



WORK

RELATIONSHIP

INDEX

Growing and Mature Economies Report –
January 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 this 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 and productive 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 a healthier relationship 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.



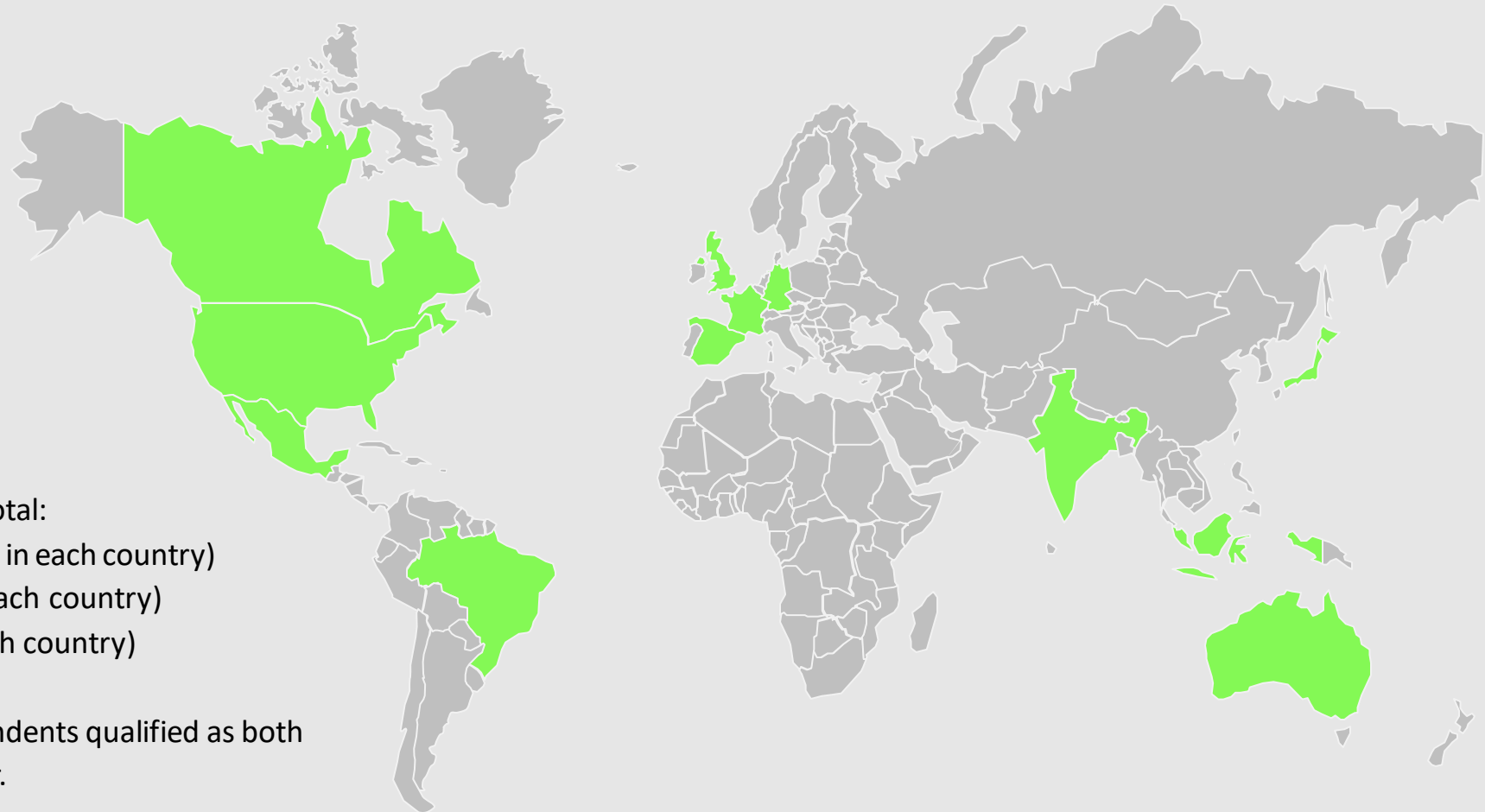
Methodology

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, Indonesia, Japan, Mexico, Spain, UK and 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 work relationships. This will help to shed light on ways that employers and employees can come together to incrementally 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

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Only 27% of knowledge workers say they have a healthy relationship with work. This rises to 40% in growing economies and falls to 21% in mature economies.

Knowledge workers in growing economies are 2x more likely to experience a healthy relationship with work compared to their peers in mature economies, due to a higher sense of Fulfillment and greater confidence in Skills.

Embracing emotional intelligence and empathy will be key in mature economies: business leaders in growing economies are already receptive to these, acknowledging the need for new styles of leadership in the workplace.

In growing economies, AI is a key component of the greater optimism knowledge workers have for the future: most employees believe AI will open up new opportunities to enjoy work and make their jobs easier and more interesting, though there are still some fears associated with the technology.

Growing economies are looking to governments, employee resource groups, unions and work councils – as well as their employers and business leaders – to play their part in improving relationships with work.



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



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

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 are higher due to a greater sense of fulfillment and confidence in skills

Global Average

Well-documented issues with work culture

	India	50%
	Indonesia	38%
	Brazil	37%
	Mexico	34%
	US	28%
	UK	25%
	Canada	23%
	Australia	22%
	France	21%
	Germany	21%
	Spain	20%
	Japan	5%

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).



At work, productivity diminishes, as does employee morale, retention and engagement

While 27% of knowledge workers have a healthy relationship with work, 32% have an unhealthy relationship with work and 41% are in the “watchout zone.”

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

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Are less productive

34%

Unhealthy Work Relationship

23%

Healthy Work Relationship

Are disengaged with their work

39%

Unhealthy Work Relationship

22%

Healthy Work Relationship

Feel disconnected from their organization

38%

Unhealthy Work Relationship

22%

Healthy Work Relationship

Contemplate leaving their company

76%

Unhealthy Work Relationship

22%

Healthy Work Relationship



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



Expectations of work have changed dramatically over the past 2-3 years

Among global knowledge workers...

