WORK RELATIONSHIP INDEX

Second Annual Index Results
September 2024

The future of work is personal. To improve the world's relationship with work, leaders' attention needs to be focused on delivering tailored and personalized experiences to today's workers.

The modern workforce is made up of billions of people, each of whom has a specialized and unique relationship with work. But work is not really working right now. While leaders and employees' expectations for work have continued to change, work itself has not. Over the past year, the world's workspaces, company culture, tools, and leadership styles have not yet evolved to keep pace with workers' newfound needs.

This year's HP Work Relationship Index (WRI) uncovers that to improve the world's relationship with work, our attention should be on the worker – a worker who wants to be treated as an individual, rather than simply as part of a collective workforce.

Put simply: To improve society's relationship with work, the future of work needs a fundamental shift.

As businesses rethink work, leaders and knowledge workers are placing an ever-increasing emphasis on choice, customization, and autonomy. In fact, when asked what workers ideally needed to feel happy and productive at work, 95% of knowledge workers gave a unique and distinct response.

So, while many corporations still take a one-size-fits-all approach, the 2024 HP WRI reveals that workers are operating from a more personalized mentality. When asked about their relationship with work, at least two-thirds of knowledge workers and leaders are actively seeking a personalized experience at work. In fact, knowledge workers place such a high value on the potential of a personalized work experience that 87% globally would be willing to forgo a portion of their salary to get it.

These experiences include working in a way that best suits their needs, personalizing their workspaces, having access to different technologies that best suit their working style, and having the liberty to define and shape what a flexible working environment looks like to them.

Making this future possible for workers everywhere will ultimately come down to leadership – leaders who are strong in their human skills and eager to capitalize on emerging technology, such as AI, with workers' needs in mind.

Methodology

HP commissioned an online survey managed by Edelman Data & Intelligence (DXI) that fielded between May 10 – June 21, 2024, in 12 countries:

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

HP surveyed 15,600 respondents in total:
→ 12,000 knowledge workers (1,000 in each country)
→ 2,400 IT decision makers (200 in each country)
→ 1,200 business leaders (100 in each country)

Depending on their role, some respondents qualified as both IT decision maker and business leader.
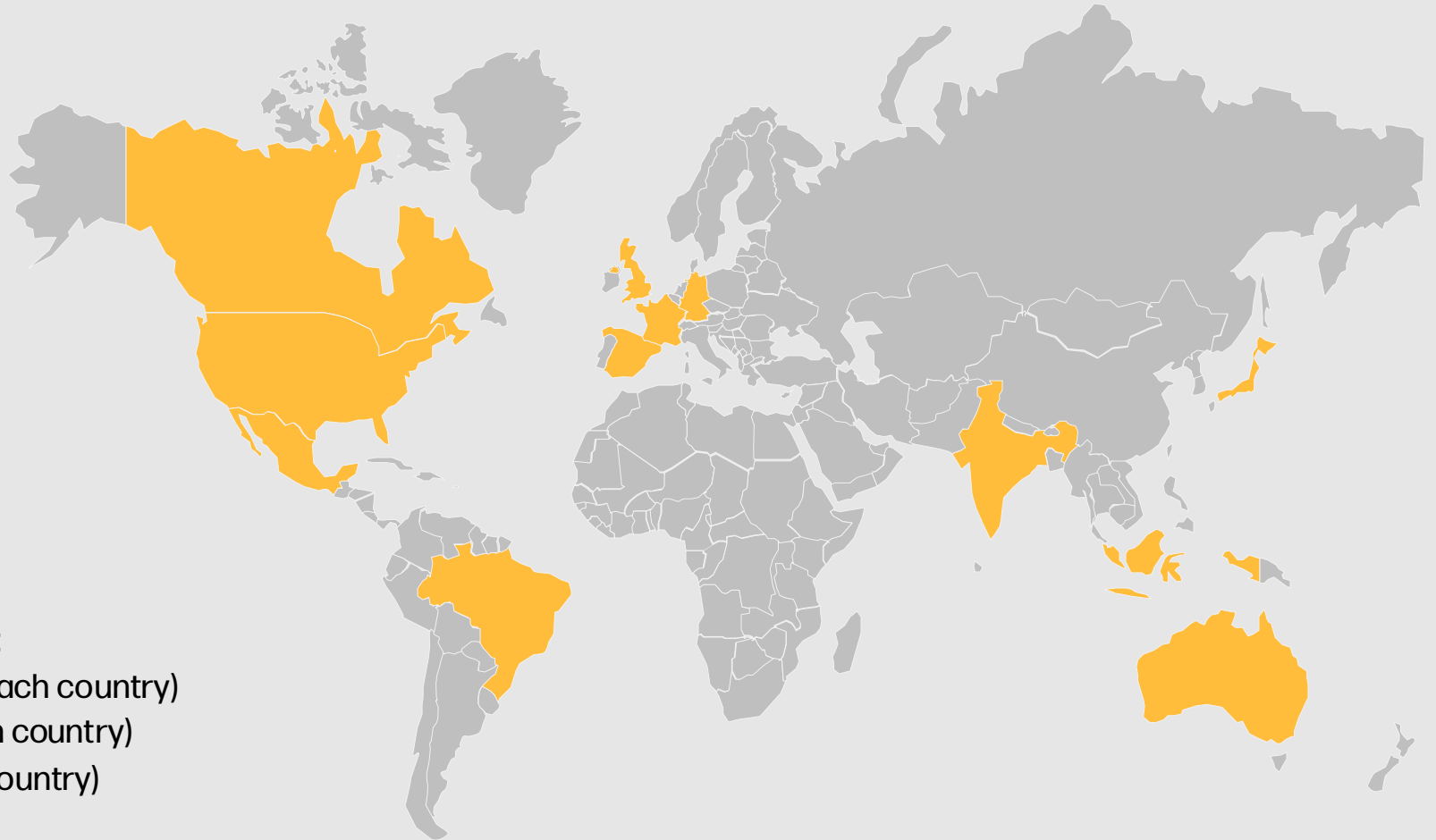
Last year, we identified six primary drivers of a healthy relationship with work that represent critical focus areas

Fulfillment:
Finding purpose, meaning and empowerment at work

Leadership:
Leading with empathy and emotional connection

People-centricity:
Putting people first and placing them at the heart of decision-making

Skills:
Enabling new hard and soft skillsets that accommodate different learning styles

Tools:
Technology's emergence as a critical vehicle for employee engagement

Workspace:
Delivering flexibility and trust in where employees work, enabled by seamless transitions

This year, there is an increased focus on **AI** and **personalization** given how conversations around the future of work have evolved in the past year

70%
of questions from last year were asked again, to **validate and gain insight** into the world's relationship with work year-over-year

30%
of questions are new to unlock more of the **"how"** to improve relationships with work in today's climate

Key Takeaways

→ Work Relationship Index reveals that **the world's relationship with work remains unhealthy**

→ **Trust in leadership reigns supreme** in driving a good relationship with work, but research reveals **leaders' lack of confidence in their human skills**

→ Most workers and leaders agree on what's important to shaping the future of work: **delivery of tailored, personalized work experiences**

→ **AI usage has exploded** – it could be key to driving a better relationship with work, while unlocking a personalized work experience for knowledge workers globally

→ **ITDMs have seen a marked improvement in relationship with work**, driven by key changes in how they work with leadership and increased fulfillment

2024 Work Relationship Index reveals that the world's relationship with work remains unhealthy

Only 28% of knowledge workers say they have a healthy relationship with work, up +1pt since 2023

US and Indonesian knowledge workers saw the largest increase in their relationship with work (+6pts), while Brazil, India and Mexico all saw drops compared to last year

2024 Working Relationship Index Among

Growing Economies	38
Mature Economies	23

2023 Knowledge Workers

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

Global Average

2024 Knowledge Workers

28	Global
46	India
44	Indonesia
34	U.S.
31	Mexico
29	Brazil
27	Australia
26	UK
25	Spain
23	Canada
22	Germany
21	France
9	Japan

Greatest changes in

US	+6
Indonesia	+6
Australia	+5
Spain	+5
Japan	+4
Mexico	-3
India	-4
Brazil	-8

With not much changing, the urgency to make a change is as important and even more critical for some now, with 74% of business leaders agreeing; a +7pt increase from 2023

% who say this is a critical moment in time to redefine our relationships with work...

Knowledge Workers

57% 2023

57% 2024

Business Leaders

67% 2023

74% 2024

ITDMs

65% 2023

68% 2024

Q4. Please tell us how much you agree or disagree with each of the following statements. Base: Global knowledge workers (n=12,000), global business leaders (n=1,200), global ITDMs (n= 2,400).

The Work Relationship Index 2024

Driver Performance among the World's Knowledge Workers

All drivers stayed stable compared to last year, with Fulfillment seeing the biggest jump (+2pts) from 2023.

FULFILLMENT
30
28 +2

LEADERSHIP
26 +1
25

SKILLS
33 +1
32

TOOLS
26 ±0
26

WORKSPACE
25 ±0
25

PEOPLE-CENTRICITY
24 +1
23

28
27 +1

— 2023
— 2024
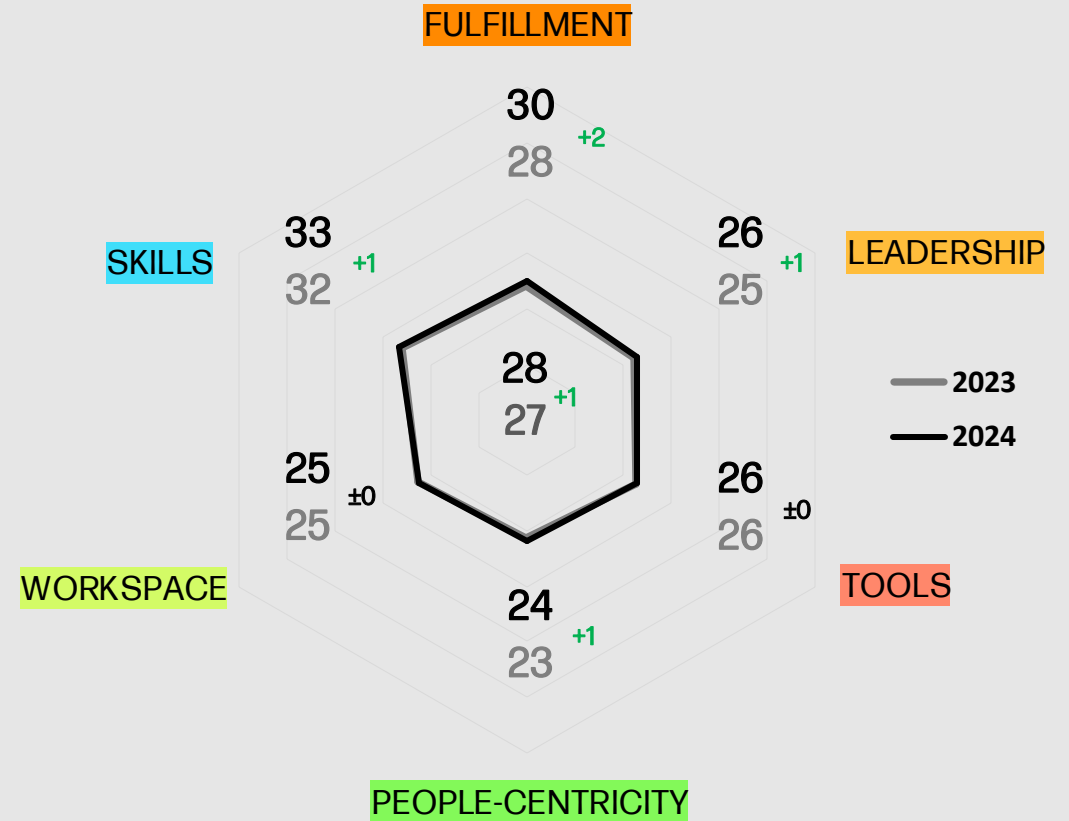
Legend:

- 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.

