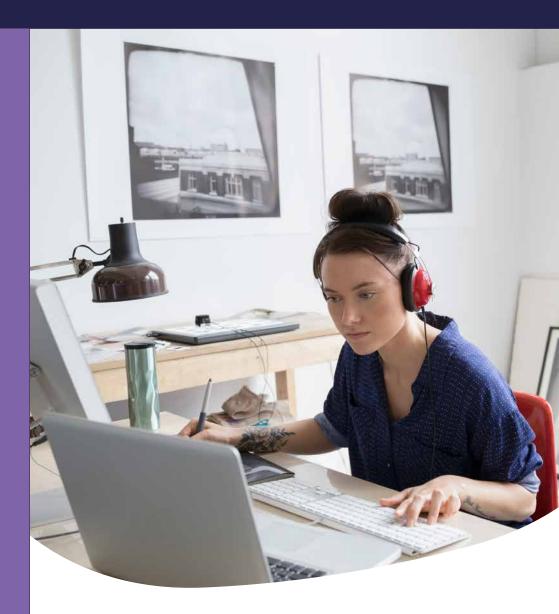
The Global Study of Engagement

Technical Report

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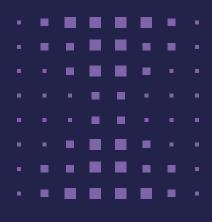
Study Highlights

The ADP Research Institute[®] (ADPRI) surveyed over 19,000 workers across the globe to measure their levels of engagement and identify what conditions at work are most likely to attract and keep workers.

We research engagement because it matters to employers and their workers. We know that when employees are not fully engaged, organisations suffer.

The study focused on aspects of engagement that organisations can actually influence rather than the myriad factors that are usually beyond an employer's control — such as political, economic, or individual concerns.

We found that teams and trust in team leaders are the most important influences on employee engagement.







Here are 10 of our key findings

1. Global engagement levels have not changed much in the past three years overall, but engagement in some countries has shifted significantly.

Only about 16 percent of employees are "fully engaged," and this number has not changed much since our study in 2015. This means 84 percent of workers are just "coming to work" instead of contributing all they could to their organisations.

Location matters. Although the overall level remained stable from 2015 to 2018, we found significant variation in percent of fully engaged by country. In eight countries (Argentina, Australia, Canada, France, India, Italy, Spain, and the United Kingdom) the percent of fully engaged increased. In four countries (Brazil, China, Mexico, and the United States) the percent of fully engaged decreased.

2. Being on a team increases engagement.

Workers who say they are on a team are 2.3 times more likely to be fully engaged than those who are not. This finding holds true within all countries in the study, and in many countries the disparity between non-team and team workers is even greater.

3. Organisations do not understand or act on the vital power of teams.

The challenge for almost all organisations today is that they are not set up to know very much about their teams. Most current HR systems are extensions of financial systems and only show their reporting structure via an organisational chart. Yet, most work happens in functional teams that can be fluid, depending on the project.

When organisations make great teams their primary focus — including what creates them and what can fracture them — we expect to see more significant rises in global engagement.

4. Trust in team leaders is the foundation of engagement.

When we examined the most engaged teams, we found that by far the best explainer of level of engagement was whether or not the team members trust their team leader.

A worker is 12 times more likely to be fully engaged if he or she trusts the team leader.

5. Knowing what is expected and using their strengths make team members engaged.

Two Engagement Pulse statements in the survey showed the strongest relationships to a worker's feeling of trust in his or her team leader:

"At work, I clearly understand what is expected of me"

"I have the chance to use my strengths every day at work"

When a leader can help team members feel clarity about expectations and communicate to them that their strengths are recognised and appreciated, these actions build trust, and a fully engaged team becomes more likely.

6. Gig workers are engaged, especially when they are part of a team.

We looked at whether work status as a full-time, part-time, or gig worker affected an employee's sense of engagement. Interestingly, the most engaging work status is to have one full-time job and one part-time job.

Gig-only workers who are part of a team are also highly engaged, with 21 percent of full-time gig workers reporting they were fully engaged.

7. Virtual workers are more engaged; those who travel are less engaged.

In all countries and industries, virtual workers who are part of a team are more likely to be engaged (29 percent) than those who work in an office (18 percent).