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58%

say expectations of **my relationship with work** have increased over the past 2-3 years

57%

say expectations of **how I am treated** by my work and workplace have increased over the past 2-3 years



Expectations are set even higher in growing economies

% of knowledge workers who say...

My expectations of my relationship with work have increased over the past 2-3 years

73%

Growing Economies

50%

Mature Economies

My expectations of how I am treated by my work and workplace have increased over the past 2-3 years

71%

Growing Economies

50%

Mature Economies

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80%	77%	71%	70%	58%	58%	56%	55%	54%	54%	48%	28%	76%	75%	70%	69%	59%	59%	58%	55%	52%	52%	52%	28%

vs. 58%, global knowledge workers

vs. 57%, global knowledge workers

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), total mature economies workers (n=8,008), Indonesian knowledge workers (n=999), Canadian knowledge workers (n=1,000), Brazilian knowledge workers (n=1,000), Australian knowledge workers (n=1,002), French knowledge workers (n=1,000), German knowledge workers (n=1,002), Indian knowledge workers (n=1,003), Japanese knowledge workers (n=1,000), Mexican knowledge workers (n=1,002), Spanish knowledge workers (n=1,001), UK knowledge workers (n=1,002), and US knowledge workers (n=1,001).

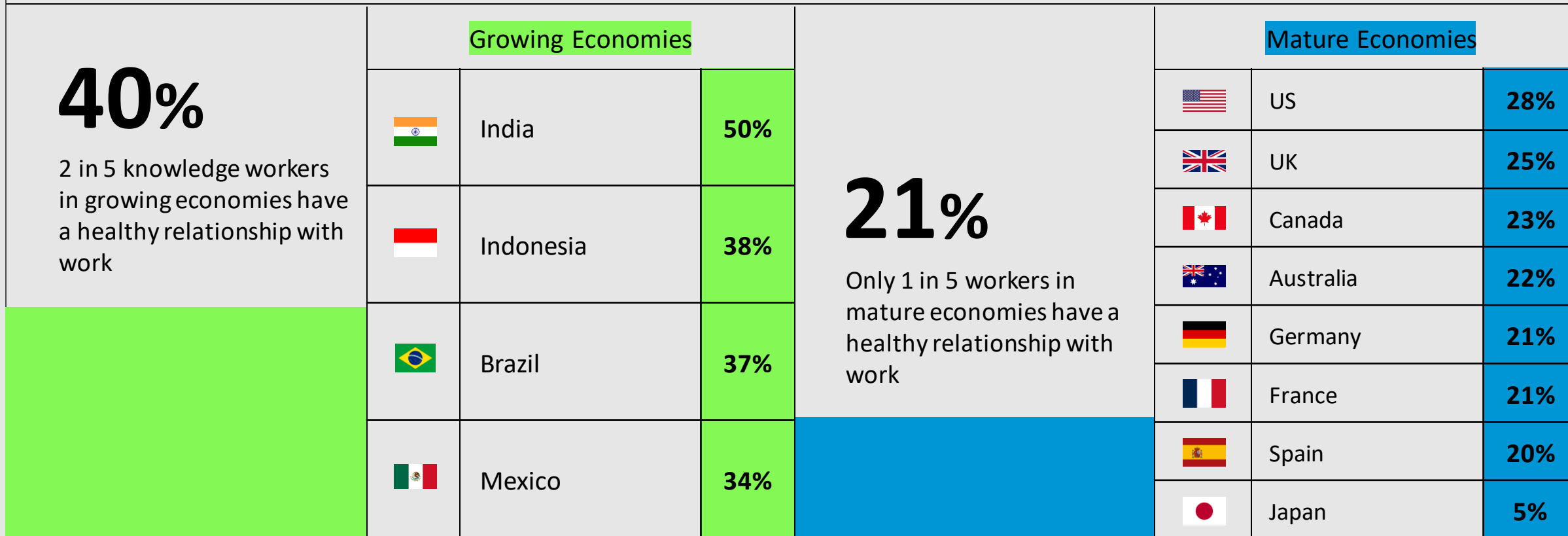


Growing economies are leading the way:
Employees in these markets have better
relationships with work, resulting in
higher levels of engagement



Knowledge workers in growing economies are 2x more likely to experience a healthy relationship with work compared to their peers in mature economies

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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 knowledge workers (n=12,012), total growing economies workers (n=4,004), total mature economies workers (n=8,008), Indonesian knowledge workers (n=999), Canadian knowledge workers (n=1,000), Brazilian knowledge workers (n=1,000), Australian knowledge workers (n=1,002), French knowledge workers (n=1,000), German knowledge workers (n=1,002), Indian knowledge workers (n=1,003), Japanese knowledge workers (n=1,000), Mexican knowledge workers (n=1,002), Spanish knowledge workers (n=1,001), UK knowledge workers (n=1,002), and US knowledge workers (n=1,001).