Countries with increases in their WRI score saw slight improvement across all drivers, most notably Leadership and Fulfillment

				2024	2023	YoY
Average increase in drivers among knowledge workers in countries with a year-over-year increase in WRI Score		Markets saw larger jumps in...	🇮🇩	44%	38%	+6
			🇺🇸	34%	28%	+6
Skills +2		• Senior leadership demonstrating empathy • Work giving them purpose	🇦🇺	27%	22%	+5
Tools +2			🇬🇧	26%	25%	+1
Leadership +4			🇪🇸	25%	20%	+5
Workspace +2			🇩🇪	22%	21%	+1
People Centricity +2 Fulfillment +4			🇯🇵	9%	5%	+4

On the flip slide, countries that experienced a decrease in WRI score also saw declines across all drivers, especially Tools, Skills and Workspace

Average decrease in drivers among knowledge workers in countries with a year-over-year decrease in WRI score

Driver	Value
Skills	-4
Tools	-5
Leadership	-3
Workspace	-4
People Centricity	-3
Fulfillment	-3

Markets saw larger jumps in...

- Their office having the right equipment, technology, and space they need to be successful at work
- Their office having the right tools they need to be successful at work
- Their confidence they have the right skills to be successful at work
- Option of working from home or in the office
- The environment making it easy for them to work seamlessly between different locations

	2024	2023	YoY
India	46%	50%	-5
Mexico	31%	34%	-3
Brazil	29%	37%	-9

Calculating Impact

This year, we built a model to determine relative impact of each driver statement on the WRI score

- In 2023, we used a factor analysis to determine which statements had a significant impact on each driver group

- This year, we used a driver's analysis model to calculate the relative importance of each statement in driving people's relationship with work

- If a statement has high impact on WRI score, then those statements will be more likely to contribute to how high or low the WRI score is

The drivers with the strongest impact on the world's relationship with work are most likely to fall in Leadership, Fulfillment and Skills

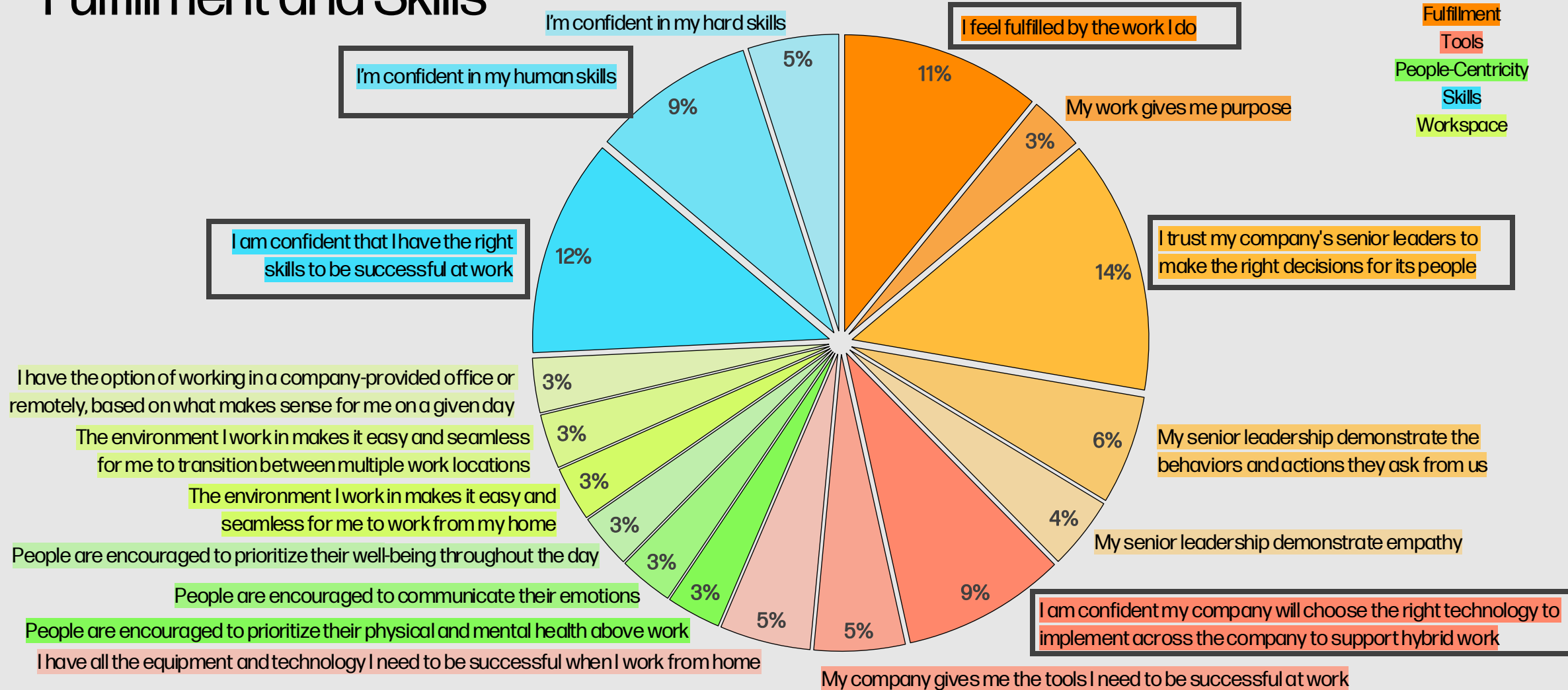Driver Groups
- Leadership
- Fulfillment
- Tools
- People-Centricity
- Skills
- Workspace

I'm confident in my hard skills — 5%

I'm confident in my human skills — 9%

I feel fulfilled by the work I do — 11%

My work gives me purpose — 3%

I trust my company's senior leaders to make the right decisions for its people — 14%

I am confident that I have the right skills to be successful at work — 12%

My senior leadership demonstrate the behaviors and actions they ask from us — 6%

My senior leadership demonstrate empathy — 4%

I have the option of working in a company-provided office or remotely, based on what makes sense for me on a given day — 3%

The environment I work in makes it easy and seamless for me to transition between multiple work locations — 3%

The environment I work in makes it easy and seamless for me to work from my home — 3%

People are encouraged to prioritize their well-being throughout the day — 3%

People are encouraged to communicate their emotions — 3%

People are encouraged to prioritize their physical and mental health above work — 3%

I have all the equipment and technology I need to be successful when I work from home — 5%

My company gives me the tools I need to be successful at work — 5%

I am confident my company will choose the right technology to implement across the company to support hybrid work — 9%

/ 14

Trust in senior leadership emerged as the attribute with the largest impact on workers' WRI score across the top five statements

		Derived Importance of Driver in Relationship with Work	Consistently Part of Workers' Experience
1	"I trust my company's senior leaders to make the right decisions for its people"	14%	26%
2	"I am confident that I have the right skills to be successful at work"	12%	35%
3	"I feel fulfilled by the work I do"	11%	29%
4	"I am confident my company will choose the right technology to implement across the company to support hybrid work"	9%	25%
5	"I'm confident in my human skills"	9%	32%

Q9 – Q14: Now, we would like to focus on factors related to your [category]. Thinking about the relationship with work you want to have, how important or unimportant are each below? Q9A – Q14A: Looking at the same factors related to your [category], please indicate on the scale below how much or little this currently describes your current work experience. Base: Global knowledge workers (n=12,000).
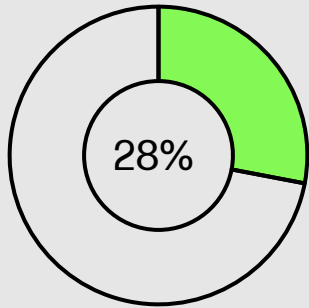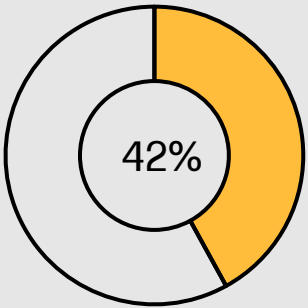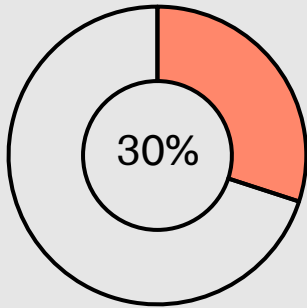
Trust in leadership reigns supreme in driving a good relationship with work, but research reveals leaders' lack confidence in their human skills

Healthy zone workers are very happy with their relationship with work, while unhealthy zone workers are not happy

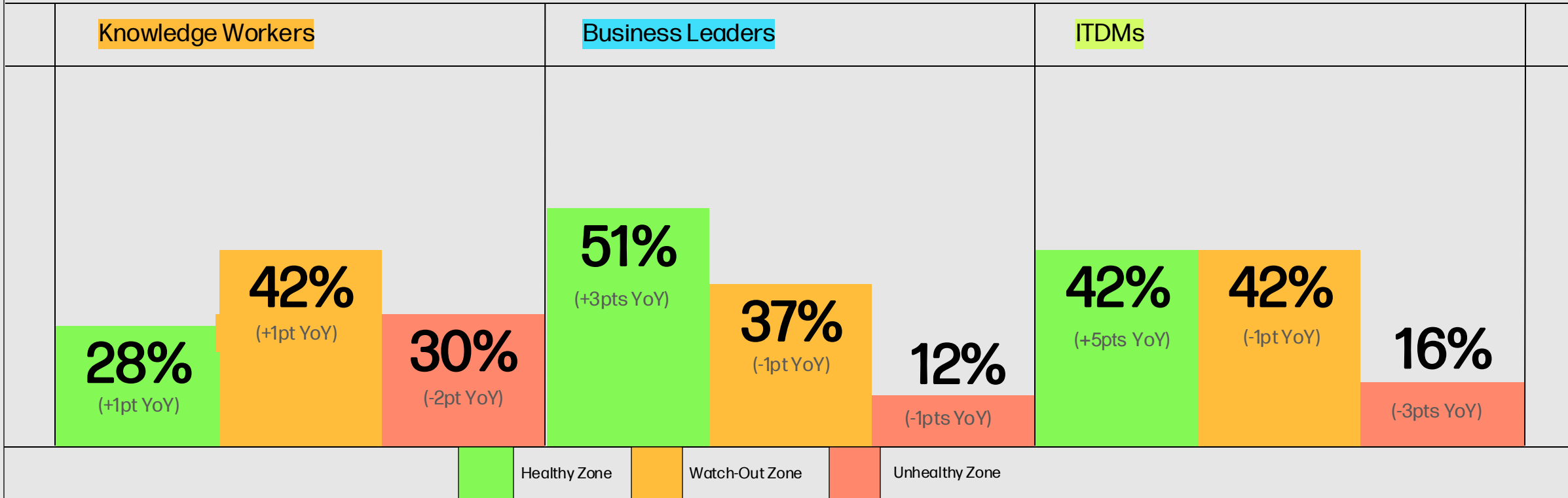|	**Healthy Zone**	**Watch-out Zone**	**Unhealthy Zone**
2024	28%	42%	30%
	% very happy (top 1 box)		% not happy (bottom 2 box)

Q2_F: 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." Base: global knowledge workers (n=12,000).

