



WORK

RELATIONSHIP

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AI in the Workplace Report -
March 2024



Over the past few years, not only has how we work on a global scale changed, but also how we think about what work is, and what the future of it should look like

We see work-related tension across news headlines every day. And while the issues are complex, multilayered and multifaceted, much of the debate has focused singularly on where we work, as if that alone is the issue to solve.

But *where* doesn't matter if people don't know *why, how* or *who* they show up for in the first place, and what it takes to have a healthy relationship with work. It's not an exaggeration to say that **in the world of work today, society is at an era-defining crossroads: the meeting of where, why, how and who.**

At HP, we wanted to understand how to navigate this busy intersection and offer relevant and realistic recommendations and solutions for all parties to take forward. We wanted to **understand the changing nature of the world's relationship with work** and, more importantly, **how to transform that relationship so everyone wins.** We believe it's not only possible to achieve, but essential for society at large.

With all this in mind, welcome to HP's Work Relationship Index (WRI). Launched for the first time in September 2023, this global study offers a new way for society to **monitor, measure and gain insights into how employees in various industries around the world feel, what they want, why they crave more satisfying work experiences and how organizations and their leaders must adapt to meet growing expectations.**

To ensure a wide and diverse spectrum of viewpoints, ideas, opinions and more, HP surveyed more than **12,000 "knowledge workers"** - those who are primarily desk-based, including hybrid and remote workers - as well as **3,600 IT decision makers** and **1,200 business leaders** across **12 countries.** The data, learnings and recommendations that ultimately arose from the survey include six core drivers to building healthier relationships with work.

This first-of-its-kind study illuminates the path ahead, shines a light on the world's relationship with work and, more importantly, provides insights that will help build better organizations and better lives for everyone.



Methodology

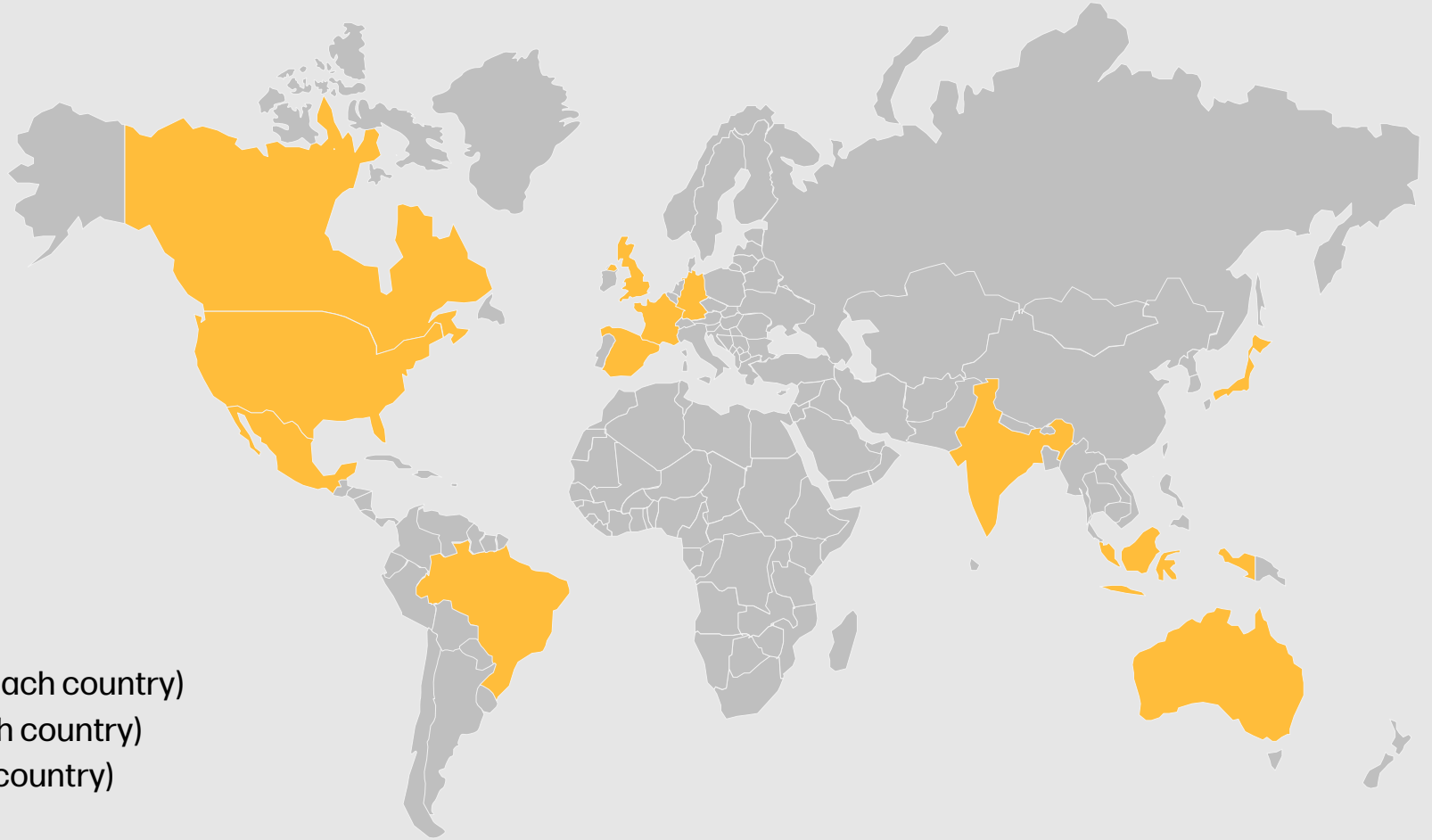
HP commissioned an online survey managed by Edelman Data & Intelligence (DxI) that fielded between June 9 - July 10, 2023, in 12 countries:

