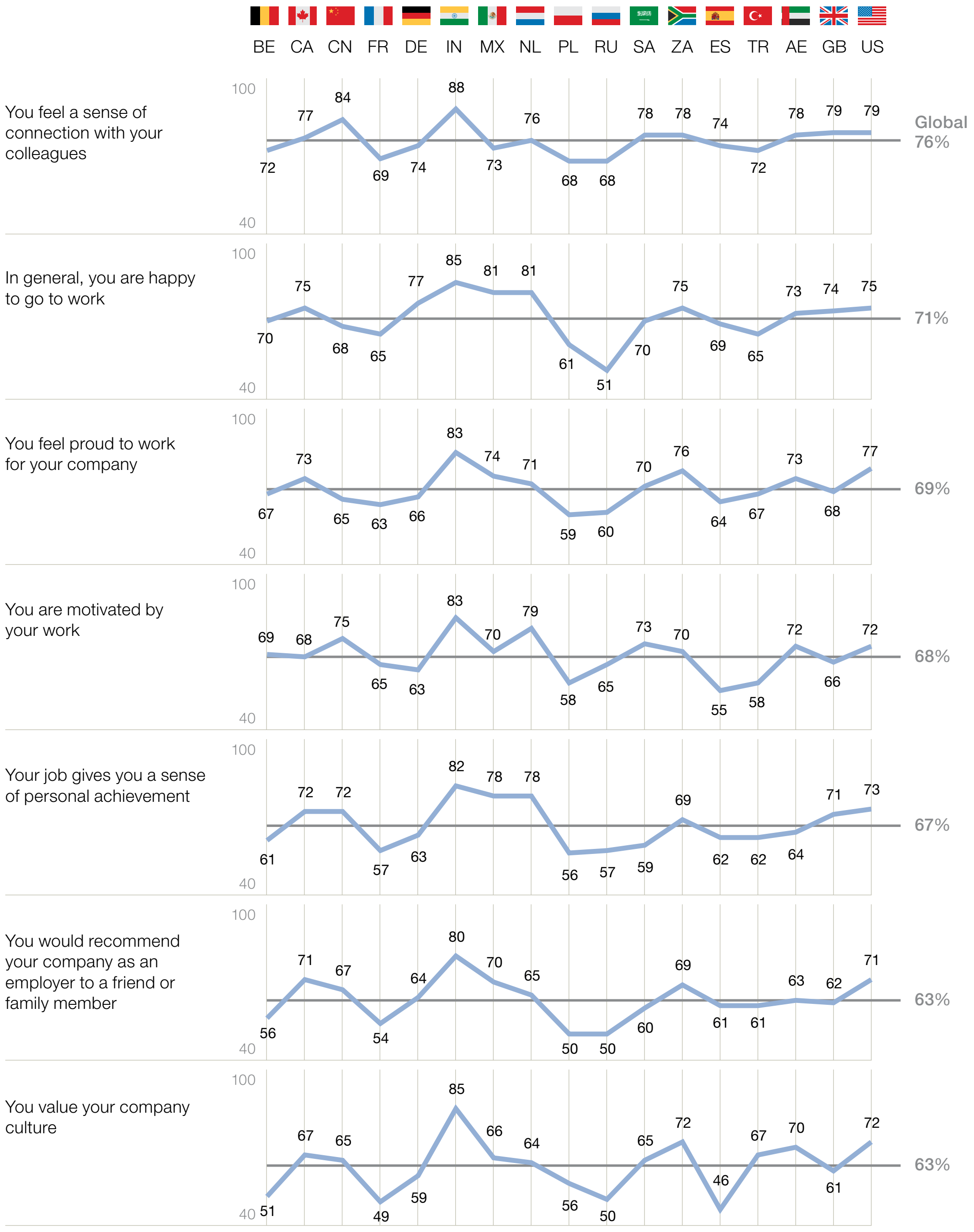


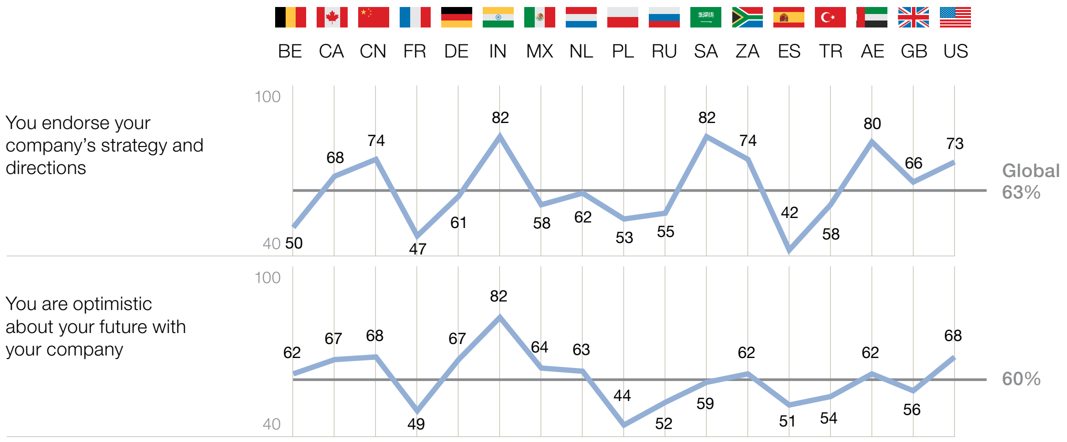
Cold



M: Workplace Engagement Metrics

Do you agree with each of the following statements?
(% agree)

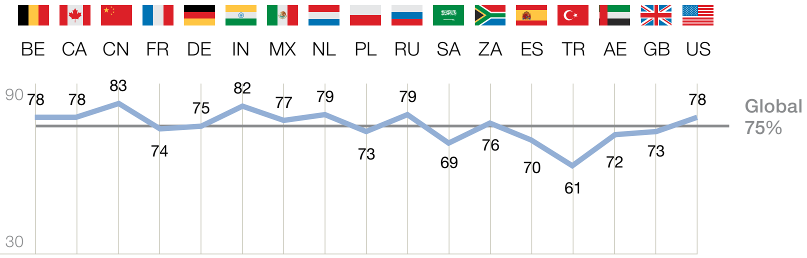




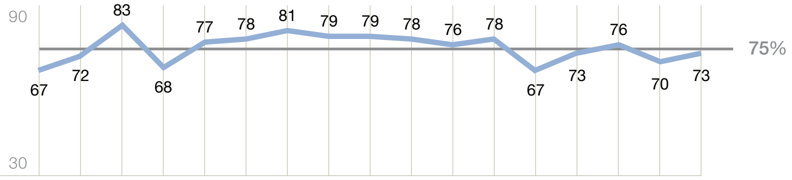
N: Workplace Satisfaction Metrics

Does your work environment allow you to:
(% agree)

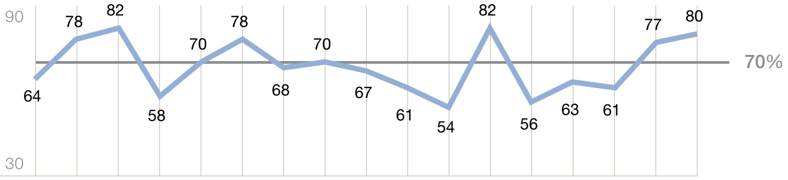
Socialize and have informal relaxed conversations with your colleagues



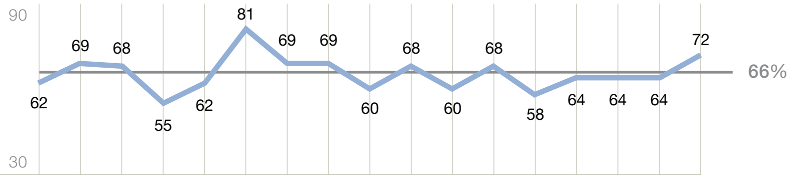
Physically move during your day and change postures



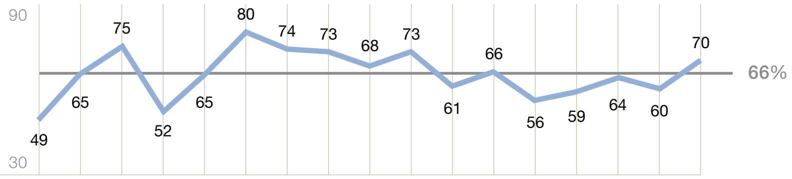
Have access to real-time information on the company