A significantly higher sense of Fulfillment and greater confidence in Skills are at the core of what is driving better relationships with work in growing economies



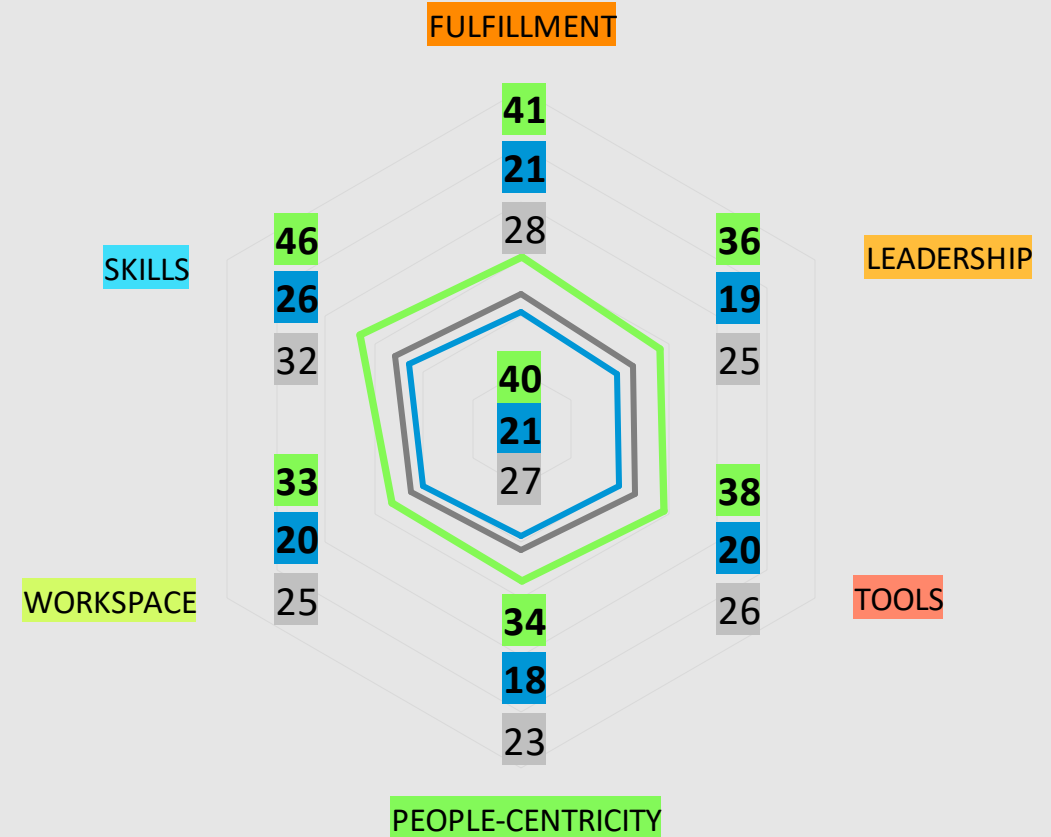
The Index's performance score for **Fulfillment** is 41 in growing economies, 20 points higher than for mature economies

The gap is the same for **Skills**: a performance score of 46 in growing economies, 26 in mature economies

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Q2_F: Please indicate how you feel about your relationship with work using the scales below. Please indicate how you feel about your relationship with work using the scales below where 1 is "I am not happy with my relationship with work at all" and 5 is "I am very happy with my relationship with work." **Q9A:** Looking at the same factors related to your skills and abilities, please indicate on the scale below how much or little this describes your current work experience. **Q10A:** Looking at the same factors related to your tools and technology, please indicate on the scale below how much or little this currently describes your current work experience. **Q11A:** Now, we would like to focus on factors related to your workspace. Please indicate on the scale below how much or little this currently describes your current work experience. **Q12A:** Now, we would like to focus on factors related to your culture at your workplace. Please indicate on the scale below how much or little this currently describes your current work experience. **Q13A:** Looking at the same factors related to your trust in senior leadership, please indicate on the scale below how much or little this currently describes your current work experience. **Q14A:** Now, we would like to focus on factors related to your work / life harmony. Please indicate on the scale below how much or little this currently describes your current work experience. Base: global knowledge workers (n=12,012), total growing economies workers (n=4,004), and total mature economies workers (n=8,008).

- Growing economies
- Mature economies
- Global knowledge workers



Legend:

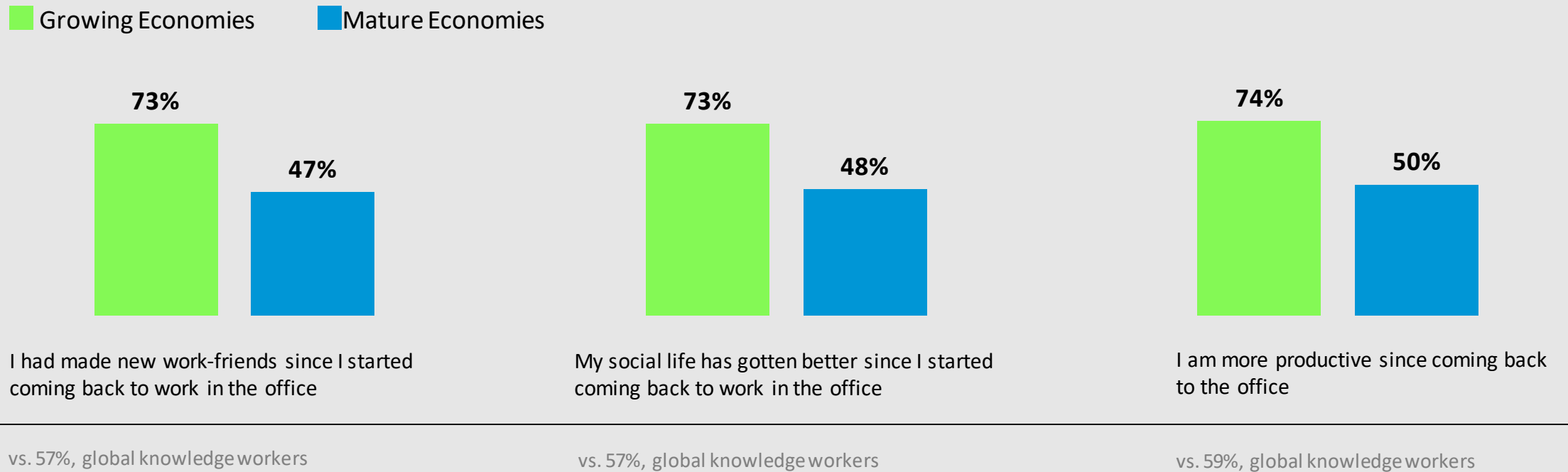
- The number in the center is the core Work Relationship Index score, capturing the percentage of people who have a healthy relationship with work today, out of 100.
- The highlighted scores outside the circle represent the current performance of each of the drivers, out of 100, where performance score indicates the percentage of people who consistently experience the driver at their company.