Australia	Brazil	Canada
France	Germany	India
Japan	Indonesia	Mexico
Spain	UK	US

HP surveyed 15,624 respondents in total:

- 12,012 knowledge workers (~1,000 in each country)
- 3,612 IT decision makers (~300 in each country)
- 1,204 business leaders (~100 in each country)

Depending on their role, some respondents qualified as both IT decision maker and business leader.





Index & Analysis

Two key components of our work were to create an index to measure the world's relationship with work, and to identify the *drivers* of healthy relationships with work. Our goal: to help uncover solutions for how employers and employees can come together to improve those relationships over time.

After analyzing 50+ aspects of our relationship with work, we identified 6 distinct drivers that fuel a healthy relationship:

Fulfillment:

Purpose, meaning and empowerment at work

Leadership:

Empathy and emotional connection from those in charge

People-centricity:

Decision-making with people at the heart

Skills:

Confidence-building by tapping into the enthusiasm employees have for learning new skills

Tools:

The right technology to drive employee engagement

Workspace:

Flexibility and trust in where employees work, enabled by seamless transitions



Key Takeaways

- ➔ Only 27% of knowledge workers say they have a healthy relationship with work.
- ➔ AI is seen as a key to unlocking a better relationship with work - with business leaders and IT decision makers particularly enthusiastic.
- ➔ To increase knowledge worker buy-in around AI - and to leverage the technology to improve work relationships - organizations need to double-down on how AI can support Fulfillment, one driver of a healthy relationship with work identified by the Work Relationship Index.
- ➔ While there is appetite for the use of AI, employees harbor concerns about its potential impact on their job security.
- ➔ Business leaders' critical role is clear: to educate their employees on the possibilities of AI - and take the lead on effectively introducing it.



The world's relationship with work is strained – and employee expectations are increasing



Only 27% of knowledge workers say they have a healthy relationship with work

Growing economies are in better shape than some of the more established, mature economies.

