

EMPLOYEE
OUTLOOK

EMPLOYEE
VIEWS ON
WORKING LIFE

Spring 2017

The CIPD is the professional body for HR and people development. The not-for-profit organisation champions better work and working lives and has been setting the benchmark for excellence in people and organisation development for more than 100 years. It has more than 140,000 members across the world, provides thought leadership through independent research on the world of work, and offers professional training and accreditation for those working in HR and learning and development.

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Foreword from the CIPD

Overall, scores for many of the items in the spring 2017 *Employee Outlook* survey have increased. There has been an increase in job satisfaction and an increase in our engagement measures of employee influence over job, use of skills, motivation and effort. Employees are also more satisfied with opportunities for employee voice and attitudes towards senior leaders have once again improved.

In the autumn 2016 *Employee Outlook* survey, we reported an increase in several of the scores for public sector employees. This trend has continued into the spring 2017 survey, where public sector job satisfaction is the highest it has been in the history of this survey (which has now been running for eight years) and several other important items have improved for public sector workers (see more on this in the conclusion).

However, there is still room for improvement and particularly so when it comes to employee development. Almost a quarter disagree or strongly disagree that their organisation provides them with opportunities to learn and grow, and a further quarter are dissatisfied with the opportunity to develop their skills in their job. More worrying still, almost two in ten say that their managers do not provide any feedback and recognition on their performance. It seems likely that future restrictions on labour mobility will further exacerbate the already high levels of skills shortages organisations face. Organisations therefore need to make sure that they don't neglect the development and upskilling of their existing employees.

The focus section in this survey on technology, the blurring of work and personal lives, and automation highlights some interesting findings on both the benefits and drawbacks of technology. The ability to switch off from work can be challenging for employees, with

15% saying they can rarely or never do this and just over two-fifths saying that they are only sometimes able to do this. Most employees check their work mobile/emails outside of working hours to a greater or lesser extent, with two-fifths checking at least five times per day. However, only 5% disagree that workers should have the right to disconnect from work by not responding to work emails out of hours.

On a positive note, employees are most likely to agree that remote access to the workplace (through work devices, mobile technology, video, and so on) helps them to work flexibly, helps them to stay in control of their workload, helps them to be more productive and empowers them. However, almost a third of employees agree that remote access to the workplace means they can't switch off in their personal time and almost a fifth say it makes them feel as though they are under surveillance, makes them anxious and impacts their sleep quality. Almost a quarter of employees are also worried that parts of their jobs or all of their jobs will be automated in the future.

These findings show us that technology is certainly aiding the blurring of work and personal lives, and for many employees this is a positive thing, providing them with more flexibility and control over when and where they carry out their work. However, for others there are real challenges in switching off from work and concerns about their organisation monitoring them. Organisations therefore need to ensure that with increased access to technology they are also setting an enabling organisation culture – one of empowerment and trust rather than surveillance and fear. It's also important to address employee concerns about future job automation and invest where possible in up-skilling and development as roles continue to evolve and change.

Foreword from Halogen

Halogen is pleased to release the spring *Employee Outlook* survey results in partnership with the CIPD. Overall, there are several encouraging signs, including improvements in job satisfaction, employee engagement and attitudes towards senior leaders. However, the data shows a need for improvement in the delivery of manager-employee feedback, and with learning and development opportunities.

Organisations can address the feedback challenges through regular one-on-one meetings between managers and employees. These meetings give managers the opportunity to ask about employee challenges, obstacles or progress as well as give positive and constructive feedback. This type of ongoing feedback is essential for engaging employees and encouraging learning and development.

Leaders should also consider updating their learning and development plans. Only one-third of employees feel they can reach their career aspirations at their current company. Investing in continuous learning and development and improving performance management can help retain high-potential employees and build future leaders. Results from the survey also show that work is changing. This shift is transforming the employee experience as well as their expectations of work. Finding a balance between enjoying the flexibility of working remotely and being able to switch off from work is important to continue high job satisfaction levels. By connecting with employees on an ongoing basis, managers can ensure employees feel empowered, valued and fulfilled without becoming overwhelmed.

Ultimately, employees want an ongoing understanding of their performance and its connection to the success of the organisation. They want better communication with their managers and peers, and an investment in their growth and development. Organisations that focus on these areas, and who provide their people with tools and resources to enable effective communication and collaboration, will be well positioned to create a motivating, engaging work experience that drives the business forward.

Dominique Jones
Chief People Officer
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Key findings

Current external context

Three-fifths (59%) believe it is either unlikely or very unlikely they will lose their current main job, with just over a tenth (11%), however, thinking it is likely or very likely they could lose their current main job. The proportion thinking it is unlikely that they will lose their job compares favourably with our last surveys in spring and autumn 2016.

Almost a third of employees believe that their organisation has been impacted by wider political changes in the UK and the US either a great deal (6%) or to some extent (26%). Almost half (49%), however, don't think their organisation has been impacted at all by these changes.

Around half of employees believe the UK's decision to leave the EU will make little or no difference to their organisation's investment in equipment and technology (58%), investment in workforce training and skill development (57%), costs (46%) and the competitiveness of their exports (45%). However, a third (33%) think it is likely to increase their organisation's costs, around a fifth (19%) think their exports will be less competitive and investment in workforce training and skill development will be reduced (18%), and 15% think it will reduce investment in equipment and technology.

Following the UK's decision to leave the EU, the majority of employees

believe that conflict at work (76%), stress (70%), people taking time off sick (76%) and morale amongst colleagues (65%) has stayed the same regardless. However, a fifth of employees believe it has led to a decrease in morale among colleagues (20%) and an increase in stress (17%). The majority of employees also believe that there will be no change to their job security (69%), their need to learn new skills (65%) and opportunities to progress (67%). However, almost two-fifths (37%) of employees feel pessimistic about the future and around a fifth (19%) feel less secure in their job.

Job satisfaction

Net job satisfaction has increased in this survey again and now sits at +48 (with 64% satisfied and 16% dissatisfied), compared with +45 in autumn 2016. Job satisfaction continues to rise in the public sector (+59) at levels not seen before in this survey series, which has been running for eight years.

Employee engagement

We have moved away from a single measure of engagement calculated through an index in recognition that employee engagement has different aspects, and creating one score risks oversimplifying it. We include four different areas that research has shown to inform employee engagement; these are: influence over job, use of skills, motivation and effort.

Employee satisfaction with the amount of influence they have over their job in general sits at +35, while satisfaction with the scope for using their own initiative within their job is higher, at +55. Both of these scores have increased since autumn 2016.

Overall, satisfaction with use of knowledge and skills sits at +49, up from +44 in spring 2016, with no significant differences between sectors. Interestingly, the overall net agreement score for 'This organisation really inspires the very best in me in the way of job performance' is low at +12, but it has risen from +6 in autumn 2016.

Employees are most likely to say they are willing to take on more work to help relieve colleagues' workloads (+47), followed by being willing to work harder than they have to in order to help their organisation succeed (+45); however, employees were more likely to disagree than agree (-8) that they would turn down another job with more pay in order to stay with their organisation.

Employee attitudes towards senior leaders and line managers

Scores for all items relating to attitudes towards senior managers have improved once again across the board in this survey. There have been particular improvements in confidence (an increase of 8 net percentage points), and on treating

employees with respect (an increase of 7 net percentage points), and trust in senior leaders to act with integrity (an increase of 7 net percentage points). However, consultation on important decisions is still a negative score (-12).

When it comes to sector differences, although all items have improved across all sectors, the biggest improvements are in the public sector and in particular in relation to trust in senior leaders to act with integrity (up 24 net percentage points), consultation on important decisions (up 19 percentage points) and confidence in their ability (up 18 percentage points).

Four-fifths (78%) of employees have a line manager or supervisor they report to as part of their job. When it comes to satisfaction with line managers, this sits at a net score of +47. Employees in the public sector (+55) have the most positive net satisfaction score (private: +46; voluntary: +36) and are significantly more likely to be very satisfied with their line managers than private sector employees (30% versus 22%).

Organisation purpose, information-sharing and opportunities for employee voice

Net agreement amongst employees that they clearly know their organisation's core purpose is very high (+78), while net agreement to being highly motivated by their organisation's core purpose is much lower (+35). However, these scores show some improvement on the autumn 2016 findings.

More than half of employees feel either fully (14%) or fairly well informed (44%) about their

organisation's strategy. This has increased again since autumn 2016, but still leaves two-fifths saying that they receive either limited information or worse when it comes to their organisation's strategy.

The scores for different aspects of employee voice have improved, once again, since our last two surveys. Employees' net satisfaction score for opportunities to feed views, issues and ideas upwards has increased (spring 2017: +24; autumn 2016: +20, spring 2016: +11), and the net satisfaction with opportunities for employees to be involved in decisions that affect them has also increased (spring 2017: +23; autumn 2016: +21, spring 2016: +16). However, net satisfaction with the attention paid to the suggestions employees make is highest (spring 2017: +35; autumn 2016: +28, spring 2016: +24). Public sector employees have seen the greatest improvements in both opportunities to feed views upwards (up 13 net percentage points) and attention paid to the suggestions they make (up 26 net percentage points) and are significantly more likely to say this than employees in the private sector.

Health and well-being at work

Thirty-eight per cent of employees are under excessive pressure at work at least once a week. This figure has remained stable over the last few surveys. Almost a third of employees (31%) say they come home from work exhausted either often (22%) or always (9%). Employees are most likely to say that work makes them feel cheerful (29%) most or all of the time as opposed to any other feeling. This is followed by optimistic (19%) and relaxed (19%) and then stressed (18%).

Employees are more likely to feel that their manager is considerate of their well-being (72%) than their employer (63%), but overall the results are positive for both.

Sixty-eight per cent of employees describe their mental health as very good (29%) or good (38%). Almost a fifth (24%) say their mental health is moderate, with 7% describing it as poor and 1% describing it as very poor. Employees were more likely to say their mental health problems were as a result of problems outside of work in their personal lives (21%) as opposed to problems at work (16%), but the highest proportion felt they were actually as a result of a combination of these two factors (62%).