Engagement levels in growing economies are also on the rise, with knowledge workers in these countries faring better with the return to the office

% of knowledge workers who say...

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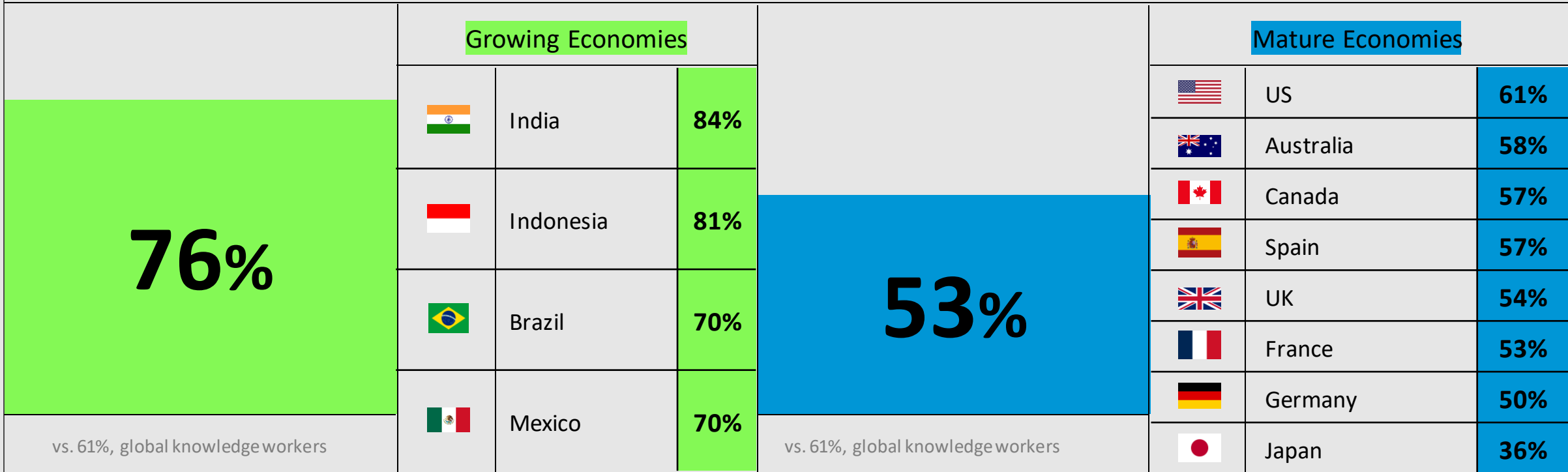
Q4B. We'd now like to focus on your experience with remote, hybrid, and in-office work, as more companies have come back to the office. Using the scale below, please tell us how much you agree or disagree with each statement. Base: Among those who work in-office or hybrid: global knowledge workers (n=11,222), total growing economies workers (n=3,874), and total mature economies workers (n=7,348).



This is evident with increased collaboration, productivity and socialization since employees have gone back to spending time in the office around the world

% of knowledge workers who say collaboration with their team has improved since coming back to the office

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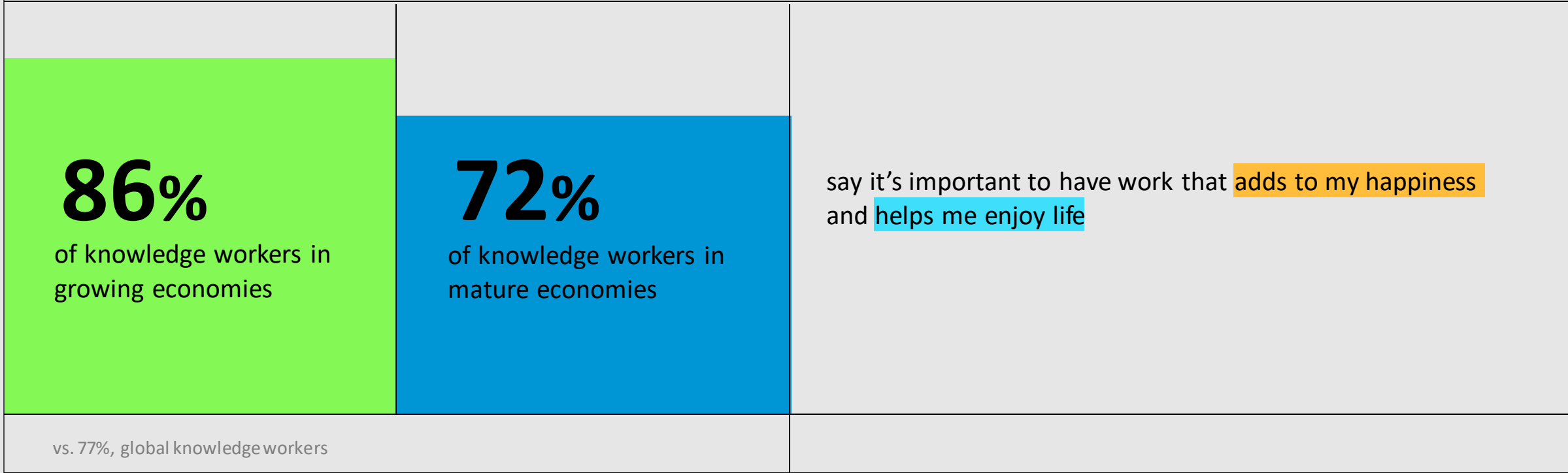


Q4B. We'd now like to focus on your experience with remote, hybrid, and in-office work, as more companies have come back to the office. Using the scale below, please tell us how much you agree or disagree with each statement. Base: Among those who work in-office or hybrid: global knowledge workers (n=11,222), total growing economies workers (n=3,874), total mature economies workers (n=7,348), Indonesian knowledge workers (n=988), Canadian knowledge workers (n=927), Brazilian knowledge workers (n=958), Australian knowledge workers (n=947), French knowledge workers (n=926), German knowledge workers (n=920), Indian knowledge workers (n=980), Japanese knowledge workers (n=878), Mexican knowledge workers (n=948), Spanish knowledge workers (n=935), UK knowledge workers (n=916), and US knowledge workers (n=899).