While 28% of knowledge workers have a healthy relationship with work, 30% have an unhealthy relationship with work and 42% are in the "watchout zone"

% selected

Knowledge Workers

Business Leaders

ITDMs

Knowledge Workers
- **28%** (+1pt YoY)
- **42%** (+1pt YoY)
- **30%** (-2pt YoY)

Business Leaders
- **51%** (+3pts YoY)
- **37%** (-1pt YoY)
- **12%** (-1pts YoY)

ITDMs
- **42%** (+5pts YoY)
- **42%** (-1pt YoY)
- **16%** (-3pts YoY)
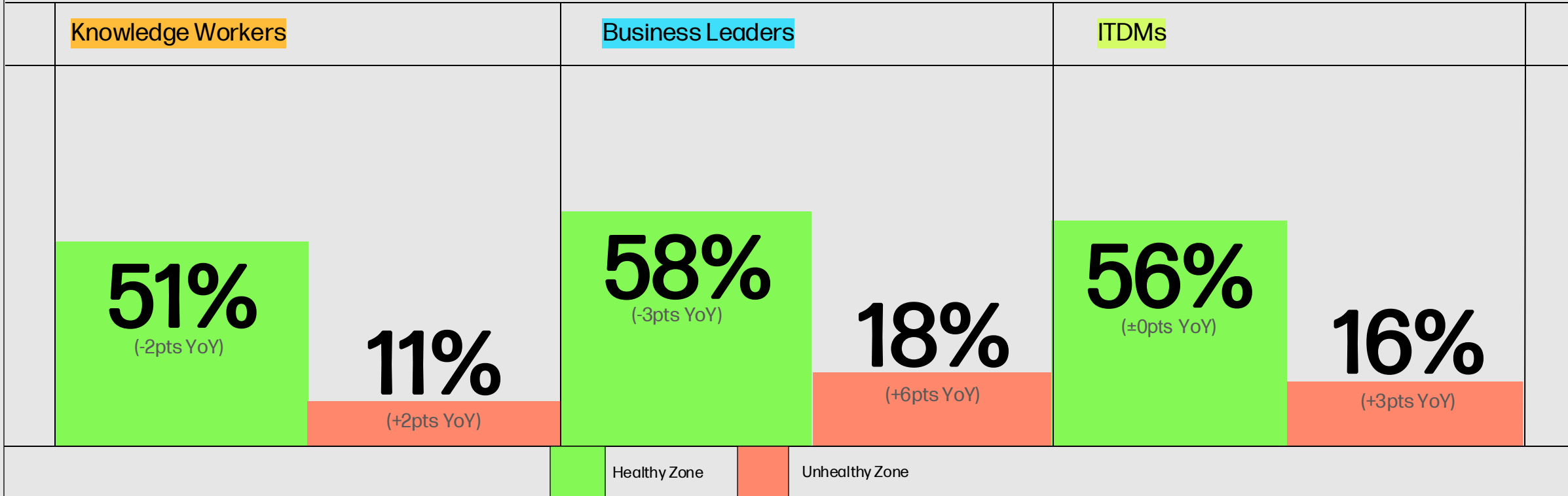
Healthy Zone   Watch-Out Zone   Unhealthy Zone

Q2: 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=12,000), global business leaders (n=1,200), global ITDMs (n= 2,400).

On average, those who have a healthy relationship with work are 4x more likely to consistently experience the drivers at work compared to those in the unhealthy zone

% consistently experience averaged across driver statements – healthy zone vs. unhealthy zone

Knowledge Workers

Business Leaders

ITDMs

51%
(-2pts YoY)

11%
(+2pts YoY)

58%
(-3pts YoY)

18%
(+6pts YoY)

56%
(±0pts YoY)

16%
(+3pts YoY)

Healthy Zone   Unhealthy Zone

Knowledge workers want to be seen as individuals and to feel like their company wants them to use their voice

In fact, knowledge workers with a healthy relationship with work are nearly 3x more likely to feel cared for as individuals and 2.5x more likely to feel encouraged to voice their wants and needs

	Healthy Zone Knowledge Workers	Unhealthy Zone Knowledge Workers	
My company cares about who I am as an individual	87%	30%	
My leaders care about who I am as an individual	85%	32%	
My company encourages us to voice our wants and needs	85%	32%	

Q4: Please tell us how much you agree or disagree with each of the following statements. Base: Global healthy zone knowledge workers (n=3,368), global unhealthy zone knowledge workers (n=3,637).

Leadership plays an important role, with knowledge workers needing transparency and emotional intelligence from their leaders to maintain a positive relationship with work

	Healthy Zone Knowledge Workers	Unhealthy Zone Knowledge Workers	
Our senior leaders acknowledge when they make mistakes	47%	9%	
My manager demonstrates emotional intelligence	46%	8%	
My company's senior leadership demonstrate emotional intelligence	43%	7%	

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 healthy zone knowledge workers (n=3,368), global unhealthy zone knowledge workers (n=3,637).

And Leadership comes up again as a key element to knowledge workers' happiness and productivity

Many knowledge workers highlight aspects of leadership surrounding communication, empathy and appreciation when asked what they need to be happiest and most productive at work

"The things that **I need to be happiest and most productive at work is guidance from a leader** and a good environment to work in."

"Personally, **I would want leadership to set certain rules regarding some free period** for employees when there is excessive work pressure."

"The **best thing is [when] you get praised by your leadership;** it gives you **happiness and courage to do more.**"

"The most essential is a **leadership, a gesture that knows how to communicate in a comprehensive and empathetic way** with all employees. That he knew how to understand and understand the function."

"To be more happy and productive at work, **I would like more incentives from my leaders telling [me] that I am doing a good job** and give me rewards to feel more appreciated."

Leadership's ability to show empathy at work greatly impacts employees' well-being, professional growth and retention

Senior leadership's ability to show empathy...

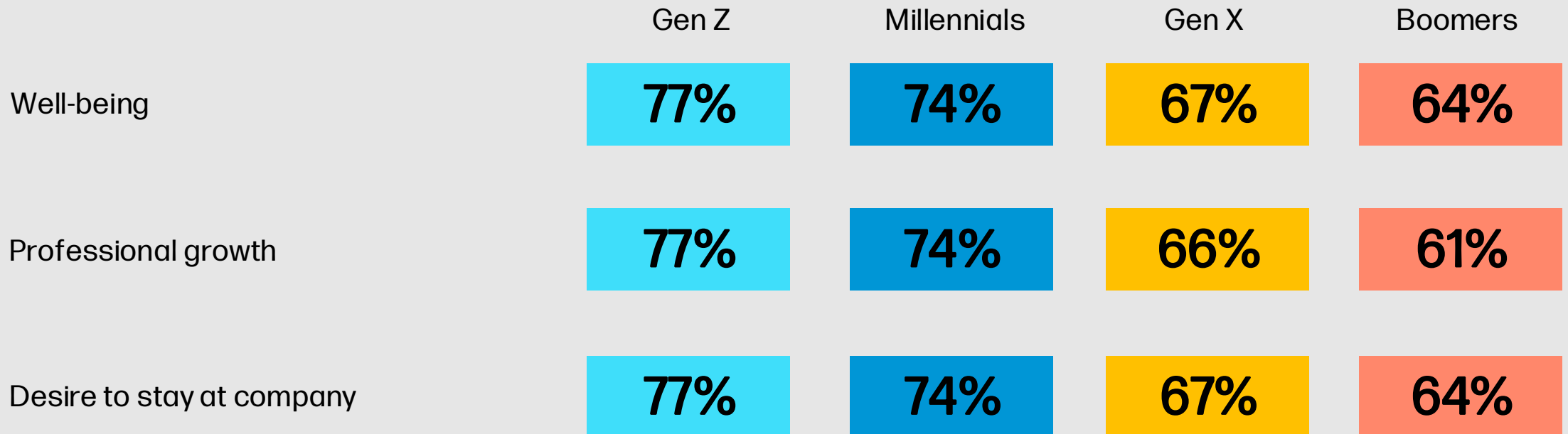|	
Positively impacts **my well-being**	72%
Makes a positive impact on **employee well-being**	90%
Positively impacts **my professional growth**	71%
Positively impacts **employees' professional growth**	90%
Positively impacts **my desire to stay at my company**	72%
Makes a positive impact on **employees' desire to stay at the company**	91%

Knowledge Workers   Business Leaders

Q4E_2024: Now we would like to focus specifically on leaderships' ability to be empathetic at work. Using the scale below, please tell us how much you agree or disagree with each statement. Throughout this study, we will be referring to the term "empathy". When we say, "empathy," we are referring to the ability to take on another's perspective, to understand, feel, and care for others' situation or emotions. Base: Global knowledge workers (n=12,000), global business leaders (n=1,200).

The impact of empathy from leadership is particularly great for Gen Z and Millennial knowledge workers

Senior leadership's ability to show empathy positively impacts...

	Gen Z	Millennials	Gen X	Boomers
Well-being	77%	74%	67%	64%
Professional growth	77%	74%	66%	61%
Desire to stay at company	77%	74%	67%	64%

However, only a fraction of knowledge workers receive the empathy they need

78%
of knowledge workers say that it's important to have senior leadership who demonstrate empathy
(vs. 74% in 2023)

28%
of knowledge workers say they consistently see their senior leadership demonstrate empathy (vs. 25% in 2023)

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? 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=12,000).

There is a big gap (25pts) between leaders' perceptions of how employees feel and what employees consistently experience

89%
of business leaders believe that employees feel senior leadership genuinely cares for their health and well-being

64%
of knowledge workers say senior leadership at my company genuinely cares for my health and well-being

Q4E_2024: Now we would like to focus specifically on leaderships' ability to be empathetic at work. Using the scale below, please tell us how much you agree or disagree with each statement. Throughout this study, we will be referring to the term "empathy". When we say, "empathy," we are referring to the ability to take on another's perspective, to understand, feel, and care for others' situation or emotions. **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=12,000), global business leaders (n=1,200).

Business leaders need help – 90% know that empathy is beneficial to employee growth, retention and well-being, but only half feel confident in their human skills

On average, only **43%** of business leaders feel confident in their human and hard skills

Business Leaders

I am confident that I have the right skills to be successful at work	**47%** (vs. 45% in 2023)
I'm confident in my human skills (e.g., mindfulness, self-awareness, communication, creative-thinking, resilience, empathy, emotional intelligence)	**44%** (vs. 41% in 2023)
I'm confident in my hard skills (e.g., technical skills, computer skills, marketing skills, presentation skills, writing skills)	**42%** (vs. 42% in 2023)

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. Base: Global business leaders (n=1,200).

We need to help business leaders understand what empathy means

When asked to describe empathetic leadership in the workplace, knowledge workers said engaging on a personal level, caring about employees as individuals, practicing active listening, communicating transparently, and prioritizing well-being

"They actually care about what you are saying and doing and not just pretending/ticking boxes."

"Our leadership team regularly provide us with business updates and communicate with us consistently, there's an open-door policy and horizontal communications and people are encouraged to reach out to leadership."

"Leadership respecting that their employees are individuals with individual needs."

