



**WORK  
RELATIONSHIP  
INDEX**



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# Introduction

Over the past few years, not only has how we work on a global scale changed, but also how we think about what work is, and what the future of it should look like.



We see this tension across news headlines every day.

And while the issues are complex, multilayered and multifaceted, much of the debate has focused singularly on *where* we work, as if that alone is the issue to solve. But, *where* doesn't matter if people don't know *why*, *how* or *who* they show up for in the first place, and what it takes to have a healthy and productive relationship with work.

It's not an exaggeration to say that in the world of work today, society is at an era-defining crossroads: the meeting of *where*, *why*, *how* and *who*.

At HP, we wanted to understand how to navigate this busy intersection and offer relevant and realistic recommendations and solutions for all parties to take forward. We wanted to understand the changing nature of the world's relationship with work and, more importantly, how to transform that relationship so everyone wins. We believe it's not only possible to achieve, but essential for society at large.

With all this in mind, welcome to HP's Work Relationship Index (WRI). Launched for the first time this year, this global study offers a new way for society to monitor, measure and gain insights into how employees in various industries around the world feel, what they want, why they crave more satisfying work experiences and how organizations and their leaders must adapt to meet growing expectations.

To ensure a wide and diverse spectrum of viewpoints, ideas, opinions and more, HP surveyed more than 12,000 "knowledge workers" - those who are primarily desk-based, including hybrid and remote workers - as well as 3,600 IT decision makers and 1,200 business leaders across 12 countries. The data, learnings and recommendations that ultimately arose from the survey include six core drivers<sup>1</sup> to building a healthier relationship with work.

This first-of-its-kind study illuminates the path ahead, shines a light on the world's relationship with work and, more importantly, provides insights that will help build better organizations and better lives for everyone.

The 2023 HP Work Relationship Index: HP commissioned an online survey managed by Edelman Data & Intelligence (DxI) that fielded between June 9 - July 10, 2023, in 12 countries: the US, France, India, UK, Germany, Spain, Australia, Japan, Mexico, Brazil, Canada and Indonesia. HP surveyed 15,624 respondents in total - 12,012 knowledge workers (~1,000 in each country); 3,612 IT decision makers (~300 in each country); and 1,204 business leaders (~100 in each country). Depending on their role, some respondents qualified as both IT decision maker and business leader.

<sup>1</sup>See Methodology section for how drivers were identified

# Executive Summary

## 1. The world's relationship with work is unhealthy.

HP analyzed more than 50 aspects of society's relationship with work, including how people feel about their skills and abilities, the role of work in their lives, the space they work in, the tools and technology they use and their expectations of leadership, and found that only about one-quarter (27%) of knowledge workers have a healthy relationship with work.

As a result, HP identified six key drivers that can lead to a healthy relationship with work (reference #6, below).

## 2. Unhealthy relationships with work impact employees' mental, emotional and physical well-being.

The implications of unhealthy relationships with work are significant - the most alarming implication is that they are impacting employees' well-being.

When work has a negative impact on employees emotionally and physically, employees eat poorly, exercise less, toss and turn at night, gain weight, struggle with their mental health, feel like failures, feel isolated and more.

## 3. Unhealthy relationships with work are not just personal, they're costing business.

Productivity, morale, connection and engagement diminish when relationships with work are unhealthy, leading to increasing challenges with employee retention.

A majority of those who don't have a healthy relationship with work already have one foot out the door (to leave their companies).

## 4. The vast majority of people today are willing to earn less if it means loving work more.

Knowledge workers have higher expectations of how they are treated at - and by - work than they did even two years ago.

They are willing to take a pay cut to work somewhere that meets their wants and needs.

## 5. The future of work is built on emotional connection.

Being professional no longer means suppressing emotional reactions. People want a culture where they can be their authentic selves at work.

Employees - especially Gen Z and Millennial knowledge workers - want empathetic and emotionally intelligent leaders who can create an organizational culture where everyone feels they belong.

## 6. Healthy relationships are fueled by six core drivers.

Each of the six drivers foster action and can help employees build a better relationship with work. These drivers are:



**Fulfillment:** Purpose, meaning and empowerment at work



**Leadership:** Empathy and emotional connection from those in charge



**People-centricity:** Decision-making with people at the heart



**Skills:** Confidence-building by tapping into the enthusiasm employees have for learning new skills



**Tools:** The right technology to drive employee engagement



**Workspace:** Flexibility and trust in where employees work, enabled by seamless transitions

# Chapter 1



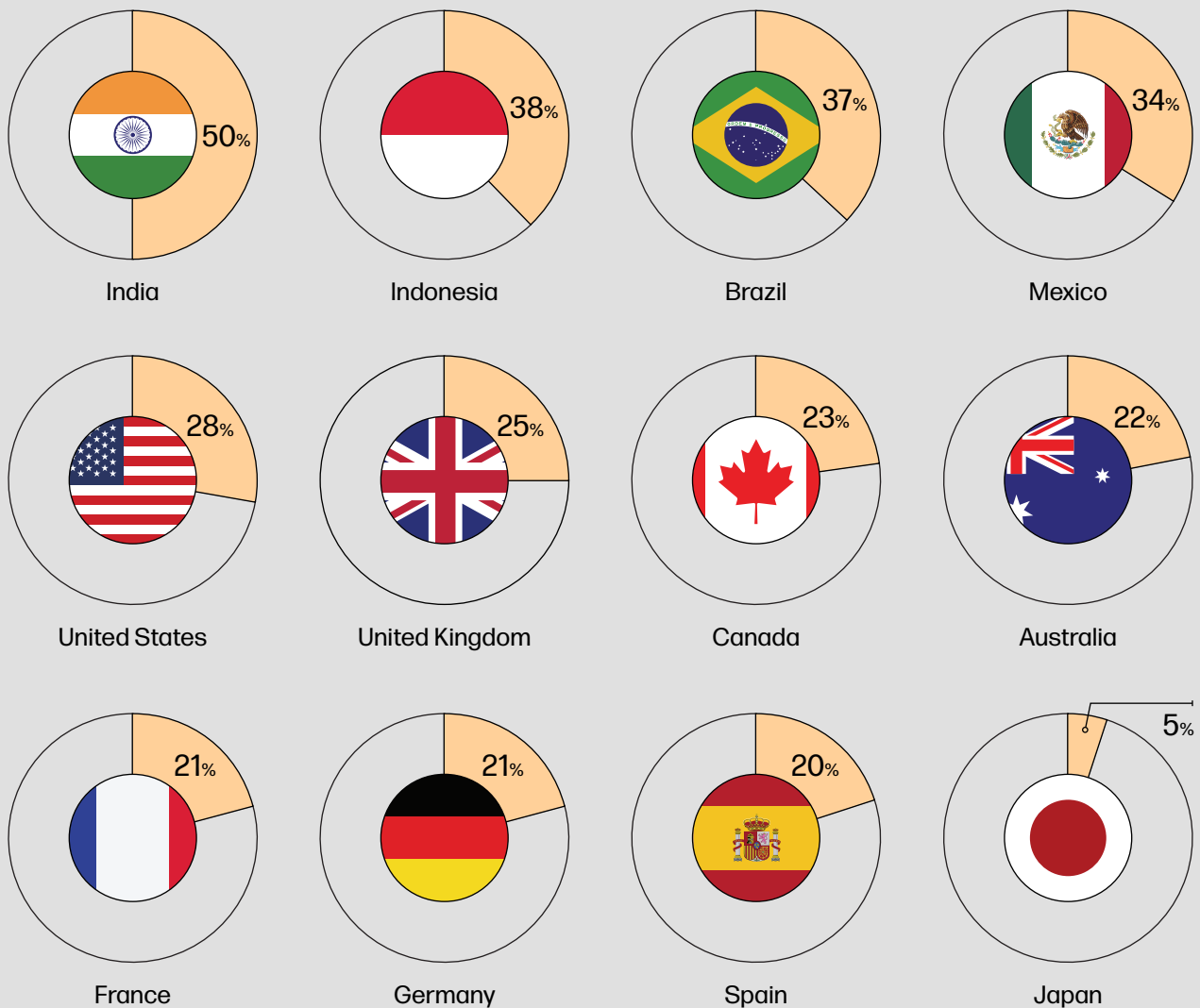
# The world's relationship with work is unhealthy

Emerging economies fare better than more mature markets like the US, France and Japan.

HP's research found that only about one-quarter (27%) of the world's knowledge workers have a healthy relationship with work.

Across the globe, however, workers' relationships with work vary greatly, from a low of 5% who have a healthy relationship in Japan to a high of 50% in India. Overall, the relationship is healthier in emerging economies than in some of the more mature markets, all of which - except the US by one point - score at or below the global average of 27%.