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Only

27%

have a healthy relationship with work

Growing economies score higher due to a greater sense of Fulfillment and confidence in Skills		India	50%
		Indonesia	38%
		Brazil	37%
		Mexico	34%
Global average is 27%		US	28%
		UK	25%
		Canada	23%
		Australia	22%
		France	21%
		Germany	21%
		Spain	20%
		Japan	5%
Well-documented issues with work culture			

Low levels of healthy work relationships around the world come at a cost: **strained relationships with work are bad for business, and bad for employees.**

Q2_F: Please indicate how you feel about your relationship with work using the scales below. Again, by "work", we mean your job(s), your career(s), and what you do to earn money. Please answer thinking about how you feel about your work experience at this moment. Base: Global office workers (n=12,012), office workers in Indonesia (n=999), office workers in Canada (n=1,000), office workers in Brazil (n=1,000), office workers in Australia (n=1,002), office workers in France (n=1,000), office workers in Germany (n=1,002), office workers in India (n=1,003), office workers in Japan (n=1,000), office workers in Mexico (n=1,002), office workers in Spain (n=1,001), office workers in UK (n=1,002), and office workers in US (n=1,001).



Bad for business: At work, productivity diminishes, as does employee morale, retention and engagement

When their relationship with work is not how they want it to be, knowledge workers say they...

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Q7. We'd now like you to think about how you feel and perform at work when your relationship with work is not how you want it to be. With this in mind, how much do you agree or disagree with the following statements? Base: Global knowledge workers with an unhealthy work relationship (n=3,816), global knowledge workers with a healthy work relationship (n=3,237).



Bad for employees: Unhealthy relationships with work impact worker well-being

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Unhealthy relationships with work are impacting employees' mental, emotional and physical well-being

Specifically, they experience negative impacts on...

62% Physical Health

55% Mental Well-being

48% Daily Life

59% Personal Passions

45% Relationships

This manifests as...

- Eating more unhealthy food, not working out or sleeping as much, gaining weight
- Reporting lower self-esteem, feeling like a failure, feeling isolated
- Being too drained (emotionally or physically) to complete personal tasks
- Becoming unmotivated to invest in themselves, becoming uninterested in personal hobbies and life outside of work
- Being unable to be the romantic partner, friend or parent they want to be



At the same time, expectations of work have changed dramatically over the past 2-3 years

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58%

of knowledge workers say expectations of their relationship with work have increased over the past 2-3 years

The bar is set even higher in **growing economies**

% of knowledge workers who say their expectations of **how they are treated** by their work and workplace have increased over the past 2-3 years

71%

50%

Growing Economies

Mature Economies

Q4: Over the past 2-3 years, the world—including our working environments—has changed a lot. Using the scale below, please tell us how much you agree or disagree with each statement. Base: global knowledge workers (n=12,012), total growing economies workers (n=4,004), and total mature economies workers (n=8,008).