In growing economies, knowledge workers demand more, firmly believing work should add to their happiness, not detract from it

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Q14. Now, we would like to focus on factors related to your work / life harmony. Thinking about the relationship with work you want to have, how important or unimportant are each below? Base: global knowledge workers (n=12,012), total growing economies workers (n=4,004), and total mature economies workers (n=8,008).



This includes an increased desire to have some level of control and autonomy in how work is conducted

% of knowledge workers who say their expectations of how much control and autonomy they have on **when, where, and how** they perform their work have increased over the past 2-3 years

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		Growing Economies				Mature Economies		
<h1>70%</h1>		India	73%	<h1>51%</h1>		Canada	60%	
		Mexico	71%			Australia	58%	
		Indonesia	70%			Spain	55%	
		Brazil	70%			US	55%	
						UK	53%	
vs. 59%, global knowledge workers				vs. 59%, global knowledge workers			Germany	53%
							France	52%
							Japan	33%

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), total mature economies workers (n=8,008), Indonesian knowledge workers (n=999), Canadian knowledge workers (n=1,000), Brazilian knowledge workers (n=1,000), Australian knowledge workers (n=1,002), French knowledge workers (n=1,000), German knowledge workers (n=1,002), Indian knowledge workers (n=1,003), Japanese knowledge workers (n=1,000), Mexican knowledge workers (n=1,002), Spanish knowledge workers (n=1,001), UK knowledge workers (n=1,002), and US knowledge workers (n=1,001).



Lesson for leaders in mature economies: Embracing emotional intelligence and empathy is key



With the emergence of new styles of working in the past 2-3 years, knowledge workers in growing economies understand the need for change in leadership styles – to a greater extent than elsewhere in the world

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73%

of knowledge workers in growing economies

58%

of knowledge workers in mature economies

say working for a company where senior leadership have evolved their leadership styles based on new ways of working from the past 2-3 years is important

vs. 63%, global knowledge workers

78%

of knowledge workers in growing economies

66%

of knowledge workers in mature economies

say trusting their company's senior leadership to foster the working environment they need to be successful is important

vs. 70%, global knowledge workers

Q13. Now, we would like to focus on factors related to your trust in senior leadership. Thinking about the relationship with work you want to have, how important or unimportant are each below? Base: global knowledge workers (n=12,012), total growing economies workers (n=4,004), and total mature economies workers (n=8,008).



Critically, business leaders in growing economies are receptive to this, acknowledging the need for new styles of leadership

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78%

of business leaders in growing economies

64%

of business leaders in mature economies

say today's ways of working need new leadership styles

vs. 64%, global knowledge workers

76%

of business leaders in growing economies

58%

of business leaders in mature economies

say they have to find new ways to detect the signs for when their teams need help and support in this new hybrid way of working

vs. 56%, global knowledge workers

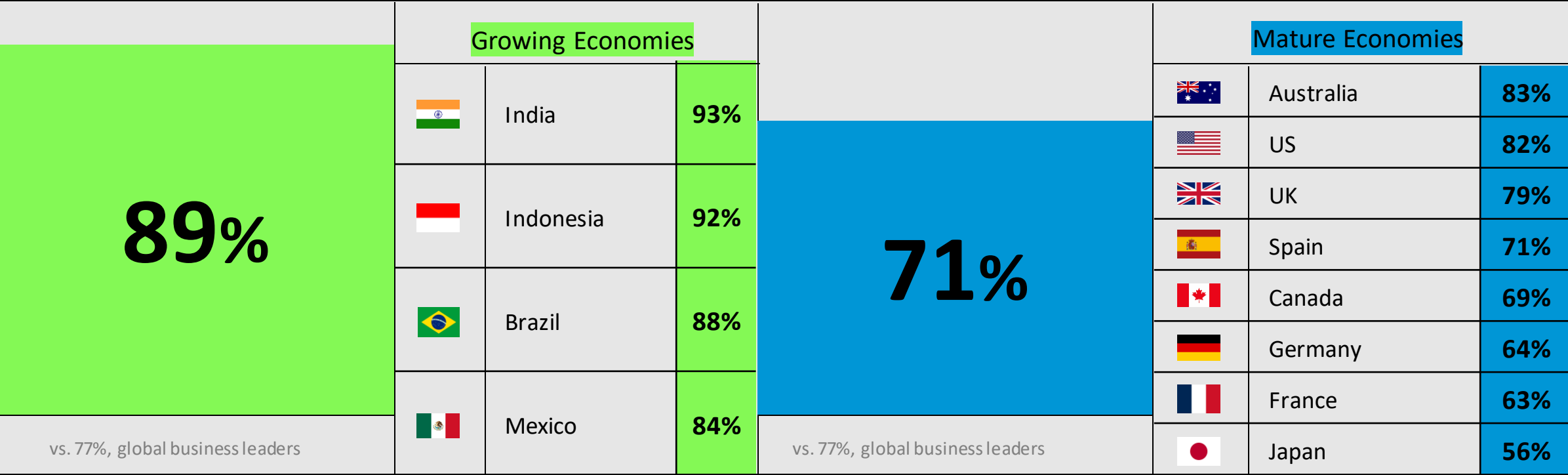
Q5. We'd now like to focus on your experience with remote, hybrid, and in-office work as a manager and/or leader in your company, as more companies have come back to the office. Using the scale below, please tell us how much you agree or disagree with each statement. Base: total business leaders (n=343), total growing economies workers (n=119), and total mature economies workers (n=224).