HP Work Relationship Index (% of knowledge workers who have a healthy relationship with work)



# Creating a healthier relationship with work

These low numbers (even the high of 50% isn't very comforting) are a wakeup call. Such a high volume of unhealthy relationships with work is bad for employees, and bad for business. The robust future of work the world needs is not sustainable at this rate. In response, HP analyzed more than 50 aspects of society's relationship with work and identified six drivers that lead to a healthy relationship with work:



**Fulfillment:** Purpose, meaning and empowerment at work



**Leadership:** Empathy and emotional connection from those in charge



**People-centricity:** Decision-making with people at the heart



**Skills:** Confidence-building by tapping into the enthusiasm employees have for learning new skills



**Tools:** The right technology to drive employee engagement



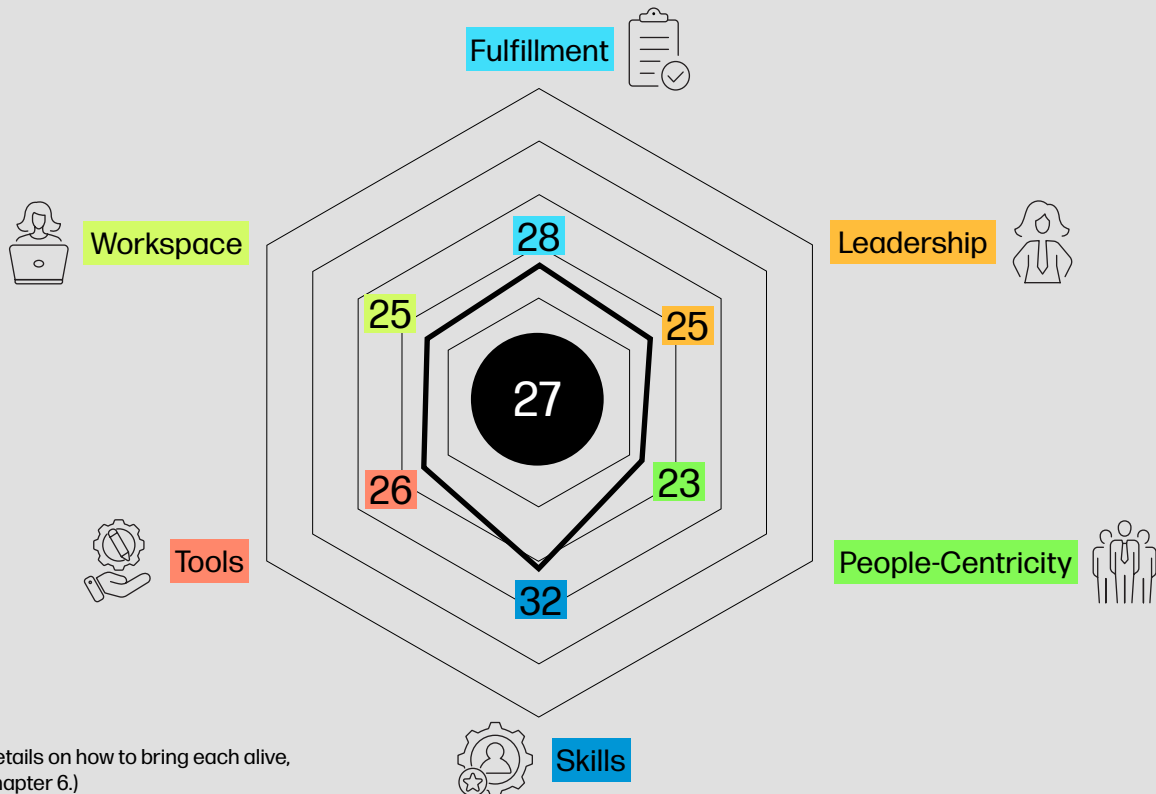
**Workspace:** Flexibility and trust in where employees work, enabled by seamless transitions







The drivers that make up the world's relationship with work score low on the Index (out of a top score of 100).

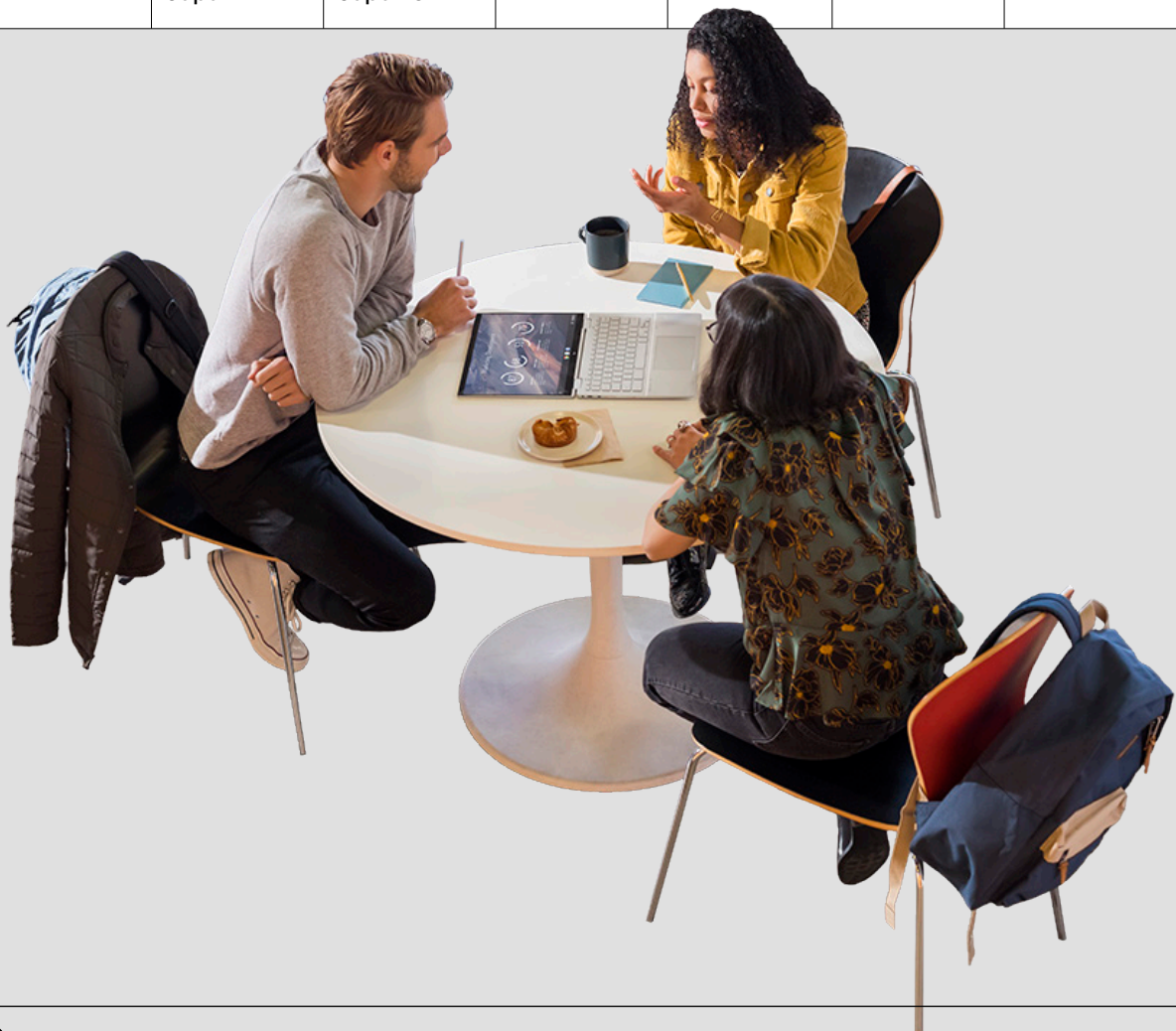
Legend:

The number in the center is the core Work Relationship Index score, capturing the percentage of people who have a healthy relationship with work today, out of 100

The highlighted scores outside the circle represent the current performance of each of the drivers, out of 100



	HP WRI Score	 Fulfillment	 Leadership	 People-Centricity	 Skills	 Tools	 Workspace
Above Average	India 50 Indonesia 38 Brazil 37 Mexico 34	India 47 Brazil 42 Indonesia 39 Mexico 38	India 42 Brazil 38 Indonesia 34 Mexico 32	India 41 Brazil 34 Indonesia 33 Mexico 28	Brazil 49 India 47 Mexico 45 Indonesia 42 US 37	India 45 Brazil 38 Indonesia 34 Mexico 33 US 29	India 40 Brazil 33 Indonesia 30 Mexico 29
Average	US 28	US 28	US 25	US 24 Australia 23			US 26
	UK 25			Canada 21	UK 30 Canada 30	Canada 25 UK 24	UK 24 Canada 24
Below Average	Canada 23 Australia 22 France 21 Germany 21 Spain 20 Japan 5	UK 24 Canada 24 Australia 23 Germany 23 Spain 23 France 21 Japan 4	Canada 22 UK 20 Australia 20 Germany 20 Spain 20 France 18 Japan 5	UK 20 Spain 18 France 17 Germany 16 Japan 4	Australia 27 Germany 27 Spain 26 France 24 Japan 4	Australia 23 Germany 22 Spain 20 France 18 Japan 3	Australia 22 Germany 22 France 21 Spain 19 Japan 4





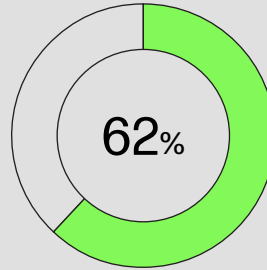
# Chapter 2



# Unhealthy relationships with work impact employees' mental, emotional and physical well-being

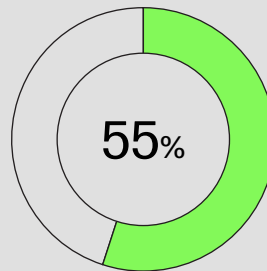
Unhealthy relationships with work have a negative effect on workers' well-being, personal passions and relationships.

Knowledge workers say when their relationship with work is not how they want it to be, they struggle with their mental, emotional and physical well-being - eating poorly, exercising less, tossing and turning at night, gaining weight, struggling with their mental health, feeling like failures, feeling isolated and more. The organizations they work for can't help but be impacted, as well.



## Physical Health

- Eat more unhealthy foods
- Don't work out as much
- Can't sleep well
- Gain weight



## Mental and/or Emotional Well-being

- Struggle with mental health
- Self-esteem goes down
- Feel like they lose themselves
- Feel like a failure in life
- Feel isolated

About half (48%) of knowledge workers are too emotionally and physically drained to complete personal tasks and responsibilities. In response, they're unable to invest in themselves and their relationships (45%). They say they become disinterested in things like hobbies and their life outside work (59%). This leaves them feeling less-than, and unable to be the friend, partner or even parent they want to be.

In turn, these feelings may impact their work life, creating a vicious circle - life negatively impacting work, negatively impacting life and so on. After all, when workers can't sleep well and feel like a failure in life, among other personal issues, they will be severely challenged to be the creative, innovative, efficient and inspirational employees that organizations need today to compete.