Engagement is affected differently if a person is in a virtual work environment or travels for work. Those workers who reported that they travelled for work displayed the lowest levels of engagement (11 percent).

8. More educated and higher-level workers are more engaged.

Workers with higher levels of education and a higher position in an organisation are both more engaged.

9. Millennials are slightly less engaged than baby boomers.

Age does not seem to be a significant factor in engagement, contrary to our initial hypothesis: 16 percent of millennials are fully engaged, as compared to 18 percent of baby boomers.

10. Women are slightly more engaged than men.

Since there are more men at higher levels in organisations, we thought men might be more engaged, but we found that gender does not make much of a difference. Globally, 17 percent of women are fully engaged, compared to 15 percent of men.



Teams work

Employee engagement can be complex at both the individual and organisational levels, but one overarching factor emerged from the survey: working on a team improves engagement — regardless of demographics, work status, or where someone works.

Even when functional teams are not part of an organisational chart, teams are important. It's important for everyone, including gig workers, to regularly work with others, have a sense of belonging, and trust their leaders.

Combined with our 2015 study, we believe this 2018 study is the largest and most reliable study of global worker engagement yet undertaken. Here is the full story.

Our global study of engagement

In July 2018, the ADPRI conducted a 19-country study to measure the relative levels of engagement of each country and to identify the conditions at work that are most likely to impact engagement. This study repeated and amplified a 2015 study of 13 countries that used the same survey and sampling methodology.

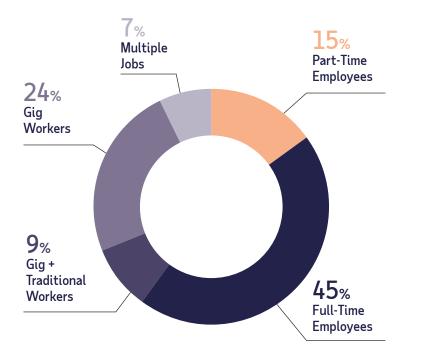
Survey and respondents

We surveyed a random sample of approximately 1,000 full-time and part-time workers in each country and analysed 19,346 responses.

The countries represented were: Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Mexico, the Netherlands, Saudi Arabia, Singapore, South Africa, Spain, United Arab Emirates, the United Kingdom, and the United States.

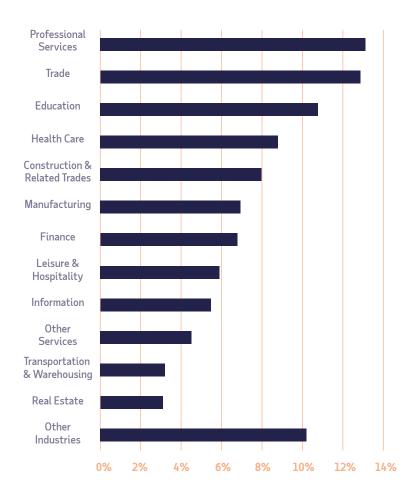
The employment status of the respondents is shown in the chart below.







Thirteen industries were represented across all 19 countries, with each industry selected by 1-22 percent of participants from each country.



How we determined engagement

We developed a survey with 50 questions to measure:

- Experiences at work with a special focus on engagement
- The existence and extent of teams in today's workplaces
- The prevalence and appeal of a growing gig economy
- The potential consequences of turnover intent

We examined many variables that could possibly contribute to a feeling of engagement at work, such as industry, company size, position title, education level, gender, part-time vs. full-time status, and gig vs. non-gig employment.

At the survey's core was an eight-question measure of engagement: The Engagement Pulse. We've researched these items extensively and found that workers who answer these eight questions positively are more often seen as highly productive and less likely to leave.

The Engagement Pulse is designed to measure the conditions of engagement created by the team leader. Specifically, it investigates four broad areas:



Purpose

Understanding what is expected and how an individual's work benefits the organisation and others.



Excellence

Understanding what is valued at work, sharing those values with co-workers and leaders to improve relationships and trust, and having the opportunity to use one's strengths.



Support

Feeling effective in one's actions, having a sense of self-worth, and the care, support, and recognition of others at work.