Career, performance and pay

Over half of employees (55%) now believe that their organisation's performance management processes are very or somewhat fair (autumn 2016: 50%; spring 2016: 44%), while almost a fifth (17%) believe that they are somewhat or very unfair (autumn 2016: 18%; spring 2016: 23%). More than three-fifths (61%) of employees who have a performance management process believe their line managers are very effective or fairly effective at communicating objectives and expectations.

When it comes to the frequency with which managers provide feedback and recognition on performance, employees are most likely to say just once or twice in the past year (41%). Twelve per cent say once or more a week, with just over a quarter (26%) saying a couple of times a month. Rather worryingly, 18% say their manager does not provide feedback or recognition at all and private sector

employees are significantly more likely to say this than employees from the other sectors (21% versus 10% of public or voluntary).

We asked employees about whether they feel able to fulfil their career aspirations in their current organisation. Employees are fairly split on this question, with just over a third (36%) saying very likely or likely and just under a third (30%) saying unlikely or very unlikely.

More employees are satisfied with their current level of pay (44%) than dissatisfied (33%), with over a fifth (22%) neither satisfied nor dissatisfied.

Learning and development

More than two-fifths (48%) of employees strongly agree or agree that their organisation provides them with opportunities to learn and grow. However, almost a quarter (24%) disagree or strongly disagree. More than two-fifths (47%) of employees are satisfied with the opportunity to develop their skills in their job, while almost a quarter (22%) are dissatisfied or very dissatisfied. Public sector employees are significantly more likely to agree that their organisation provides them with opportunities to learn and grow than the other two sectors and are also more likely to be satisfied with the opportunity to develop their skills in their job than private sector employees (55% versus 44%).

Technology and the blurring of boundaries between work and personal lives

The ability to switch off from work can be challenging for employees, with 15% saying they can rarely or never do this and just over two-fifths (42%) saying that they are only sometimes able to do this. However, two-fifths (44%) say they always feel able to

switch off from work, and private sector employees (47%) are more likely to say that they can always switch off compared with public (35%) and voluntary (29%) sector employees.

Two-fifths of employees say that they always (15%) or occasionally – at least five times (25%) – check their work mobile/emails outside of their working hours. Around the same number (23%) say they rarely do this (checking just once or twice out of working hours). Finally, around a fifth (21%) say that they never do this.

Following recent legislation in France on the right to disconnect, the majority of employees (77%) either agreed or strongly agreed employees should have the right to disconnect from work by not responding to work emails out of hours, while just 5% disagreed.

Employees are most likely to agree that remote access to the workplace (through work devices, mobile technology, video, and so on) helps them to work flexibly (51%), helps them to stay in control of their workload (41%) and helps them to be more productive (37%). Almost a third (30%) also believe that remote access empowers them. However, almost a third of employees (32%) agree that remote access to the workplace means they can't switch off in their personal time. Almost a fifth (18%) say it makes them feel as though they are under surveillance, with 17% saying remote access to the workplace makes them anxious and impacts their sleep quality.

Almost a quarter of employees (23%) are worried that parts of their jobs (18%) or all of their jobs (5%) will be automated in the future. While 8% of those that are worried about their roles and automation think this will

happen in the next year, most think this might happen in five (49%) or ten years' (33%) time.

Job-seeking

Just over a fifth (21%) of employees are now looking for a new job with a different employer. This has reduced from autumn (23%) and spring (24%) 2016. More than half (54%) of all those currently looking for a new job have applied for a position in the last six months (autumn 2016: 53%; spring 2016: 50%).

Over half of employees are looking/ applying for a new role in order to get better pay and benefits elsewhere (54%). This is perhaps unsurprising given current pay levels have not kept pace with inflation. Almost half (46%) are looking to increase their overall job satisfaction. Almost a third are also looking to move jobs in order to help reduce stress (31%).

Twenty-eight per cent want to do a different type of work altogether, while a similar number (27%) are unhappy with the leadership of their current senior management team. Just over a fifth (23%) are looking for promotion opportunities, with a similar number wanting a shorter commute to work (21%) and more flexible work hours (20%).

1 Current external context

In this first section of the survey, we explore employee perceptions of the current external context. In particular we look at employee perceptions of job security and we also look at whether employees have perceived any noticeable changes to their organisations following the UK's decision to leave the EU.

Job security

Three-fifths (59%) believe it is either unlikely or very unlikely they will lose their current main job. Just over a tenth (11%), however, do think it is likely or very likely they could lose their current main job. This compares favourably with our last surveys in spring and autumn 2016, with fewer people overall believing it is likely they could lose their job and with more people believing it is unlikely they could lose their job (see Table 1).

Sector differences show that fewer employees in the voluntary sector believe it is unlikely they will lose their job (46%) compared with employees in the public (63%) and private (59%) sector. When it comes to region, those in Scotland are significantly more likely than those in the north of England or the east of England to think it is likely they will lose their job (18% versus 8% and 7% respectively).

Perceived changes to organisations following the UK's vote to leave the EU

Employees were asked whether they believed wider political changes in the UK (that is, the vote for the UK to leave the European Union, and the new prime minister, Theresa May) and the US (that is, election of President Donald Trump) had impacted their organisation in any way. Almost a third felt their



59%

Three-fifths (59%) believe it is either unlikely or very unlikely they will lose their current main job.

Table 1: Likelihood of losing main job, by sector and survey (%)

| | Spring 2017 | | | | Autumn 2016 | | | | Spring 2016 | | | |
|-----------------------------|-------------|---------|--------|-----------|-------------|---------|--------|-----------|-------------|---------|--------|-----------|
| | All | Private | Public | Voluntary | All | Private | Public | Voluntary | All | Private | Public | Voluntary |
| Very likely | 3 | 4 | 2 | 1 | 4 | 3 | 6 | 4 | 3 | 3 | 4 | 4 |
| Likely | 8 | 6 | 11 | 11 | 8 | 8 | 11 | 11 | 11 | 9 | 16 | 15 |
| Neither likely nor unlikely | 27 | 27 | 21 | 36 | 26 | 26 | 24 | 32 | 27 | 28 | 22 | 29 |
| Unlikely | 31 | 29 | 38 | 29 | 31 | 32 | 29 | 37 | 30 | 30 | 33 | 33 |
| Very unlikely | 28 | 29 | 25 | 17 | 26 | 26 | 26 | 10 | 24 | 25 | 22 | 17 |
| Don't know | 4 | 4 | 3 | 6 | 5 | 5 | 4 | 6 | 5 | 5 | 4 | 2 |

Base: spring 2017: 2,224; autumn 2016: 2,091; spring 2016: 2,029



Following the vote to leave the EU, the majority of employees believe that conflict at work (76%), stress (70%), people taking time off sick (76%) and morale amongst colleagues (65%) has stayed the same regardless.

organisation had been impacted by these changes either to a great (6%) or to some extent (26%). Almost half (49%), however, felt their organisation hadn't been impacted by these changes at all. Public and voluntary sector employees are more likely to say they have been impacted by these wider political changes a great deal than private sector employees (10% versus 3%).

Perceived impact to organisations

We asked employees about four different ways in which their organisation might be impacted as a result of the UK's decision to leave the EU. The first area relates to organisation cost. Just under half of employees think Brexit will make little or no difference to their organisation's costs (46%), while 33% think it is likely to increase costs, and just 2% think it will reduce them, with 19% saying they don't know. More employees in this survey compared with autumn 2016 believe that Brexit is likely to increase costs (33% compared with 24%). Those employed in the public sector are significantly more likely to say that the UK's decision to leave the EU will increase their organisation's costs compared with private and voluntary sector employees (47% versus 30% and 27% respectively).

The second area relates to the products and services that organisations export. For those organisations that export products and services, the largest proportion (45%) believe the UK's decision on the EU will make little or no difference to the competitiveness of their exports. The remainder are fairly split on the likelihood of exports being more (14%) or less (19%) competitive.

The third area relates to investment in equipment and technology. Over three-fifths (58%) believe the decision to leave the EU will make little or

no difference to their organisation's investment in equipment and technology, with 15% believing their organisation is likely to reduce its investment in this area and just 5% believing it is likely to increase its investment. Public sector (25%) employees are significantly more likely than private sector (13%) employees to say it is likely to reduce investment.

The final area relates to investment in workforce training and skill development. While three-fifths (57%) believe the decision to leave the EU will make little or no difference to workforce training and skill development, 18% believe it is likely that investment will be reduced in this area, with just 5% believing that it will be increased. Public sector employees are significantly more likely than private sector employees to think that it will reduce their organisation's investment into this area (26% versus 16%).

Perceived impact to employees

Following the vote to leave the EU, the majority of employees believe that conflict at work (76%), stress (70%), people taking time off sick (76%) and morale amongst colleagues (65%) has stayed the same regardless. However, a fifth of employees believe that the vote to leave the EU has led to a decrease in morale among colleagues (20%) and an increase in stress (17%). Much fewer say that it has led to an increase in conflict (8%) and people taking sick leave (7%). Public and voluntary sector employees are more likely than private sector employees to say there have been increases in all of these things.

