

The Work Report

Australians and how they feel about work

Edition 1, 2023 – October

A complimentary report



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When asked to explain how they feel and why, the most common topic they mention is...work

For many Australians, work is how we spend most of our waking time. Do we work because we have to, or because we enjoy it. This is an important question when you consider time at work comes at the cost of other important things in life – self, friends, and family.

This is our first complimentary report about work. In it, we introduce some key metrics of workplace engagement and explore the issue of work life balance. We hope you find it useful and interesting.

EVOLVED

Introducing the Work Report

Looking at work in context of our lives

In this first edition of The Work Report, we have listened to employees to understand what matters using the latest in AI technology.

Know how you compare...

In The Work Report, we've replicated our core questions asked on our proprietary Employee Listening workplace diagnostic tool and obtained feedback from over 3,000 Australians about work.

You can use this report to explore what matters in your industry. It also provides a benchmark set of metrics to see how your workplace compares.

What creates engagement

Working means you give up your time in return for money. However, for many of us, it is also about purpose and much more.

In this first edition we explore the drivers of workplace engagement and consider the importance of work life balance.

Project objectives

1

Explore how Australians feel about work

2

Provide critical benchmark information from which to compare your workplace to Australian norms

3

Provide insights into how experiences vary across key demographic groups

4

Build a baseline from which to track changes over time

How we track workplace experiences

- The Evolved Omnibus is a nationally representative tracking study that runs 12 months of the year with 1,000 surveys each month. The surveys are collected from the Pureprofile panel.
- The sample is quota controlled with weekly representative targets set on age, gender and location (state).
- The questions take 2 minutes to complete and comprises these questions – see right
- In this October report, we explore key workplace metrics to understand the employee experience from April to October 2023. The total base of analysis is (n=3,850).

Please use the slider below to indicate how you felt over the last day (24 hours)?

Why do you feel that way today? Feel free to share what is on your mind

...and in the last 24 hours, how many hours did you spend doing the following? - Work

What industry are you employed in?

How likely would you be to recommend your employer to others?

How would you describe your role? - Senior leadership, Manager, other role no DRs

Rate - My level of engagement at work, My physical energy at work, My connection with my current employer's purpose and values, My brain power and focus at work

For employers to consider...

This report gives you an idea of how your workplace rates using the measure of eNPS. If you'd like to benchmark your workplace, let us know!

Beyond benchmarking, we have identified some 'truths' from engaging with over 3,000 Australian employees. We have identified what it is that makes for happy, healthy and engaged employees.

We know from other research that such employees are more likely to provide discretionary effort, less likely to leave and are more likely to take sick leave. In other words, they become a powerful force in your organisational success.

The truth that this report exposes is, that too many Australians are not happy at work and are disengaged. It is important for employers to focus on addressing these issues both from their own self interest, but also because the workplace is the most important overall driver of our general wellbeing and happiness.

The Drivers of Workplace Engagement

Based on analysis of over 3,000 AI powered conversations with EVE – Evolved Verbatim Engine™



Australia's most engaged industries

Advertising, Arts & Media	+ 37.5
Design & Architecture	+ 28.6
Marketing & Communications	+ 27.3

Australia's least engaged industries

Government & Defence	-11.6
Science & Technology	-12.0
Accommodation Services	-23.9

The Role of Work in our Daily Lives...

Below is an example conversation from an Australian talking about their day and how work fits into it with EVE™ our chat AI. The chart on the right shows that work topics are common and on average, have mildly negative sentiment



Hi there, I'm EVE. Why do you feel that way today? Feel free to share what is on your mind.

I have been feeling exceptionally tired from work, mainly from burnout however mostly from the highly narcissistic environment. My managers are extremely toxic and the turnover rate has seen 5 people resign in the past month.



I understand that it must be incredibly draining to be in an environment like that. How has it been affecting your mental and emotional well being?

It has been making very tired all the time, i dread going to work and i dream of the day that i get lucky and can resign.