"Understanding that individuals face unique challenges in their professional and personal lives, which can impact their well-being, performance at work, etc."

"Empathic leaders actively listen to their employees without judgment or interruption. They strive to understand their concerns, ideas, and feedback."

Notably, female business leaders are significantly more confident than their male counterparts – not only in their human skills, but hard skills too

On average, female business leaders are +12pts more confident in their skillset compared to their male counterparts

Business Leaders	Men	Women
I am confident that I have the right skills to be successful at work	**42%** (vs. 44% in 2023)	**54%** (vs. 46% in 2023)
I'm confident in my human skills (e.g., mindfulness, self-awareness, communication, creative-thinking, resilience, empathy, emotional intelligence)	**39%** (vs. 39% in 2023)	**52%** (vs. 42% in 2023)
I'm confident in my hard skills (e.g., technical skills, computer skills, marketing skills, presentation skills, writing skills)	**38%** (vs. 41% in 2023)	**48%** (vs. 44% in 2023)

Female business leaders' higher confidence in their hard skills is consistent across all generations

% who say...		Male Business Leaders	Female Business Leaders	
I'm consistently confident in my hard skills (e.g., technical skills, computer skills, marketing skills, presentation skills, writing skills)	Gen Z	43%*	59%*	
	Millennials	42%	49%	
	Gen X	37%	41%*	
	Boomers	25%	56%*	

* Indicates small base size and can only be analyzed directionally.

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. Base: Global Gen Z male business leaders (n=54), global Gen Z female business leaders (n=39), global Millennial male business leaders (n=387), global Millennial female business leaders (n=322), global Gen X male business leaders (n=187), global Gen X female business leaders (n=88), global Boomer male business leaders (n=102), global Boomer female business leaders (n=16)

Female business leaders are more likely to define empathetic leadership with soft skills and flexibility

When asked to define empathetic leadership, female business leaders focus more on **soft skills and flexibility**

On the other hand, male business leaders are defining empathetic leadership through direct actions such as **recognizing accomplishments** and valuing their employees

Understanding and Relating

"Listening and **genuinely caring** about employees' problems or issues whatever they be and **helping to solve them.**"

Open Discussion

"**Letting everyone have a voice** and actually **implementing change** based on positive suggestions."

Support for Personal Growth

"An empathetic leader **actively listens** to employees, **provides support and resources** for growth."

Recognition and Feedback

"Empathetic individuals care about their employees, so **they make time to celebrate their accomplishments** and give them positive recognition."

Valuing Employees

"I think it is fundamental that the **worker feels valued,** and they are not treated as just another member of the organization."

Effective Communication

"Empathetic leaders are **communicative** and can stay in touch with employees at all times."

Female business leaders may prioritize Leadership and People-Centricity, as these areas impact them more than their male counterparts

Derived Importance of Driver in Relationship with Work		Male Business Leaders		Female Business Leaders
1	"I feel fulfilled by the work I do"	18%	"I trust my company's senior leaders to make the right decisions for its people"	20%
2	"I trust my company's senior leaders to make the right decisions for its people"	15%	"People are encouraged to prioritize their well-being throughout the day"	12%
3	"My company gives me the tools I need to be successful at work"	12%	"I feel fulfilled by the work I do"	9%
4	"I am confident my company will choose the right technology to implement across the company to support hybrid work"	10%	"I am confident that I have the right skills to be successful at work"	7%
5	"I'm confident in my human skills"	7%	"I'm confident in my human skills"	7%

Q9A – Q14A: Looking at the same factors related to your [category], please indicate on the scale below how much or little this currently describes your current work experience. Base: Global male business leaders (n=732), global women business leaders (n=465).

Most workers and leaders agree on what's important to shaping the future of work: delivery of tailored, personalized work experiences

Defining Personalized Work

To set employees up for greater success (and therefore the company), personalized work is the idea that work
moves toward a more tailor-fit experience for everyone who works there

We look at this through the lens of our drivers

Elements of personal preferences:

- Personal life (e.g., home life, kids, dogs, daily realities outside of work)

- Personal well-being (e.g., mental, physical, emotional, psychological health)

- Personality/personal style (e.g., how I best work/ learn/grow, how I handle stress/pressure, how I communicate, what triggers me, what fulfills me, how I best receive feedback, what makes me feel seen/valued)

We asked what workers ideally need to feel happy and productive at work: out of 12,000, we got ~11,500 unique responses

95%

of knowledge workers shared unique preferences that would shape their ideal circumstances at work

Collaboration

"[Need a] quiet area where I can work uninterrupted." **VS.** "[I] need to have some people contact and interaction."

Management

"I am most productive when I have clear and actionable tasks with timelines." **VS.** "[I] need to be trusted that I am doing my job, not micromanaged."

Working Hours

"[I need] not to work mornings; I am nocturnal and hate morning work." **VS.** "[I'd like] a workday that you are out by 4pm."

Working Environment

"[I] need quiet time." **VS.** "[I need] some background music."
"I have no interest in perks in the office." **VS.** "... address workplace issues such as slow networks, poor lighting and ergonomics."

My personal life is your business:

Knowledge workers reference personal factors, such as **caretaking responsibilities, medical/accessibility needs** and **personal stressors** alongside preferences

Personalized work emerges as a new universal human need – a strong desire for tailored experiences is evident across most markets, particularly in growing economies

67%

of knowledge workers globally say its important to have the ability to personalize their workspace at the office (e.g., multiple monitors, adding personal items)

Country	%
Indonesia	80%
India	77%
Brazil	75%
Mexico	74%
US	69%
Australia	68%
Spain	68%
Canada	67%
Germany	62%
UK	62%
France	60%
Japan	38%

68%

of knowledge workers globally say its important to work for a company that allows them to define and shape what a flexible working environment looks like

Country	%
Indonesia	81%
Brazil	78%
Mexico	78%
India	75%
Australia	70%
Canada	69%
Spain	68%
US	67%
Germany	66%
UK	65%
France	58%
Japan	42%

Q11 / Q12: Now, we would like to focus on factors related to your [category]. Thinking about the relationship with work you want to have, how important or unimportant are each below? Base: Global knowledge worker (n=12,000), knowledge workers per country (n=1,000).

And while most business leaders and IT decision makers report currently experiencing personalized work, only about half of knowledge workers can say the same

% who agree...

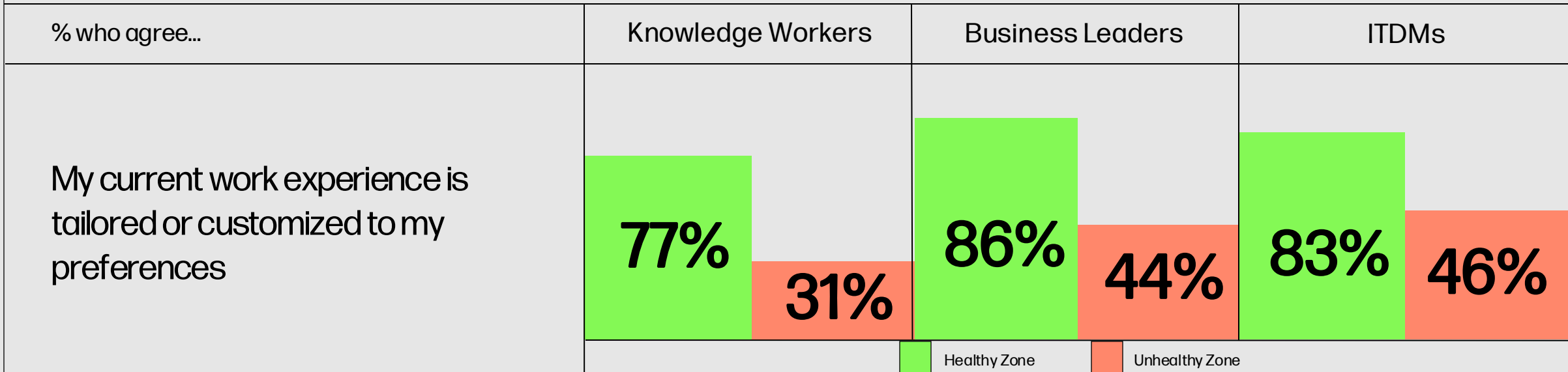My current work experience is tailored or customized to my preferences

55% Knowledge Workers

75% Business Leaders

70% ITDMs

Those who currently experience work personalization are much more likely to fall within the healthy work relationship zone

% who agree...	Knowledge Workers	Business Leaders	ITDMs
My current work experience is tailored or customized to my preferences	77% 31%	86% 44%	83% 46%

Healthy Zone   Unhealthy Zone

Knowledge workers want personalization implemented across all aspects of their work

Growing markets are more likely to desire personalization across technology, training, and general day-to-day

72% say its important to **have access to different technology** that best fits their working style

Indonesia	86%
Mexico	84%
India	83%
Brazil	82%
Spain	72%
US	71%
Australia	70%
UK	69%
Canada	68%
Germany	67%
France	65%
Japan	47%

69% say its important to work for an organization that **personalizes trainings** to fit their learning style

India	82%
Brazil	81%
Mexico	80%
Indonesia	79%
US	70%
UK	70%
Australia	69%
Spain	68%
Canada	67%
Germany	60%
France	58%
Japan	47%

70% say its important when people at their organization **can work in the way that best suits their needs**

Indonesia	80%
India	78%
Mexico	77%
Brazil	76%
Canada	73%
Australia	73%
US	71%
UK	68%
Germany	67%
Spain	66%
France	62%
Japan	47%

More than two-thirds of knowledge workers globally say they are seeking a personalized work environment – business leaders and ITDMs agree

% who agree the following are important	Knowledge Workers	Business Leaders	ITDMs
Having access to different technology that best fits my style of working	72 %	82 %	81 %
People at my organization can work in the way that best suits their needs	70 %	79 %	76 %
Working for an organization that personalizes trainings to fit my learning style	69 %	79 %	77 %
Having the ability to personalize my workspace at the office (e.g., multiple monitors, adding personal items)	67 %	77 %	75 %
Working for a company that allows me to define and shape what a flexible working environment looks like to me	68 %	76 %	75 %

Q9 / Q11 / Q12: Now, we would like to focus on factors related to your [category]. Thinking about the relationship with work you want to have, how important or unimportant are each below? Base: Global knowledge works (n=12,000), global business leaders (n=1,200), global ITDM (n=2,400).

And, on average, 7-in-10 are likely to benefit from personalized work

% who agree	Knowledge Workers	Business Leaders	ITDMs
Having a tailored or customized work style to fit my needs would make me more productive	70%	78%	76%
Having a tailored or customized approach to my work would improve my relationship with work	69%	77%	76%
I prefer to work customized hours that best fit with my schedule	70%	78%	76%
Having tailored or customized solutions to my work needs would incentivize me to stay with my company longer	68%	76%	77%
If work was tailored or customized to my personal needs and preferences, I would be more invested in my company's growth	64%	76%	76%

Q9C_2024: For this question, we're going to ask you about how your experiences at work might be tailored or customized to you to improve your overall experience. For example, you may have the ability to personalize your own setup or preferred way of working, tailored learning styles, or your company may provide you the tools, workspace, and flexibility to work the way that makes you happiest and most productive. How much do you agree or disagree with the following statements? Base: Global knowledge works (n=12,000), global business leaders (n=1,200), global ITDM (n=2,400).