Again, the majority of employees say there has been no change in how secure they feel their job is (69%), that the skills they have remain sufficient

Figure 1: Potential impact of Brexit decision, by survey (%)

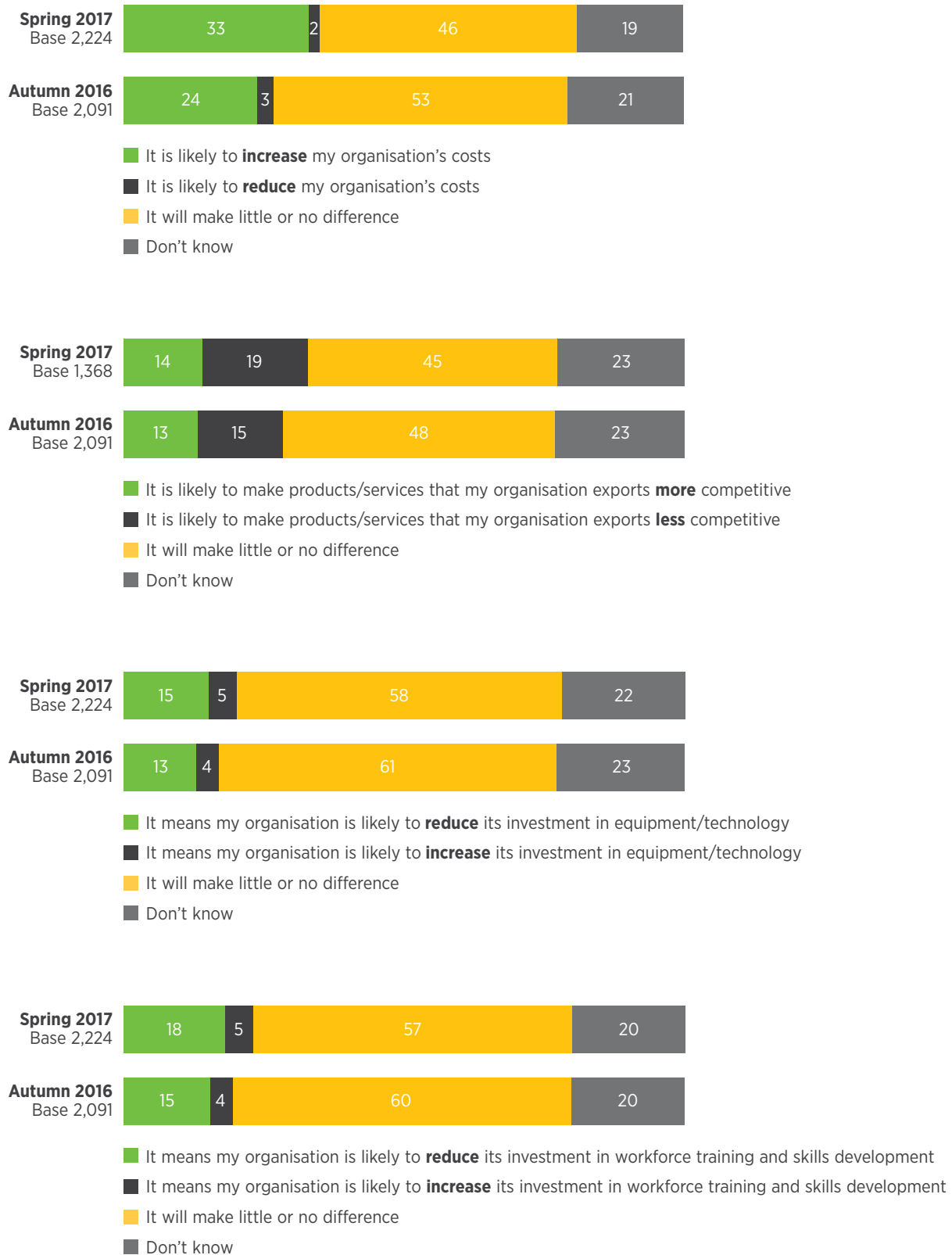
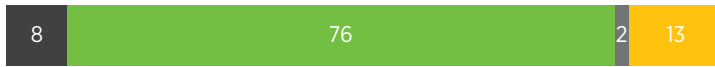


Figure 2: Perceived impact of the UK's decision to leave the EU on employees (%)

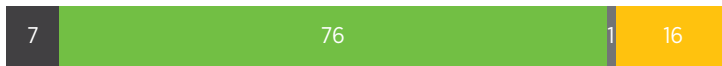
Conflict at work between colleagues



Stress



People taking time off sick



Morale among colleagues



Base 2,224

- Increased
- Stayed the same
- Decreased
- Don't know

(65%), and that there will be as many opportunities to progress post-Brexit (67%). However, almost two-fifths (37%) of employees feel pessimistic about the future following the UK's decision to leave the EU and around a fifth (19%) feel less secure in their job. More than one in ten also believe that they need to now learn more skills (15%), that there are fewer opportunities to progress (14%) and there will be more office politics (13%).

The majority of employees (82%) have also never witnessed or experienced incidences of racist harassment or bullying at work following the UK's vote to leave the EU. However, 10% have either experienced this personally, witnessed this or heard about this happening in their workplace. Public sector employees (22%) are significantly more likely to say this than private sector employees (6%).

Table 2: Perceived impact of the UK's decision to leave the EU on employees (%)

Job security

| | |
|--|----|
| Less secure in your job | 19 |
| No change – I feel as secure as I did pre-Brexit | 69 |
| More secure in your job | 3 |
| Don't know | 9 |

Skills

| | |
|----------------------------------|----|
| The need to learn more skills | 15 |
| The skills I have are sufficient | 65 |
| Don't know | 20 |

Progression opportunities

| | |
|---|----|
| There are fewer opportunities for me to progress | 14 |
| No change – there will be as many opportunities for me to progress as there were pre-Brexit | 67 |
| There are more opportunities for me to progress | 4 |
| Don't know | 15 |

Feelings about the future

| | |
|-------------------------------|----|
| Pessimistic about the future | 37 |
| The same as I felt pre-Brexit | 34 |
| Optimistic about the future | 22 |
| Don't know | 7 |

Office politics

| | |
|---|----|
| There will be less office politics | 2 |
| No change – there will be the same amount of office politics as there were pre-Brexit | 71 |
| There will be more office politics | 13 |
| Don't know | 14 |

Racist harassment or bullying at work

| | |
|--|----|
| Yes, I have experienced this personally | 2 |
| Yes, I witnessed this happen to someone else | 3 |
| Yes, I have heard about such an incident at my workplace | 4 |
| No, never | 82 |
| Not applicable | 10 |

Base: 2,224

2 Job satisfaction and employee engagement

In this section of the survey we track employee satisfaction with their jobs and explore four different aspects of employees' engagement: influence over their jobs, use of skills, motivation and effort.

Job satisfaction

Net job satisfaction has increased in this survey again and now sits at +48 (with 64% satisfied and 16% dissatisfied – see Table 4) compared with +45 in autumn 2016. Job satisfaction continues to rise in the public sector (+59) at levels not seen before in this survey series, which has been running for eight years.

The public sector score has risen by 14 net percentage points since our last survey, which was up by 13 net percentage points on the previous survey. Employees in the public sector (73%) are significantly more likely to be satisfied with their jobs than employees working in the private sector (61%).

Employee engagement

We have moved away from a single measure of engagement calculated through an index in recognition that employee engagement has different aspects, and creating one score risks oversimplifying it. We include four



Net job satisfaction has increased in this survey again and now sits at +48.

Table 3: Employee net satisfaction, by sector and size of organisation

| | Spring 2017 | Autumn 2016 | Spring 2016 | Autumn 2015 |
|-----------|-------------|-------------|-------------|-------------|
| Overall | +48 | +45 | +40 | +48 |
| Private | +45 | +44 | +41 | +50 |
| Public | +59 | +45 | +32 | +38 |
| Voluntary | +48 | +38 | +42 | +49 |
| Micro | +63 | +58 | +49 | +76 |
| Small | +37 | +34 | +25 | +35 |
| Medium | +45 | +35 | +44 | +48 |
| Large | +43 | +38 | +34 | +39 |

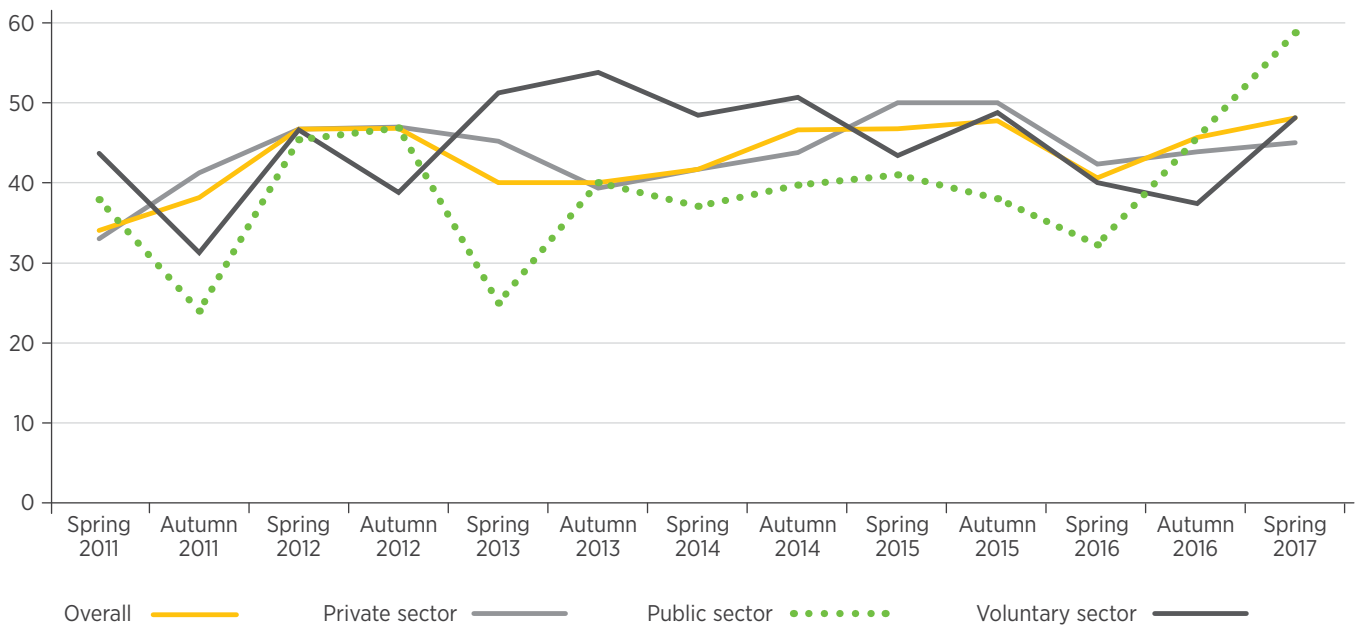
Base: spring 2017: 2,224; autumn 2016: 2,091; spring 2016: 2,029; autumn 2015: 2,043

Table 4: Employee job satisfaction, percentage breakdown by sector (%)

| | Overall | Private | Public | Voluntary |
|------------------------------------|---------|---------|--------|-----------|
| Very satisfied | 21 | 21 | 20 | 22 |
| Satisfied | 43 | 41 | 52 | 45 |
| Neither satisfied nor dissatisfied | 20 | 22 | 14 | 14 |
| Dissatisfied | 12 | 12 | 12 | 15 |
| Very dissatisfied | 4 | 5 | 1 | 4 |
| Don't know | 0 | 0 | - | - |

Base: 2,224

Figure 3: Employee job satisfaction trends (2010-17)



different areas in this section that research has shown to be important drivers and aspects of employee engagement, while recognising that other factors discussed in this report (such as employee voice, shared purpose and organisational commitment) also relate to employee engagement. The four areas of focus in this section are: employees' influence over their jobs, use of skills, motivation and effort. We have drawn on questions from the Skills and Employment Survey (Cardiff University 2014) for this section.