% of workers who feel negative impacts of an unhealthy relationship with work

	AU	CA	IN	MX	UK	JPN	ES	BR	DE	FR	US	ID
Physical Health	69%	69%	58%	57%	65%	59%	60%	64%	62%	62%	60%	56%
Mental Well-being	65%	62%	53%	46%	57%	59%	53%	52%	57%	55%	52%	42%

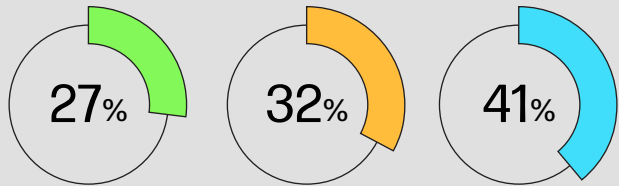
# Chapter 3



# Unhealthy relationships with work are not just personal, they're costing business.

Productivity diminishes. So does employee morale, connection and engagement.

While **27%** of knowledge workers have a healthy relationship with work, **32%** have an unhealthy relationship with work and **41%** are in the "watch-out zone".



When their relationship with work is not how they want it to be...

Healthy Work Relationship	Watch-out Zone	Unhealthy Work Relationship	Knowledge workers say they...
23%	27%	34%	are less productive at work
22%	26%	39%	are disengaged with their work
22%	26%	38%	feel disconnected from their organization
29%	28%	33%	do the bare minimum required to stay in good standing

In fact, the majority (76%) of people in unhealthy work relationships contemplate leaving their current company. Those in unhealthy work relationships are also unlikely to champion their own company,

with one-quarter (24%) willing to recommend their company as a good place to work. This is especially true for individuals in the UK (20%), France (19%), Germany (18%) and Japan (12%).

### When their relationship with work is not how they want it to be...

Healthy Work Relationship	Watch-out Zone	Unhealthy Work Relationship	Knowledge workers say they...
22%	39%	76%	contemplate leaving their company
91%	77%	35%	see themselves working at their company in two years' time
93%	74%	24%	would recommend their company as a great place to work.

### When their relationship with work is not healthy, % of knowledge workers who...

	AU	CA	IN	MX	UK	JPN	ES	BR	DE	FR	US	ID
Contemplate leaving	80%	75%	76%	81%	81%	74%	67%	83%	68%	71%	78%	77%
Would recommend	30%	33%	40%	29%	20%	12%	27%	32%	18%	19%	28%	31%

# Chapter 4



# 83% of people today are willing to earn less if it means loving work more

For the vast majority, the personal satisfaction that comes from a healthy relationship with work means they would give up a portion of their salary.

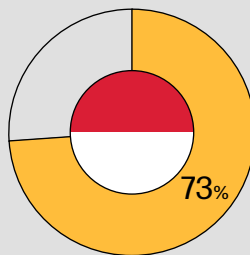
Knowledge workers would actually consider lower wages for higher work satisfaction. But workers' expectations (not to mention priorities) have changed. With all that's transpired over the past few years, workers see this as an opportunity to redefine their relationship with work - and what that would mean for them and their organizations.

% of knowledge workers who say this is a pivotal time to redefine our relationship with work

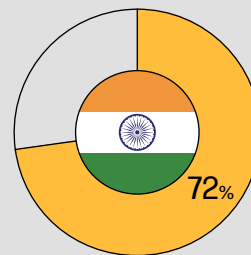
57%	of knowledge workers
65%	of IT decision makers
66%	of business leaders

Knowledge workers from emerging markets agree more that this is pivotal time to redefine their relationship with work

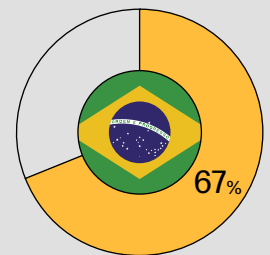
Higher than global average



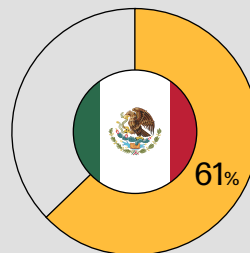
Indonesia



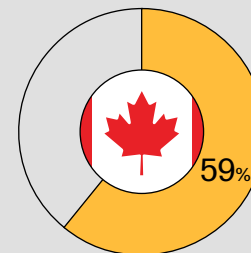
India



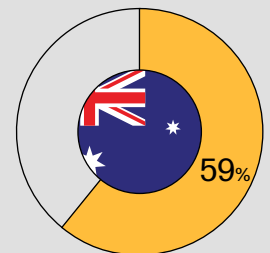
Brazil



Mexico

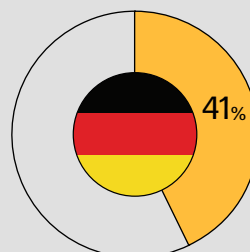


Canada

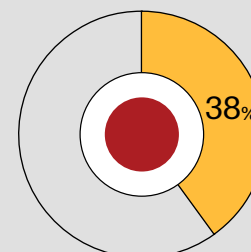


Australia

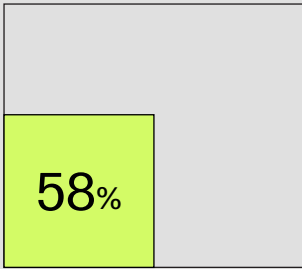
Lower than global average



Germany



Japan



For **58%** of knowledge workers, their expectations of the quality of their relationship with work have increased in recent years, and their expectations of how they are treated by their workplace are higher, too (57%).

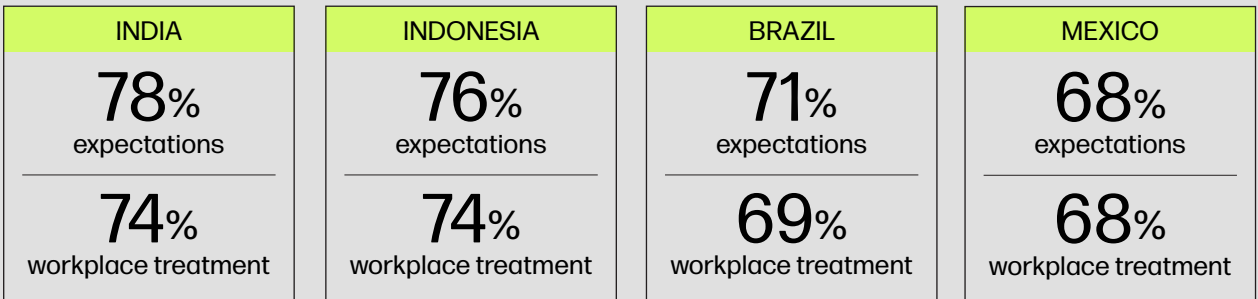
% of knowledge workers who say “expectations of my relationship with work have increased over the past 2 - 3 years”

IN	ID	BR	MX	Global	ES	CA	AU	FR	US	DE	UK	JPN
78%	76%	71%	68%	58%	57%	57%	55%	54%	53%	52%	47%	27%

% of knowledge workers who say “expectations of how I am treated by my work and workplace have increased over the past 2 - 3 years”

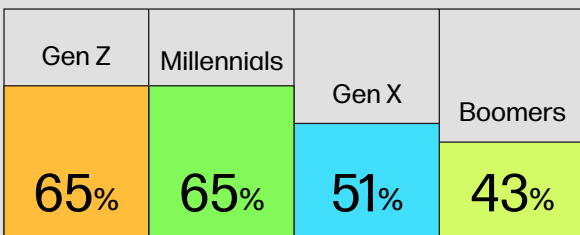
IN	ID	BR	MX	AU	Global	CA	US	ES	FR	UK	DE	JPN
74%	74%	69%	68%	58%	57%	57%	56%	54%	51%	50%	50%	27%

Knowledge workers in emerging markets are more likely than the global average to say their expectations of their relationship with work and how they’re treated by their work and workplace have increased.

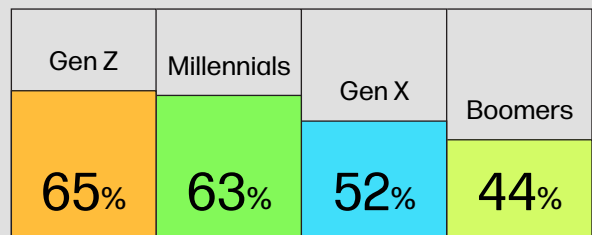


Gen Z and Millennials are leading the charge in demanding more from their work and workplace, though more than 50% of Gen X and more than 40% of Baby Boomers are speaking up, as well.

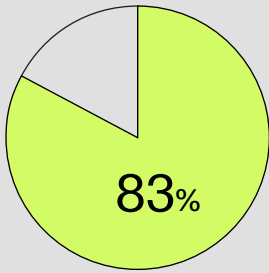
% of knowledge workers who say expectations of my relationship with work have increased over the past 2 - 3 years



% of knowledge workers who say expectations of how I am treated by my work and workplace have increased over the past 2 - 3 years





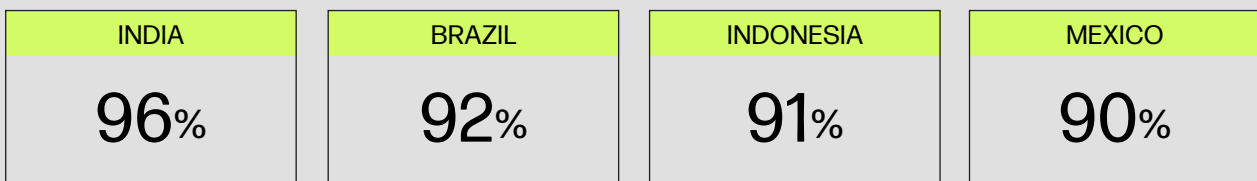


Increasing expectations have led knowledge workers to even reconsider their compensation, with **83%** of knowledge workers actually willing to earn less if it means loving work more.