Leaders in growing economies are also more aware of the role emotional intelligence and empathy play at work

% of business leaders who say feeling confident they can demonstrate the right level of empathy is important

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Q9. We would now like to ask you about the importance of different factors that may influence your relationship with work. First, we want to focus on factors related to your skills and abilities. Thinking about the relationship with work you want to have, how important or unimportant are each below? Base: Total business leaders (n=1,204), total growing economies business leaders (n=400), total mature economies business leaders (n=804), Indonesian business leaders (n=100), Canadian business leaders (n=100), Brazilian business leaders (n=100), Australian business leaders (n=100), French business leaders (n=100), German business leaders (n=100), Indian business leaders (n=100), Japanese business leaders (n=103), Mexican business leaders (n=100), Spanish business leaders (n=100), UK business leaders (n=101), and US business leaders (n=100).



And this is already translating into tangible outcomes for knowledge workers in growing economies

33% of knowledge workers in growing economies say they consistently experience that their company's senior leaders have evolved their leadership styles based on new ways of working from the past 2-3 years.

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<div style="background-color: #90EE90; padding: 10px; display: flex; align-items: center;"> <div style="font-size: 2em; margin-right: 10px;">33%</div> <div>of knowledge workers in growing economies</div> </div>		Growing Economies			Mature Economies		
			India	37%		US	22%
<div style="font-size: 2em; margin-right: 10px;">16%</div> <div>of knowledge workers in mature economies</div>		Brazil	35%		Canada	19%	
		UK	18%		Australia	17%	
		Indonesia	31%		Germany	16%	
		Spain	15%		France	14%	
		Mexico	28%		Japan	3%	
say their company's senior leadership have evolved their leadership styles based on new ways of working from the past 2-3 years							

Q13A. Looking at the same factors related to your trust in senior leadership, please indicate on the scale below how much or little this currently describes your current work experience. Base: global knowledge workers (n=12,012), total growing economies workers (n=4,004), total mature economies workers (n=8,008), Indonesian knowledge workers (n=999), Canadian knowledge workers (n=1,000), Brazilian knowledge workers (n=1,000), Australian knowledge workers (n=1,002), French knowledge workers (n=1,000), German knowledge workers (n=1,002), Indian knowledge workers (n=1,003), Japanese knowledge workers (n=1,000), Mexican knowledge workers (n=1,002), Spanish knowledge workers (n=1,001), UK knowledge workers (n=1,002), and US knowledge workers (n=1,001).



Greater optimism for the future
– with AI as a key component



Knowledge workers in growing economies anticipate an upcoming year characterized by stronger relationships with work and continued career growth

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68%

of knowledge workers in growing economies

36%

of knowledge workers in mature economies

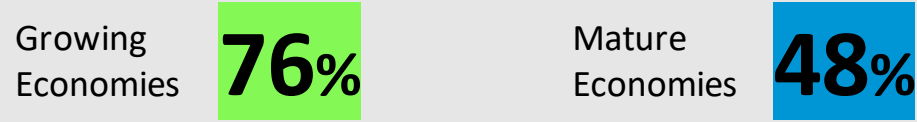
believe their relationships with work will improve, and they will see growth in their careers, in the next 12 months.

vs. 47%, global knowledge workers

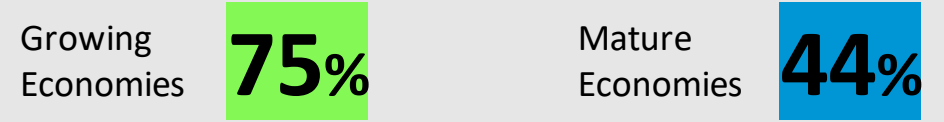


AI is also a bright spot in these countries, seen as a greater source of opportunity and progress than in mature economies

% of knowledge workers who say AI will make their job easier



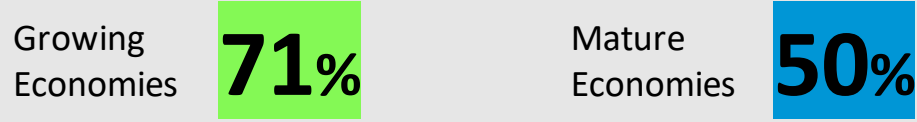
% of knowledge workers who say AI will make their job more interesting



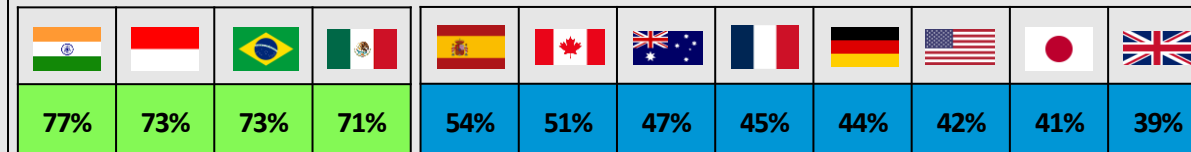
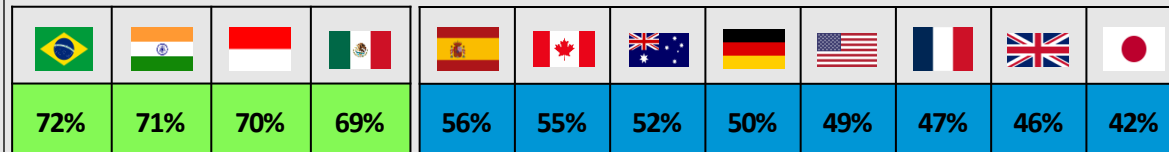
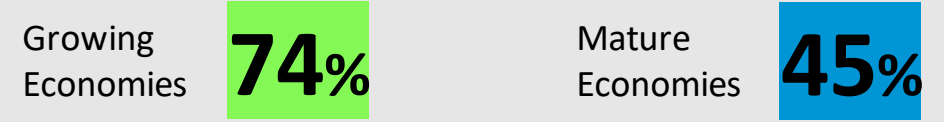
vs. 58%, global knowledge workers

vs. 55%, global knowledge workers

% of knowledge workers who say AI will allow them to offload repetitive/tedious tasks to focus on more productive work