Influence over job

When looking at influence over job, we have measured two aspects of this – employees' satisfaction with the amount of influence they have over their job in general and their satisfaction with the scope for using their own initiative within their job. Employee satisfaction with the amount of influence they have over their job in general sits at +35, while satisfaction with the scope for using their own initiative within their job is higher, at +55. Both of these scores have increased since autumn 2016.

As you might expect, satisfaction with the amount of influence over their job and scope for using their own initiative increases with seniority. Those employees that believe they are overqualified for their roles are significantly more likely to be dissatisfied with the two measures compared with those with the right level of qualifications. Employees in the public sector are also significantly more likely to be satisfied with the scope for using their own initiative in their job than private sector employees.

Table 5: Employee net satisfaction with influence over job, by sector

| | All | Private | Public | Voluntary |
|---|-----|---------|--------|-----------|
| Amount of influence over job | +35 | +34 | +37 | +43 |
| Scope for using own initiative within job | +55 | +52 | +66 | +60 |

Base: 2,224

Table 6: Net agreement to: 'In my current job I have enough opportunity to use the knowledge and skills that I have'

| All | Private | Public | Voluntary | Micro | Small | Medium | Large |
|-----|---------|--------|-----------|-------|-------|--------|-------|
| +49 | +48 | +52 | +59 | +54 | +46 | +48 | +45 |

Base: 2,224

Table 7: Employee net agreement to: 'This organisation really inspires the very best in me in the way of job performance'

| All | Private | Public | Voluntary | Micro | Small | Medium | Large |
|-----|---------|--------|-----------|-------|-------|--------|-------|
| +12 | +10 | +14 | +14 | +36 | +6 | +12 | -3 |

Base: 2,224

Use of skills

We also measured employee satisfaction with use of knowledge and skills through the statement: 'In my current job I have enough opportunity to use the knowledge and skills that I have.' As with job influence, this is underpinned by social determination theory, specifically the aspect of the feeling of competence. Building on this, more popular work has been done under the label of 'strengths' (for example, Buckingham 2005). Overall, satisfaction with use of knowledge and skills sits at +49, up from +44 in spring 2016, with no significant differences between sectors.

Motivation

Motivation is the core outcome within self-determination theory (Deci and Ryan 1985, Moller et al 2007). We measured employee motivation by agreement with the item: 'This organisation really inspires the very best in me in the way of job performance.' Interestingly, the overall net agreement score for this item is low at +12, but it has risen from +6 in autumn 2016. In particular, there has been a 14 net percentage point increase for scores in the public sector for this item.

Effort

Finally, effort can be seen as a more tangible behavioural outcome of motivation. We measured three different aspects of employee effort: employees' willingness to 'work harder than they have to in order to help this organisation succeed', 'turning down another job with more pay in order to stay with this organisation', and 'often taking on more work to help relieve colleagues' workloads'. Employees are most likely to say they are willing to take on more work to help relieve colleagues' workloads (+47), followed by being willing to work harder than they have to in order to help their organisation succeed (+45); however, employees were more likely to disagree than agree (-8) that they would turn down another job with more pay in order to stay with their organisation.

Table 8: Employee net score for effort, by sector

| | All | Private | Public | Voluntary |
|---|-----|---------|--------|-----------|
| <i>I will often take on more work to relieve my colleagues' workloads.</i> | +47 | +42 | +60 | +54 |
| <i>I am willing to work harder in order to help my organisation succeed.</i> | +45 | +44 | +50 | +56 |
| <i>I would turn down another job with more pay in order to stay with my organisation.</i> | -8 | -10 | -8 | +6 |

Base: 2,224

Public sector employees are significantly more likely than private sector employees to say they will often take on more work to relieve their colleagues' workloads. And voluntary sector employees are significantly more likely than public and private sector employees to agree that they would turn down another job with more money in order to stay with their organisation. The score for public sector employees on this item, while still negative, has improved from -20 in autumn 2016 to -8 in this survey.

3 Employee attitudes towards senior leaders and line managers

This section explores employee attitudes towards directors/senior managers as well as their satisfaction with, and attitude towards, their immediate managers.

Attitudes towards senior managers

We measure employee satisfaction with the senior managers of their organisations across five different areas: consultation, respect, trust, confidence and clarity of vision.

Scores for all items relating to attitudes towards senior managers have improved once again across the board in this survey. There have been particular improvements in confidence (an increase of 8 net percentage points), on treating employees with respect (an increase of 7 net percentage points), and trust in senior leaders to act with integrity (an increase of 7 net percentage points).

When it comes to sector differences, although all items have improved across all sectors, the biggest improvements are in the public sector and in particular in relation to trust in senior leaders to act with integrity (up 24 net percentage points), consultation on important decisions (up 19 percentage points) and confidence in their ability (up 18 percentage points).

Attitudes towards line managers

Four-fifths (78%) of employees have a line manager or supervisor they report to as part of their job. When it comes to satisfaction with line managers, this sits at a net score of +47. Employees in the public sector (+55) have the most positive net satisfaction score (private: +46; voluntary: +37) and are significantly more likely to be satisfied with their line managers than private sector employees.

Employees say that their managers are most likely to be very/fairly well committed to their organisation (74%), treat them fairly (70%), make clear what is expected of them (66%), listen to their suggestions (65%), are supportive if they have a problem (64%) and tell them when they do a good job (63%). On the other hand, employees are most likely to say their managers are fairly poor or very poor at coaching them on the job (27%), discussing training and development needs (24%), keeping them in touch with what is going on (24%), providing feedback on how they are performing (23%) and acting as a role model in the organisation (22%).

Scores for all items relating to attitudes towards senior managers have improved once again across the board in this survey.

Table 9: Attitudes to senior management team (net agree scores by survey)

| | Spring 2017 | Autumn 2016 | Spring 2016 | Autumn 2015 |
|--|-------------|-------------|-------------|-------------|
| They have a clear vision of where the organisation is going. | +36 | +35 | +22 | +25 |
| They treat employees with respect. | +26 | +19 | +10 | +13 |
| I have confidence in their ability. | +20 | +12 | +3 | +5 |
| I trust them to act with integrity. | +25 | +18 | +13 | +3 |
| They consult employees about important decisions. | -12 | -15 | -27 | -27 |

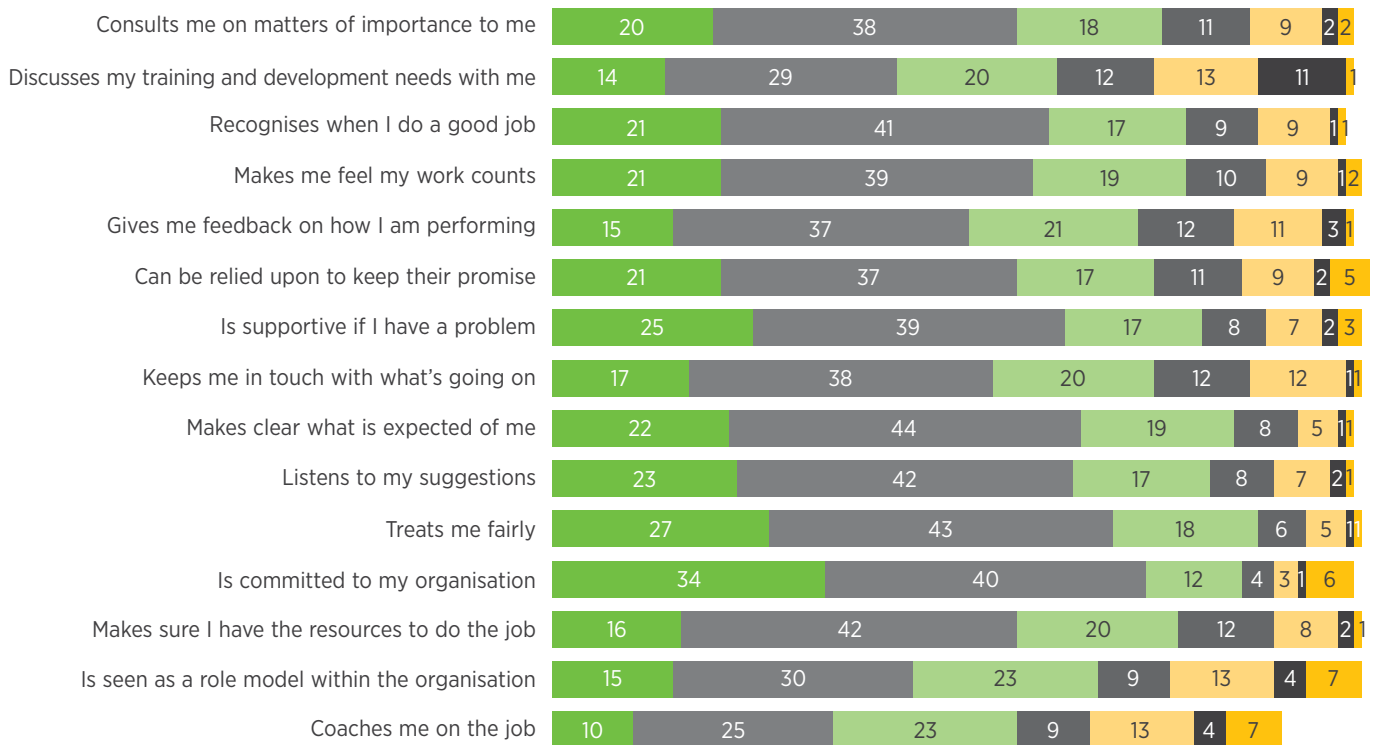
Base: spring 2017: 2,224; autumn 2016: 2,091; spring 2016: 1,904; autumn 2015: 1,826

Table 10: Attitudes to senior management team (net agree scores by sector)

| | Private | | Public | | Voluntary | |
|--|-------------|-------------|-------------|-------------|-------------|-------------|
| | Spring 2017 | Autumn 2016 | Spring 2017 | Autumn 2016 | Spring 2017 | Autumn 2016 |
| They have a clear vision of where the organisation is going. | +37 | +37 | +32 | +28 | +33 | +33 |
| They treat employees with respect. | +24 | +21 | +27 | -11 | +30 | +31 |
| I have confidence in their ability. | +21 | +17 | +13 | -5 | +20 | +6 |
| I trust them to act with integrity. | +24 | +21 | +28 | +4 | +26 | +32 |
| They consult employees about important decisions. | -14 | -12 | -8 | -27 | -8 | -8 |

Base: spring 2017: 2,224; autumn 2016: 2,091

Figure 4: How well or poorly does your line manager do each of the following...? (%)



Base: 1,796

■ Very well
 ■ Fairly well
 ■ Neither well nor poorly
■ Fairly poorly
 ■ Very poorly
 ■ Not applicable
 ■ Don't know

4 Organisation purpose, information-sharing and opportunities for employee voice

In this section we explore employees' understanding and motivation of their organisation's core purpose. We examine how well informed employees feel about their organisation's strategy and whether employees would be likely to recommend their organisation. Lastly, we investigate opportunities for employee voice, including opportunities to feed views upwards, to be involved in decisions that affect them and satisfaction with the attention paid to the suggestions employees make.