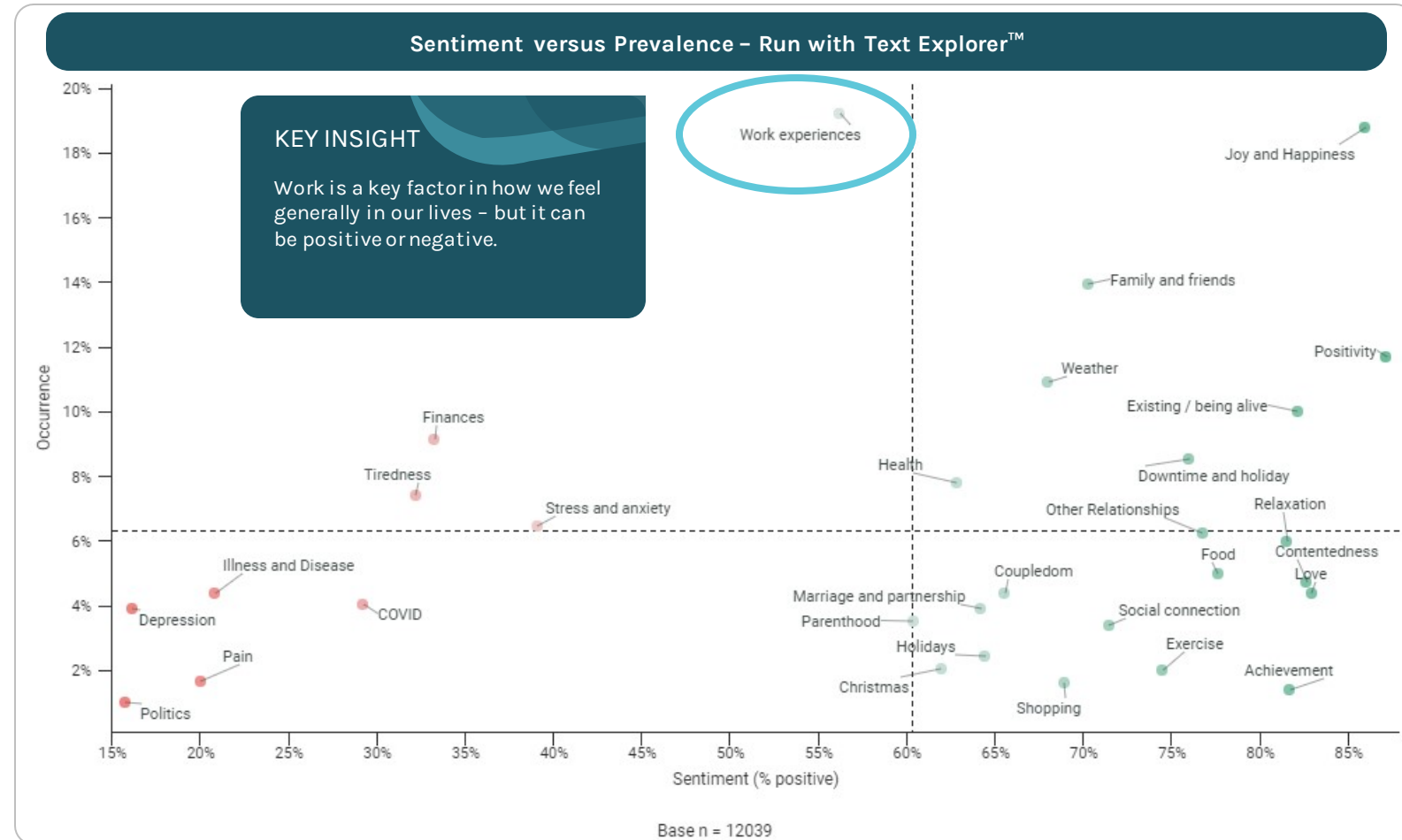
It sounds like the environment is causing you a lot of stress and anxiety. How have you been coping with it?

I have been relaxing with some of my favourite podcasts and meals. I have also been spending lots of time with my family.



That's great that you have been able to relax and spend time with family. What do you think could make your situation at work more bearable?

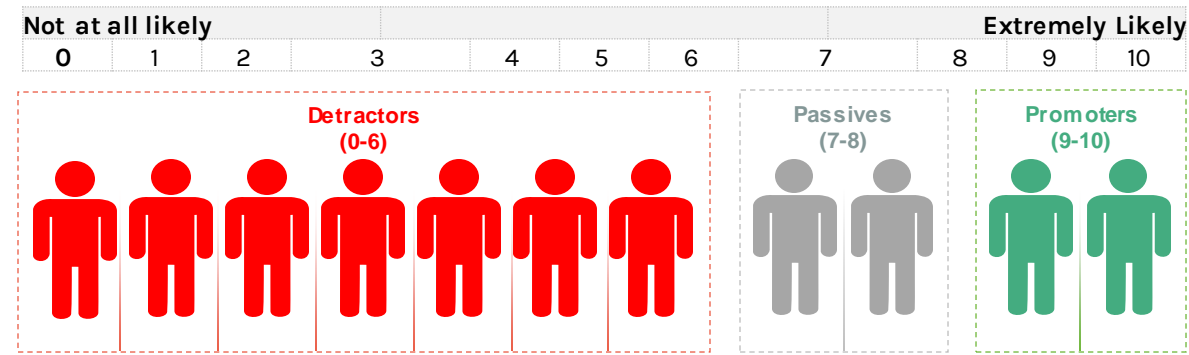
If my manager resigned and my workplace just shut down. During the pandemic i was so happy because there was no work.



Introducing Workplace eNPS - Explainer

Just like Customer NPS, Workplace NPS (eNPS) provides a standard measure of workplace engagement. The Evolved Employee Listening system uses eNPS as one of several standard metrics to benchmark performance.

How likely would you be to **recommend your employer to others?**



% rating 9-10 minus % rating 0 to 6
Score Varies from -100 to +100

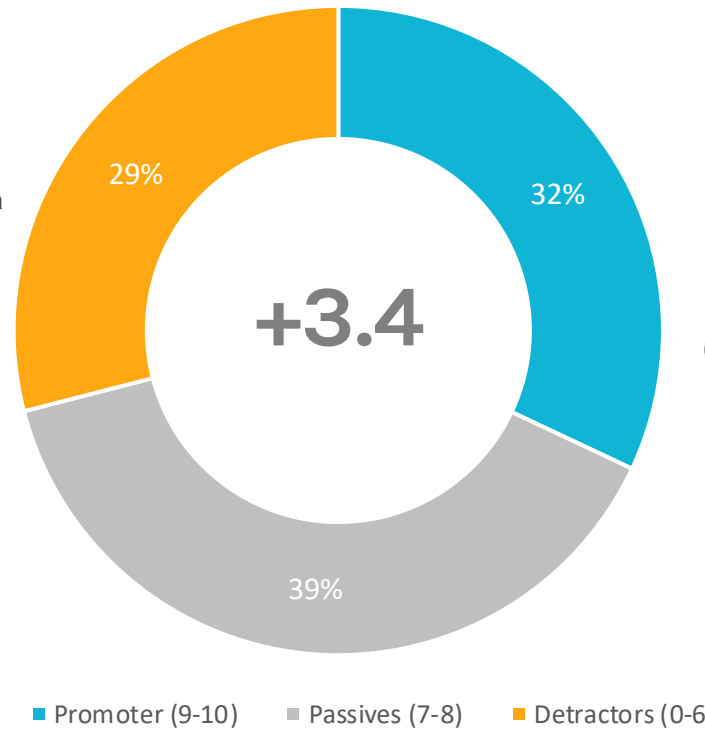
Result	Interpretation
-100 to 0	Needs improvement
1 to +30	Good
+31 to +70	Very Good
+71 to +100	Great