Parents are more likely to see the benefits of personalized work; meanwhile, there is only a slight difference across gender

	Parents	Non-Parents	Men	Women
Having a tailored or customized work style to fit my needs would make me more productive	72%	65%	68%	71%
Having a tailored or customized approach to my work would improve my relationship with work	71%	65%	68%	70%
I prefer to work customized hours that best fit with my schedule	71%	66%	67%	69%
Having tailored or customized solutions to my work needs would incentivize me to stay with my company longer	70%	63%	67%	69%
If work was tailored or customized to my personal needs and preferences, I would be more invested in my company's growth	67%	58%	64%	65%

Q9C_2024: For this question, we're going to ask you about how your experiences at work might be tailored or customized to you to improve your overall experience. For example, you may have the ability to personalize your own setup or preferred way of working, tailored learning styles, or your company may provide you the tools, workspace, and flexibility to work the way that makes you happiest and most productive. How much do you agree or disagree with the following statements? Base: Global male knowledge workers (n=5,584), global female knowledge workers (n=6,381), global non-parent knowledge workers (n=3,874), global parent knowledge workers (n=8,087).

And female business leaders are more likely to agree that personalization would improve their own relationship with work

83%

of female business leaders say, "having a personalized approach to work would improve their relationships with work" *(vs. 73% of male business leaders)*

"I need a comfortable working environment, having to stay in an open space makes it hard to concentrate."

"A workspace that can be modified and made to suit each individual person."

"In my experience, a flexible schedule for family and personal needs keeps me balanced."

"I really like the flexibility of hybrid work, the truth is that I feel much more comfortable working since I have it."

"Providing advanced technologies that can help simplify and assist our work."

In fact, 87% of workers globally would be willing to forgo a portion of their salary to have a more personalized, tailored work experience

Knowledge workers want the ability to work not just where they want, but also when and how they want

Of their salary, workers would be willing to give up…

16%	**16**%	**15**%	**14**%
+3 YOY to work WHERE they want (e.g., in the office, in their home, or somewhere else)	**+3 YOY** to work WHEN they want (flexible hours that can shift based on their life needs)	to work HOW they want (e.g., on small teams, on certain clients)	to have more TAILORED OR CUSTOMIZED options that suit their working preferences

For a salary of $75,000, this means knowledge workers would be willing to give up …

$12,000	$12,000	$11,250	$10,500

Q15. How much of your current salary would you be willing to give up to work for a company that is leading the way in the following areas: Base: Global knowledge workers (n=12,000).

Desiring personalization is even higher among Gen Z & Millennials, with over 80% who would be willing to forgo salary for options

	Gen Z	Millennials	Gen X	Boomers
% of knowledge workers would be willing to give up any amount of their salary for personalization	88%	81%	68%	56%
Average % of current salary knowledge workers would give up to work for a company...				
With more tailored or customized options to suit my working preferences	19%	15%	11%	11%
That lets me work WHERE I want (whether it be in the office, in my home, or somewhere else)	21%	17%	13%	12%
That lets me work WHEN I want (flexible hours that you can shift based on your life needs)	21%	16%	13%	12%
That lets me work HOW I want (e.g., on small teams, on certain clients)	21%	15%	12%	12%

Q15: How much of your current salary would you be willing to give up to work for a company that is leading the way in the following areas: Base: Global Gen Z knowledge workers (n=2,035), global Millennial knowledge workers (n=5,466), global Gen X knowledge workers (n=3,195), global Boomer knowledge workers (n=1,284).
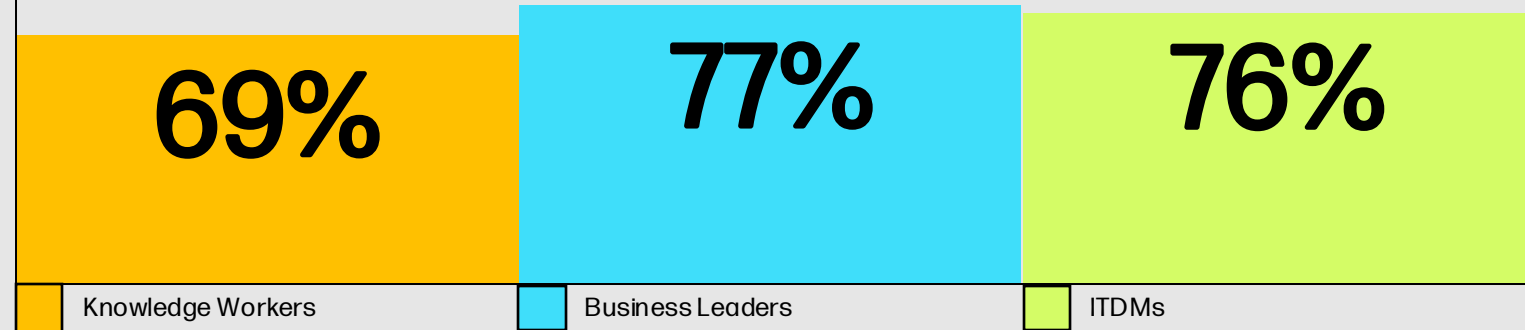
By getting a tailored, personalized work experience, workers, leaders and ITDMs alike say it would benefit their well-being and work relationship
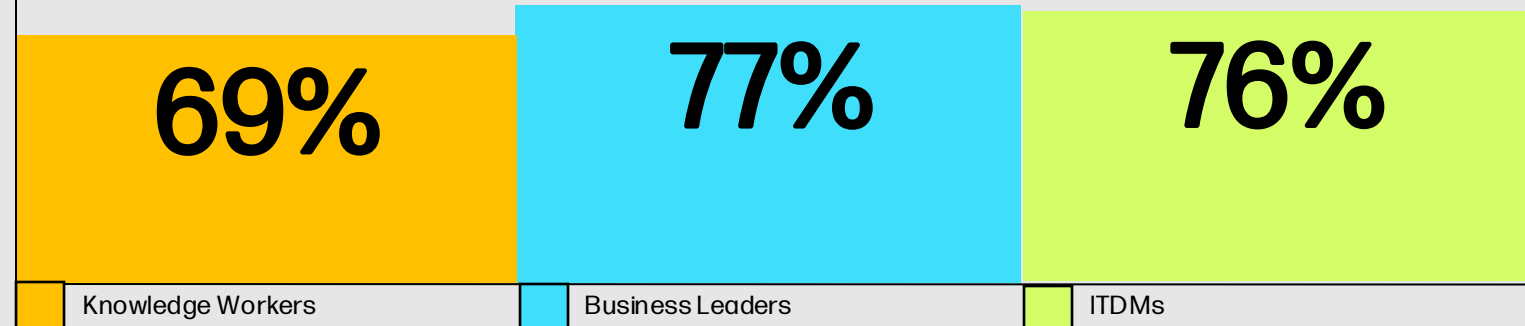
% who agree....

If work was tailored or customized to my personal needs and preferences, my overall well-being would improve

69%	77%	76%
☐ Knowledge Workers	☐ Business Leaders	☐ ITDMs

% who agree....

Having a tailored or customized approach to my work would improve my relationship with work

69%	77%	76%
☐ Knowledge Workers	☐ Business Leaders	☐ ITDMs

Gen Z and Millennials are more likely to say personalized work would improve their well-being and work relationship
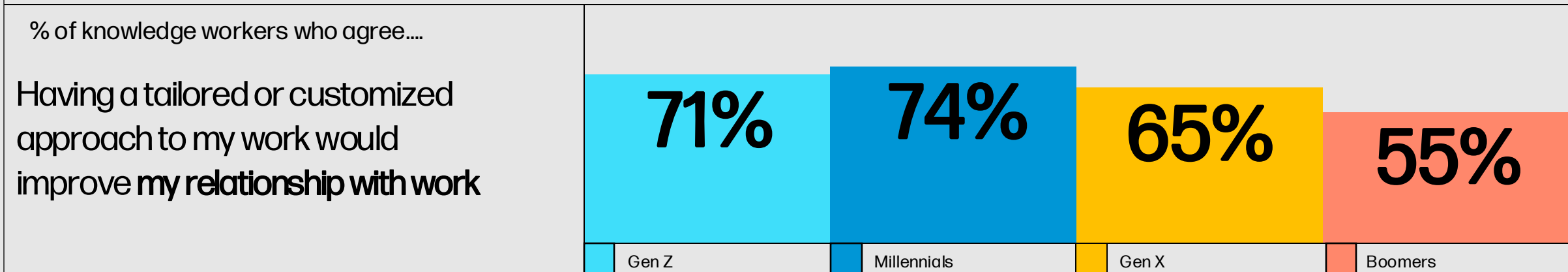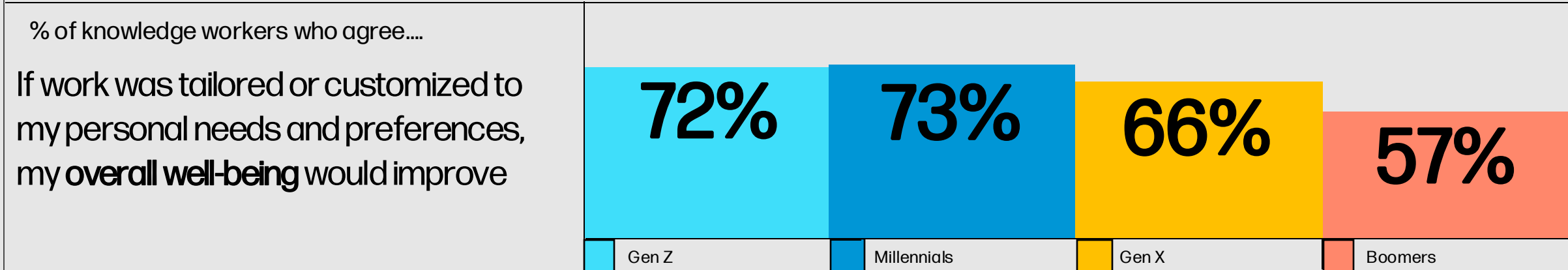
% of knowledge workers who agree....

If work was tailored or customized to my personal needs and preferences, my overall well-being would improve

Gen Z	Millennials	Gen X	Boomers
72%	73%	66%	57%

% of knowledge workers who agree....

Having a tailored or customized approach to my work would improve my relationship with work

Gen Z	Millennials	Gen X	Boomers
71%	74%	65%	55%

Q9C_2024. For this question, we're going to ask you about how your experiences at work might be tailored or customized to you to improve your overall experience. For example, you may have the ability to personalize your own setup or preferred way of working, tailored learning styles, or your company may provide you the tools, workspace, and flexibility to work the way that makes you happiest and most productive. How much do you agree or disagree with the following statements? Base: Global Gen Z knowledge workers (n=2,035), global Millennial knowledge workers (n=5,466), global Gen X knowledge workers (n=3,195), global Boomer knowledge workers (n=1,284).

Personalized work also has real business impact, incentivizing employee retention across audiences

% who agree...