Purpose

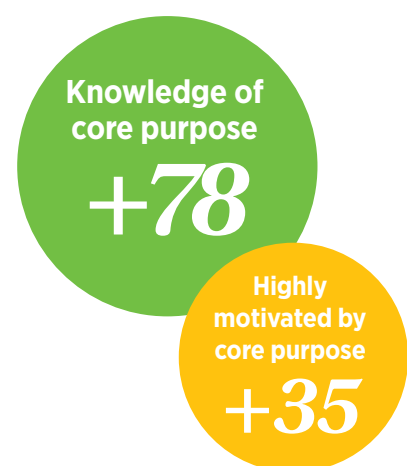
We asked respondents, first, how clearly they know what the core purpose of the organisation is and, second, how motivated they are by the organisation's core purpose. Net

agreement to employee knowledge of core purpose is very high (+78), while net agreement to being highly motivated by their organisation's core purpose is much lower (+35). However, these scores show some improvement on the autumn 2016 findings.

Public sector employees are significantly more likely than private sector employees to agree that they know what the core purpose of their organisation is, and public and voluntary sector employees are significantly more likely to say they are motivated by it compared with private sector employees.

Information-sharing

More than half of employees feel either fully (14%) or fairly



Net agreement to employee knowledge of core purpose is very high (+78), while net agreement to being highly motivated by their organisation's core purpose is much lower (+35).

Table 11: Items relating to core purpose (net scores), by sector

| | All | Private | Public | Voluntary |
|--|-----|---------|--------|-----------|
| I know very clearly what the core purpose of my organisation is. | +78 | +75 | +87 | +81 |
| I am highly motivated by my organisation's core purpose. | +35 | +27 | +54 | +72 |

Base: 2,224

Table 12: How informed, if at all, do you feel about your organisation's strategy? (%)

| | All | Private | Public | Voluntary |
|---|-----|---------|--------|-----------|
| I feel fully informed. | 14 | 12 | 15 | 22 |
| I feel fairly well informed. | 44 | 41 | 52 | 41 |
| I receive only a limited amount of information. | 25 | 26 | 22 | 48 |
| I get to hear very little about what goes on. | 14 | 16 | 8 | 9 |
| I don't know anything. | 3 | 4 | 1 | 1 |
| Don't know | 1 | 1 | 2 | 0 |

Base: 1,753

Table 13: Net satisfaction with employee voice items (net scores), by sector

| | All | Private | Public | Voluntary |
|--|-----|---------|--------|-----------|
| Opportunities to feed views upwards | +24 | +21 | +33 | +29 |
| Involvement in decisions that affect you | +23 | +24 | +19 | +18 |
| Attention paid to the suggestions you make | +35 | +31 | +49 | +35 |

Base: 2,002

well informed (44%) about their organisation's strategy. This has increased again since autumn 2016, but still leaves two-fifths saying that they receive either limited information or worse when it comes to their organisation's strategy. Employees in the voluntary sector (22%) are significantly more likely than employees in the public (15%) and private sector (12%) to feel fully informed about their organisation's strategy.

Advocacy

Just over half (52%) of employees would be likely or very likely to recommend their organisation as an employer, while just over a fifth (22%) would be unlikely or very unlikely to do this. Public and voluntary sector employees are significantly more likely than private sector employees to recommend their organisation as an employer.

Voice

Employee voice is the means by which employees communicate their views on employment and organisational issues to their employers. It's the main way employees can influence matters that affect them. Employee voice features prominently in research on high-performance work systems, which points to links between 'high involvement' management styles and performance.

The scores for different aspects of employee voice have improved, once again, since our last two surveys in autumn and spring 2016. Employees' net satisfaction score for opportunities to feed views, issues and ideas upwards has increased (spring 2017: +24; autumn 2016: +20, spring 2016: +11), and the net satisfaction with opportunities for employees to be involved in decisions

that affect them has also increased (spring 2017: +23; autumn 2016: +21, spring 2016: +16). However, net satisfaction with the attention paid to the suggestions employees make is highest (spring 2017: +35; autumn 2016: +28, spring 2016: +24). Public sector employees have seen the greatest improvements in both opportunities to feed views upwards (up 13 net percentage points) and attention paid to the suggestions they make (up 26 net percentage points) and are significantly more likely to say this than employees in the private sector.

5 Health and well-being at work

A focus on health and well-being is an important part of the CIPD's purpose to improve work and working lives. While great strides have been made in workplace health and well-being in recent years, our research has shown that there is a worrying implementation gap. Our 2015 *Absence Management* survey in partnership with Simplyhealth found that just 8% of workplaces have a standalone health and well-being strategy. We believe that well-being needs to be viewed as a strategic priority and a source of competitive advantage, not an 'add-on' or a 'nice to have'. In this section we explore employee work-life balance and pressure at work, how work makes employees feel in general, how considerate employees believe their organisations are of their well-being as well as issues relating to mental health.

Work-life balance and pressure at work

Employees' ability to achieve the right balance between their work and home lives has remained stable over the last few surveys and sits at +39. Private sector (+42) employees are most likely to agree that they achieve the right work-life balance, with voluntary (+33) and public sector employees (+32) least likely to agree.

Thirty-eight per cent of employees are under excessive pressure at work at least once a week. This figure has remained stable over the last few surveys. Employees in the public sector (48%) are significantly more likely than employees in the private sector (38%) to say that they are under excessive pressure at work at least once a week.



Private sector (+42) employees are most likely to agree that they achieve the right work-life balance, with voluntary (+33) and public sector employees (+32) least likely to agree.

Table 14: Proportion of employees who come home from work exhausted (%)

| | All | Men | Women | Private | Public | Voluntary |
|-------------|-----|-----|-------|---------|--------|-----------|
| Always | 9 | 7 | 11 | 8 | 13 | 11 |
| Mostly | 22 | 19 | 26 | 22 | 25 | 26 |
| Sometimes | 39 | 40 | 37 | 39 | 37 | 41 |
| Hardly ever | 22 | 24 | 20 | 22 | 22 | 19 |
| Never | 7 | 8 | 6 | 9 | 2 | 3 |
| Don't know | 1 | 1 | 0 | 0 | 1 | 1 |

Base: 2,091

Almost a third of employees (31%) say they come home from work exhausted either often (22%) or always (9%). Private sector employees are significantly more likely than employees in the other sectors to say that they never come home from work exhausted. Gender differences also show that women are significantly more likely than men to say that they always or often come home from work exhausted.

How work makes you feel

The next section explores how work makes employees feel (Figure 5). The good news is, out of the emotions listed, employees are most likely to say that work makes them feel cheerful (29%) most or all of the time as opposed to any other feeling. This

is followed by optimistic (19%) and relaxed (19%), then stressed (18%). Few employees say that work makes them feel worried (11%), miserable (10%) or excited (9%) most or all of the time.

Private sector employees are more likely than public sector employees to say that their job never makes them feel tense or worried. They are also more likely than public sector employees to say their job never makes them feel cheerful and more likely than public and voluntary sector employees to say their job never makes them feel excited. And public sector employees are significantly more likely than private sector employees to say their job makes them feel stressed most of the time.

Consideration of well-being at work

Employees were asked to what extent they feel their employer and manager are considerate of their well-being at work. Employees are more likely to feel that their manager (72%) is considerate of their well-being than their employer (63%), but overall the results are positive for both.

Employees in the private sector are more likely than employees in the voluntary sector to say their manager is not at all considerate of their well-being. There are no significant sector differences for employer consideration of well-being.

Figure 5: Over the past few weeks, how much of the time has your job made you feel...? (%)

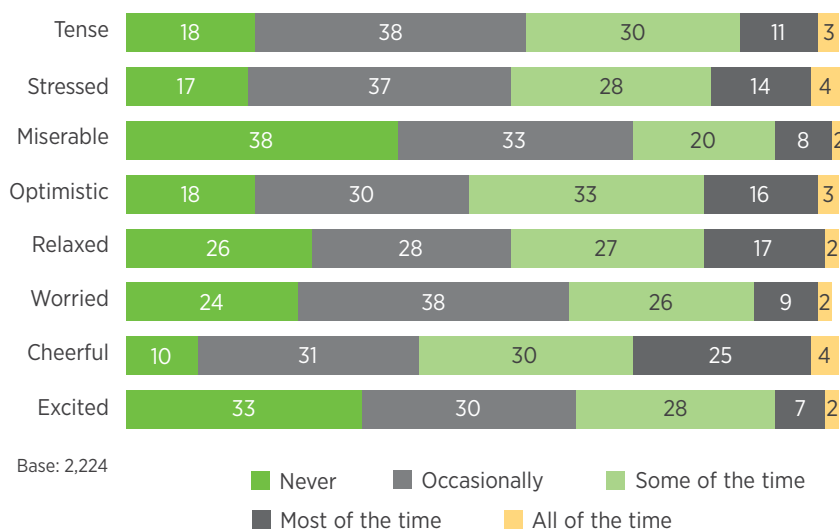


Table 15: To what extent do you feel that your manager is considerate of your well-being at work? (%)

| | All | Private | Public | Voluntary |
|------------------------|-----|---------|--------|-----------|
| Very considerate | 26 | 25 | 31 | 26 |
| Fairly considerate | 46 | 46 | 46 | 45 |
| Not very considerate | 17 | 18 | 14 | 24 |
| Not at all considerate | 9 | 10 | 7 | 3 |
| Don't know | 2 | 2 | 1 | 2 |

Base: 2,002

Mental health issues

Sixty-eight per cent of employees describe their mental health as very good (29%) or good (38%). Almost a fifth (24%) say their mental health is moderate, with 7% describing it as poor and 1% describing it as very poor. Men are significantly more likely to say their mental health is very good (33%) compared with women (26%).

