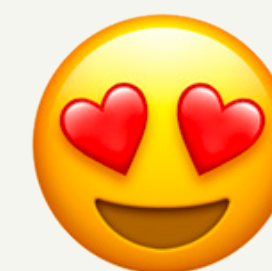
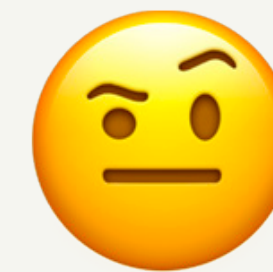


MINDSPACE

EMPLOYEE HAPPINESS SURVEY 2019



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In our 2019 global work survey, we focus on happiness.

Why happiness? Because it has significant implications for people, business, and the world at large. It's not only a universal desire, it's also been found to have a direct correlation on productivity and creativity. And when someone is unhappy, it not only affects their day-to-day life, it's also bad for business.

so we set out to explore the topic, asking:

- **Are people happy at work?**
- **What makes them happy?**
- **What attributes of the workplace can promote happiness?**

Happiness is crucial for business, in more ways than we thought, and that companies can influence employee happiness in several key ways. It's an important point for businesses to realize - their impact on society is not just limited to the products or services they produce, they also have a powerful impact on their employees and their wellbeing.

We hope this report serves as an encouragement and reminder for us all that it's possible to work on increasing happiness, all over the world.

MINDSPACE



MindSpace is an international operator of boutique workspaces for companies of all sizes.

We get people excited about coming to work so businesses can thrive.

MindSpace gives business owners the peace of mind to focus on their core business, while we take care of the rest.

More at mindspace.me

About the survey

We surveyed 5,000 people who work in an office to find out how they feel about their jobs.

People in 7 countries were surveyed: the US, the UK, Germany, the Netherlands, Israel, Poland, and Romania.

Participants came from a wide range of sectors, including finance, engineering, law, information technology, healthcare, media, public service, transport and logistics, creative arts and design, and more.

The survey was conducted in 2019 by OnePoll, an independent research firm, in collaboration with Mindspace.



Happiness at work is a critical business consideration

Happiness makes people more productive.

This may seem intuitive, but it's also backed up by research: **studies** have found that worker productivity increases by approximately 12% for happier people.

What else is affected by happiness in the workplace? Happiness can increase creativity, people who are happier tend to stay at their jobs longer, and happy people help create a more positive work environment overall. Having happy employees is of real value to organizations.

While much research has been done on employee engagement, fewer studies have taken a closer look at employee happiness. People spend most of their working hours at

work, so if they're happier at work, it can affect how they are outside of work - at home, with their families, and in their communities.

Businesses should have employee happiness high on their agendas, not just because it makes individuals happy, but because it's beneficial for business. And for the world at large.

On the flip side, it's known that people who are unhappy at work have a considerably negative effect on workplace culture. They spread their unhappiness throughout the office and create a work environment that's detrimental to the business. **Studies** show that 'toxic' workers can cost businesses money (one study estimates the cost at \$12,500). And people who are dissatisfied with their

jobs are less likely to be there a year later. So, if happy people are good for business, it's also the case that unhappy people are bad for business.



It's not outrageous to say that making people happier at work can have a positive ripple effect on society.



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Are people happy at work?

Overall, the news is good. We found that most people are happy or very happy at work.

People were asked if they were *very happy, happy most of the time, not very happy, or not at all happy.*

Nearly 84% of respondents were happy or very happy. The average response was 3.2 (out of 4)*.

*Based on a conversion of response options to a scale of 1-4



Very Happy
30%



Happy most of the time
54%



Not very Happy
13%



Not at all Happy
3%

how happy are people around the world?