Future

Confidence in the future of the organisation and the opportunity to be challenged and grow in one's job.

How we assessed who is fully engaged

The Engagement Pulse statements are:

- 1. I am really enthusiastic about the mission of the company.
- 2. At work, I clearly understand what is expected of me.
- 3. In my team, I am surrounded by people who share my values.
- 4. I have the chance to use my strengths every day at work.
- 5. My teammates have my back.
- 6. I know I will be recognised for excellent work.
- 7. I have great confidence in my company's future.
- 8. In my work, I am always challenged to grow.

Unlike many engagement surveys that ask about general employee happiness or satisfaction, these eight items are designed to measure specific aspects of employee engagement that organisations and team leaders can influence. These are factors that make a difference for employees, and that employers can change and improve.

Based on survey responses, we calculated the percentage of workers who are fully engaged in any team, company, or country, and looked at the conditions most likely to lead to being fully engaged at work.

To assess whether a respondent was fully engaged, we looked at the extreme positives on each question, giving more weight to the questions with the strongest relationship to positive productive outcomes. The workers who were not fully engaged we call, simply, "coming to work." These workers aren't necessarily disengaged; they just aren't contributing all they could.

Why employee engagement matters.

There is a real cost to organisations when employees are merely coming to work. For every one percent drop in Full Engagement, the likelihood of voluntary attrition increases by 45 percent (Nine Lies about Work: A Freethinking Leader's Guide to the Real World, in press). The direct cost to organisations for each early departure ranges from a little over half the salary of a front-line worker up to nearly 2.5 times the salary of a knowledge worker or supervisor (LinkedIn, August 2013)!

In contrast, companies with a highly engaged culture perform better, with higher stock prices, higher productivity, lower turnover, and greater customer satisfaction (Forbes, May 2017).

Having a disengaged workforce can cost organisations millions of dollars. Across the global talent community, the cost is in the billions.

What we learnt

Global

Global engagement is low.

Global engagement is dismal. Only 15.9 percent of employees worldwide are fully engaged, down slightly from 16.2 percent in 2015. This means that 84 percent of workers are merely 'coming to work', and are not contributing all they could to their organisations.

There are many entrenched reasons for low engagement around the globe. Dangerous or monotonous work, macro-economic forces, and labour policies of certain countries all contribute to the work environment. While these factors can be beyond an employer's control, focusing on the Engagement Pulse factors will help organisations be more intentional and systematic in the way they seek to engage their workers, regardless of external influences. This happens primarily through developing effective teams and trust in team leaders.

But first, here is the data and what we learnt about global engagement in general.

Location

Engagement varies significantly by country.

Although overall engagement rates were stable from 2015 to 2018, we found significant variations by country. In eight countries, the percent of fully engaged employees increased, while in four countries, the percent of fully engaged decreased.

India showed the largest increase in percentage of fully engaged workers, up by five points to 22 percent. China showed the largest decrease, with a 13-point drop in percent fully engaged from 19 percent to six percent.

Despite some increases, the countries with the highest level of employees who were fully engaged are still at less than 30 percent, with most countries in the six percent to 17 percent range. The consistency of low global employee engagement over time indicates that the engagement initiatives we are using are not making much, if any, difference, and that it's time to understand and address engagement in new ways.



Country	2015	2018	Change
Argentina	13%	15%	+2%
Australia	14%	16%	+2%
Brazil	16%	14%	-2%
Canada	15%	17%	+2%
China	19%	6%	-13%
Egypt	-	15%	-
France	15%	17%	+2%
Germany	14%	14%	0%
India	17%	22%	+5%
Italy	14%	16%	+2%
Mexico	14%	13%	1%
The Netherlands	-	10%	-
Saudi Arabia	-	16%	-
Singapore	-	20%	-
South Africa	-	16%	-
Spain	13%	16%	+3%
United Arab Emirates	-	26%	-
United Kingdom	14%	15%	+1%
United States	19%	17%	-2%

Industry

Construction and professional services have higher engagement.

There are differences seen across industries. The highest engagement occurs in construction and professional services.

We know that education and level in organisational hierarchy also affect engagement (see below). These factors could explain some of the differences by industry, particularly in the overall averages for industries such as manufacturing and hospitality that have a high percentage of workers at entry-level positions.