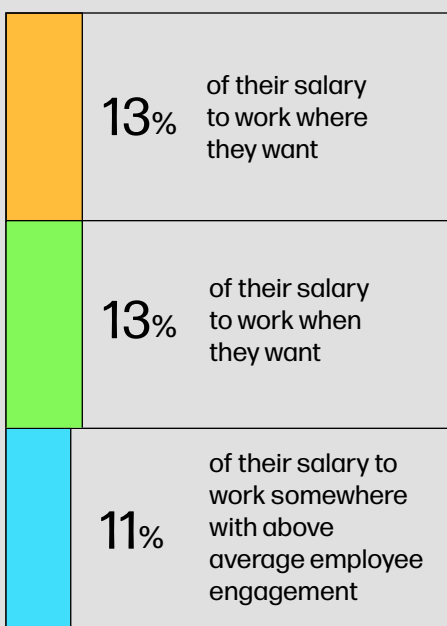
% of knowledge workers who are willing to take a salary cut for a better relationship with work

IN	BR	ID	MX	JPN	CA	ES	AU	FR	US	UK	DE
96%	92%	91%	90%	84%	84%	81%	81%	79%	76%	74%	74%

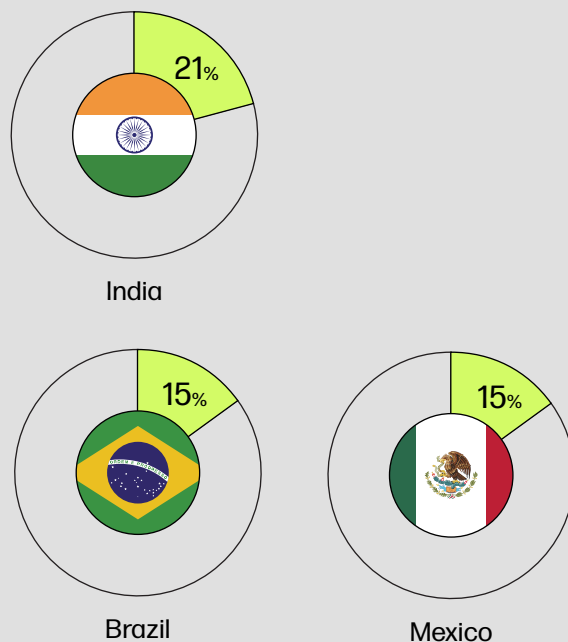
Knowledge workers from emerging markets are more willing to take a salary cut in exchange for a better relationship with work

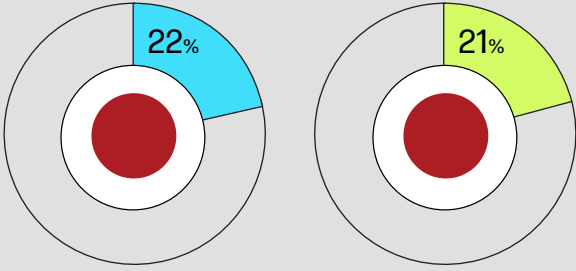


Specifically, knowledge workers say they are willing to give up:



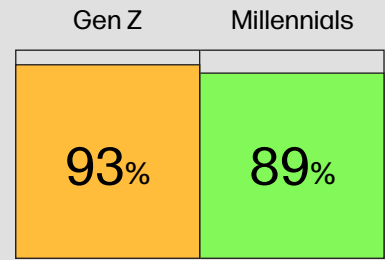
Emerging markets are generally willing to take higher salary cuts to work where they want, compared to mature markets.





Japanese knowledge workers are willing to give up the highest portion of their salary across all statements, with individuals willing to give up **22%** to work when and where they want, and **21%** to work somewhere with above average employee engagement.

In addition to how the generations' expectations have changed, the younger generations are particularly willing to put their money where their mouth is, with **93% of Gen Z** and **89% of Millennial** knowledge workers willing to take a salary cut for a better relationship with work.



**% salary cut knowledge workers are willing to take**

	Gen Z	Millennials	Gen X	Boomers
To work where they want	16%	14%	11%	9%
To work when they want	18%	14%	11%	9%
To work somewhere with above average employee engagement	15%	13%	10%	8%

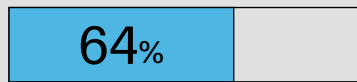
# Chapter 5



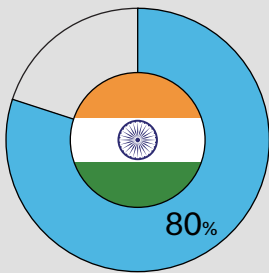
# The future of work is built on emotional connection

Both business leaders and employees want a culture where they can be their authentic selves.

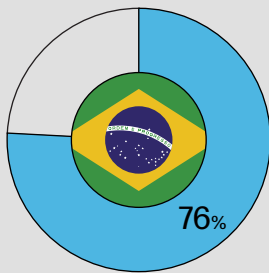
Business leaders and their employees agree on the importance of building - and experiencing - emotional connection and empathy at work. Being professional no longer means suppressing emotional reactions - people want a culture that supports employees communicating emotions at work. However, less than 25% feel they are consistently able to do so.



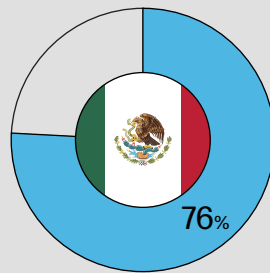
of knowledge workers say it's important that people are encouraged to communicate their emotions in the workplace



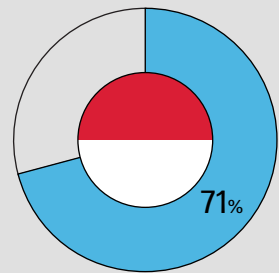
India



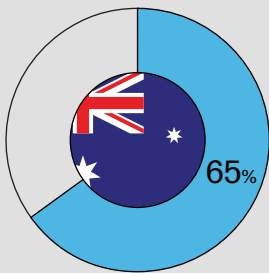
Brazil



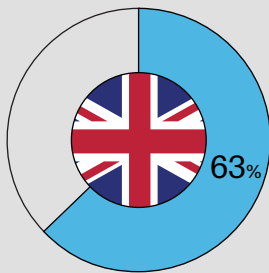
Mexico



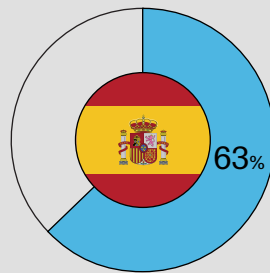
Indonesia



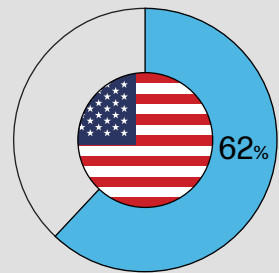
Australia



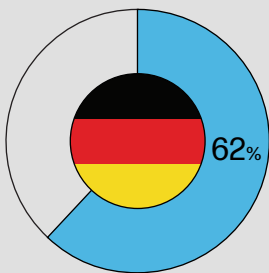
United Kingdom\*



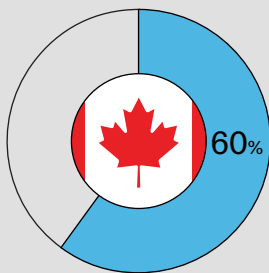
Spain



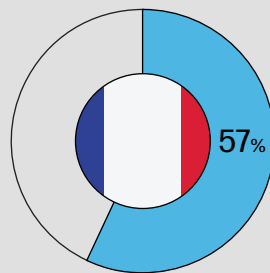
United States



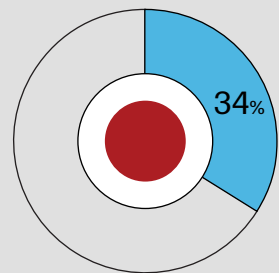
Germany



Canada



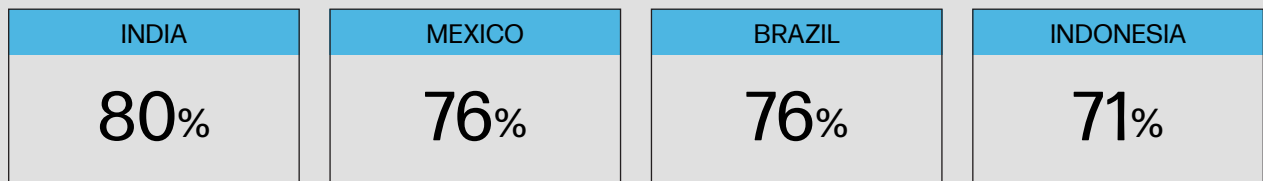
France



Japan

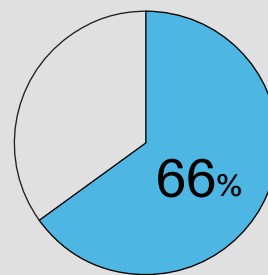
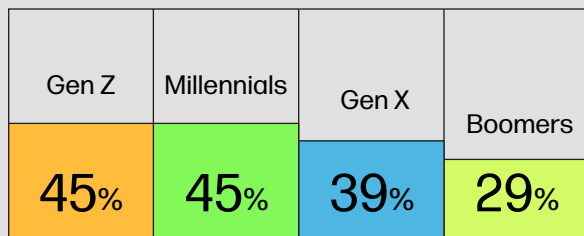
\*Global Average

Knowledge workers in emerging markets are more likely to say it's important that people are encouraged to communicate their emotions in the workplace



Business leaders agree that a new type of leadership is needed, with 77% recognizing the importance of senior leadership demonstrating empathy and 70% saying it's important for leaders to be emotionally intelligent to be successful. While these percentages for leaders are high, from the employees' perspective, leaders aren't meeting their own behavior goals, with 41% of knowledge workers believing that the emotional intelligence their company's leaders display has not met their growing expectations.