AI has the potential to unlock
healthier relationships with
work

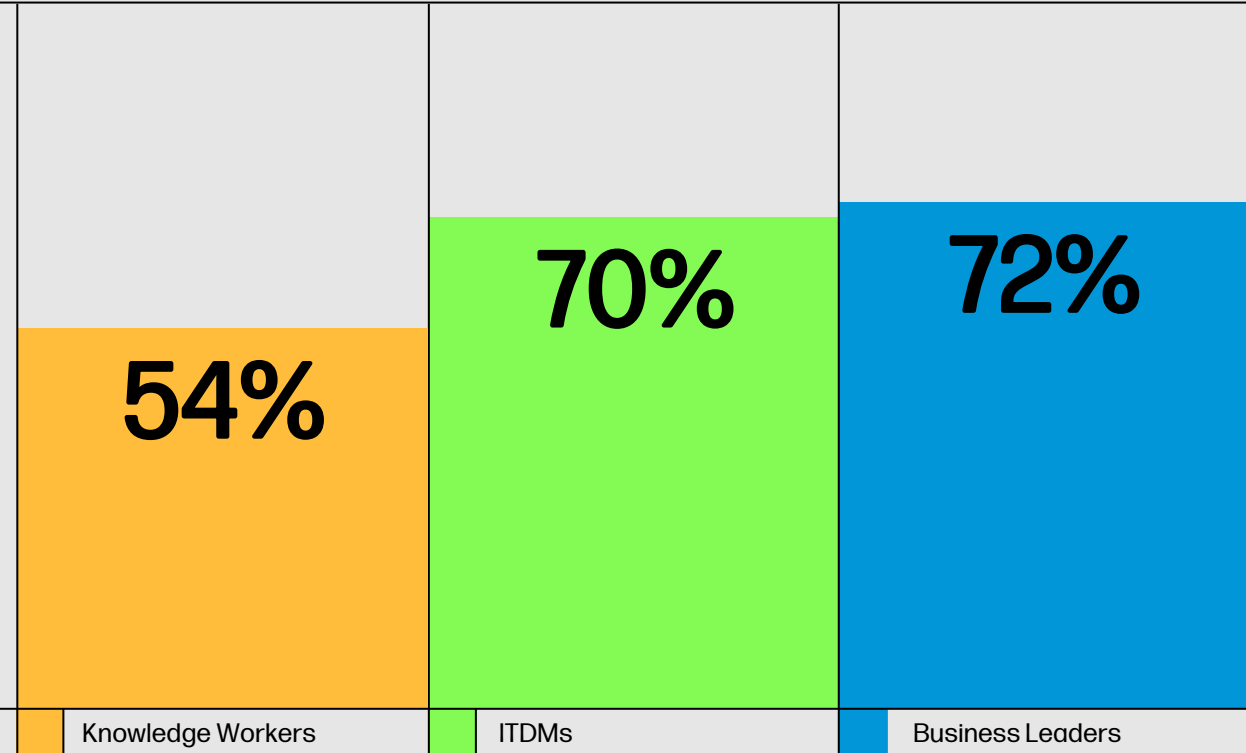


All employee groups believe AI can play an important role in improving not only their work-life balance but also their relationship with work

Notably, enthusiasm is particularly strong among business leaders and IT decision makers.

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Percentage of respondents who see the role AI can play in improving their relationship with work and their work-life balance



Q4C. We'd now like to focus on your feelings and perceptions towards artificial intelligence (AI) in your experience at work. Using the scale below, please tell us how much you agree or disagree with each statement. Base: global knowledge workers (n=12,012) and global business leaders (n=1,204).



To a similar extent, employees recognize the potential AI brings to offload tedious tasks and make the workday easier and more productive

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Business leaders are more likely to see AI's benefits than knowledge workers

Think AI will make their job easier

58%

75%

See the role AI will play in allowing them to offload repetitive or tedious tasks and focus on more productive work