But this does not explain the relatively higher engagement in Construction, which also tends to have more entry-level positions and less stringent formal education requirements. We believe that the nature of the work, often involving teams and a strong sense of purpose in creating permanent structures that workers can take pride in, may explain why construction workers are some of the most engaged employees.

Industry	Percent fully engaged
Construction & Related Trades	19%
Professional Services	18%
Trade	17%
Education	16%
Real Estate	16%
Information	15%
Health Care	14%
Finance	14%
Leisure & Hospitality	14%
Manufacturing	14%
Other Services Except Public	14%
Transportation & Warehousing	13%

Organisational size

The size of an organisation does not affect engagement.

The differences in the percent of fully engaged employees across company size are minimal, which signals that engagement is not dependent on the size of the organisation.

Company Size	Percent fully engaged
1–49 employees	17%
50-999 employees	15%
1,000+ employees	17%
Total	16%

Education

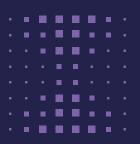
Higher education means higher engagement.

We see an upward trend in engagement with the more education a person has achieved. The highest engagement across countries and industries occurs with those who have a professional or advanced degree.

Education's impact on engagement could be related to more work opportunities and the ability to both understand and use one's strengths. The data below on hierarchy is consistent with this explanation.

Education	Percent fully engaged
Professional or advanced degree	19%
4-year degree	15%
2-year degree	14%
Some college, no degree	16%
None of the above	12%

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Position in organisation

Engagement improves as workers advance.

Engagement differs by the level an employee holds within an organisation. The higher the level, the higher the engagement.

This data is consistent with our prior findings on employee retention, showing that retention improves when employees become managers with direct reports. Entry-level employees and managers without direct reports have monthly turnover rates of 2.2–2.4 percent. Once managers have direct reports, monthly turnover drops to 1 percent. (See Getting Your Retention Strategy Right, 2018 ADP.)

Primary role	Percent fully engaged
Executives (e.g., C-Level Executive, EVP, Director, Partner)	24%
Management (e.g., Manager, Supervisor, Head of Department)	15%
Individual contributors (e.g., Assistant, Junior Analyst, Account Associate)	10%

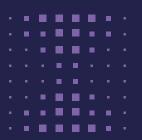


Employment status

Gig workers are more engaged.

According to our findings, the most engaging work status is to have one full-time job and one part-time job. While average global engagement is 16 percent, a full 25 percent of those who have a full-time job and also a part-time job are fully engaged. **°***

Employment status	Percent fully engaged
l full-time job & l part- time job for different companies	25%
1 full-tim e job & am self employed full time as a contingent worker	21%
I am self employed full time as a contingent worker and I do not work for anyone else	21%
1 part-time job & am self-employed full time as a contingent worker	19%
l full-tim e job	15%
l part-time job	14%
I am self-employed part time as a contingent worker and I do not work for anyone else	14%
2 full-time jobs for different companies	14%
1 part-time job & am self employed part time as a contingent worker	13%
1 full-time job & am self employed part time as a contingent worker	12%
2 or more part-time jobs for different companies	9%



A possible explanation is that having both a full-time job and a part-time job brings "the best of both worlds." The full-time job brings stability and benefits, while the part-time role brings flexibility and the chance to do something the worker truly enjoys (as well as gain additional earnings).

To help further define those who are working more than one job, we asked respondents to describe their work. Even within the contingent worker population, there are differences in the levels of engagement.

Employment status: 2nd Job	Percent fully engaged
Self employed full time as a contingent worker	23%
Full-time work for a company/organisation	15%
Part-time work for a company/organisation	14%
Self employed part time as a contingent worker	13%

The 10 percent higher engagement rates of self-employed full-time workers versus self-employed part-time workers could be related to better financial stability or a person's connection to the work and people who he or she works with.

We expect that both factors matter, but especially the consistent connections with a team. When we asked gig workers if they worked on teams, the ones who were part of a team were 21 percent fully engaged, but engagement dropped to only 11 percent for those who were not part of a team.

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Where work happens

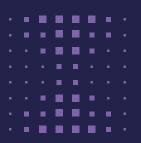
Virtual workers are more engaged.