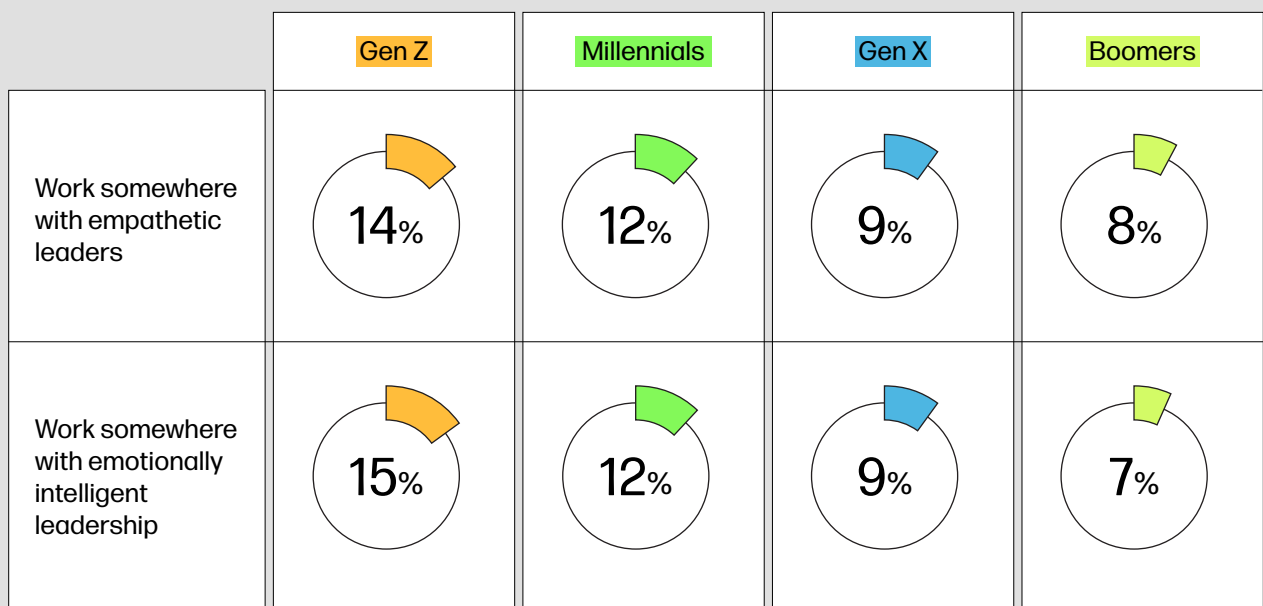
% of knowledge workers who say the emotional intelligence their company's leaders display has not met their expectations over the past 2 - 3 years



Emotional fluency has become so important that two-thirds (66%) of knowledge workers would opt to get paid less to work somewhere with emotionally intelligent leadership.

Specifically, knowledge workers are willing to give up an average of 11% of their salary for this. Again, this is even truer for the younger generations, who make up an increasing proportion of the global workforce.

% salary cut knowledge workers are willing to take to...



# Chapter 6



# Six core drivers that can lead to a healthy relationship with work

It's possible to build a better relationship with work, but there's a lot of work to do first.

After analyzing more than 50 aspects of the world's relationship with work, HP identified six drivers that represent key imperatives to business leaders:



## Fulfillment

Purpose, meaning and empowerment at work



## Leadership

Empathy and emotional connection from those in charge



## People-centricity

Decision-making with people at the heart



## Skills

Confidence-building by tapping into the enthusiasm employees have for learning new skills



## Tools

The right technology to drive employee engagement

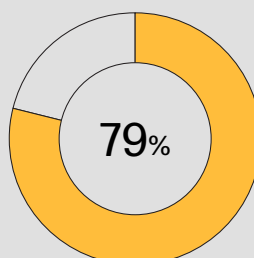


## Workspace

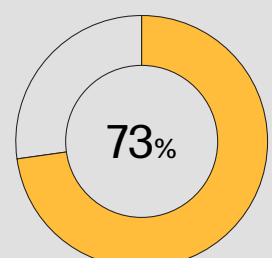
Flexibility and trust in where employees work, enabled by seamless transitions

Changing the dynamic of relationships with work is everyone's responsibility:

79% say their employer and senior leadership have a role to play in changing relationships for the better,



and 73% recognize their own role in effecting that change.





## Fulfillment

Purpose, meaning and empowerment at work

Fulfillment is the largest driver of a healthy relationship with work. When unpacking what it means to be fulfilled in today's working world, it's "my work gives me purpose," "I feel connected to the work I do" and "the work I do at my organization is meaningful to me," among other expectations.

HP also found that voice and agency are critical to employees' relationship with work. Yet only a fraction of workers say they are currently experiencing them with any consistency.

All statements below have high correlation with employees feeling fulfilled. Statements are in order of what is most correlated with employees feeling fulfilled.

% of knowledge workers who consistently experience...

My work gives me purpose	28%
I feel connected to the work I do	28%
The work I do at my organization is meaningful to me	28%
My work helps me enjoy my life	26%
I have a clear path to career growth	25%
My preferences about work assignments are taken into account	24%
I play a role in determining success criteria for my work	25%
People are given a voice in creating a shared vision and purpose	24%
My work gives me the space & resources to pursue things that give me purpose	26%
Our company culture gives employees space to process difficult things	23%
I know I am trusted by my senior leadership to do my job well	29%
I am able to successfully balance my work and personal life	29%



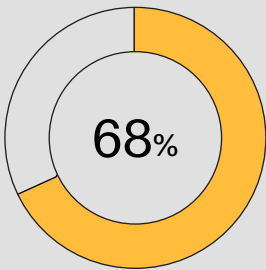




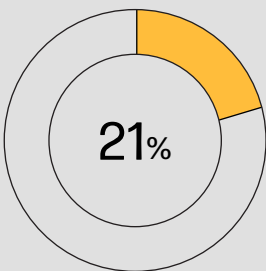
# Leadership

Empathy and emotional connection from those in charge

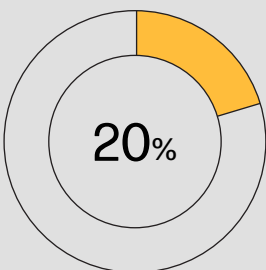
Along with society's evolving relationship with work, the role of the leader is necessarily evolving, too, requiring a higher standard of emotional intelligence in response. In fact, business leaders globally agree that today's ways of working need new leadership styles - yet employees are not experiencing leaders walking the talk.



68%  
of business leaders say today's ways of working need new leadership styles



21%  
Only 1 in 5 knowledge workers agree that senior leaders have evolved their leadership styles in response to the new ways of working that have emerged in the past 2 - 3 years



20%  
Only 1 in 5 knowledge workers agree that senior leaders in their company demonstrate emotional intelligence on a consistent basis

Brazilian (79%), Indian (79%) and Indonesian (77%) business leaders are more likely to agree that new leadership styles are needed. And more than other countries, they have seen the evolution of their leaders' leadership style in the past 2 - 3 years (Brazil: 35%, India: 37%, Indonesia: 31%) and continue to see their leaders demonstrating emotional intelligence on a consistent basis (Brazil: 32%, India: 32%, Indonesia: 30%).

Fewer business leaders in mature markets, such as the US (66%), Germany (56%) and Canada (65%), agree they need new leadership styles.

## % of knowledge workers who say...

"My company's senior leadership have evolved their leadership styles based on our new ways of working from the past 2 - 3 years"

IN	BR	ID	MX	US	Global	CA	UK	AU	DE	ES	FR	JPN
37%	35%	31%	28%	22%	21%	19%	18%	17%	16%	15%	14%	3%

"Senior leadership demonstrates emotional intelligence"

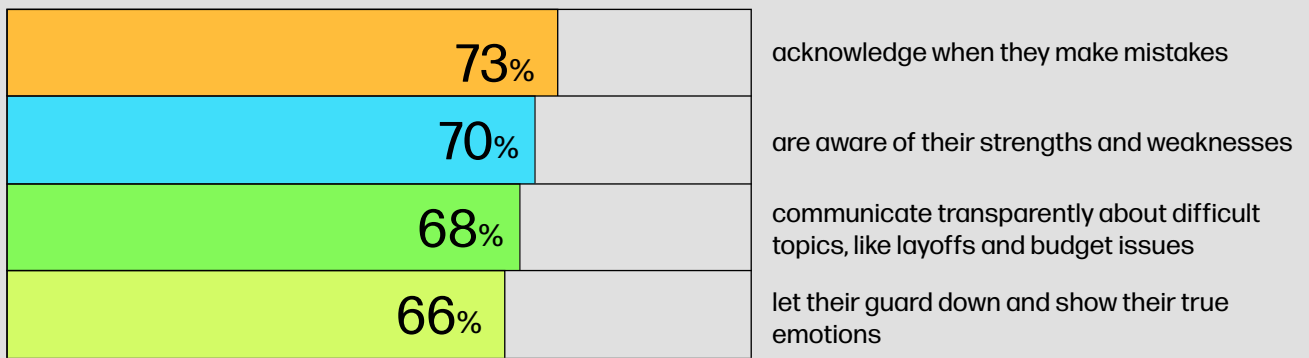
IN	BR	ID	MX	US	Global	CA	AU	UK	DE	ES	FR	JPN
32%	32%	30%	25%	22%	20%	19%	17%	16%	16%	15%	12%	3%

Knowledge workers want leaders who are empathetic and vulnerable.

## % of knowledge workers who say it's important that my senior leadership demonstrate empathy

74%	Knowledge workers
77%	Business leaders

% of knowledge workers who say it's important that our senior leaders...



Emerging markets are more likely to say key elements of vulnerability are important.

% of knowledge workers who say it's important that senior leaders...

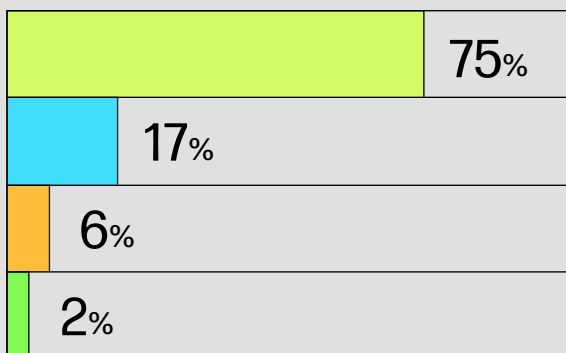
	IN	MX	BR	ID
acknowledge when they make mistakes	76%	81%	83%	76%
are aware of their strengths and weaknesses	76%	79%	82%	77%
communicate transparently about difficult topics, like layoffs and budget issues	75%	77%	81%	72%
let their guard down and show their true emotions	73%	75%	79%	67%

Despite their importance, just 20% of knowledge workers agree that senior leaders in their company demonstrate these characteristics of emotional intelligence on a consistent basis.