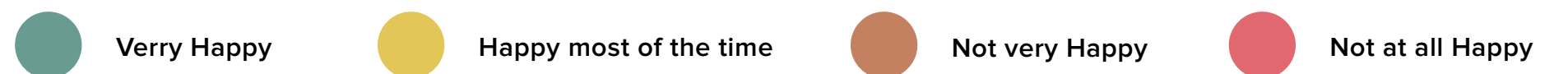
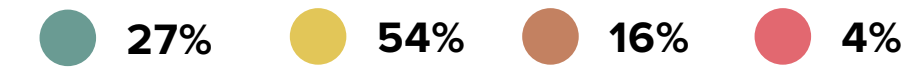
If we look at the very happy and mostly happy workers, people in the U.S. and the Netherlands are the happiest:

94% in the U.S. and 91% in the Netherlands.

In the middle range are Poland (83%), Germany (81%), and Israel (80%).

The least happy people overall are in the UK, with nearly 24% reporting being not very happy or not happy at all.

This is compared to only 7% in the U.S and 9% in the Netherlands.



Is everyone the same kind of happy?

Not exactly. If we look closely at the data, some interesting differences appear.

In general, **men** report being happier at work more than women do, across all countries.

The exception is in Poland, where women report being happier than men.

Across age ranges, **millennials** are significantly happier than people in their **40-50s** (3.23 vs. 2.98 out of 4).

What about where you fall in the hierarchy of an organization? That matters, too.

Managers and business owners are happier than employees (45% of all managers vs. 27% of employees report being happy).

It's interesting to see, especially with the rise of freelancers, that 73% of people who are

self-employed are happy with their current work.

This compares to just 25% of people employed by a company. That's something employers should note, and see what they can do to make a difference.

And what about the type of work people do? People working in the creative and arts industries are the most satisfied (3.36 out of 4), while teachers are the least (2.96 out of 4). Considering that teachers are the foundation of our education systems and are preparing our future citizens and employees, this should be of real concern. Not just to parents and communities, but for businesses, as well.

WHO'S HAPPIER?

HAPPY



MEN



MILLENNIALS



MANAGERS

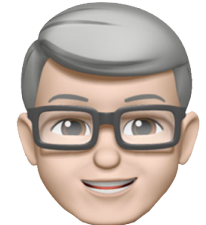


SELF-EMPLOYED

LESS HAPPY



WOMEN



40-50s



EMPLOYEES



WORKS AT A COMPANY

What makes people happy at work?

What really makes people happy? Of course, different things matter to different people. This is true across cultures, countries, and individual preference.

To get a sense of the commonalities, as well as the differences, we looked at several factors to see how and if they're connected to happiness at work.

We looked at these issues because we feel it's important to understand what's really underlying an employee's happiness and engagement at work. We wanted to know which specific factors contribute to someone's ability to say, „Yes, I'm happy at work“ or „No, I'm not.“ Below are a variety of factors and their correlations to happiness at work.



Sense of purpose

Having a sense of purpose at work is crucial. It means you're more likely to be dedicated to your job and the success of your work, and to impact your overall happiness. Studies have shown that **people who have a sense of purpose in life appear to live longer.**

The correlation between having a sense of purpose at work and happiness is very strong: over **75% of very happy people report having a strong sense of purpose at their jobs.** Conversely, those who are not very happy report a low sense of purpose at their job.

Who has a high sense of purpose at work? Most people report feeling a sense of purpose at their jobs. This is especially true for people ages 55+, perhaps due to seniority at work - as people progress in their careers and gain more responsibility, it makes sense they'd feel a correspondingly greater sense of purpose.

Across the world, people in the U.S. and the Netherlands report feeling the highest purpose at their jobs (4.35 out of 5), while those in the UK report the lowest (3.66 out of 5). Business owners and managers feel significantly more purpose at their jobs than employees, across all countries.

Interestingly enough, **social workers** and people working in the **tech industries** have the highest sense of purpose.

It's so important that across all countries and ages, **having a sense of purpose at work is among the top things that people look forward to when they go to work every day.**



75% OF VERY HAPPY PEOPLE HAVE A STRONG SENSE OF PURPOSE AT THEIR JOB.