We asked respondents about the amount of time they work virtually to understand if differences existed in the levels of engagement. We wondered whether individuals who work virtually would be less engaged, but this is not the case. The highest engagement occurs in those who work virtually at least 80 percent of the time.

This is an important insight when we consider the tech companies in Silicon Valley who design workspaces so people can encounter each other regularly. While regular connections to people are important, many people also desire the ability to "tune it out" when they need or want to.

Percent virtual	Percent fully engaged
0%-19%	12%
20%-39%	16%
40%-59%	15%
60%-79%	18%
80%-99%	23%
100%	23%

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Getting to work

Commute times are not an important part of engagement.

Average commute times have very little effect on engagement. Individuals who have very short commutes (less than 10 minutes) and very long commutes (one hour or more) have the highest levels of engagement. Engagement drops by 13 percent for those who commute between 11 and 60 minutes.

While the differences are nominal, it also makes sense that short commutes don't matter and that people with long commutes have figured out how to use, and maybe even enjoy, that time.



Average commute	Percent fully engaged
0–10 minutes	17%
11-20 minutes	15%
21-30 minutes	15%
31-60 minutes	16%
l hour or more	17%

Travel

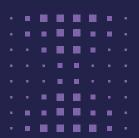
The road is hard.

Engagement happens at almost the same level no matter the work location, except for those who travel for business. When your primary location for work involves travel, engagement drops an average of 45 percent.

We were not surprised that travel has a negative impact on work. The uncertainties of travel, constant adaptation to new people and places, and the loneliness of regularly being away from friends and family is difficult.

Location	Percent fully engaged
Company office	17%
Home office	16%
Client place of business	15%
Traveling	11%





Age

Age doesn't matter.

We examined whether generation affects engagement. Contrary to our initial hypotheses, we found very little difference in engagement by generation. Sixteen percent of millennials are fully engaged, compared to 18 percent of baby boomers.

The average global engagement rate is 16 percent and all age groups are in about the average range. This is an indicator that people are looking for similar things regardless of age, but few are finding what they want.

Age group	Percent fully engaged
18-29 years	16%
30-44 years	17%
45-60 years	15%
> 60 years	18%



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Gender

There is very little gender difference in engagement.

Engagement does not differ much by gender. Women are 1.1 times more likely to be engaged than men.

We expected men might have the engagement edge, since they have more representation in upper levels of organisations as well as industries with stronger engagement such as construction. However, gender differences in engagement are narrow, indicating that other factors are more important.

Gender	Percent fully engaged
Female	17%
Male	15%

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Teams and trust are the keys to engagement



Although each of the factors previously discussed revealed interesting relationships with engagement, one factor was more important than all others to explain why a worker was fully engaged: the worker was on a team. "Workers who say they are on a team are 2.3 times more likely to be fully engaged than those who are not."



Team	Percent fully engaged
On a team	17%
Not on a team	8%

Dynamic teams improve engagement.

The highest engagement happens in cross-functional and dynamic teams that change over time, with 21 percent of workers on these types of teams being fully engaged.

The differences in engagement level by team configuration could indicate that both new challenges and new collaborations might contribute to improving engagement. In addition, engagement suffers when teams don't feel seen, and are likely not supported, by the organisation.

Types of teams	Percent of those on teams	Percent fully engaged
Dynamic/changing over time	37%	21%
Cross-departmental/cross- functional	29%	21%
Visible on an organisation chart	25%	20%
Static team	28%	19%
Disconnected from organisational hierarchy	13%	18%

Globally, virtual team workers are more engaged.

Interestingly, in all countries and industries, virtual workers — as long as they are part of a team — are more likely to be fully engaged than those who work in an office. Virtual team workers are 29 percent fully engaged compared to 14 percent for team members who work in a traditional office. This finding suggests that a) physical proximity is not required to create a sense of team, and b) the flexibility and ease inherent in working virtually is appealing to many workers (as long as they feel part of a team).

The power of virtual work also is true regardless of country. The countries with the highest numbers of team workers are Saudi Arabia and India, each with 94 percent. The least, interestingly, is the United Kingdom, with 65 percent. Notwithstanding geography, it is likely that workers are part of a team, and usually it's a dynamic team.