- The Net Promoter Score (NPS) is a widely used performance metric that provides insights into customer loyalty and perceived performance. **Workplace NPS (eNPS) is the same but about work.**
- eNPS measures the likelihood of an employee recommending their place of work to others on a scale of 0-10, with 0 being not at all likely and 10 being extremely likely.
- Based on the responses, customers are classified into three categories: **Promoters (9-10), Passives (7-8), and Detractors (0-6)**. The eNPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters, resulting in a score ranging from -100 to +100.
- To help understand the results we have analysed feedback about work experiences provided in our happiness discussions (see previous page)

A third of Australians would not recommend their place of work to others

Australian workplaces have a shockingly high number of detractors. Just under a third of Australian's fall into the detractor range with 39% 'passive' and around a third (32%) Promoters.

How likely would you be to recommend your employer to others? (base n=3,850)



Tired, exhausted from work and had a few average nights sleep. Worries about further interest rate rises today.

I understand. What have you felt would help make this day a bit better?



Having a bit more energy.

How do you usually try to get that extra energy?

Get a good rest. Find motivation to do things I enjoy doing.



What sorts of activities do you find motivating and energizing?

Doing exercise such as going for a run or a bike ride.



I'm feeling healthy and happy with my life family and work.

That's wonderful! What do you think has contributed to your feeling of contentment?



My family and friends my job and health.

How have your family and friends helped you to feel content?

Just by being there spending time with them.



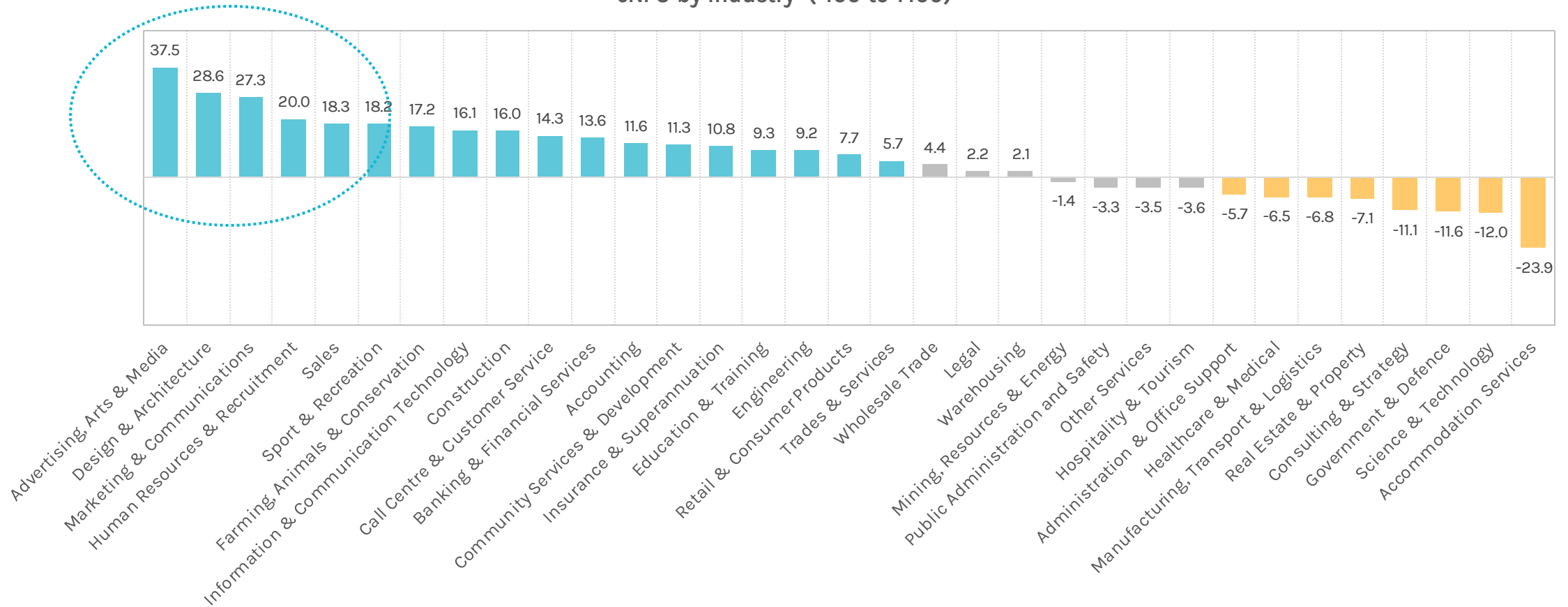
What impact have those moments of spending time together had in helping you feel content and healthy?

Caring about me and vice versa supporting each other.