Who feels a high sense of purpose at work?

- **People ages 55+**
- **People in the U.S and the Netherlands**
- **Managers & business owners**

Feeling valued

Feeling valued has been found as a key indicator of job performance. Employees who feel valued are more likely to be engaged in their work and feel satisfied and motivated. And they continue to feel that way, even when facing challenges at work.

Approximately 80% of people feel valued at work to some extent, and 90% of happy employees feel very valued. In contrast, 80% of people who are not happy at work say they do not feel valued.

From an employer's perspective, ensuring that people feel valued can certainly pay off. If employees feel valued, they're more likely to be happy.

There is a difference globally, however, as people in the U.S. feel much more valued at work than people in Europe.



90% of very happy people feel very valued



80% of not at all happy people do not feel very valued

Wellness

As employee wellness programs become increasingly more common, it's interesting to look at whether they have an impact on people's happiness. One way to approach this is to see who's participating in wellness activities.

Happy people tend to participate more than others, though whether they're happier because of the wellness programs or they're more likely to participate in those activities to begin with, remains an open question. Approximately 40% of employees participate in wellness activities, with **younger employees (ages 18-24) twice as likely to participate than older employees (ages 45-55), at 33% vs. 16%.**

People in the U.S. are much more likely to participate in wellness programs than in

other countries, and across all countries, people working in research and marketing are most likely to take advantage of wellness programs (with people in administration and logistics having the lowest participation rates). Interestingly, people in research and marketing also report higher satisfaction at their jobs than those in admin and logistics.

Across countries, most people think that wellness in the workplace is important - whether they participate in the activities or not. But in general, wellness is more important to younger employees than older ones.

Are businesses matching their employees' expectations about wellness programs?

Overall, they are. 85% of people feel employee wellness is important to their organizations to some extent. But it's not equal across countries - in Israel and Germany, 25-30% of employees feel that wellness does not take an important role in their workplace, while in the U.S. and the Netherlands, less than 5% feel the same.

There is a strong correlation between happiness and the importance of wellness at an organization.

Happy employees are more likely to feel that wellness is important at their companies than unhappy employees (3.7 vs. 2.3 out of 4).



Wellness

Employee engagement is a popular management concern today, with businesses spending significant amounts on employee engagement programs. It's reasonable to ask, then, whether these programs have an effect on employee happiness.

Overall, 88% of people feel generally engaged in their work. Around the world, employee engagement is highest in the U.S. and Poland (3.5 out of 4 for each), and lowest in the UK (2.7 out of 4). Of very happy people, 99% feel somewhat or very engaged in their job. So, it's fair to say that happy people are engaged. And engaged people are happy.

And what makes people feel not engaged in their work? 34% of people were not engaged because they felt they were not getting paid enough. But, just as many people - 35%, said they weren't

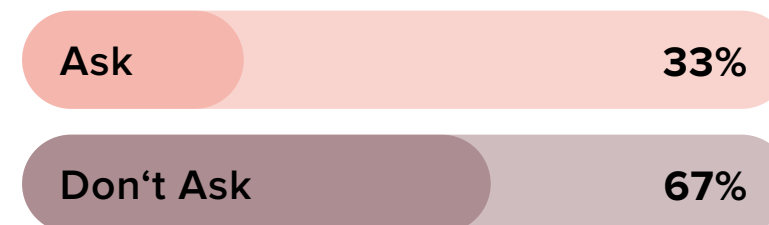
engaged because their workplace environment was uninspiring. So, it's not just the money that matters. If companies want to work on improving employee engagement, it's important that they have a sense of how their employees are feeling. Who's checking to see if their employees are engaged at work?

Approximately a fifth of companies (21%) do not assess employee engagement. There is a difference across countries, however. In the U.S., for example, 18% of businesses do not assess employee engagement, while in Israel, 31% do not. That leaves many people not being asked about their level of engagement. And it's hard to work on improving engagement, if you don't know how people feel to begin with.