Employees working in the private sector (32%) are significantly more likely than employees in the voluntary (17%) sector to say that their mental health is very good (public sector: 24%).

We asked those employees who described their mental health as poor to indicate whether this was as a result of problems at work, problems outside

of work, or a combination of both. Employees were more likely to say their mental health problems were as a result of problems outside of work in their personal lives (21%) as opposed to problems at work (16%), but the highest proportion felt they were actually as a result of a combination of these two factors (62%).

We asked employees about the organisational support provided to employees with mental health problems. Respondents were fairly split on this issue, with 40% believing they support employees very (10%) or fairly well (30%) and 24% believing they support employees not very (13%) or not at all well (11%). Voluntary and public sector

employees are significantly more likely to say the organisation supports employees with mental health problems very or fairly well compared with private sector employees.

We also asked employees how confident they would feel disclosing unmanageable stress or mental health problems to their employer or manager. Employees were fairly evenly split between being confident (48%) and not confident (45%) on disclosing this information. Public sector employees were significantly more confident than private sector employees in disclosing unmanageable stress or mental health problems to their employer or manager.

Table 16: To what extent do you feel that your employer is considerate of your well-being at work? (%)

| | All | Private | Public | Voluntary |
|------------------------|-----|---------|--------|-----------|
| Very considerate | 20 | 17 | 13 | 22 |
| Fairly considerate | 44 | 45 | 51 | 51 |
| Not very considerate | 22 | 21 | 21 | 17 |
| Not at all considerate | 11 | 13 | 13 | 8 |
| Don't know | 4 | 5 | 3 | 2 |

Base: 2,002

Table 17: How confident would you feel disclosing unmanageable stress or mental health problems to your employer or manager? (%)

| | All | Private | Public | Voluntary |
|----------------------|-----|---------|--------|-----------|
| Very confident | 14 | 14 | 13 | 14 |
| Confident | 34 | 31 | 41 | 41 |
| Not very confident | 25 | 24 | 29 | 28 |
| Not at all confident | 19 | 22 | 13 | 13 |
| Don't know | 7 | 8 | 4 | 4 |

Base: 2,002

6 Career, performance and pay



Employees in the private sector (37%) are significantly more likely to say that their pay is linked to their performance than employees in the public (18%) and voluntary (20%) sectors.

We explore in this section employee perceptions of their performance management systems. We also examine career progression opportunities, the issue of overqualification and, finally, employee satisfaction with pay.

Performance management

Fifty-seven per cent of employees say their organisation has a performance management process. The public sector (81%) and the voluntary sector (76%) are significantly more likely to have performance management processes than the private sector (48%).

We wanted to examine employees' views with regard to fairness of performance management processes. Over half of employees (55%) now believe that they are very or somewhat fair (autumn 2016: 50%; spring 2016: 44%), while almost a fifth (17%) believe that

they are somewhat or very unfair (autumn 2016: 18%; spring 2016: 23%). Voluntary sector employees are significantly more likely to say their performance management systems are unfair compared with public sector employees. However, men (21%) are significantly more likely than women (13%) to say that their performance management systems are unfair.

Just under a third of employees (30%) believe that their pay is linked to their performance, while more than half do not (56%). Employees in the private sector (37%) are significantly more likely to say that their pay is linked to their performance than employees in the public (18%) and voluntary (20%) sectors.

More than three-fifths (61%) of employees who have a performance management process believe their line managers are very effective

Table 18: How fair do you believe your organisation's performance management process to be, by sector (%)

| | All | Private | Public | Voluntary |
|-----------------|-----|---------|--------|-----------|
| Very fair | 19 | 18 | 20 | 25 |
| Somewhat fair | 35 | 34 | 40 | 29 |
| Neutral | 23 | 24 | 22 | 20 |
| Somewhat unfair | 12 | 12 | 10 | 18 |
| Very unfair | 5 | 7 | 3 | 5 |
| Don't know | 6 | 5 | 6 | 3 |

Base: 1,183

or fairly effective at communicating objectives and expectations. Public sector employees (68%) are significantly more likely to say effective than private sector (59%) employees.

When it comes to the frequency with which managers provide feedback and recognition on performance, employees are most likely to say just once or twice in the past year (41%). Twelve per cent say once or more a week, with just over a quarter (26%) saying a couple of times a month. Rather worryingly, 18% say not at all and private sector employees are significantly more likely to say this than employees from the other sectors.

Career progression

We asked employees about whether they feel able to fulfil their career aspirations in their current organisation. Employees are fairly split on this question, with just over a third (36%) saying very likely or likely and less than a third (30%) saying unlikely or very unlikely.

Overqualification

While just over three-fifths (62%) of employees believe they have the right level of qualifications for their current job, just under a third (30%) of employees believe that they are overqualified. Just 5% feel that

they are underqualified for their role. Part-time workers (40%) are significantly more likely to say that they are overqualified than full-time workers (26%).

Just 24% of employees that believe they are overqualified for their roles are satisfied with their jobs, compared with 69% who believe they have the right level of qualification. Additionally, just 21% of employees who believe they are overqualified for their roles believe that it is likely they will be able to fulfil their career aspirations in their current organisation, compared with 45% who believe they have the right level of qualification.

Satisfaction with pay

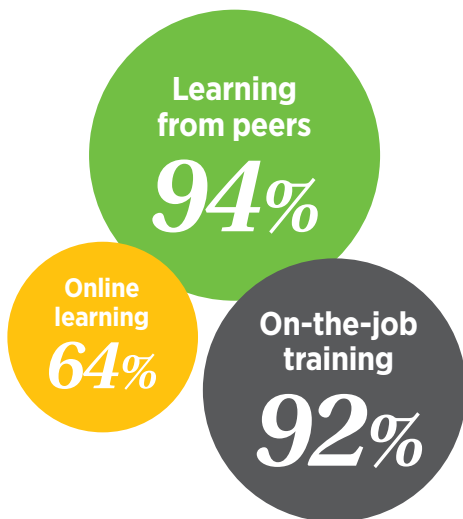
We also asked employees about their satisfaction with their current level of pay. This sits at a net satisfaction of +11, up from +9 in autumn 2016. More employees are satisfied (44%) than dissatisfied (33%), with over a fifth (22%) neither satisfied nor dissatisfied. There are no significant sector differences when it comes to satisfaction with pay.

Table 19: Overqualification by full-time/part-time workers (%)

| | All | Full-time | Part-time |
|-------------------------------|-----|-----------|-----------|
| Overqualified | 30 | 26 | 40 |
| Right level of qualifications | 62 | 66 | 53 |
| Underqualified | 5 | 5 | 4 |
| Don't know | 3 | 3 | 3 |

Base: 2,002

7 Learning and development



Two of the most popular forms of training are rated among the most useful/very useful – on-the-job training (92%) and learning from peers (94%). Online learning, however, is only rated useful/very useful by under three-fifths (64%) of employees who have experienced it.

This section explores the importance of continuous learning and development opportunities for both employees and the organisation. We explore employee development opportunities and perceptions of training effectiveness.

Development opportunities

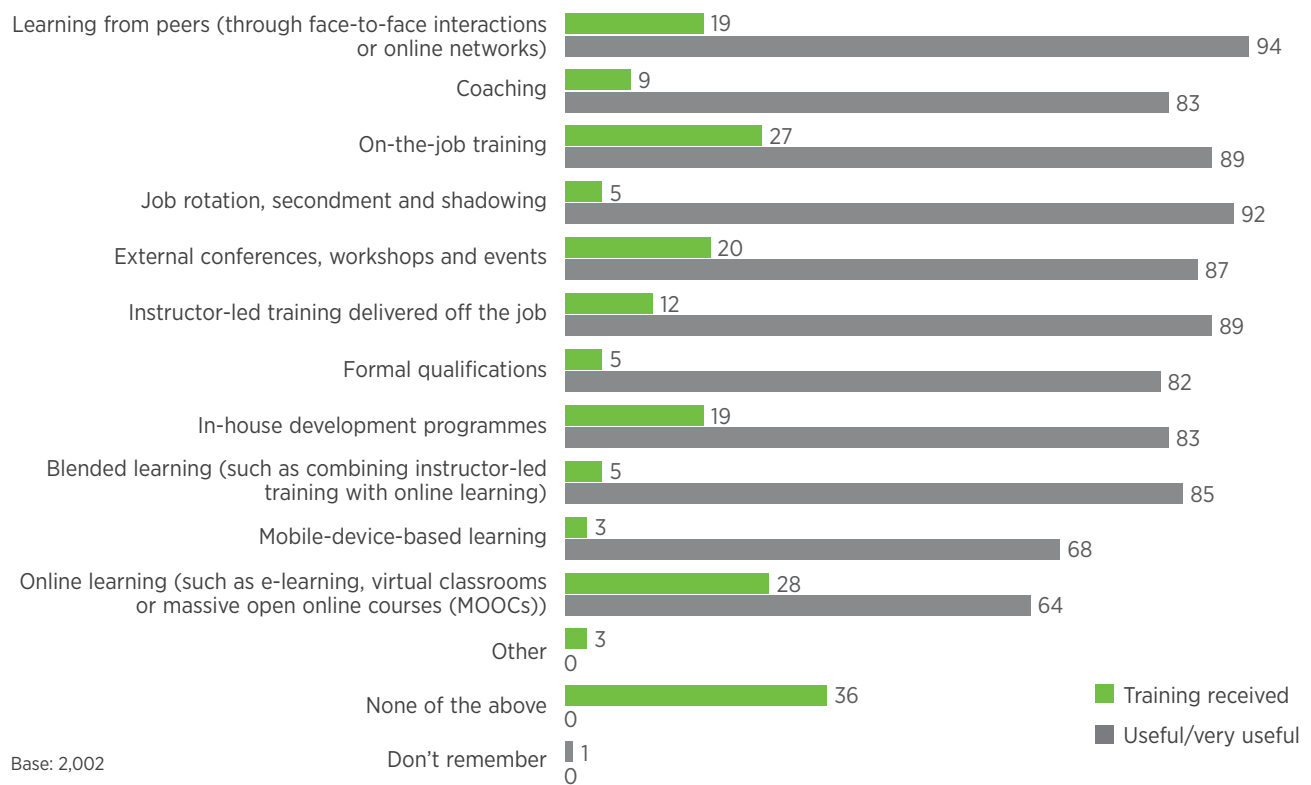
More than two-fifths (48%) of employees strongly agree or agree that their organisation provides them with opportunities to learn and grow. However, almost a quarter (24%) disagree or strongly disagree. More than two-fifths (47%) of employees are satisfied with the opportunity to develop their skills in their job, while almost a quarter (22%) are dissatisfied or very dissatisfied. Public sector employees are significantly more likely to agree that their organisation provides them with opportunities to learn and grow than the other two sectors and are also more likely to be satisfied with the opportunity to develop their skills in their job than private sector employees.