The disconnect between what employees expect and what leaders offer has created a trust gap. A majority of business leaders believe they are largely trusted by their employees, but that may not be the case. In fact, one-third (33%) of knowledge workers simply don't trust the intentions of their company's senior leadership.

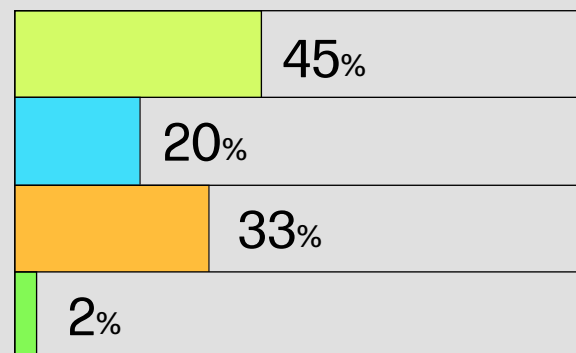
**BUSINESS LEADERS**

I think my company's employees trust senior leadership



**KNOWLEDGE WORKERS**

I trust my company senior leadership's intentions



● Agree   
 ● Neither disagree nor agree   
 ● Disagree   
 ● N/A



## People-centricity

Decision-making with people at the heart

Employees aren't willing to compromise their health and well-being for work. In fact, 70% of knowledge workers say it's important that people are encouraged to prioritize their physical and mental health above work (69%) and their well-being throughout the day (68%).

Human-centric aspects of knowledge workers' relationships with work are especially important for those in the emerging economies of Brazil, Mexico, India and Indonesia, though the majority of employees globally believe it's important, too.

% of knowledge workers who think it's important that people are encouraged to prioritize their physical and mental health above work

BR	MX	IN	ID	US, CA	Global	ES, AU	UK	FR	DE	JPN
82%	79%	77%	76%	70%	69%	69%	67%	64%	64%	45%

% of knowledge workers who think it's important that people are encouraged to prioritize their well-being throughout the day

BR	MX	IN, ID	AU	US	UK, CA	Global	ES	DE	FR	JPN
84%	80%	76%	71%	70%	69%	68%	68%	61%	59%	29%

However, many knowledge workers don't feel seen as individuals by their employers.

25%	believe people are treated as valued and respected beings as opposed to being viewed as just an employee number
25%	believe their organization makes them feel safe to be their whole, authentic self

% of knowledge workers who consistently experience that people are treated as valued and respected human beings as opposed to being viewed as just a number

IN	BR	ID	MX	US	UK	AU	CA	DE	FR	ES	JPN
42%	36%	35%	30%	28%	24%	23%	23%	22%	19%	17%	3%

Overall, knowledge workers in emerging markets generally feel more valued and respected as opposed to being viewed as just a number, compared to global findings and other mature markets.

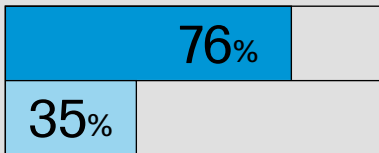
Knowledge workers in France, Spain and Japan feel a lack of humanity at work even more strongly than the other countries surveyed.



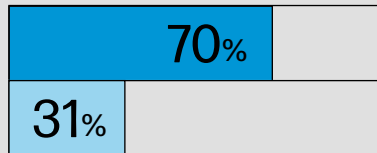
## Skills

Confidence-building by tapping into the enthusiasm employees have for learning new skills

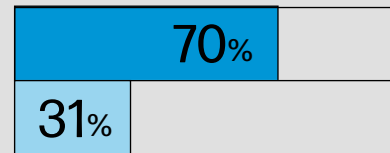
In a changing world, the amount of importance placed on business/technical and power/people skills has equalized – in fact, 70% rate both types of skills as important in their relationship with work. That said, knowledge workers are in a crisis of confidence when it comes to skills, with only a fraction of them feeling consistently confident in their proficiency.



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



I'm confident in my human skills



I'm confident in my hard skills

● Knowledge workers' importance

● Knowledge workers who consistently experience

Once again, country level differences demonstrate a split between markets whose employees have confidence in their skills and those who don't.

% of knowledge workers who say they are...

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

Consistently Experience:

IN	BR	MX	ID	US	Global	UK	CA	ES	AU	DE	FR	JPN
52%	50%	46%	45%	39%	35%	32%	31%	30%	29%	29%	27%	5%

“confident in my human (people/power) skills”

Consistently Experience:

BR	MX	IN	ID	US	Global	CA	UK	DE	ES	AU	FR	JPN
48%	45%	43%	40%	34%	31%	28%	28%	28%	26%	26%	23%	3%

“confident in my hard (business/technical) skills”

Consistently Experience:

BR	IN	MX	ID	US	Global	UK	CA	AU	DE	ES	FR	JPN
48%	46%	45%	42%	37%	31%	30%	29%	26%	25%	23%	21%	3%

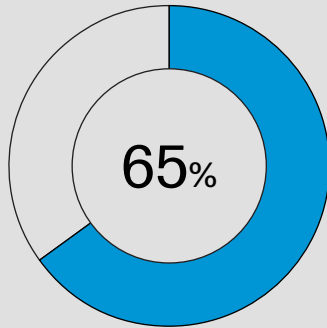
Knowledge workers in emerging markets and the US have more confidence in their skills.

Companies are missing an opportunity to harness the enthusiasm employees have for learning new skills, which would benefit their organizations as much as it would its employees.

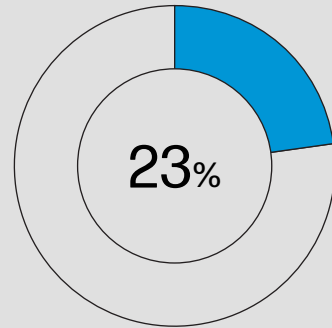
% of knowledge workers who say it's important... vs. % who consistently experience...

	Importance	Consistently experience
Being part of a company that provides individuals with opportunities to learn new professional skills that cater to their passions	68%	23%
Being part of a company that offers a variety of training types and platforms to address differences in learning styles	62%	22%

Employees are also eager to contribute to innovation, with 65% of knowledge workers stressing that fostering ways to innovate across all levels and departments is key



- yet, just 23% feel people at their company are allowed to make mistakes.

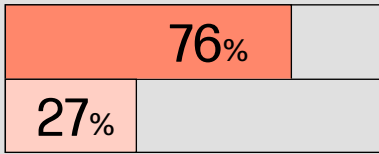




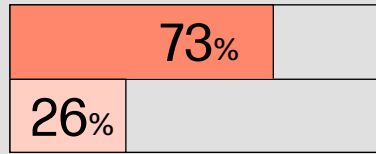
## Tools

The right technology to drive employee engagement

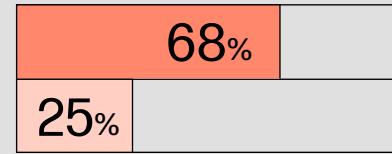
Knowledge workers today don't feel they have the right tools and equipment to be successful, especially in a hybrid world, where staying connected and feeling connected aren't the same thing. Once again, a gap exists between what employees say is important and what they are consistently experiencing.



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



My company's office has all the equipment, technology and space I need to be successful



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

● Knowledge workers' importance

○ Knowledge workers who consistently experience

As seen with the Skills drivers, the disparity between countries when it comes to tools and technology is wide - with a global average of only about 26% consistently experiencing each of the Tools drivers, the data reaches as high as 47% in India and as low as 3% in Japan.

### % of knowledge workers who consistently experience...

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

IN	BR	ID	MX	US	Global	CA	UK	AU	DE	ES, FR	JPN
47%	39%	35%	33%	32%	27%	27%	26%	24%	21%	20%	3%

"My company's office has all the equipment, technology and space I need to be successful"

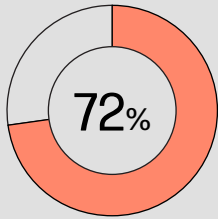
IN	BR	ID	MX	US	Global	CA	UK	DE	AU	ES	FR	JPN
44%	38%	34%	33%	28%	26%	26%	25%	24%	23%	21%	18%	3%

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

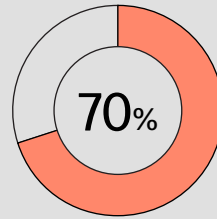
IN	BR	ID	MX	US	Global	AU, UK, CA	DE	ES	FR	JPN
43%	37%	33%	32%	26%	25%	22%	20%	18%	17%	3%

Overall emerging markets are more likely to report that their workplace supplies them with the right tools, equipment, technology and space they need to be successful at work and that they are confident their company will choose the right technology to support hybrid work.

In addition, employees want to be heard, both in how technology is chosen and how it gets used.



of knowledge workers say it's important to work for an organization that provides technology and tools based on employee needs and feedback



of knowledge workers say it's important to have access to technology that allows everybody to be seen and heard regardless of where they are

Emerging markets and the US emphasize the importance of working for an organization that provides technology and tools based on employee needs and feedback. Meanwhile, mature markets in Europe, such as France and Germany, are less likely to agree.

% of knowledge workers who...