Want to be happy at work – be creative and communicate

The top performing industries for eNPS require employees to exercise their creative selves and have a strong focus on personal interactions. At the other end of the spectrum industries with negative NPS tend to have a strong technical, administrative focus.

eNPS by Industry (-100 to +100)



Base: Apr-Oct 2023 (n=3,850)

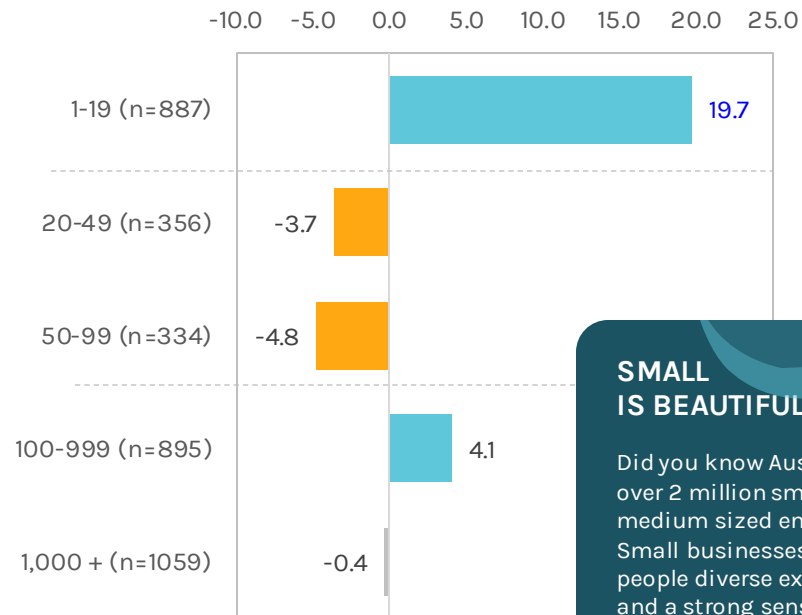
Q: How likely would you be to recommend your employer to others?

↑ significantly higher lower at p<.05 versus overall average | | *Caution, base < n=30

Small business sets the tone for happier employees

Those most engaged with work are people that work in small companies and are in senior leadership roles. The latter is true even when we control for company size.

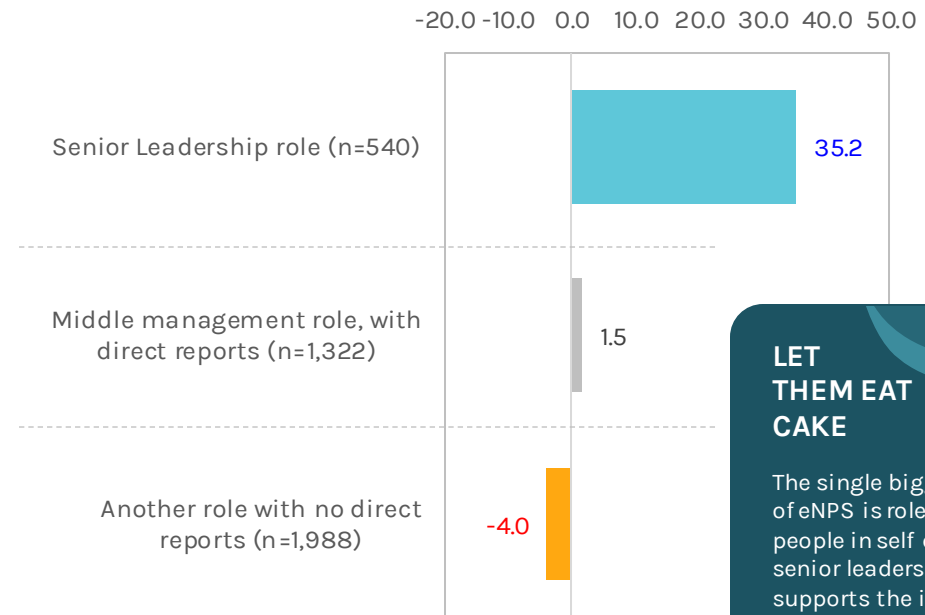
eNPS versus Company size (employees)



SMALL IS BEAUTIFUL

Did you know Australia has over 2 million small and medium sized enterprises! Small businesses give people diverse experiences and a strong sense of purpose. Often it is the mid-sized companies caught between flexibility and strong support systems where life is most challenging.

