



International Employee Engagement Benchmarking Study 2011

Findings of the GfK 29-country study on working
conditions and engagement



Content

- 1 Pressing questions on changes in today's working environment**
- 2 Details on the Global GfK Employee Engagement Survey 2011**
- 3 Selected results – the first step to the solution**

Pressing issues for organizations today



Ageing society &
war for talent



Globalization of markets &
the work force



Work related pressure &
stress



Economic uncertainty &
influences on the workplace

Just fancy
buzz words?

Let's ask
the people affected

In the Employee Engagement Survey we asked questions about the perception of...

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GfK's Employee Engagement definition measures employees' identification with their company's success, dedication, and willingness to stay with their employer.

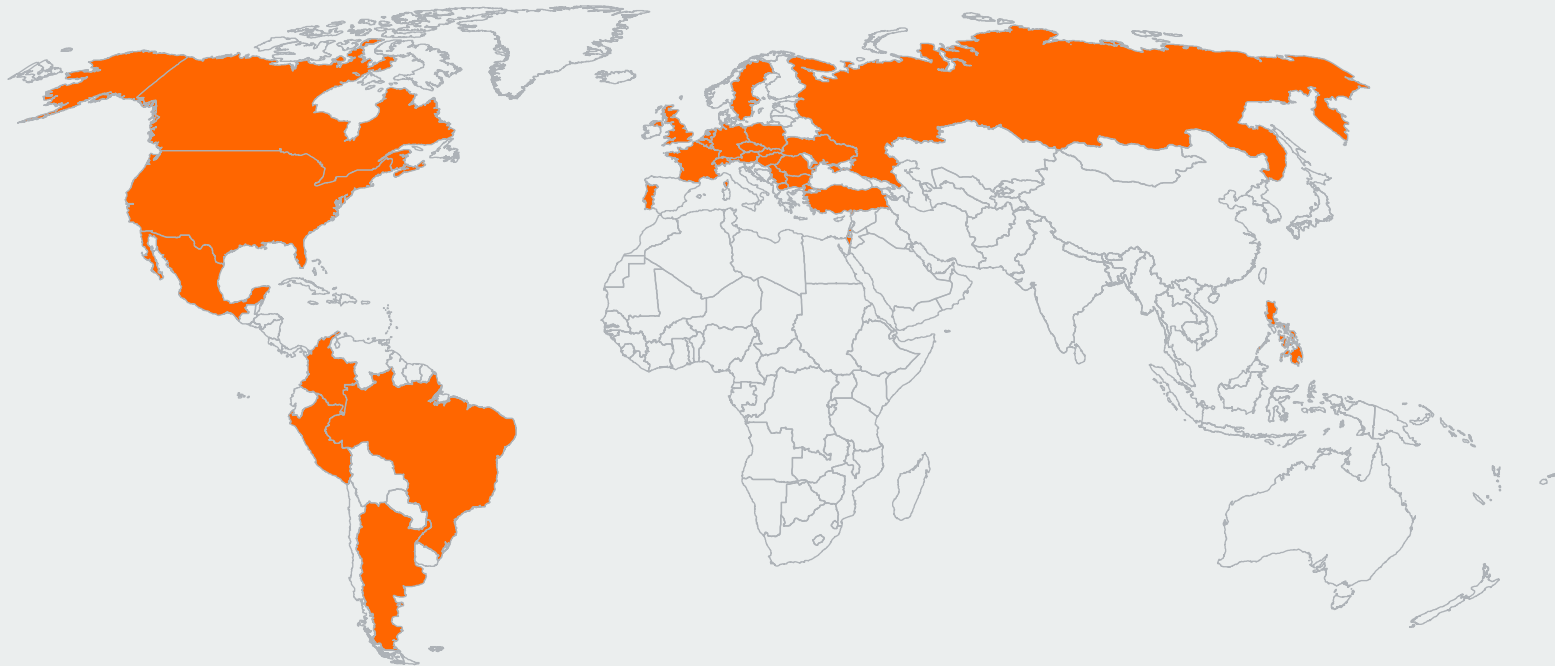
Employee engagement is influenced by the organizational framework employees operate in.

This is why our measurement model includes both, questions about engagement and about the organizational framework.

We received answers...

...from more than 30'000 employees around the world

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North America

Canada
USA

Middle and South America

Argentina
Brazil
Colombia
Mexico
Peru

Western Europe

Austria
Belgium
France
Germany
Netherlands
Portugal
Sweden
Switzerland
United Kingdom

Eastern Europe

Bulgaria
Czech Republic
Hungary
Macedonia
Poland
Romania
Russia
Serbia
Slovakia
Ukraine

Near and Far East

Israel
Philippines
Turkey

Insights gained from answers enable us to...