In the last 12 months, employees are most likely to have received online learning (28%), on-the-job training (27%), and access to an external conference/workshop/event (20%). They are least likely to have received mobile-device-based learning (3%), blended learning (5%), job rotation, secondment and shadowing (5%), and formal

qualifications (5%). However, over a third (36%) have received none of these types of training and private sector employees are significantly more likely to say this (42%), compared with public (17%) and voluntary (23%) sector employees.

When it comes to how useful employees found these different types of training in carrying out their work, two of the most popular forms of training are rated among the most useful/very useful – on-the-job training (92%) and learning from peers (94%). Online learning, however, is only rated useful/very useful by under three-fifths (64%) of employees who have experienced it. Job rotation, secondment and shadowing is rated as useful/very useful by 96%, even though only 5% have taken part in this in the last 12 months, and coaching is also rated as useful/very useful by 83%, even though only 9% have received it in the last 12 months.

Figure 6: Training received in the last 12 months by useful/very useful rating (%)



8 Technology, the blurring of boundaries between work and personal lives, and automation



77%

The majority (77%) either agreed or strongly agreed employees should have the right to disconnect from technology, while just 5% disagreed.

Technology has contributed to the blurring of boundaries between work and personal lives for many employees. We therefore thought it would be timely to explore this issue. We examine here how employees view technology and whether they ever feel able to switch off from work and technology. We also explore employee concerns regarding the automation of jobs.

Ability to switch off from work

The ability to switch off from work can be challenging for employees, with 15% saying they can rarely or never do this and just over two-fifths (42%) saying that they are only sometimes able to do this. A further two-fifths (44%) say they always feel able to switch off from work and private sector employees (47%) are more likely to say that they can always switch off compared with public (35%) and voluntary (29%) sector employees.

Two-fifths of employees say that they always (15%) or occasionally – classed as at least five times (25%) – check their work mobile/emails outside of their working hours. Around the same number (23%) say they rarely do this (checking just once or twice out of working hours). Finally, around a fifth (21%) say that they never do this. Public

sector workers are more likely to check their phone at least five times compared with private and voluntary workers.

Following legislation introduced at the beginning of this year by companies in France guaranteeing employees the right to disconnect from technology, we asked employees to what extent they agreed/disagreed that employees should have the right to disconnect from work by not having to respond to work emails out of hours. The majority (77%) either agreed or strongly agreed employees should have the right to disconnect from technology, while just 5% disagreed. Employees in the voluntary sector were more likely to strongly agree with this than employees from the other two sectors.

Table 20: How often, if at all, do you feel able to switch off from work in your personal time? by sector (%)

| | All | Private | Public | Voluntary |
|-----------|-----|---------|--------|-----------|
| Always | 44 | 47 | 35 | 29 |
| Sometimes | 42 | 39 | 50 | 49 |
| Rarely | 12 | 11 | 13 | 16 |
| Never | 3 | 3 | 2 | 6 |

Base: 2,224

Table 21: How often do you 'actively' check your work mobile/emails outside of your working hours? by sector (%)

| | All | Private | Public | Voluntary |
|--|-----|---------|--------|-----------|
| Always (that is, every time I receive an email, phone call, text, etc) | 15 | 16 | 14 | 17 |
| Occasionally (that is, at least five times) | 25 | 23 | 32 | 17 |
| Rarely (that is, once or twice) | 23 | 22 | 24 | 35 |
| Never | 21 | 22 | 20 | 22 |
| Don't know | 1 | 1 | 1 | - |
| Not applicable | 15 | 17 | 10 | 10 |

Base: 2,224

Table 22: To what extent do you agree or disagree that employees should have the 'right to disconnect' from work by not having to respond to work emails out of hours? by sector (%)

| | All | Private | Public | Voluntary |
|----------------------------|-----|---------|--------|-----------|
| Strongly agree | 51 | 48 | 55 | 64 |
| Agree | 26 | 28 | 24 | 19 |
| Neither agree nor disagree | 13 | 13 | 12 | 12 |
| Disagree | 3 | 3 | 4 | 2 |
| Strongly disagree | 2 | 2 | 3 | - |
| Don't know | 5 | 5 | 2 | 3 |

Base: 2,224

Table 23: Are you worried that either all or some parts of your job might be automated in the future? (%)

| | |
|---|----|
| Yes - that all parts of my job will be automated in the future | 5 |
| Yes - that some parts of my job will be automated in the future | 18 |
| No | 71 |
| Don't know | 6 |

Base: 2,224

Remote access to the workplace

Employees are most likely to agree that remote access to the workplace (through work devices, mobile technology, video, and so on) helps them to work flexibly (51%), to stay in control of their workload (41%) and to be more productive (37%). Almost a third (30%) also believe that remote access empowers them.

However, almost a third of employees (32%) agree that remote access to the workplace means they can't switch off in their personal time. Almost a fifth (18%) say it makes them feel as

though they are under surveillance, with 17% saying remote access to the workplace makes them anxious and impacts their sleep quality.

The impact of automation on jobs

Almost a quarter of employees (23%) are worried that parts of their jobs (18%) or all of their jobs (5%) will be automated in the future.

Those who work in financial intermediation (32%) are more likely than construction (14%) and other community and personal services (19%) to say they are worried that

parts or all of their jobs will be automated in the future. Those in large organisations (29%) are more likely than micro organisations (12%) to say the same, while those employees that are overqualified are also more likely to say they are worried about automation than employees with the right level of qualification.

While 8% of those that are worried about their roles and automation think this will happen in the next year, most think this might happen in five (49%) or ten years' (33%) time.

Figure 7: Remote access to the workplace... (%)

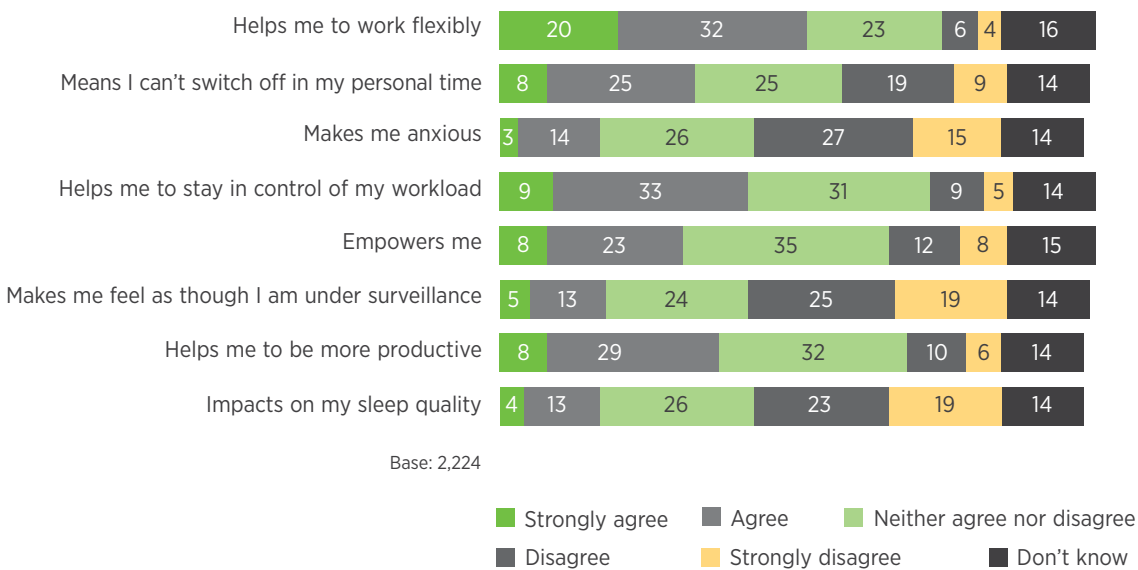


Table 24: You told us you feel worried that either all or some parts of your job will be automated in the future. According to you, roughly when do you think this might happen? (%)

| | |
|-----------------------------|----|
| In a year's time (by 2018) | 8 |
| In 5 years' time (by 2022) | 49 |
| In 10 years' time (by 2027) | 33 |
| In 20 years' time (by 2037) | 4 |
| In 30 years' time (by 2047) | 2 |
| Beyond 30 years | 0 |
| Don't know | 4 |

Base: 66

9 Job-seeking

In this final section we explore employees' job-seeking intentions and reasons for looking or applying for a new job.