57%

72%

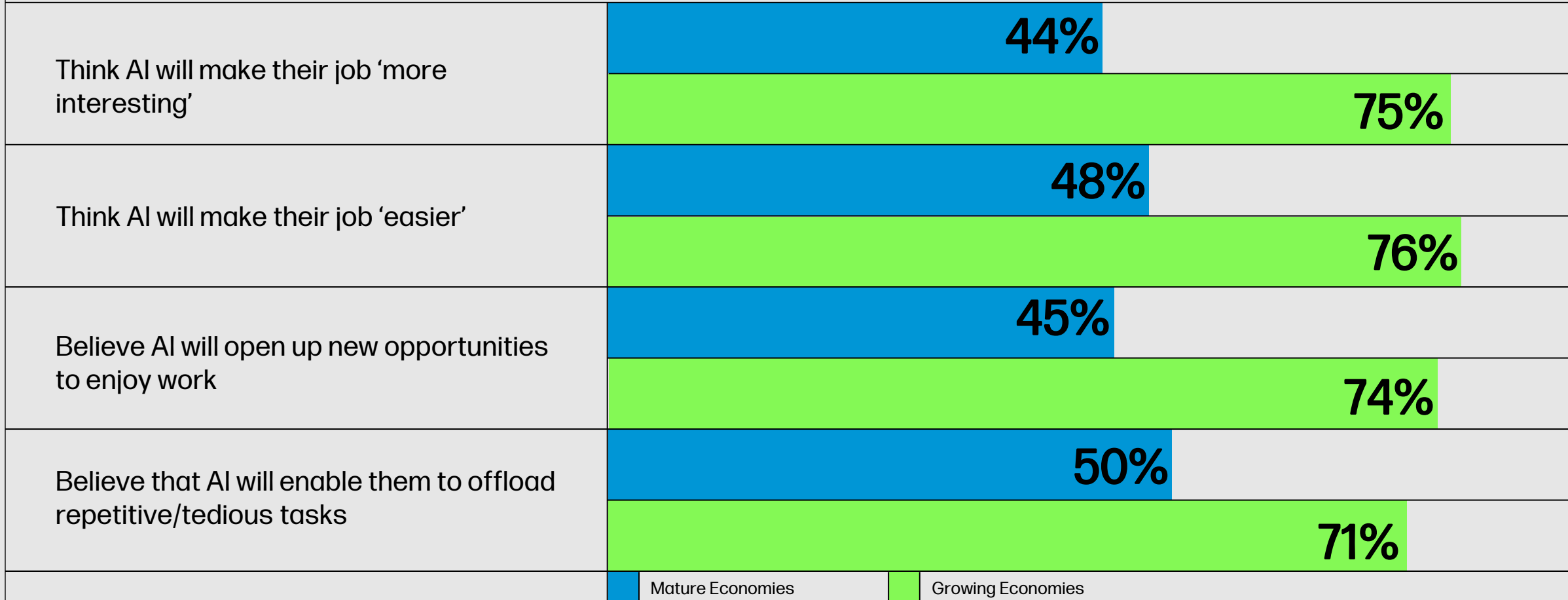
Knowledge Workers

Business Leaders



Workers in growing economies see AI as a greater source of opportunity and progress than their peers in mature economies

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AI can be a key contributor to a
core driver of a healthier
relationship with work:
Fulfillment



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Employees have signaled that they are looking for greater meaning in their work – but only a few are consistently experiencing this today

28%

of knowledge workers say that their work consistently gives them purpose; that they feel connected to the work they do; and that the work they do is meaningful to them



This creates an opportunity for organizations to lean into the benefits that AI can bring to this aspect of inspiring healthier relationships with work

Employees already recognize that AI has the potential to make work more meaningful and enjoyable.

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55%

of knowledge workers believe AI will open up **new opportunities** for them to enjoy work