This is particularly true at small companies, where 33% do not assess employee engagement.

WHO IS ASKING ABOUT EMPLOYEE ENGAGEMENT?

Small Company | 2-20 Employees



Medium-Sized Company | 21-249 Employees



Corporate | 250-999 Employees



Enterprise | 1000+ Employees



Collaborative environment

Collaboration is a key part of today's work culture, and many organizations strive to maximize collaboration among their employees in recognition of its benefit for improving both ideas and outcomes. In addition to fostering collaborative work practices, many companies strive to encourage collaboration through workplace design, creating spaces that promote and encourage enhanced collaboration.

How does collaboration impact happiness?

75% of people feel that working in a more collaborative environment would make them happier.

This varies across countries and ages, with people in the U.S. and Israel much more likely to feel this way than those in the UK and Germany.

Younger people also prefer a more collaborative environment. Interestingly, people who are self-employed also say they'd be happier working in a more collaborative environment (4.31 vs. 3.97 out of 5 for those employed by companies). This could have implications for where they choose to work - even for self-employed people, a more collaborative office space could impact their happiness.

Where do people think they'll be the most productive?

In general, most people prefer to work in private offices or small shared spaces. Fewer than 9% of people prefer to work in large shared spaces, although there is a generational difference - younger people

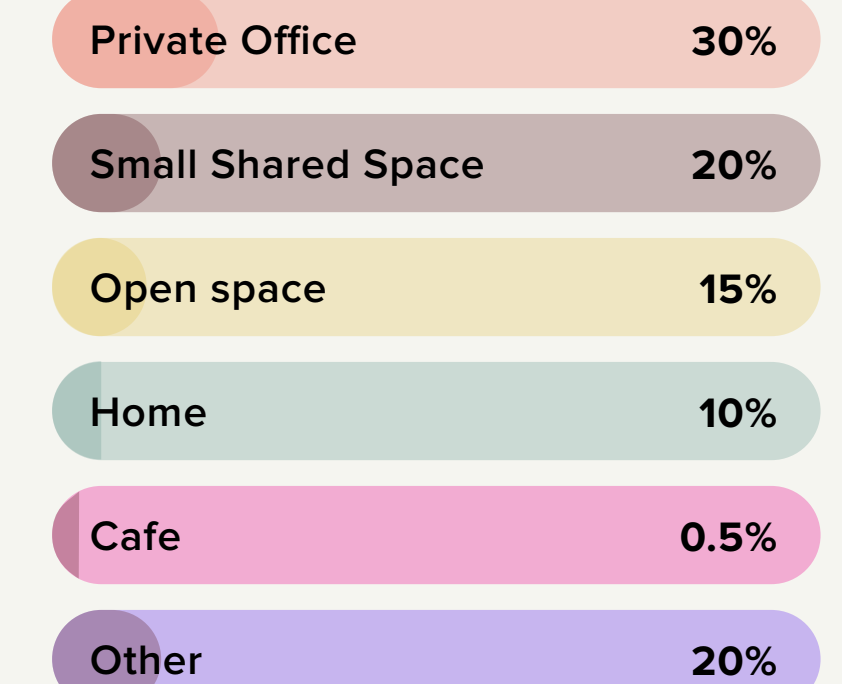
(ages 18-24) find large shared spaces to be more productive than older people (ages 44+). Additionally, fewer than 9% of people prefer working from their homes, across all countries. So what about that dream some people may be harboring about staying home all day and working from their couch? We'd caution against it. There's a strong inverse correlation between working at home every day and happiness at work.

Happy employees prefer working from an office rather than at home, while unhappy employees prefer to work from home.

While working from home may be good for us once in a while, it does not appear to be a good choice in the long term for an employee's happiness.



WHERE DO PEOPLE FEEL THEY WOULD BE THE MOST PRODUCTIVE?