Having tailored or customized solutions to my work needs would **incentivize me to stay with my company longer**

68%	**76%**	**77%**
Knowledge Workers	Business Leaders	ITDMs

Q9C_2024. For this question, we're going to ask you about how your experiences at work might be tailored or customized to you to improve your overall experience. For example, you may have the ability to personalize your own setup or preferred way of working, tailored learning styles, or your company may provide you the tools, workspace, and flexibility to work the way that makes you happiest and most productive. How much do you agree or disagree with the following statements? Base: Global knowledge works (n=12,000), global business leaders (n=1,200), global ITDM (n=2,400).
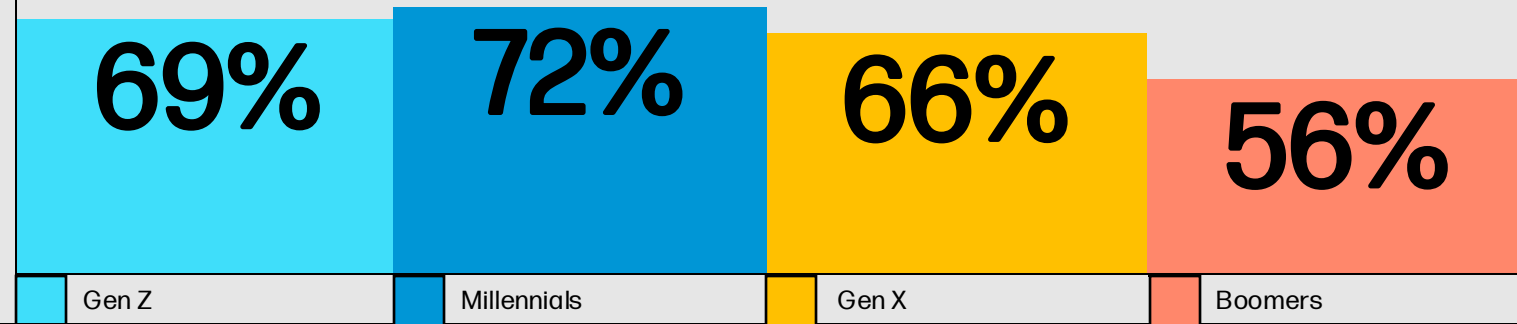
Gen Z and Millennials consistently acknowledge the benefits of personalized work, as the impact on employee retention is even greater among the younger workforce

% of knowledge workers who agree...

Having tailored or customized solutions to my work needs would **incentivize me to stay with my company longer**

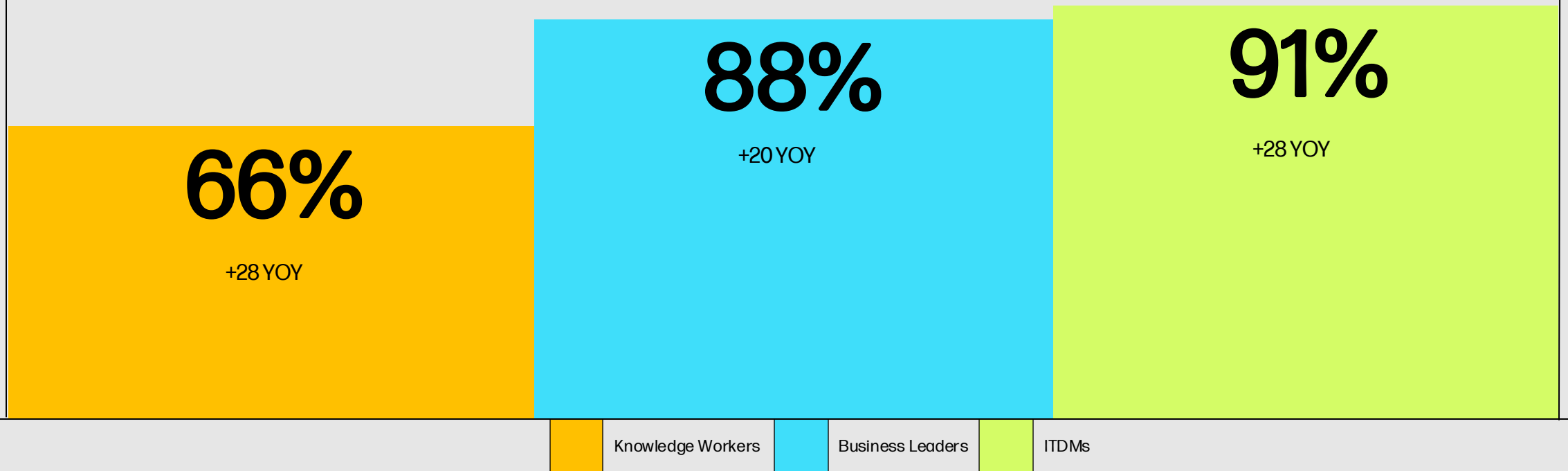|			
69%	**72%**	**66%**	**56%**
Gen Z	Millennials	Gen X	Boomers

AI usage has exploded – it could be the key to driving a better relationship with work, while unlocking a personalized work experience for knowledge workers around the globe

AI usage at work has exploded over the past year – a +28pt increase year-over-year for knowledge workers and ITDMs

% who have used AI at work in 2024...

66%
+28 YOY

88%
+20 YOY

91%
+28 YOY

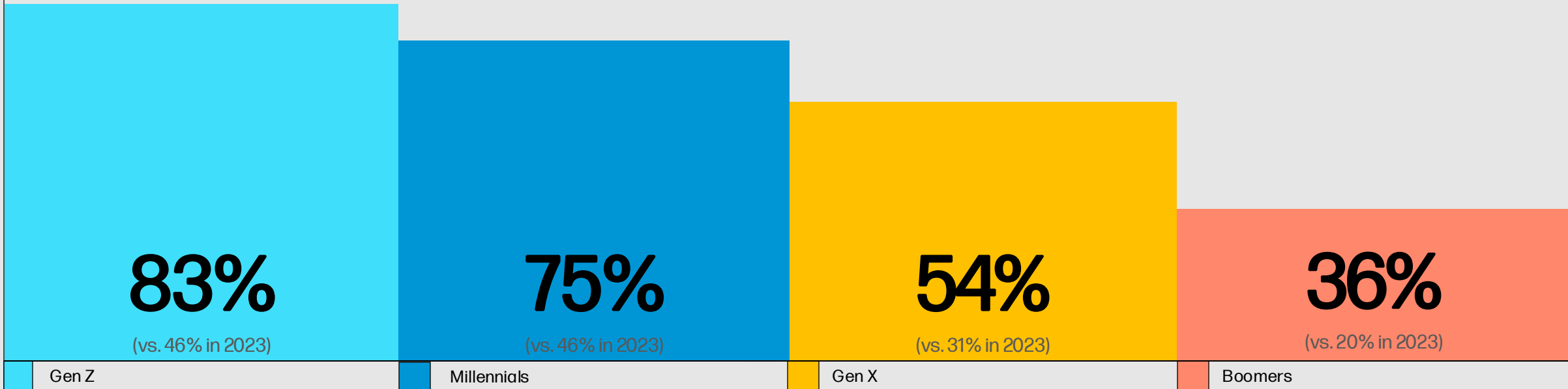■ Knowledge Workers   ■ Business Leaders   ■ ITDMs

Q4H_2024: How often do you currently use AI (Artificial Intelligence) at work and in your everyday life? Base: Global knowledge works (n=12,000), global business leaders (n=1,200), global ITDM (n=2,400).

Gen Z and Millennial knowledge workers lead in AI usage – still, only one-third of Boomers have used AI at work

% of knowledge workers who have used AI at work...

83%
(vs. 46% in 2023)

75%
(vs. 46% in 2023)

54%
(vs. 31% in 2023)

36%
(vs. 20% in 2023)

| Gen Z | Millennials | Gen X | Boomers |

Q4H_2024: How often do you currently use AI (Artificial Intelligence) at work and in your everyday life? Base: Global Gen Z knowledge workers (n=2,035), global Millennial knowledge workers (n= 5,466), global Gen X knowledge workers (n=3,195), global Boomer knowledge workers (n=1,284).

Translating languages is the number one use-case of AI across knowledge workers, ITDMs, and business leaders

	Knowledge Workers	Business Leaders	ITDMs
Translating languages	44%	43%	43%
Internet searches (e.g., Microsoft CoPilot)	39%	42%	43%
Digital voice assistants (e.g., Amazon Alexa, Siri, Google Assistant)	37%	42%	44%
Editing (e.g., drafting emails, proofreading reports)	36%	38%	39%
Producing written work or content	34%	38%	35%
Website / app chatbots or smart FAQ	32%	38%	36%
Productivity assistance (e.g., managing calendars, setting reminders, scheduling meetings, tracking work hours)	32%	40%	39%
Data analysis or analytics (e.g., identifying patterns)	30%	39%	42%
Creating still visuals / images	26%	33%	30%
Strategy planning / research	26%	35%	35%
Technical and data assistance (e.g., generating code, deep neural networks)	25%	36%	35%
Creating videos / video content	24%	34%	31%
Guidance for improving and maintaining wellbeing	19%	30%	26%
Sales (e.g., pricing)	18%	31%	22%
Financial assistance or advice (e.g., robo-advisors)	18%	29%	26%
Job or leadership coaching	16%	27%	25%
Self-driving or driver-assist vehicles	11%	21%	16%

Those who use AI are seeing clear benefits

	Knowledge Workers	Business Leaders	ITDMs
% of AI users who agree...			
AI plays a key role in improving my work-life balance	60%	77%	73%
AI opens up new opportunities for me to enjoy work	68%	82%	78%
AI makes my job easier	73%	83%	81%

The benefits become more profound among those who use AI on a daily or weekly basis

Active AI users = daily or weekly use of AI	Knowledge Workers	Business Leaders	ITDMs
% of <u>active</u> AI users who agree...			
AI plays a key role in improving my work-life balance	69%	80%	77%
AI opens up new opportunities for me to enjoy work	77%	84%	82%
AI makes my job easier	82%	85%	86%

In fact, the Work Relationship Index score for knowledge workers and business leaders who use AI is +11pts and +10pts higher, respectively, than their colleagues who don't use AI

2024 Knowledge Workers		2024 Business Leaders		2024 ITDMs	
28	Global	51	Global	42	Global
31	AI User	53	AI User	44	AI User
35	AI Active User	55	AI Active User	46	AI Active User
20	AI Non-User	43	AI Non-User*	45	AI Non-User

*Indicates small sample size – directional findings only.

Q2. 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 AI user knowledge workers (n=8,951), global AI user business leaders (n=1,088)., global AI user ITDMs (n=2,250), global knowledge workers who use AI at least weekly (n=5,203), global business leaders who use AI at least weekly (n=895)., global ITDMs who use AI at least weekly (n=1,738), global non-user knowledge workers (n=4,035), global non-user business leaders (n=143)., global non-user ITDMs (n=209).