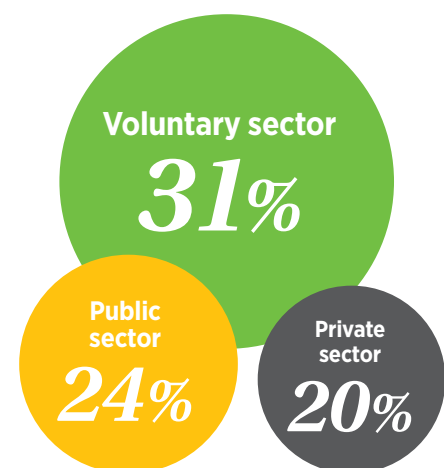
Just over a fifth (21%) of employees are now looking for a new job with a different employer. This has reduced from autumn (23%) and spring (24%) 2016. Voluntary sector employees are most likely to be looking for a new job (31%), followed by employees in the public sector (24%), with employees in the private sector (20%) least likely to be currently looking for a new job. More than half (54%) of all those currently looking for a new job have applied for a position in the last six months (autumn 2016: 53%; spring 2016: 50%).

Of those employees who have applied for a new job in the last six months, more than a third are taking

opportunities to develop new skills (30%), and more than one in ten (13%) are volunteering, retraining (9%) and holding more than one job (8%). However, over half (55%) of employees who have applied for a new job in the last six months are not doing any of these activities.

Reasons for looking/ applying for a new job

We decided to explore the reasons why employees are currently looking for or applying for a new role. Over half are doing so in order to get better pay and benefits elsewhere (54%). This is perhaps unsurprising given current pay levels have not kept a pace with inflation. Almost half (46%) are looking to increase their overall job satisfaction. Almost a third are also looking to move jobs in order to help reduce stress (31%).



Voluntary sector employees are most likely to be looking for a new job (31%), followed by employees in the public sector (24%), with employees in the private sector (20%) least likely to be currently looking for a new job.

Table 25: Proportion looking for a new job, by sector (%)

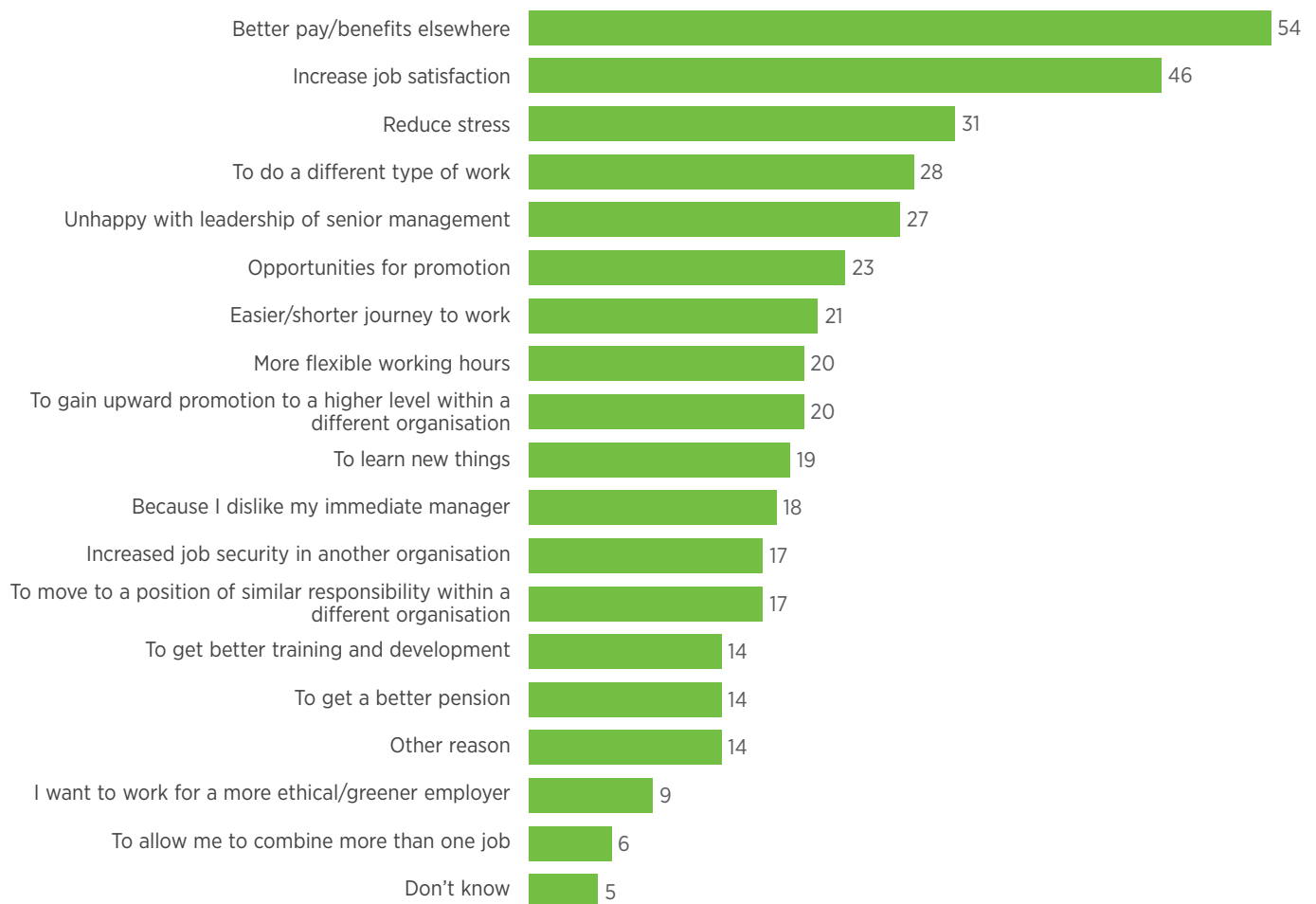
| | Spring 2017 | Autumn 2016 | Spring 2016 | Autumn 2015 |
|------------------|-------------|-------------|-------------|-------------|
| All | 21 | 23 | 24 | 20 |
| Private sector | 20 | 22 | 23 | 19 |
| Public sector | 24 | 28 | 27 | 23 |
| Voluntary sector | 31 | 30 | 29 | 21 |

Base: spring 2017: 2,224; autumn 2016: 2,091; spring 2016: 2,029; autumn 2015: 2,043

Twenty-eight per cent want to do a different type of work altogether, while a similar number (27%) are unhappy with the leadership of their current senior management team. Just over a fifth (23%) are looking for promotion opportunities, with a similar number wanting a shorter commute to work (21%) and more flexible work hours (20%).

Public sector workers are more likely than private sector workers to cite upward promotion and combine more than one job as reasons for a potential move, while private sector employees are more likely than public sector employees to be wanting to do a different type of work.

Figure 8: Which, if any, of the following are your reasons for looking/applying for a new job? (%)



Base: 249

Conclusion

It is nice to be able to report some positive findings in this spring 2017 *Employee Outlook* survey. This survey sees fewer employees thinking it is likely they will lose their job, an increase in net job satisfaction, and an increase in our engagement measures of employee influence over job, use of skills, motivation and effort. Employees are also more satisfied with opportunities for employee voice and are more likely to believe that their performance processes are fair. Overall attitudes to senior leaders have improved and the emotion that employees most readily associate with work is that of being cheerful.

In the autumn 2016 *Employee Outlook* survey, we reported an increase in several of the scores for public sector employees. This trend has continued into the spring 2017 survey, where public sector job satisfaction is the highest it has been in the history of this survey (which has now been running for eight years). In particular, there have been increases in satisfaction with opportunities for employee voice – both in opportunities to feed views upwards and attention paid to the suggestions employees make. There have been increases in aspects of engagement such as scope for using own initiative, motivation and effort. There has been an increase in the understanding and motivation of their organisation's core purpose.

Public sector workers are also more likely than employees from the private and voluntary sectors to now say their organisation provides them with opportunities to learn and grow. Attitudes to senior leaders have also improved for public sector workers. However, public sector workers are still reporting high levels of pressure at work and exhaustion.

These largely positive findings might at first seem puzzling given the current, unsettled context that the UK finds itself in. However, there was a great deal of uncertainty before the EU referendum, so people might be feeling more settled now. Employees might also be continuing to experience the optimism that often comes with a new government. For public sector workers it could be that some of the Government's messages on fairness and equality might be resonating with them. Trust and confidence in senior leaders in the public sector has certainly increased in this survey, as have opportunities for employee voice. There is also the possibility that the challenging work associated with negotiating the UK's exit package from the EU might be positively reflected in public sector workers' increased job satisfaction, aspects of engagement and opportunities to learn and grow.

When it comes to the UK's decision to leave the EU, employees are beginning to feel some impact from

an organisation and employee perspective. From an organisation perspective, a third think it is likely to increase their organisation's costs, while around a fifth think their exports will be less competitive and that investment in workforce training and skill development will be reduced. From an employee perspective, a fifth of employees believe the decision to leave the EU has led to a decrease in morale among colleagues and an increase in stress, while almost two-fifths (37%) of employees feel pessimistic about the future. The decision to leave the EU is also likely to impact labour mobility and the way organisations attract and retain talent. Organisations need to keep a sharp focus on talent retention and the reasons given by employees for seeking out and applying for new positions. Better pay and benefits tops the list, followed by wanting to increase overall job satisfaction and wanting to reduce stress. Over a quarter are seeking to do a different type of work altogether, while a similar number are unhappy with the leadership of their current senior management team. Flexible working hours and shorter commutes are also important to job-seeking employees.

Background to the survey

The CIPD has commissioned a twice-yearly survey among UK employees (including sole traders) to identify their opinions of and attitudes towards working life today.

YouGov conducted the latest survey for the CIPD of 2,224 UK employees in February and March 2017. This survey was administered to members of the YouGov Plc UK panel of more than 350,000 individuals who have agreed to take part in surveys. The sample was selected and weighted to be representative of the UK workforce in relation to sector and size (private, public, voluntary), industry type and full-time/part-time working by gender. Size of organisation was classified in the following way: sole trader (one-person business), micro business (2-9), small business (10-49), medium (50-249) and large (more than 250).

Emails were sent to panellists selected at random from the base sample. The email invited them to take part in a survey and provided a generic survey link. Once a panel member clicked on the link, they were sent to the survey that they were most required for, according to the sample definition and quotas. The sample profile is normally derived from census data or, if not available from the census, from industry-accepted data. Net scores refer to the proportion of people agreeing with a statement minus those disagreeing.

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Issued: April 2017 Reference: 7490 © CIPD 2017