% of knowledge workers who say AI will open up new opportunities to enjoy work



vs. 57%, global knowledge workers

vs. 55%, global knowledge workers

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), total growing economies workers (n=4,004), total mature economies workers (n=8,008), Indonesian knowledge workers (n=999), Canadian knowledge workers (n=1,000), Brazilian knowledge workers (n=1,000), Australian knowledge workers (n=1,002), French knowledge workers (n=1,000), German knowledge workers (n=1,002), Indian knowledge workers (n=1,003), Japanese knowledge workers (n=1,000), Mexican knowledge workers (n=1,002), Spanish knowledge workers (n=1,001), UK knowledge workers (n=1,002), and US knowledge workers (n=1,001).



Two key callouts for business leaders:
A lack of autonomy and empowerment,
as well as fears around AI, could limit that
optimism for the future



The optimism felt in growing economies is more reliant on an expected shift towards gaining greater control over how and where work gets done

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62%

of knowledge workers in growing economies

say in the next year, they think they will have more autonomy in how their work gets done

36%

of knowledge workers in mature economies

vs. 45%, global knowledge workers

51%

of knowledge workers in growing economies

say they are now unwilling to work for a company that doesn't let them have control and autonomy on when, where, and how they perform their work

vs. 51%, global knowledge workers

48%

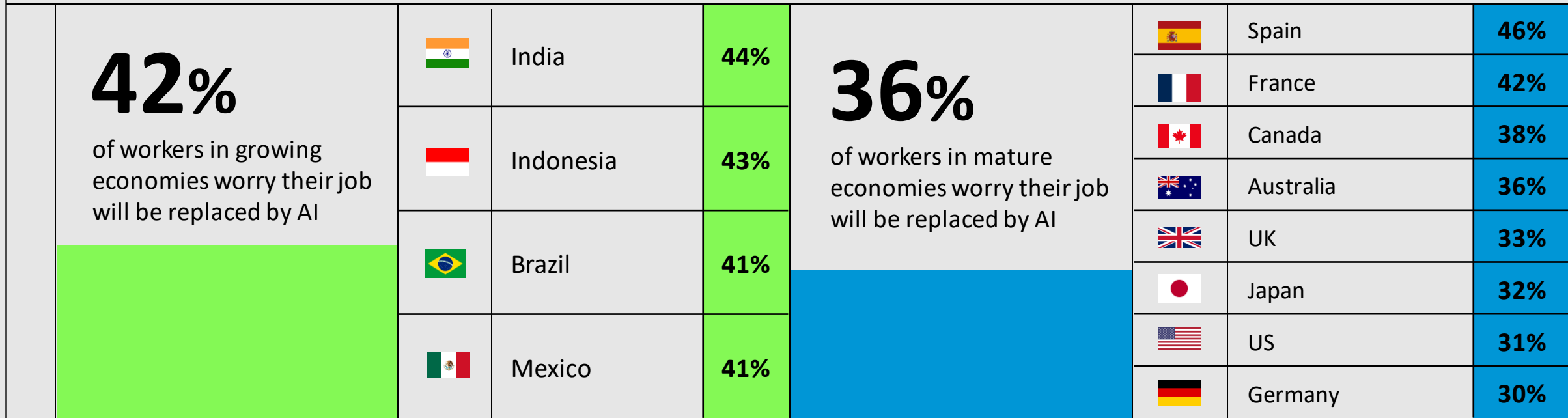
of knowledge workers in mature economies

Q6: Based on your current work experience, where do you fall on each of the scales below. In the next year, I think... **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).



Both growing and mature economies recognize the existential threat that comes with AI, with degrees of concern about it replacing people's jobs

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vs. 38%, global knowledge workers

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. When we say AI, we mean applications that perform complex tasks that once required human input, such as communicating with customers online or playing chess. Base: global knowledge workers (n=12,012), total growing economies workers (n=4,004), total mature economies workers (n=8,008), Indonesian knowledge workers (n=999), Canadian knowledge workers (n=1,000), Brazilian knowledge workers (n=1,000), Australian knowledge workers (n=1,002), French knowledge workers (n=1,000), German knowledge workers (n=1,002), Indian knowledge workers (n=1,003), Japanese knowledge workers (n=1,000), Mexican knowledge workers (n=1,002), Spanish knowledge workers (n=1,001), UK knowledge workers (n=1,002), and US knowledge workers (n=1,001).



Who's accountable for improving relationships with work?

Workers in growing economies expect their governments and unions to play a role



All countries agree that employers and company leadership – as well as employees themselves – are among the most responsible for leading the charge in improving relationships with work

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79%

of knowledge workers say their employer and senior leadership have a role in changing work relationships for the better