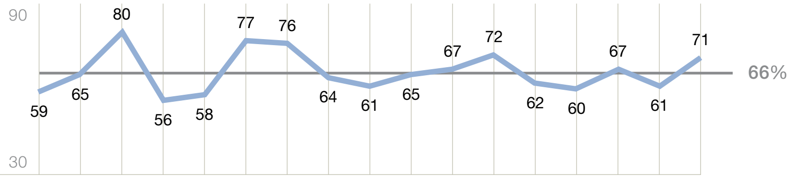
Easily and freely express and share your ideas



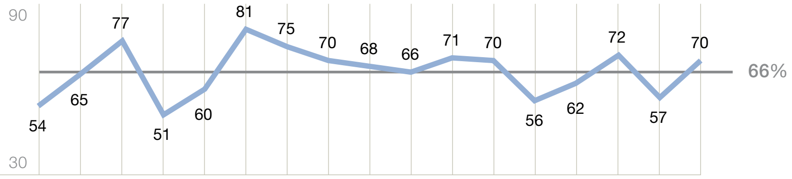
Feel a sense of belonging to your company and its culture



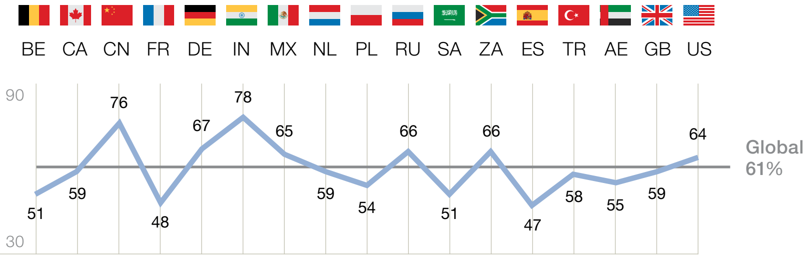
Accommodate visitors/ service providers under satisfactory conditions



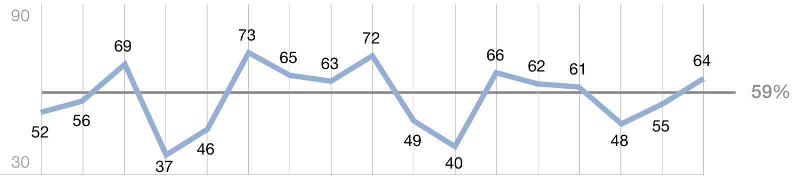
Concentrate easily



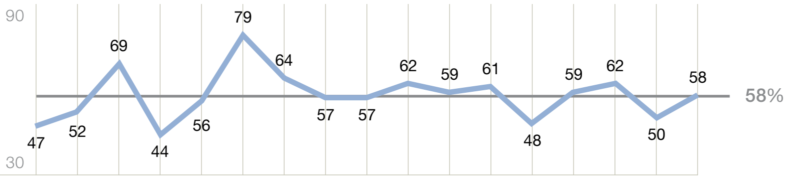
Share projects achievements and in general the work that you or your team are engaged in



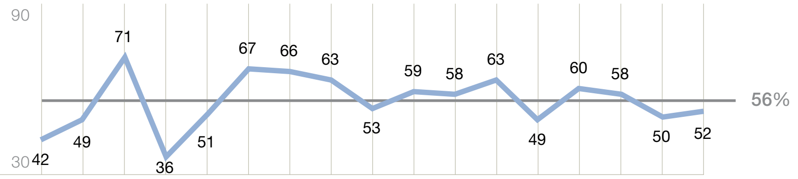
Feel relaxed, calm



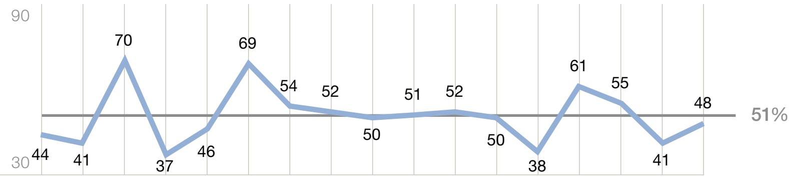
Work in teams without being interrupted or disrupted