eNPS versus Role in Company



LET THEM EAT CAKE

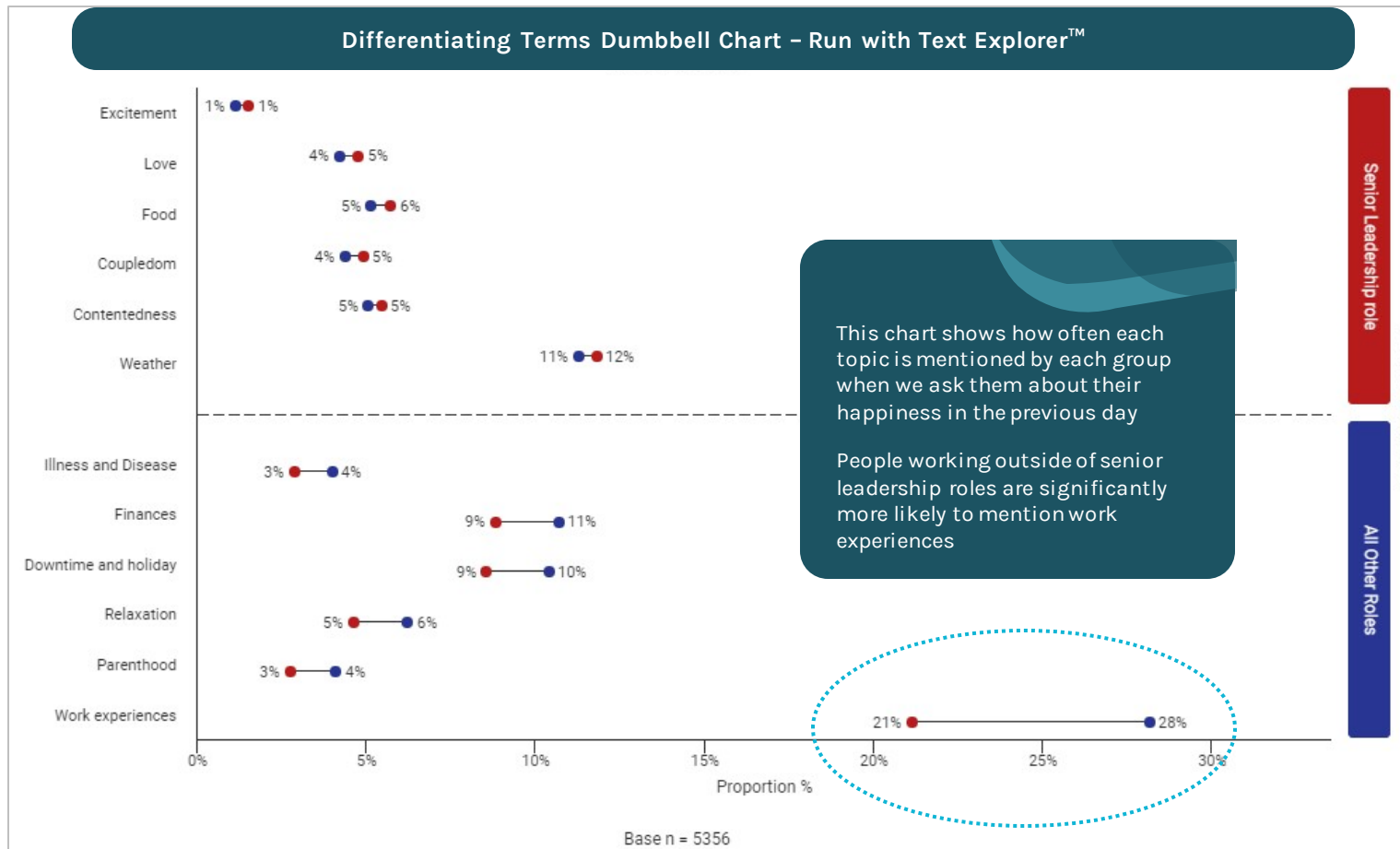
The single biggest predictor of eNPS is role – that is people in self described senior leadership roles. This supports the idea that freedom and agency are important factors in how much we get out of work –the hierarchies at work create negative experiences for many employees.

Base: Apr-Oct 2023 (n=3,850)

Q: How likely would you be to recommend your employer to others?

↑ ↓ significantly higher lower at p<.05 versus overall average | | *Caution, base < n=30

When we look at the broader life outlook, the difference in outlook of our leaders and followers becomes clear...



I'm very stressed about upcoming projects with work. I want it to all go well but feel that my lack of experience will show and expose me as an imposter in my field.



Thank you for sharing. I appreciate you being so open and honest. I encourage you to seek support, if needed.

I already do have support systems in place.



That's good to know! What kind of support do you have in place?

Family, friends, and professionals that I can speak to.