Flexibility

Flexibility at work is increasingly recognized as an important factor for employee happiness, and some companies are making significant efforts to offer flexible work options.

However, while the great majority of employees say they need more flexibility, many organizations are still not giving them the kind of flexibility they need. And it matters. Studies have shown that employee performance and well-being thrive in flexible environments.

About 40% of people surveyed indicate their work day was flexible and they can come late or leave the office early. The U.S. leads in this area, with 30% of respondents saying that their work day is very flexible and they

can come and go as they please. In Poland and Romania, only 7% of employees report the same.

Across countries, 50% of respondents indicate that flexible work hours is one of the most important office perks. Flexibility regarding time is not the only benefit that people value.

30% of respondents indicate that having the ability to work from home or another location on occasion is one of the most valuable work benefits they receive.

Flexibility matters. For the people who are not engaged in their jobs, almost a third say that it's due to a bad work/life balance. If these people were given more flexibility, it could impact their level of engagement.

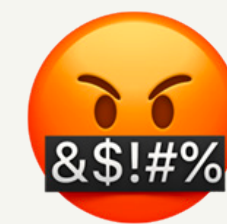
HOW DOES FLEXIBILITY CONNECT TO HAPPINESS?

70% OF HAPPY EMPLOYEES ENJOY FLEXIBILITY AT WORK.

70% OF UNHAPPY EMPLOYEES DO NOT HAVE A FLEXIBLE WORK ENVIRONMENT.



90% of happy employees have flexibility



70% of unhappy employees do not have flexibility

Workplace culture

Environment matters. Everyone acknowledges that workplace culture can affect productivity and business results, but how does it affect happiness?

Less than 5% of employees find their workplace fun and exciting, and 15% find their workplace boring. In Romania, the difference is more stark: 2% of employees say their workplace is fun and exciting and 30% describe it as boring.

Regarding boredom, however, there's a wide range - on one end of the spectrum, 36% of employees in Israel say their workplace is boring, while only 7% in Germany. People who are happy generally have positive workplace cultures. 33% of happy people describe their workplaces as friendly,

while only 10% of unhappy employees do. And 10% of happy employees describe their workplace as fun and exciting, with just 3% of unhappy employees saying the same.

Not surprisingly, unhappy people experience a negative work culture more than happy people do. Almost 40% of unhappy employees described their workplace as mundane, compared to only 12% of happy employees. What do people look forward to when going to work?

Overall, people look forward to having a sense of purpose and achieving set goals and results. In Poland and Israel, 22% of employees seek personal development when going to work, while in the U.S. and Western Europe, it's only 12%. People in Western Europe look forward to going to work

for social reasons, such as interacting with colleagues (16% in Western Europe vs. 5% in the U.S., Israel, and Eastern Europe). Of happy people, 40% look forward to achieving set goals and results and to having a sense of purpose at work, compared to 10% of unhappy employees. Of unhappy people, 22% look forward to vacation, while for happy people, only 4% do.

WHO FINDS WORK BORING?



12% of happy people

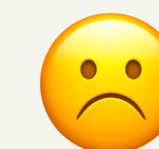


40% of unhappy people

WHO THINKS THEIR WORKPLACE IS FRIENDLY?



33% of happy people



10% of unhappy people

Which workplace attributes can promote happiness?

What steps can a business take to create a workplace environment that has a positive impact on employee happiness?

On a basic level, people want to work in a nice space with a healthy environment. 30% of employees worldwide say that good air quality and lighting have the greatest impact on their mental wellbeing at work. Of happy employees, 40% said good air quality affects their wellbeing, while only 20% of unhappy employees say the same.

Flexibility is also key, and it's ranked as the top perk that all employees want from their workplace, including happy employees. Organizations should keep in mind that flexibility not only refers to flexibility

regarding time, but also where people are able to work throughout the course of the day. Wellness programs matter.