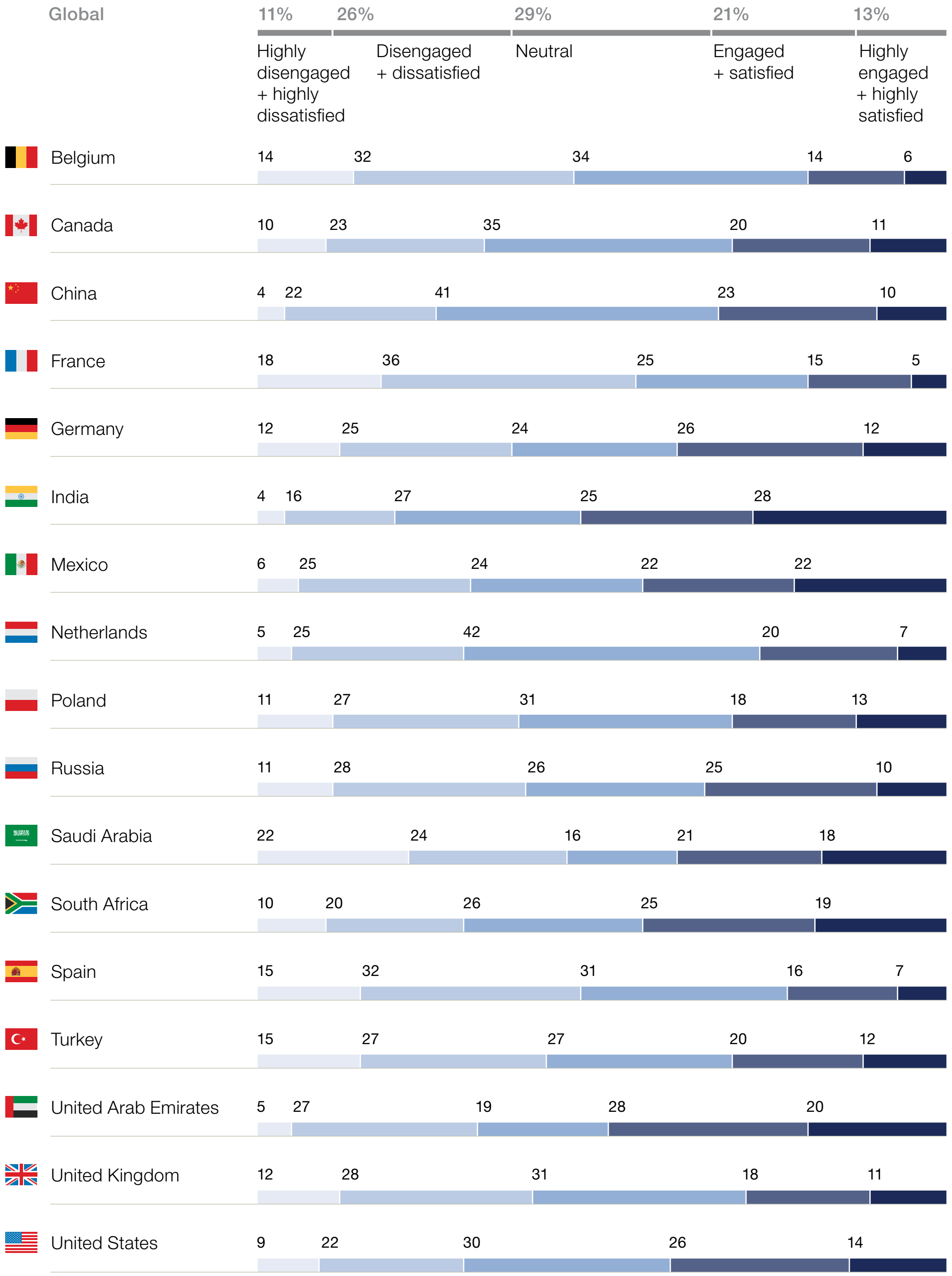
Accommodate employees that are usually teleworking or mobile working



Choose where you wish to work within the office based on the task that you are doing



O: Engagement + Workplace Satisfaction Cluster Analysis Data



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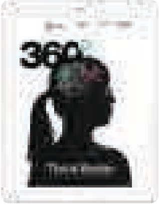

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