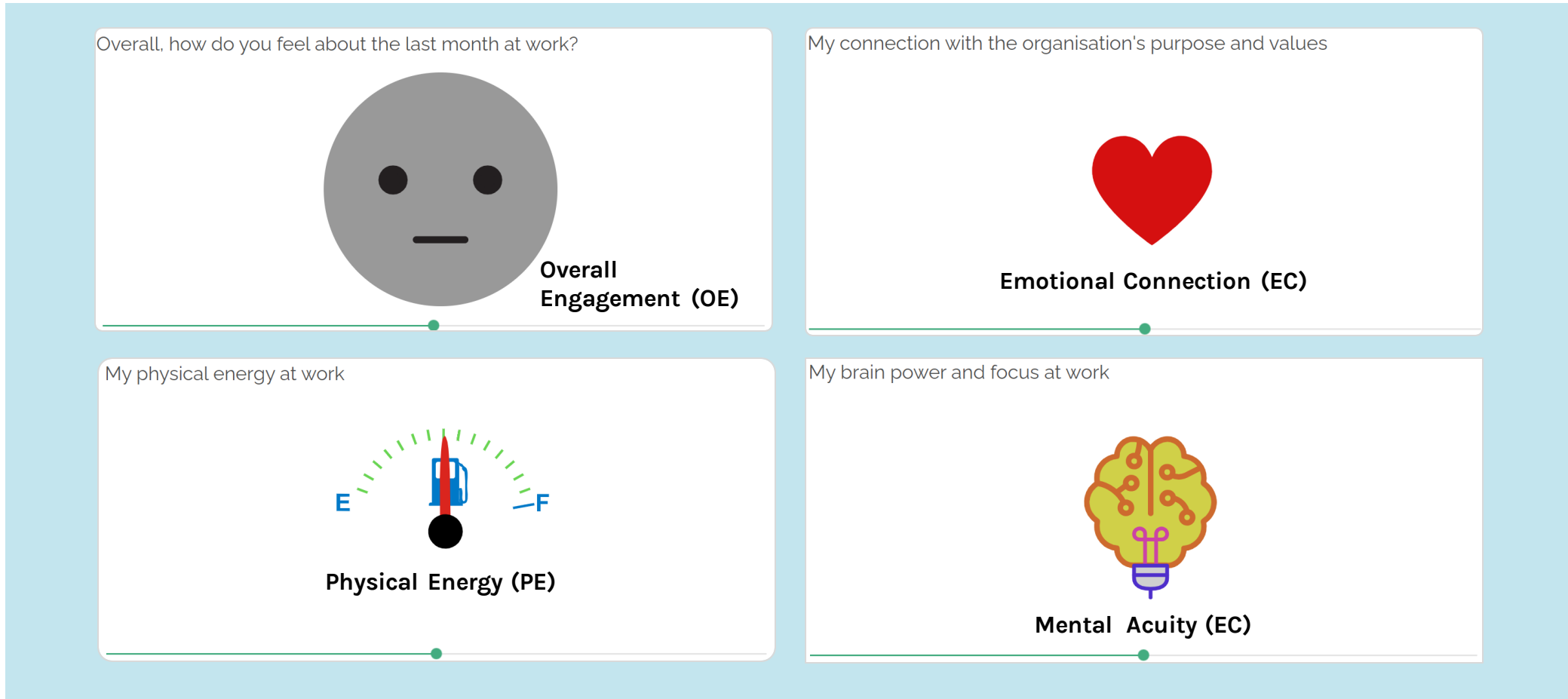


That's wonderful to hear. How have these support systems helped you manage your stress around your upcoming projects?

They are understanding of my feelings and are able to help me talk out the situations I am in.

Introducing Employee Listening Smile Badge - Explainer

For 3 years, Evolved has been measuring Employee Engagement using the Smile Badge system. Employees rate their workplace feelings on four key dimensions that are predictive of eNPS. Each is scaled from 0 to 100



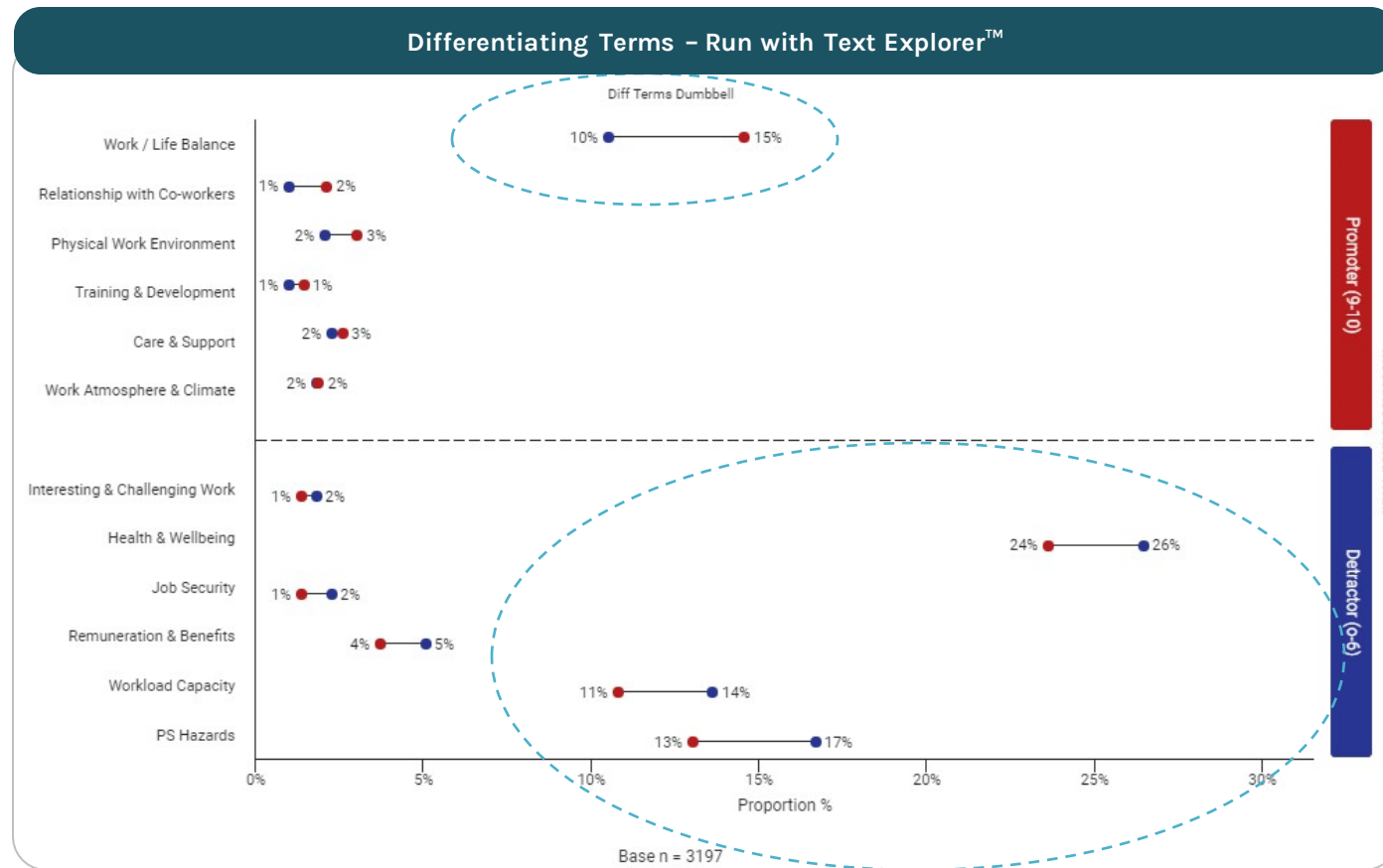
Base: Apr-Oct 2023 (n=3,850)

Q: Rate each area on the scale

↑ ↓ significantly higher lower at p<.05 versus overall average | | *Caution, base < n=30

The key to workplace enjoyment is work life balance and health and wellbeing

The chart shows the percentage of workplace detractors or promoters that mention each topic in our Employee Listening workplace categorization model.