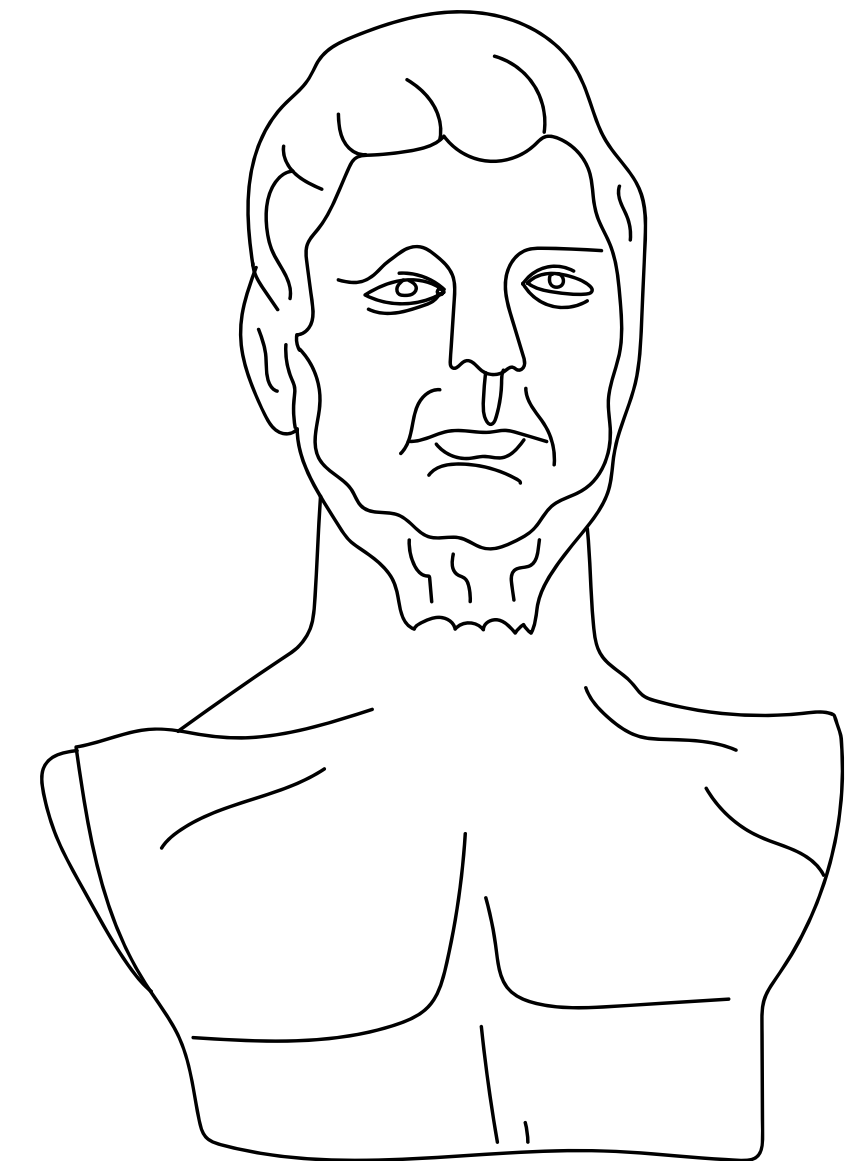
Happy employees work in companies that have more robust wellness programs, with 40% of happy employees working in offices that offer free health checkups or exercise classes. Wellness programs are appreciated by happy people: 25% of happy employees participate in mindfulness sessions or enjoy massages at work, as opposed to 6% of unhappy employees.

There are definite steps a business can take to raise happiness levels for people at work.

Businesses can provide their employees with a nice and healthy atmosphere, give them flexibility, and take care of their wellness at work. Treating people as full individuals, and making sure their professional, emotional, and physical needs are valued and taken care of at work, can have a real impact. People will be happier.

HAPPIER PEOPLE ARE GOOD FOR BUSINESS.

AND FOR THE WORLD.



MINDSPACE

**COMING
SOON**
2020



SEE YOU SOON ;)