Additionally, all audiences who currently use AI recognize the positive impact AI can have on their career progression

% of AI users who say a <u>better understanding of AI will make it easier to advance their careers...</u>

Knowledge Workers
73%

Business Leaders
84%

ITDMs
80%

AI can help start paving the way to a more personalized work experience

39% of knowledge workers who don't use AI say AI should help them create a more tailored / customized experience at work

69% of knowledge workers who use AI agree they can personalize the use of AI to make them more productive

Knowledge workers believe there's a need for proper AI training, but business leaders don't agree

27%
of knowledge workers who use AI say their company doesn't hold proper AI training

61%
of knowledge workers who don't use AI say their company needs to hold proper AI training

76%
of business leaders who use AI believe their company already holds proper AI training

And among AI non-users, expectations and fears haven't improved since last year

	Knowledge Workers	Business Leaders	ITDMs
% of AI non-users agree...			
I'm not sure when to use or not use AI in the workplace	**55%** +11 YOY	**48%** +7 YOY	**52%** +14 YOY
I don't feel equipped to make the most of AI in my job at all	**52%** +10 YOY	**48%** +12 YOY	**43%** +5 YOY
I worry my job will be replaced by AI	**37%** +5 YOY	**38%** +15 YOY	**41%** +9 YOY
I think AI can play a key role in improving my work-life balance	**33%** -4 YOY	**36%** -6 YOY	**43%** -9 YOY

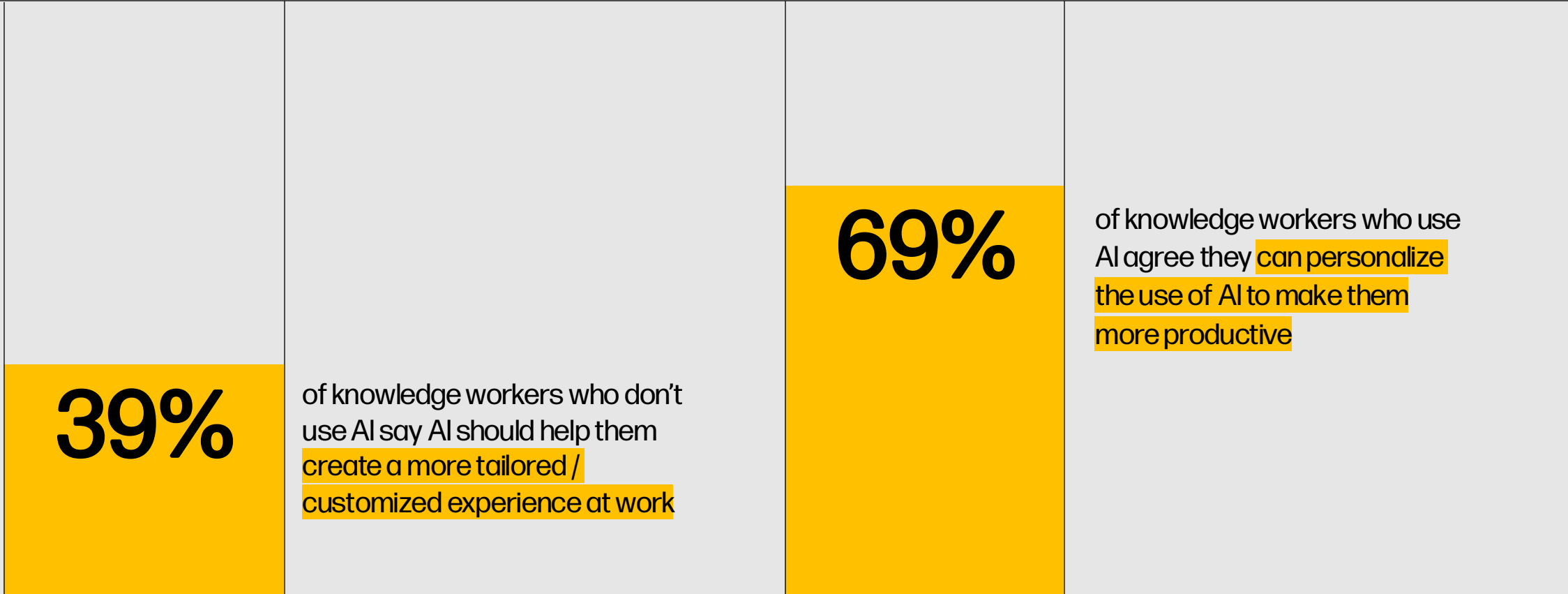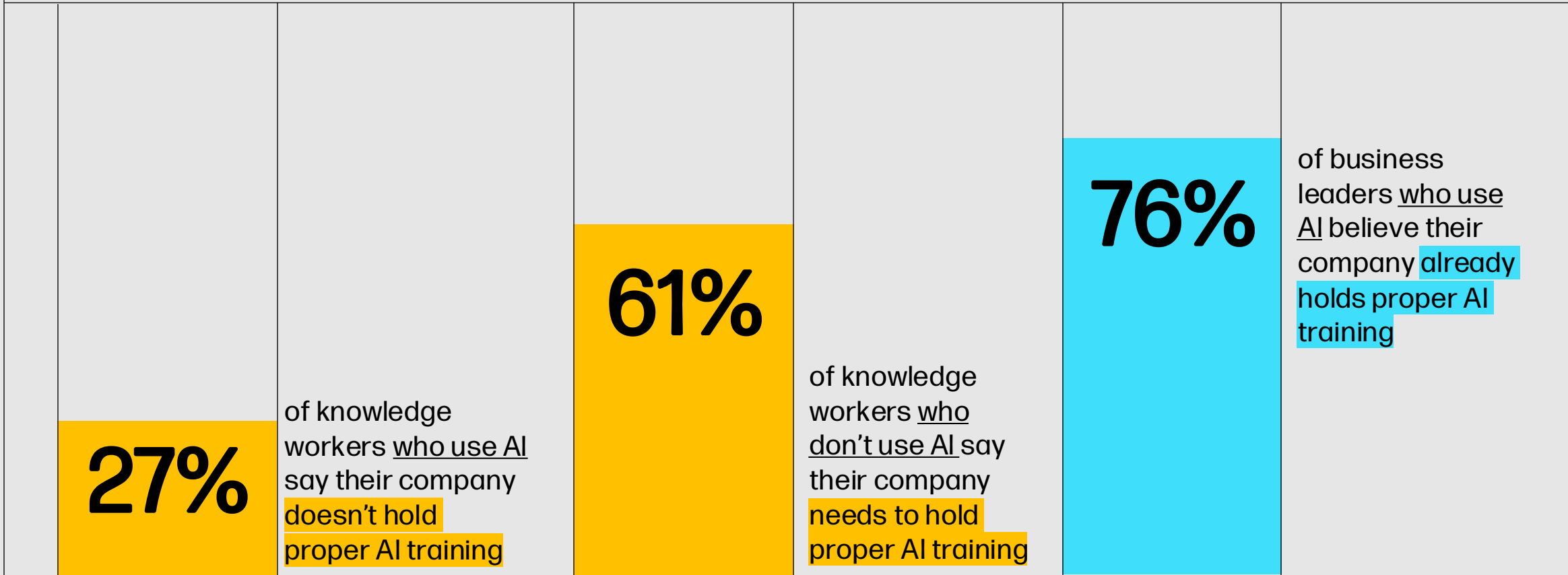**Q4C:** We'd now like to focus on your feelings and perceptions towards artificial intelligence (AI) in your experience at work or in your personal life. Using the scale below, please tell us how much you agree or disagree with each statement. When we say AI, we mean applications that perform complex tasks that once required human input, such as communicating with customers online or playing chess.. Base: Global non-user knowledge workers (n=4,035), global non-user business leaders (n=143)., global non-user ITDMs (n=209).

ITDMs have seen the highest lift in WRI score, driven by changes in how they work with leadership and lending their key expertise during a year dominated by AI

ITDMs in half of global markets saw significant improvement in their relationship with work over the past year

Indonesian ITDMs saw the largest increase in their relationship with work (+13pts), while Brazil saw a drop (-10pts) in the last year
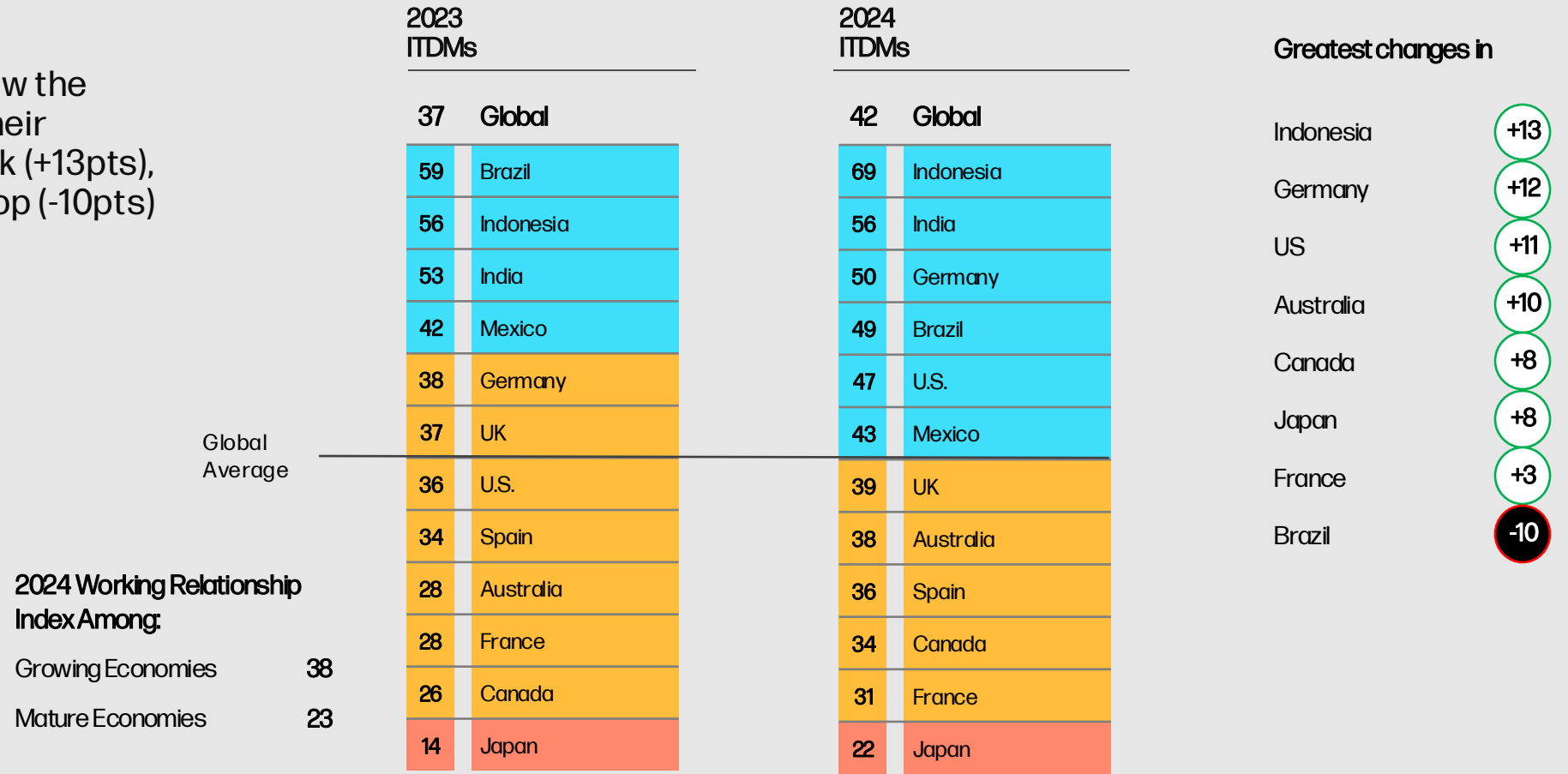
2024 Working Relationship Index Among:

Growing Economies   38

Mature Economies   23

2023 ITDMs

37	Global
59	Brazil
56	Indonesia
53	India
42	Mexico
38	Germany
37	UK
36	U.S.
34	Spain
28	Australia
28	France
26	Canada
14	Japan

Global Average

2024 ITDMs

42	Global
69	Indonesia
56	India
50	Germany
49	Brazil
47	U.S.
43	Mexico
39	UK
38	Australia
36	Spain
34	Canada
31	France
22	Japan

Greatest changes in

Indonesia	+13
Germany	+12
US	+11
Australia	+10
Canada	+8
Japan	+8
France	+3
Brazil	-10

Q2. 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 ITDMs (n=2,400), ITDMs per country (n=200).