... identify prerequisites for **High Performance Organisations**

...offer representative comparison values from **29 countries** worldwide for **benchmarking**

...provide information on differences in perception between different **industries** and job roles

...analyze **cultural differences** and answer patterns

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- 3 Answers and insights – the first step to the solution

Background of the GfK International Employee Engagement Survey

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General Information

Survey conducted by: GfK Custom Research

No. of Countries: 29

No. of responses: 30,556 (working adults)

Survey period: February 8th and April 4th 2011

Data collection: Online, telephone or in-person interviewing techniques appropriate to the country

Weights: Data were weighted to represent the demographic composition (industry, gender and age) of each country. To produce global statistics that combine countries, the data for each country was also weighted by GDP (PPP).

GfK Global Employee Engagement Survey

Detailed topics

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- | | |
|-------------------------------------|---|
| ✓ Job satisfaction | ✓ Equal treatment practices |
| ✓ Identification with the company | ✓ Individual work load perception |
| ✓ Organizational structure | ✓ Change processes within the company |
| ✓ Working conditions | ✓ Personal and company performance |
| ✓ Scope of employee empowerment | ✓ Training and development within the company |
| ✓ Job and team | ✓ Work-related pressure and stress |
| ✓ Organizational culture | ✓ Job security |
| ✓ Management and management culture | ✓ Perception of the economic situation and the labor market |
| ✓ Communication structure | |

Data analysis according to the following variables (breaks)...

- ✓ Age
- ✓ Job tenure
- ✓ Job titles/ job functions
- ✓ Managerial function
- ✓ Gender
- ✓ Level of education
- ✓ Size and scope (national, international) of the company
- ✓ Industry
- ✓ Countries



Industry benchmarks include sectors like...

- ✓ Manufacturing
- ✓ IT and Telecommunications
- ✓ Professional and Technical
- ✓ Retail and Wholesale
- ✓ Hospitality and Leisure
- ✓ Finance, Insurance
- ✓ Health and Social Work
- ✓ Government
- ✓ Services
- ✓ Transportation
- ✓ Construction
- ✓ Utilities
- ✓ Education