Across the world, the data reveals that it is extremely difficult to engage workers who do not feel they are part of a team.

Country	Percent team membership	Percent fully engaged for those on a team
Saudi Arabia	94%	16%
India	94%	23%
China	93%	7%
Brazil	90%	15%
Mexico	90%	13%
South Africa	89%	16%
Egypt	89%	16%
United Arab Emirates	88%	29%
The Netherlands	88%	11%
Singapore	86%	22%
Australia	86%	17%
Argentina	83%	17%
Spain	79%	18%
United States	74%	19%
Italy	74%	19%
France	72%	19%
Canada	72%	20%
Germany	68%	17%
United Kingdom	65%	18%



Teams matter more than industry.

The influence of teams on engagement also holds true no matter the industry. Construction has the most team workers at 89 percent. Real Estate has the fewest at 81 percent.

Industry	% Team membership	% Fully engaged for those on a team	% Fully engaged not on a team
Construction and related fields	89%	20%	5%
Finance	87%	16%	6%
Manufacturing	87%	15%	8%
Health care	86%	15%	9%
Education	86%	17%	8%
Trade	84%	19%	9%
Leisure & hospitality	83%	15%	9%
Information	83%	17%	4%
Transportation & warehousing	83%	15%	1%
Professional services	82%	20%	10%
Real estate	81%	18%	6%
Other services	73%	15%	10%
Other	72%	18%	10%

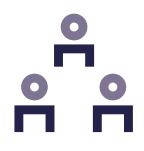
Most workers are on more than one team.

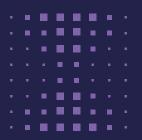
Most people do their work in teams, and many of them work on more than one team.

For companies of more than 150 people, 91 percent of employees report working on teams, and of these, 70 percent report working on more than one team. Even gig workers report working on teams — albeit at a lower rate of 67 percent.

In organisations with more than 50 workers, the number of teams that someone is a part of makes a difference. There is about a 29 percent shift in engagement between those belonging to one team and those on more than one team. Workers are 1.3 times more likely to be fully engaged while working on more than one team.

How many teams?	Percent fully engaged
One team	14%
More than one team	18%





Even in small companies, people are working on multiple teams. In companies of 49 employees or fewer, 54 percent report working on more than one team.

How many teams?	Percent on one team	Percent on more than one team
1–49 employees	46%	54%
50–999 employees	30%	70%
1,000+ employees	30%	70%

So, teams are more significant to employee engagement than country, industry, or the size of the organisation. Moreover, multiple, dynamic, cross-functional teams are the most effective for fully engaged workers.

Trust

Trust in leaders is the key to teams.

When we examined the most engaged teams, we found that, by far, the best explainer of level of engagement was whether or not the team members trust their team leader.

Two Engagement Pulse statements in the survey showed the strongest relationships to a worker's feeling of trust in his or her team leader:

- At work, I clearly understand what is expected of me.
- I have the chance to use my strengths every day at work.

This data suggests that these two conditions — knowing what is expected and playing to one's strengths — are the foundations of trust.

When a team leader — despite the ambiguous, fluid, and fast pace of the world of work — can help team members feel clarity about expectations and communicate to them that their strengths are recognised and used frequently, then trust is built and a fully engaged team becomes more likely.



Teams are important for gig workers, too.

As part of our research, we examined the prevalence of gig work and its effect on engagement.

Gig-only workers, when part of a team, are also highly engaged. Gig workers are 21 percent fully engaged compared to 16 percent of traditional workers.

The most common reasons for doing gig work are flexibility of schedule and the chance to do work that a worker loves. As we saw with part-time work, these two factors are an important part of engagement.

Interestingly, the most common title of gig-only workers is "president," suggesting many people take gig work because they like to see themselves as their own boss.

When we examine all eight of the engagement questions closely, we see that gig-only workers score more positively on six of the eight questions, but significantly lower on the remaining two. The two questions that gig-only workers scored lower on than traditional workers were:

- I am surrounded by people who share my values.
- My teammates have my back.

This suggests that, as other researchers have noted, gig-only workers can feel more isolated than other workers.