Leadership, Fulfillment and People-Centricity drivers have the strongest impact on ITDMs' relationship with work

Driver Groups

Leadership
Fulfillment
Tools
People-Centricity
Skills
Workspace

I am confident that I have the right skills to be successful at work

I'm confident in my human skills

I'm confident in my hard skills

I have the option of working in a company-provided office or remotely, based on what makes sense for me on a given day

The environment I work in makes it easy and seamless for me to transition between multiple work locations

The environment I work in makes it easy and seamless for me to work from my home

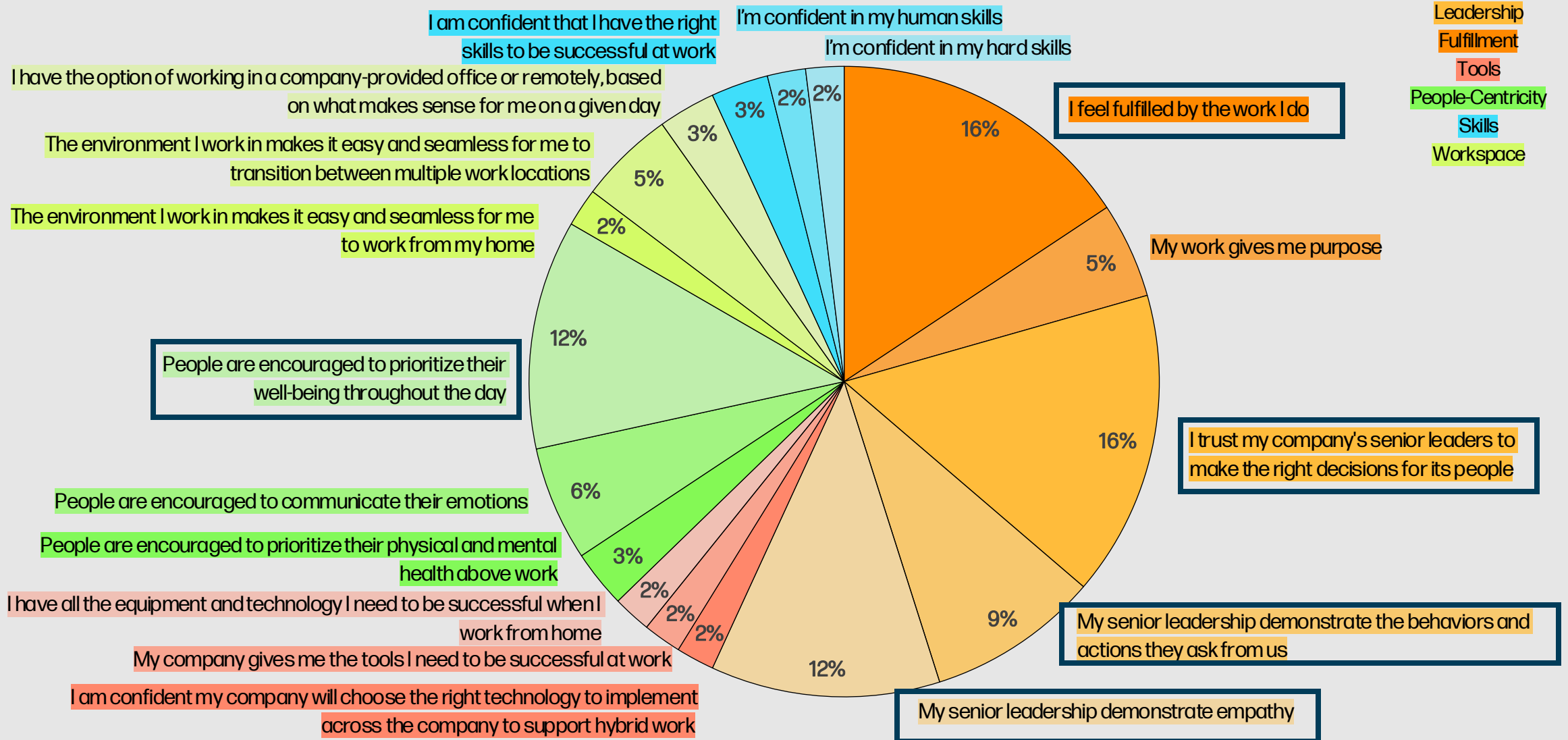People are encouraged to prioritize their well-being throughout the day

People are encouraged to communicate their emotions

People are encouraged to prioritize their physical and mental health above work

I have all the equipment and technology I need to be successful when I work from home

My company gives me the tools I need to be successful at work

I am confident my company will choose the right technology to implement across the company to support hybrid work

I feel fulfilled by the work I do

My work gives me purpose

I trust my company's senior leaders to make the right decisions for its people

My senior leadership demonstrate the behaviors and actions they ask from us

My senior leadership demonstrate empathy

16% 5% 16% 9% 12% 2% 2% 3% 6% 12% 2% 5% 3% 3% 2% 2%

For ITDMs, the top 5 drivers with the strongest impact on work relationship were among those they are more likely to agree with in 2024, helping to boost their WRI score

		Impact		Performance (Consistently Part of Workers' Experience)	
Fulfillment	"I feel fulfilled by the work I do"	**16%**	-1pt	+3pts	**41%**
Leadership	"I trust my company's senior leaders to make the right decisions for its people"	**16%**	+9pts	+5pts	**39%**
Leadership	"My senior leadership demonstrate empathy"	**12%**	+5pts	+3pts	**39%**
People	"People are encouraged to prioritize their well-being throughout the day"	**12%**	+7pts	+2pts	**35%**
Leadership	"My senior leadership demonstrate the behaviors and actions they ask from us"	**9%**	+5pts	+4pts	**37%**

Q9A – Q14A: Looking at the same factors related to your [category], please indicate on the scale below how much or little this currently describes your current work experience. Base: Global ITDMs (n=2,400).

ITDMs have also seen the most improvement in consistently experiencing the drivers of most impact, compared to other roles

Top 5 Most Impactful Drivers (2024)

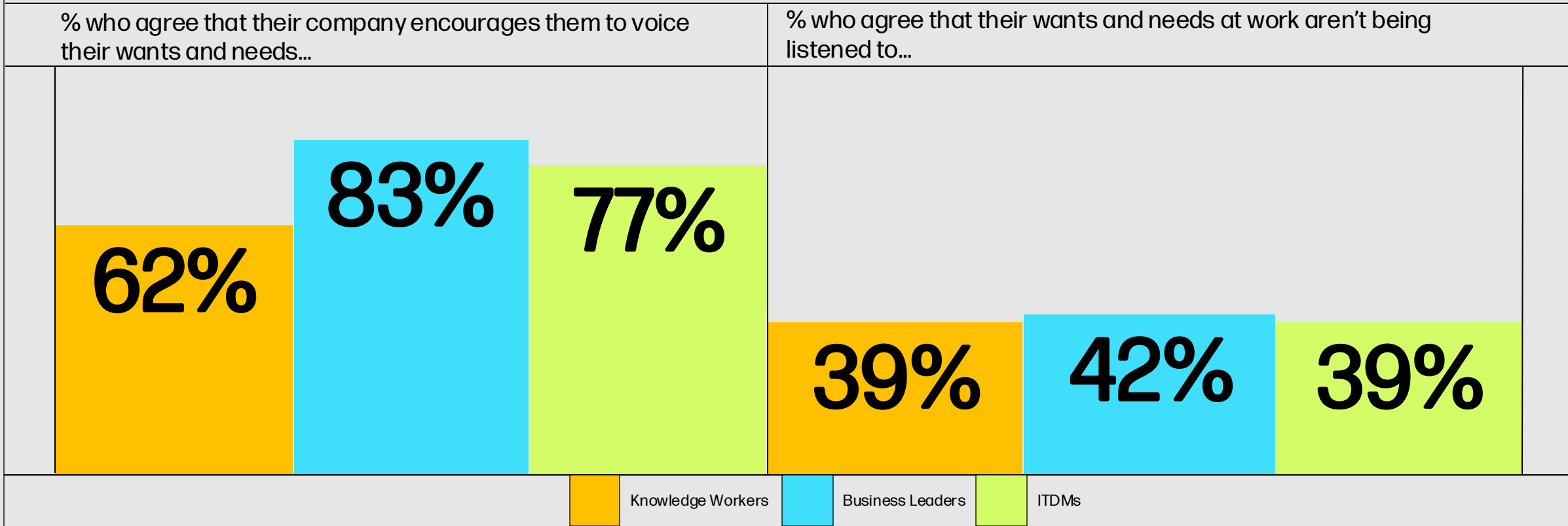|	Increase in Performance (Consistently Part of Workers' Experience)
ITDMs	**+17pts**
Knowledge Workers	**+3pts**
Business Leaders	**+4pts**

Q9A – Q14A: Looking at the same factors related to your [category], please indicate on the scale below how much or little this currently describes your current work experience. Base: Global knowledge works (n=12,000), global business leaders (n=1,200), global ITDM (n=2,400).

And alongside business leaders, ITDMs feel that their wants and needs are being heard and met by their companies

% who agree that their company encourages them to voice their wants and needs...

% who agree that their wants and needs at work aren't being listened to...

62% **83%** **77%**

39% **42%** **39%**

Knowledge Workers Business Leaders ITDMs

Q4: Please tell us how much you agree or disagree with each of the following statements. Base: Global knowledge works (n=12,000), global business leaders (n=1,200), global ITDM (n=2,400).

Additionally, ITDMs trust their leadership's intentions more compared to knowledge workers and business leaders

% who say that they trust their company's senior leadership's intentions…

Knowledge Workers
44%

Business Leaders
45%

ITDMs
50%

Q4: Please tell us how much you agree or disagree with each of the following statements. Base: Global knowledge works (n=12,000), global business leaders (n=1,200), global ITDM (n=2,400).

ITDMs further recognize the benefits of AI in their work and advocate for leadership to expand AI implementation and training initiatives

For many ITDMs, their expertise in AI often secures them a seat at the table with senior leadership, where they advocate for expanded AI solutions and training.

Having senior leadership implement technologies that ease their work is a fundamental aspect of what many seek for work productivity and happiness.

"Equipment like AI helped to improve my work-life balance, major work is done in minutes."

"I was able to benefit from training offered by my company to develop my AI skills, and become more productive in my work."

"New means of training on current issues, would also be very welcome, especially those related to AI, which is so popular, and necessary at this moment in our history."

"I would consider having more technology solutions available to be the most productive that I can be as an employee of my organization. Replacing legacy technology and the appropriate training initiatives are suggestions that I have offered to Senior leadership."

"...I am given full authority over the implementation of AI in my company, can learn new skills that can continue to support the company..."

"[To be happiest and most productive at work, I need] supportive top leadership that values innovation and fosters a collaborative work environment."

Q9A_2024: Now, we'd like you to consider that we all have unique and different preferences for how we work best. What do you personally need to be happiest and most productive at work? Please share at least a few examples that work together to create your ideal circumstances. This can be related to anything across workspace setup or tools, leadership, company culture, learning and growth opportunities, and/or how fulfilled you feel by the work you do. Base: Global knowledge works (n=12,000), global business leaders (n=1,200), global ITDM (n=2,400).