55%

of knowledge workers think AI will make their **job more interesting**



AI and job security: fears persist

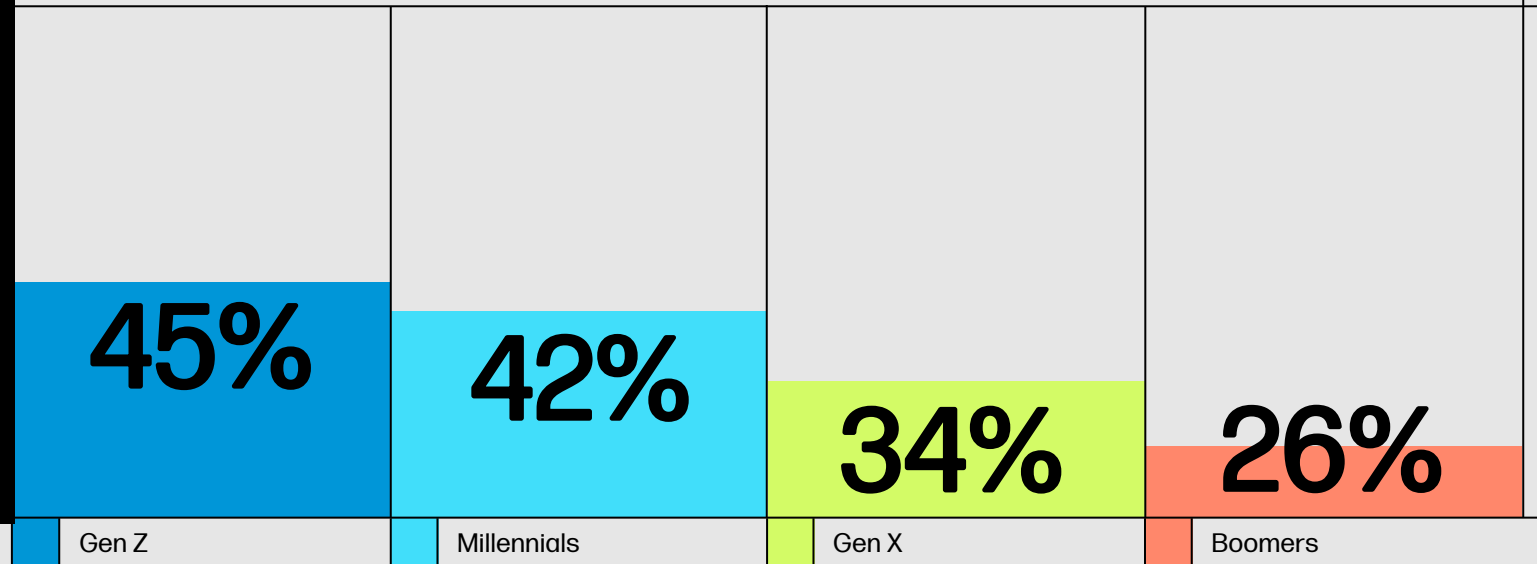


Younger workers are more likely to see AI as a potential threat to their job security

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Nearly half of Gen Z knowledge workers are concerned about their jobs being replaced by AI

% of knowledge workers who worry about their job being replaced by AI

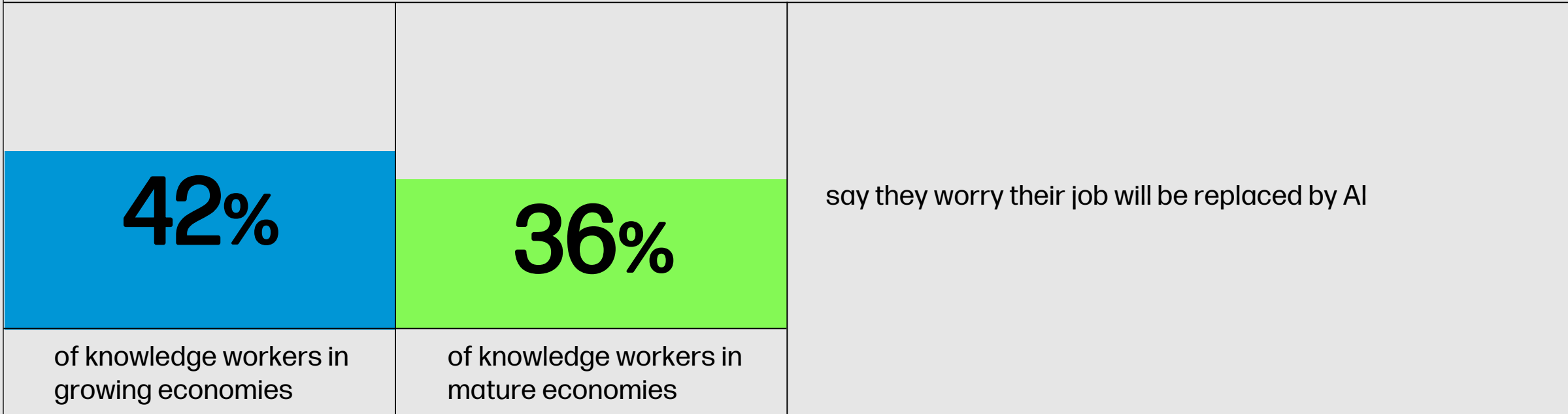


Q4C. We'd now like to focus on your feelings and perceptions towards artificial intelligence (AI) in your experience at work. Using the scale below, please tell us how much you agree or disagree with each statement. Base: global knowledge workers (n=12,012), global business leaders (n=1,204), Gen Z knowledge worker (n=1,740), Millennial knowledge worker (n=5,144), Gen X knowledge worker (n=3,336), and Boomer knowledge workers (n=1,792).



Despite the greater optimism workers in growing economies have that AI will be a source of opportunity and progress, their concerns about its impact on job security are greater than those in mature markets

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**Business leaders' critical role:
educating employees on AI and
how to integrate it into work to
drive better outcomes**



Business leaders have a responsibility to address this and educate their employees on the possibilities of AI

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42%

of knowledge workers don't know when to use AI at work

58%

of knowledge workers believe it is senior leadership's responsibility to understand how to leverage AI so it helps them be more successful at work



That said, both business leaders and knowledge workers are looking to their employers to offer more training on how to integrate AI into their work

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