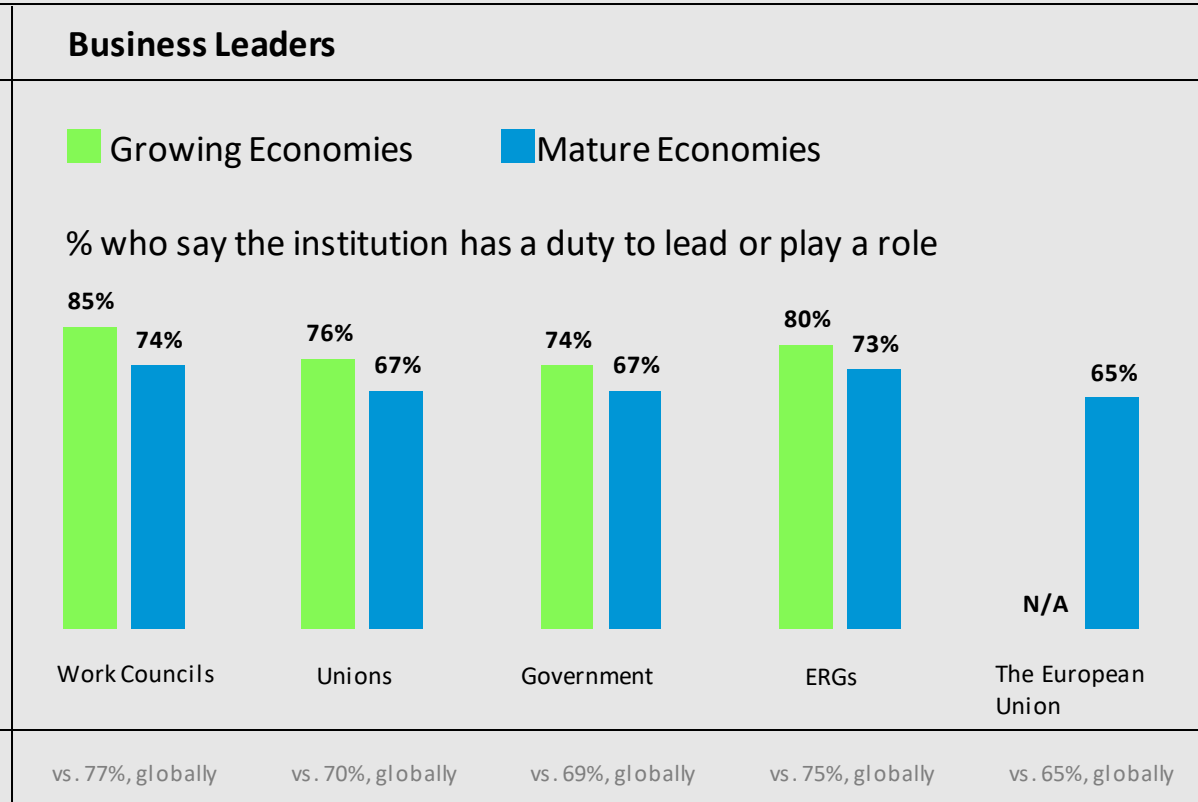
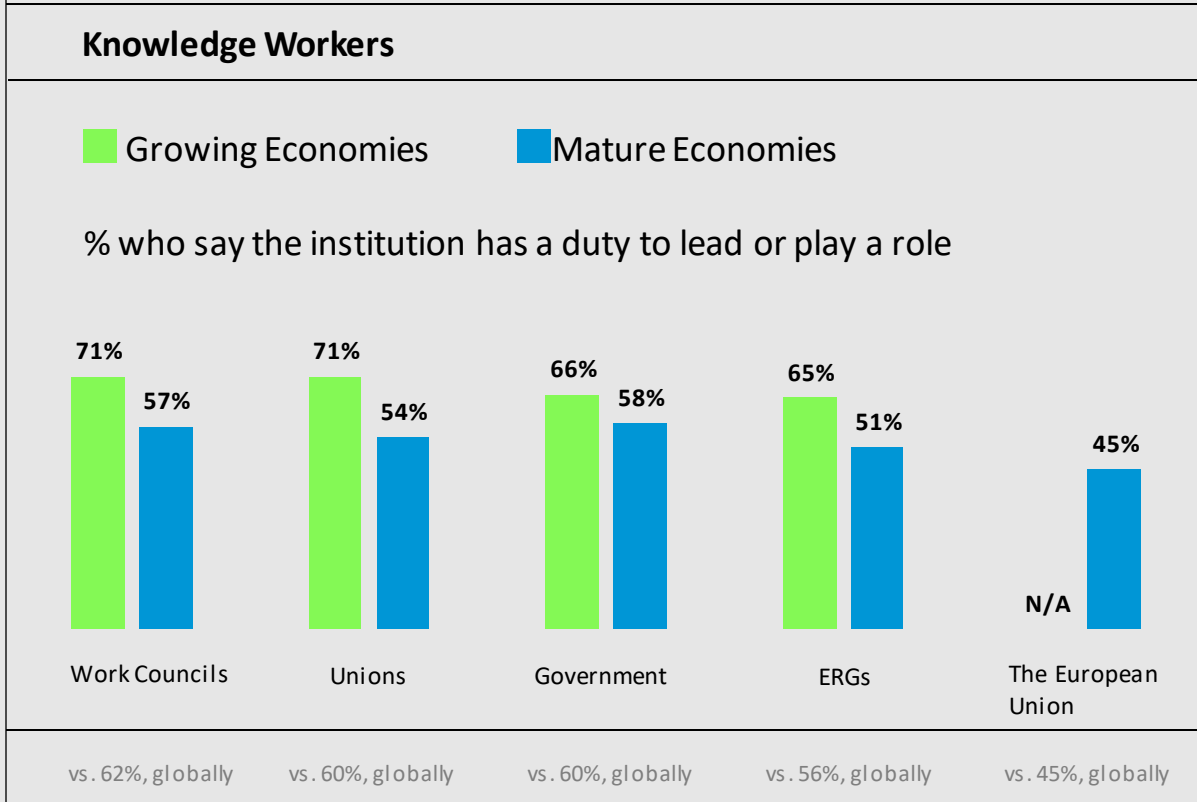
73%

of knowledge workers recognize their own responsibility in effecting this change



More employees in growing economies see an important role for other institutions, such as governments, employee resource groups (ERGs), unions, and work councils in helping to improve those relationships

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Q17: For each of the following institutions and individuals below, please indicate the role you feel each should have in changing our relationship with work for the better? Base: Total business leaders (n=1,204), global knowledge workers (n=12,012), total growing economies workers (n=4,004), total mature economies workers (n=8,008), total growing economies business leaders (n=400), total mature economies business leaders (n=804).