"Say it's important to work for an organization that provides technology and tools based on employee needs and feedback"

BR	MX	IN	ID	US	AU	UK	CA	Global	ES	FR	DE	JPN
87%	84%	84%	83%	77%	74%	73%	73%	72%	72%	65%	64%	31%

"Consistently experience working for an organization that provides technology and tools based on employee needs and feedback"

IN	BR	ID	MX	US	Global	CA	UK	AU	DE	ES	FR	JPN
43%	34%	33%	28%	24%	23%	22%	19%	19%	17%	16%	15%	15%



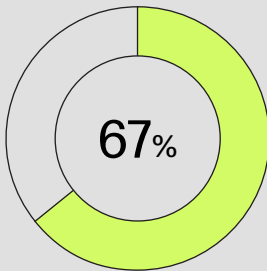


# Workspace

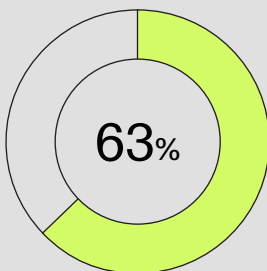
Flexibility and trust in where employees work, enabled by seamless transitions

Autonomy, flexibility and ease-of-use are key when it comes to the space in which individuals work.

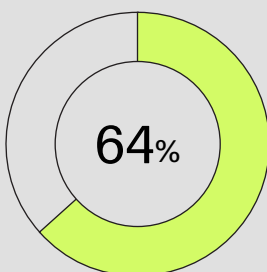
% of knowledge workers who say it's important that...



"the environment I work in makes it easy and seamless for me to work from my home."



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



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

Knowledge workers in emerging markets (Brazil, India, Indonesia and Mexico) place a higher importance on factors related to Workspace compared to their peers.

% of knowledge workers who say it's important that...

	BR	MX	IN	ID
The environment I work in makes it easy and seamless for me to work from my home	79%	77%	79%	74%
The environment I work in makes it easy and seamless for me to transition between multiple work locations	80%	75%	76%	76%
I have the option of working in a company-provided office or remotely based or what makes sense for me on a given day	78%	72%	75%	73%

French and German knowledge workers are less likely to place importance on the ease of working from home.

FR	DE
62%	62%

Meanwhile US, UK and German knowledge workers place less importance on the ease of transitioning between multiple work locations.

US	UK	DE
57%	56%	56%

Knowledge workers place such a great deal of importance on autonomy and flexibility that they are willing to take a pay cut for it.

72%	
73%	

of knowledge workers are willing to take a salary cut to work somewhere that lets them work where they want

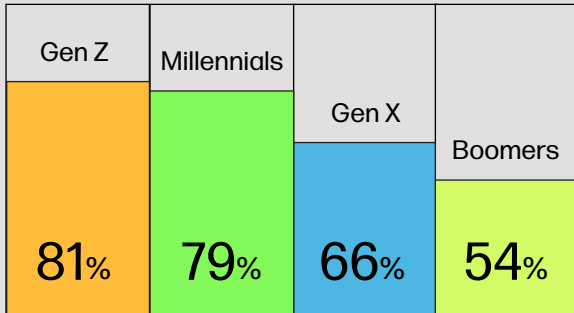
of knowledge workers are willing to take a salary cut to work somewhere that lets them work when they want



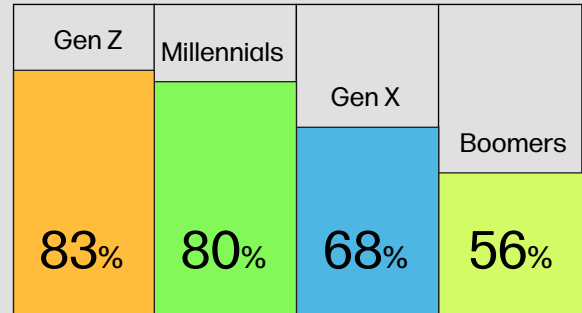
## Workspace continued

All generations feel this way, though the younger generations are more likely to want this flexibility and autonomy.

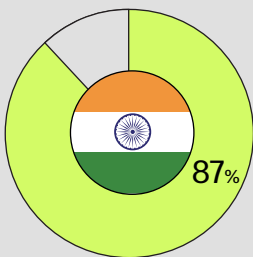
% of knowledge workers willing to take a salary cut to work somewhere that lets them work where they want



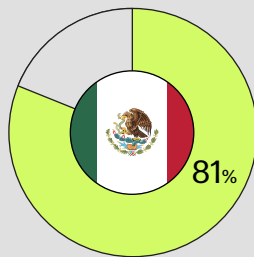
% of knowledge workers willing to take a salary cut to work somewhere that lets them work when they want



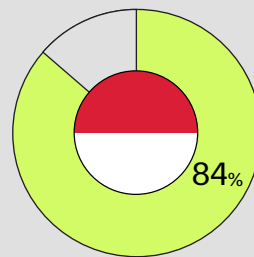
A higher portion of knowledge workers in emerging markets are willing to take a salary cut to work where...



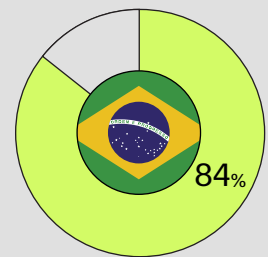
India



Mexico

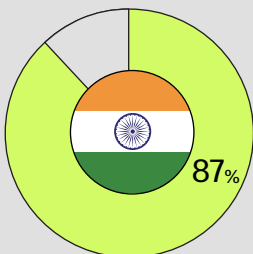


Indonesia

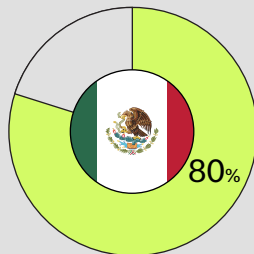


Brazil

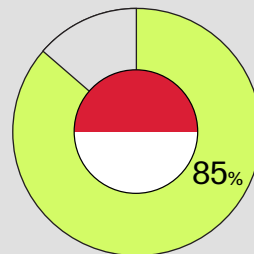
... and when they want



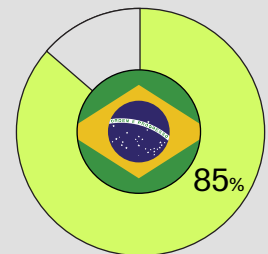
India



Mexico



Indonesia

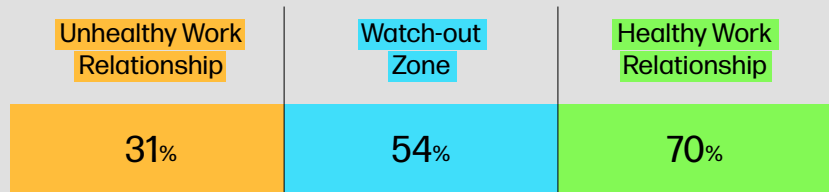


Brazil

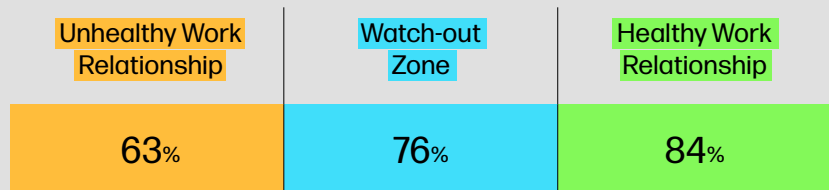


The type of working environment a knowledge worker has also plays a key role in having healthy relationships with work, both in the office and at home. Those with healthy work relationships have more flexibility in where they spend their working-time. They also are more likely to have a dedicated workstation at home (an office or desk set up) compared to their colleagues.

% of knowledge workers who have the option of working in a company-provided office or remotely, based on what makes sense for them on a given day, some or most of the time