GfK as employee research provider

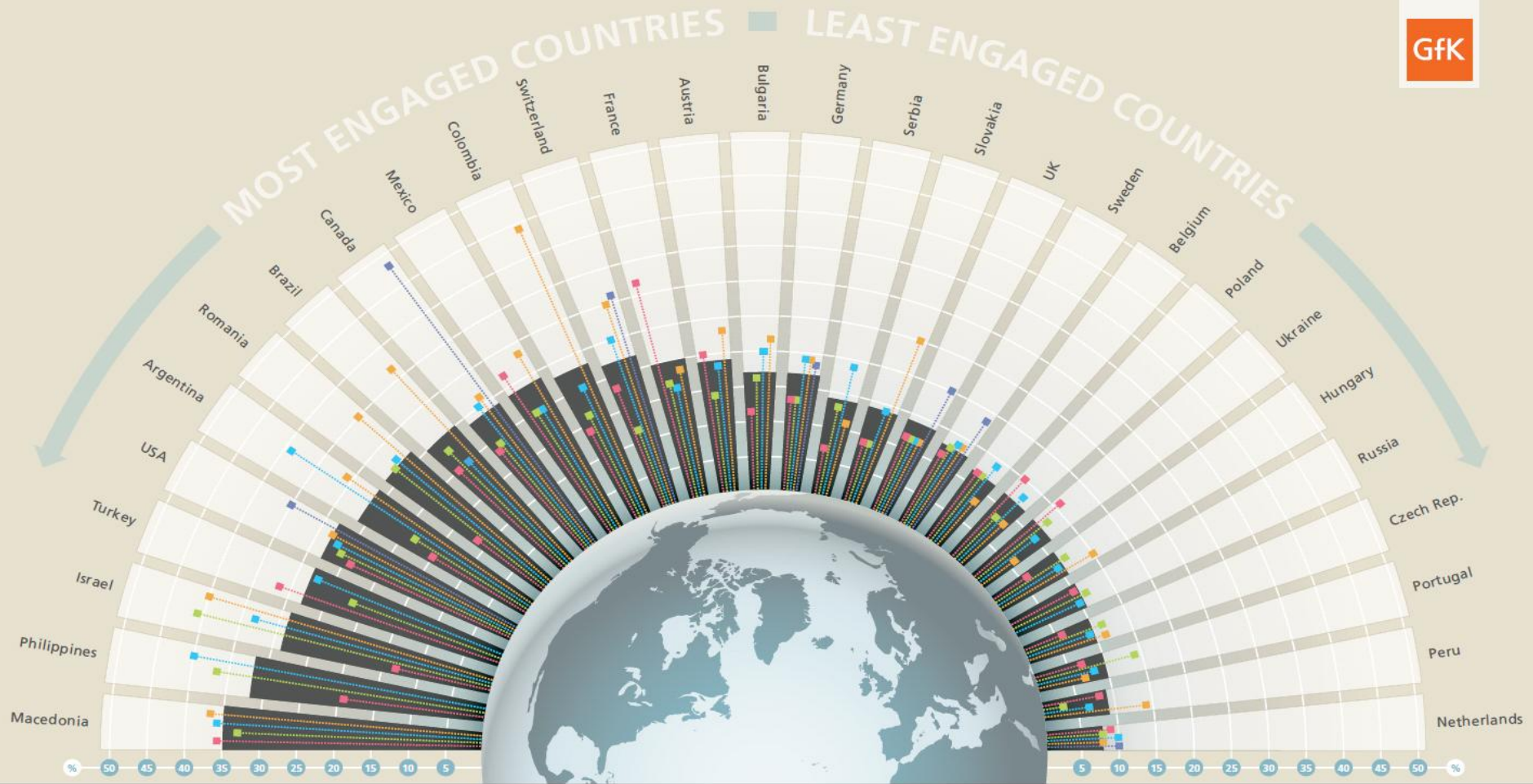
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- ✓ GfK Employee Engagement experts offer a wide range of information and consultancy services that help organizations develop their talent more effectively. Our teams of HR consultants provide end-to-end solutions, designing, implementing and supporting people-related strategies including; employee engagement, talent management, HR & team effectiveness, internal communications, change management, training and coaching and business performance metrics.
- ✓ The GfK Group offers the fundamental knowledge that industry, retailers, services companies and the media need to make market decisions. It delivers a comprehensive range of information and consultancy services in the three business sectors Custom Research, Retail and Technology and Media. The No. 4 market research organization worldwide operates in more than 100 countries and employs over 10,000 staff. In 2010, the GfK Group's sales amounted to EUR 1.29 billion. For further information, visit our website: www.gfk.com.

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Findings: Differences in engagement around the world and between age groups



Employee Engagement

KEY FOR EMPLOYEES WHO ARE HIGHLY ENGAGED



Source: GfK International Employee Engagement Study 2011, 30,556 interviewed employees in 29 countries

Findings: A Disengaged Generation

Young workers disengaged by pressures of work worldwide 1/2

Young workers around the world are lacking in engagement with their employers and are the most affected by perceived pressures at work, posing long-term retention and management problems for companies and countries.

What does this mean for organisations today?



Engagement of age groups:

Just 21 per cent of 18-29-year-olds are highly engaged with their employer, compared to 31 per cent of those in their 60s.

This 10-point gap between the younger 'doers' and those likely to be in the more senior positions poses real problems for businesses around the world, as it risks creating divided workplaces, inter-generational resentment and can hamper efforts to recruit, retain and motivate a flow of qualified young talent.

Findings: A Disengaged Generation

Young workers disengaged by pressures of work worldwide 2/2



Around the globe:

Some countries face a far more severe problem with the level of engagement in their young workforce.

In Macedonia, France and Turkey, close to a third of their 18-29 year old workers are 'highly engaged' with their employers, indicating a fairly stable and productive situation for companies. However, at the bottom of the 'engaged' list, Hungary, the Czech Republic, Serbia and Portugal (6-7 per cent each) all face a very different proposition. Retaining young talent could become problematic in these countries, as economies become stronger.



Work related pressure and stress

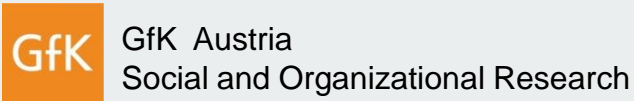
Two fifths (40 per cent) of young workers are frequently stressed at work – which is a higher percentage than that seen in any other age. Moreover, almost a third (31 per cent) feel under pressure to work long hours.

Two fifths of young workers (39 per cent) are unhappy with their work-life balance – again the highest percentage of all age groups - while a third (32 percent) feel that work pressure and stress frequently impacts their health – five points more than those in their 50s, and ten points higher than those in their 60s.

Findings

Further results
and insights
will be released
in the course of
2011

Do you have questions which we could help you with?
Feel free to contact us.



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