Base: Mention one or more workplace topics in daily happiness

Base: Apr-Oct 2023 (n=3,850)
 Q: Rate each area on the scale
 ↑ significantly higher lower at p<.05 versus overall average | | *Caution, base < n=30

KEY INSIGHT

By far the strongest predictor of being a workplace promoter is that you have a positive perception of work life balance. Bring on the 4 day week.

I have just started leave from work and am going overseas with my family tomorrow.



How are you feeling about the upcoming trip?

Very excited, it has been a long time since I've had a holiday due to work commitments and covid etc.



What are you most looking forward to on the vacation?

Relaxing and seeing places I have never seen before. The Grand Canyon will be a standout, I think.



Wow, that sounds amazing! What makes the Grand Canyon in particular stand out to you so much?

It's sheer size and natural beauty, nothing had to be built, it's all done by nature.

KEY INSIGHT

These areas are predictive of workplace detractor – mentioning of Health and Wellbeing, Workload and Capacity issues and PS Hazards (e.g. bullying or other psychological distress) at work. Health and Wellbeing factors can be inside or outside of work.

Topical Summary Drill Down – Work Life Balance

GPT Generated Summaries

Overall, achieving a positive work-life balance is crucial for personal happiness and overall well-being. It allows individuals to lead fulfilling lives both inside and outside of work, fostering stronger relationships, improved mental and physical health, and a greater sense of purpose.



Positive Work Life balance

- People who have a positive work-life balance often report feeling fulfilled and satisfied in both their professional and personal lives.
- They can effectively manage their time and prioritise their tasks, allowing them to dedicate quality time to their families, hobbies, and personal development outside of work.
- These individuals have a healthy level of job satisfaction and can disconnect from work during non-work hours, leading to reduced stress levels and increased overall happiness.

Fortunate to live in Australia and feeling well.



That's great to hear. How have you been able to stay positive despite current circumstances?

Spending a lot of time with family and friends and keeping myself busy with work.



How have your family and friends helped you to stay positive during the current climate?

By going out and doing fun things, watching movies and doing mindful activities.



What are some of the mindful activities you have been doing to maintain your positivity?

Hiking, travelling interstate, spending time with pets and watching movies.



Negative Work Life Balance

- Individuals with a negative work-life balance report struggling with the demands of their job, leaving little time or energy for personal pursuits.
- They feel constantly overwhelmed, stressed, and burnt out. These individuals find it challenging to separate work from their personal lives, leading to strained relationships and decreased overall well-being.
- The lack of time for self-care and personal interests can lead to increased stress levels, lower job satisfaction, and even physical and mental health issues.

Work is busy at the moment so struggling to find time for everything else I need to be doing with my family.



How much of an impact has that made on your personal and family life?

a very big impact.



In what ways has it impacted your family life?

I've missed stuff with my kids as I have been working lots.



How do you think your kids have been feeling about you missing out on family time?

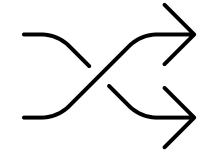
they are very sad but it is only temporary so they will be ok.

Base: Apr-Oct 2023 (n=3,850)

Q: Rate each area on the scale

↑↓ significantly higher lower at p<.05 versus overall average | *Caution, base < n=30

Topical Summary Drill Down – Purpose at Work



GPT Generated Summaries

Purposeful Role – summary of feedback from employees using GPT

Purpose in the workplace refers to having a clear understanding of the reason behind one's work and how it contributes to a larger goal or mission. It is about finding meaning in what one does and feeling a sense of fulfillment and satisfaction from it. Having a sense of purpose is important as it provides people with direction and motivation. When employees have a clear purpose, they are more likely to be engaged and committed to their work. They have a sense of ownership and pride in what they do, which can lead to higher levels of job satisfaction and performance. Purpose also plays a role in shaping organisational culture. When employees are aligned with the purpose of the organization, they are more likely to feel a **sense of belonging** and be **motivated to contribute to its success**. Organizational success is also often tied to a clear and compelling purpose that inspires employees to go above and beyond in their roles.

I had a productive day at work followed by a great opportunity in my personal business and a fantastic sleep.



That sounds like a great day! What have you been doing at your job that has been productive?

Working on a particular parts of a project that have a great impact in the community and I attended a training that will be valuable and helpful to my project.



It sounds like you've put a lot of effort into making a positive change in the community. What has been the most rewarding thing you've gotten from your training?

The most rewarding part of the training was connecting with the other attendees who are important collaborative partners and in terms of content, the most valuable content was learning how to positively frame messaging.



It's great to connect with people in the community who share similar goals. What has been the most helpful thing you've taken away from the training in terms of framing messages?

The most helpful thing I've taken away from training in terms of framing messages is that when talking to the public about public health and health promotion to put messaging in a positive frame rather than negative.

Feel like a failure to be honest. Everything I do turns shit. Every time I try to grow, I end up embarrassing myself and looking like a failure



I'm sorry to hear that. What caused you to feel like a failure today?

Started a new job and after one day of working, I quit but haven't told my previous employer that but I have to ask for my day back which is embarrassing because I literally just started it and asked for one of my working days off from my previous employer.



Feeling embarrassed can be hard. What made you decide to quit your job after just one day?

Too high pressured, couldn't keep up with my standards, lack of mentoring and long hours, family saying I shouldn't work.



That sounds like a lot of pressure to manage. What was it about the job that made it difficult for you to stay?

Stress and highly anxious not enough time or assistance.