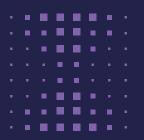
However, when we examined gig-only workers who were also on a team, the differences regarding these two questions disappeared. So, gig work does not necessarily have to be isolating. If a gig worker can work as part of a team, then he or she will net all the benefits of gig work — greater flexibility, a higher chance of doing work he or she enjoys, being his or her own boss, while at the same time feeling the benefits of traditional work: the safety and support of teammates. "Of those who strongly agreed that they trusted their team leader, 45 percent were fully engaged. In contrast, those who didn't strongly agree were only six percent fully engaged. This means a worker is 12 times more likely to be fully engaged if he or she trusts the team leader. Across countries, industries, and positions, a trusted team leader is the foundation for building highly engaged teams."

Putting it all together



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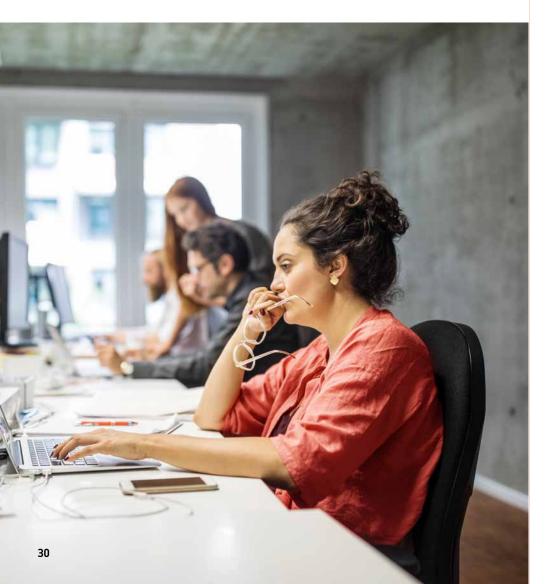




Results from our study help to shed light on global engagement across 19 countries on six continents. Engagement is a powerful construct that has historical ties to productive outcomes. Fully engaged workers are more productive and less likely to leave.

This current study had two primary objectives:

- To measure the relative levels of engagement of the original 13 countries and add six additional countries to the global study.
- To examine the conditions in the world of work that affect engagement and that organisations and managers can influence or change.



"We learned that global engagement is about the same as it was back in 2015. However, for some countries, engagement levels vary significantly. We also learned that feeling part of a team is critical to being fully engaged, and teams should be led by someone team members can trust."

Improving teams and engagement

So, what should organisations do with this information?

For starters, organisations must be able to see, support, and measure teamwork. However, most current HR talent management systems aren't built to function in this way.

Organisations simply don't know how many teams they have, who is on each team, or what the best teams are like. The reality is that anything and everything an organisation wants from its people — productivity, engagement, performance, innovation, inclusion — is mediated through teams. Yet, teams are still erroneously viewed as static organisational structures, rather than dynamic, cross-departmental functions that get actual work done.

The challenge for almost all organisations today is that they are not set up to know very much about their teams. Human Capital Management (HCM) systems can't even identify teams.

We have found that most current HR systems are extensions of financial systems. They are only able to show who-reports-to-whom boxes on an organisational chart. The trouble is that most work does not happen in these structured boxes. Of those who say they work in teams, 64 percent report they work on more than one team and 75 percent report that the teams are not represented in the organisational chart.

For everyone involved in building better companies, virtually nothing that is being done to increase performance or improve the quality of work is working. We believe that's because most companies don't understand how many teams they have or who is on which team. This means they also don't know what is happening on the best teams.

We've all been digging in the wrong places. Everything we are doing to make work better has overlooked where the work actually happens. Large organisations are functionally blind to where their work is happening. So, it's no wonder that productivity isn't getting better and engagement isn't going up.

Although being engaged won't stop employees from looking at new jobs, it does make them less likely to actually leave. This truth holds for all employment types, including gig work. So, if organisations use contractors or gig workers — and today many do — the faster and more genuinely they can introduce these workers into teams, the more they will see high levels of engagement, productivity, and retention they will see from these workers.

The inverse is also true: the more organisations can make traditional work similar to gig work — with greater flexibility and more chances to do what people love — the more they will see higher worker engagement, productivity, and retention.

"People want to work with other people, and people do their best working together. When they do, engagement almost doubles."



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