Base: Apr-Oct 2023 (n=3,850)

Q: Rate each area on the scale

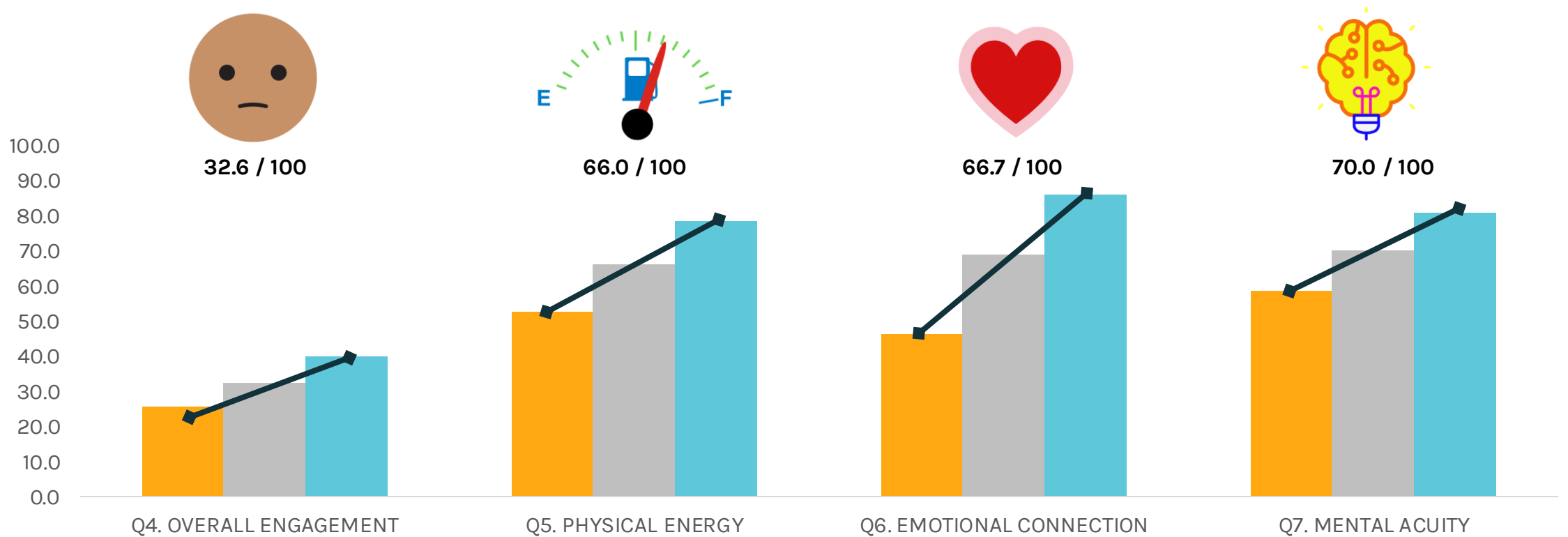
↑ ↓ significantly higher/lower at p<.05 versus overall average | *Caution, base < n=30

Emotional Connection is the key driver of eNPS

This tells us that to advocate for your workplace, employees must believe in its purpose and values. The second most important factor is Physical Energy

Relationship between Work Feelings and eNPS

0 to 6 (Detractor) 7 to 8 (Passive) 9 to 10 (Promoter)







Base: Apr-Oct 2023 (n=3,850)

Q: Rate each area on the scale

↑ significantly higher lower at p<.05 versus overall average | | *Caution, base < n=30

Smile Badge industry analysis - benchmarks

How does your industry compare?

<p>Best</p>	<ul style="list-style-type: none"> • Construction (40.8) • Advertising, Arts & Media (40.6) • Sales (38.5) 	<ul style="list-style-type: none"> • Advertising, Arts & Media (77.7) • Warehousing (75.0) • Farming, Animals & Conservation (71.9) 	<ul style="list-style-type: none"> • Advertising, Arts & Media (85.6) • Human Resources & Recruitment (82.3) • Sport & Recreation (80.6) 	<ul style="list-style-type: none"> • Consulting & Strategy (80.2) • Farming, Animals & Conservation (79.3) • Advertising, Arts & Media (77.9)
	 <p>32.6 / 100 Overall Engagement (OE)</p>	 <p>66.0 / 100 Physical Energy (PE)</p>	 <p>66.7 / 100 Emotional Connection (EC)</p>	 <p>70.0 / 100 Mental Acuity (EC)</p>
<p>Worst</p>	<ul style="list-style-type: none"> • Legal (23.4) • Farming, Animals & Conservation (21.5) • Other Services (35.1) 	<ul style="list-style-type: none"> • Public Administration and Safety (57.9) • Insurance & Superannuation (57.0) • Other Services (68.0) 	<ul style="list-style-type: none"> • Manufacturing, Transport & Logistics (59.4) • Mining, Resources & Energy (56.0) • Other Services (67.7) 	<ul style="list-style-type: none"> • Call Centre & Customer Service (61.0) • Mining, Resources & Energy (60.2) • Other Services (68.4)

Base: Apr-Oct 2023 (n=3,850)

Q: Rate each area on the scale

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Human Insights

Ideation & NPД

Testing your ideas to find the ones most likely to find traction and succeed in market

Consumer Insights

Exploring market opportunities with persona development, market segmentation, price testing and many other methods - become a consumer centric organisation

Category Insights

Understanding your category in detail through human insights - what your customers want, when they want it and what they expect from the experience

Evolved Thinking is part of the Evolved Group, a technology enabled Human Insights Company

We work with a broad range of organisations to identify opportunities and optimise experiences

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Customer Experience & VOC

Develop great customer experiences that lead to advocacy, loyalty and deeper customer relationships

Employee Experiences

A workplace engagement platform that delivers benefits across the full employee lifecycle, replacing traditional surveys with Conversational AI.

Brand Insights

Understand how your brand is performing in market, explore your advertising performance and identifying positioning opportunities in a competitive context



Thinking