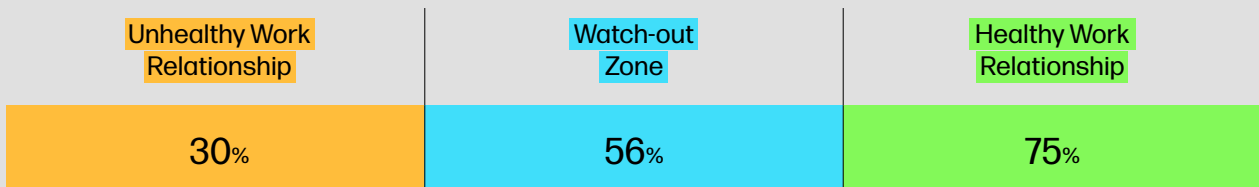


% of knowledge workers who have a dedicated workspace at home



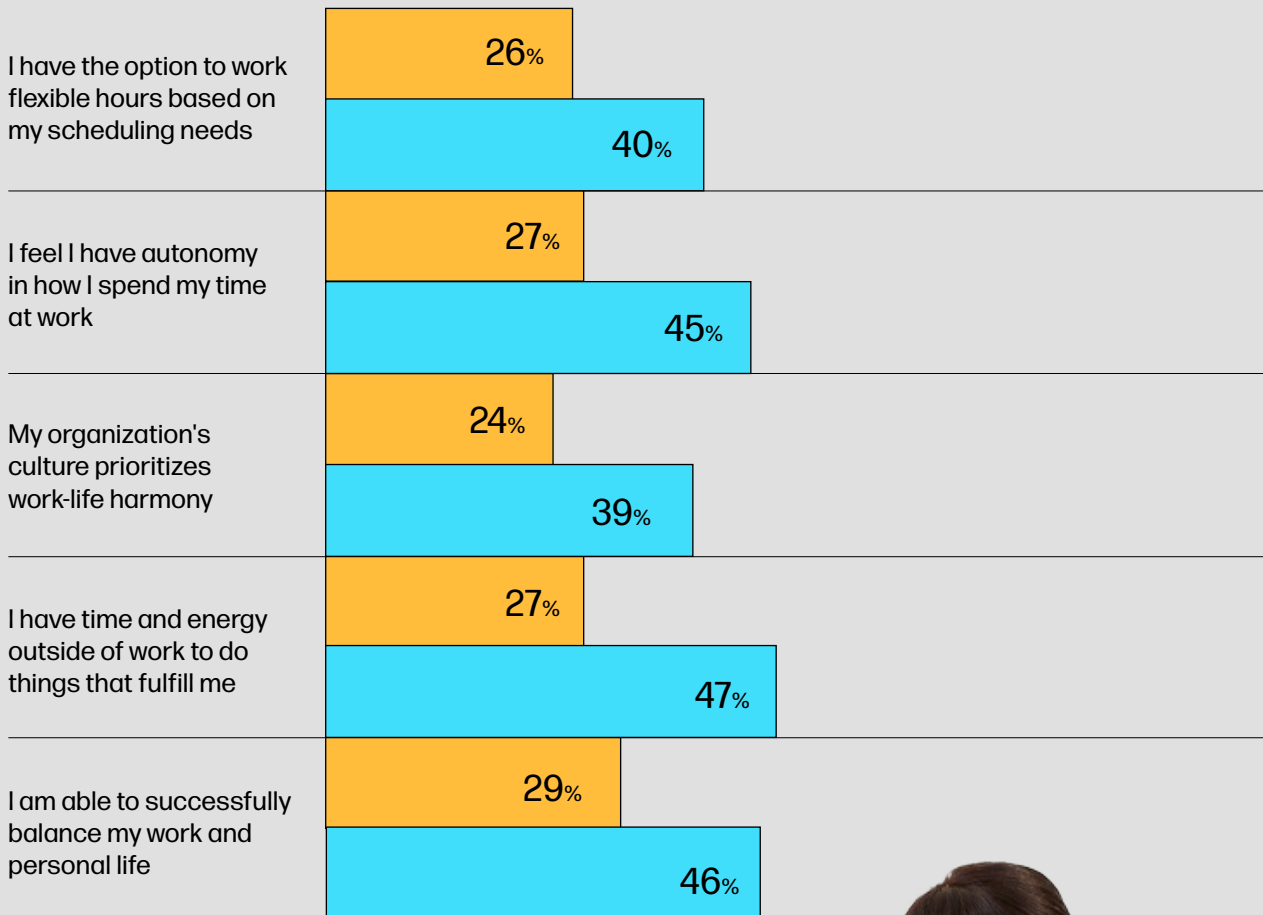
It's not enough for knowledge workers to have agency and choice in where they are working from, however. The ease and seamlessness of transitioning between work locations is just as critical.

% of knowledge workers who work in an environment where it is easy and seamless for them to transition between multiple work locations



Business leaders are more likely than their employees to have flexibility, autonomy and work-life balance. While only an average of 27% of workers experience these elements consistently, 43% of business leaders experience them (still, it's notable that fewer than half of business leaders feel that way).

% of employees who consistently experience that...



● Knowledge workers      ● Business leaders



# HP's Work Relationship Index 2023: HP's Recommendations



## Fulfillment

Expectations have changed - employees are placing greater importance on purpose and empowerment than ever before. Businesses must explore ways to support employee fulfillment by giving them greater voice and agency.



## Leadership

Leaders and employees alike agree that a different leadership skillset is necessary to succeed in business today. Senior leaders and managers must demonstrate empathy and stronger emotional intelligence - and will gain respect from doing so. The human/ open style of leadership that grew in prominence during 2020 should be rediscovered and preserved.



## People-centricity

Employees want to bring their whole selves to work—and are less willing to make sacrifices to their work life balance. They are looking for greater respect and autonomy, and expect company management to lead by example. Businesses and their leaders should put a demonstrable emphasis on putting people first and placing their teams at the heart of their decision-making.



## Skills

Employees are eager to develop their skills and learn on the job, yet are experiencing a crisis of confidence as skills-needs evolve. "Best-practice" businesses have an opportunity to gain a vital skills-development and employee engagement edge by investing in holistic training and support.



## Tools

Technology must now be looked at as an important vehicle for employee engagement. No longer just a utility, the technology portfolio is emerging as a key driver of connection, enablement, flexibility and autonomy - and a potent symbol of a company's values around empathy and agency.



## Workspace

In recent years, expectations of where people should be able to work - and the quality of the experience they look for, no matter where they are - have radically shifted. Effective hybrid workspaces with seamless transitions between locations are key - as is appropriate flexibility in where employees can work, according to their roles and the needs of the business. As with Tools, the Workspace flexibility companies offer is seen as a reflection of the trust and agency they place in their employees.

# Methodology

This research consisted of desk research and a large global survey.



# Desk Research Methodology

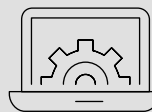
The desk research consisted of analyzing global, English, online conversations related to key themes - helpful tools, spaces and processes, human-first culture, work-life harmony, confidence in skills and ability and trustworthy leadership - from April 2022 through March 2023.



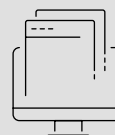
To understand the landscape of the conversation, HP:



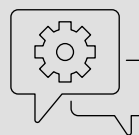
Analyzed earned and social (Twitter, now called X) conversations.



Analyzed global search results and trends to contextualize shifts in search patterns and emerging trends across the globe.



Analyzed existing global academic and industry research to understand the existing landscape from a data perspective.



Supplemented with deep-dives into identified areas of interest, including competitive spaces as well as a manual review of key LinkedIn and forum conversations.

# Survey Methodology

The survey was fielded online between June 9 – July 10, 2023, in 12 countries: the US, France, India, UK, Germany, Spain, Australia, Japan, Mexico, Brazil, Canada and Indonesia. HP surveyed:



## Knowledge workers

Workers who are primarily desk-based (including hybrid and remote workers).

- n=12,012 knowledge workers



## IT decision makers

Individuals who have the ability to either specify, recommend or approve what computers and/or printers their organization uses (particularly among medium to large companies).

- n=3,612 IT decision makers



## Business leaders

Those who self-identify as Directors, Senior leaders, Small Business Owners, VPs, CFOs, CEOs, etc. and have at least some influence over technology / IT decisions.

- n=1,204 business leaders

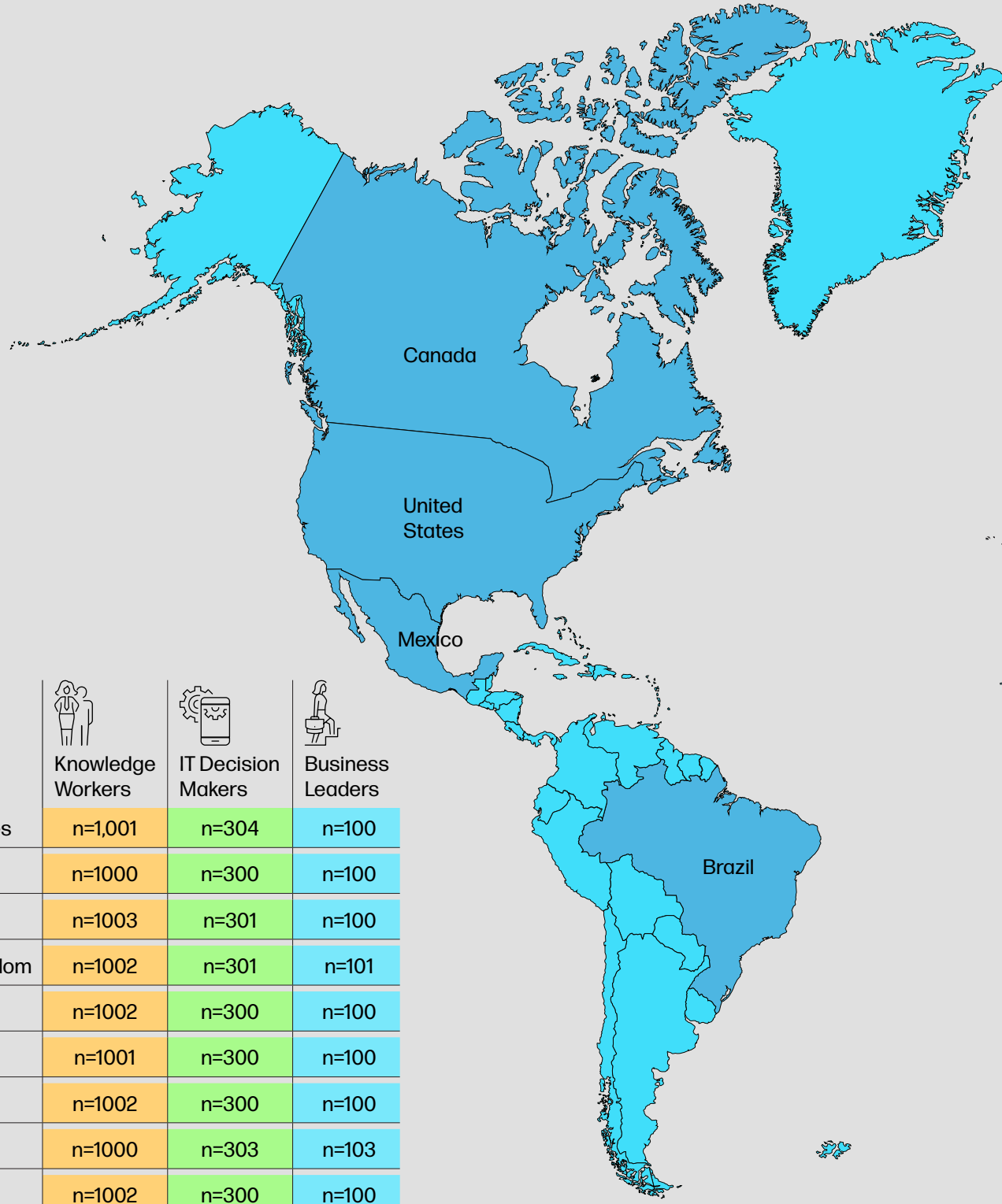
Depending on their role, some respondents qualified as both IT decision maker and business leader.

To create the work relationship diagnostic, multiple scales, options and wording were tested. The final metric was validated through a series of driver and factor analyses. Ultimately, the best metric to diagnose a healthy relationship is a scale that asks individuals about their happiness level with their relationship with work. The scale places people in three distinct groups: people with a healthy relationship with work, people in a 'watch-out zone' and people with an unhealthy relationship with work. The Work Relationship Index score is the proportion of people who currently have a healthy relationship with work.

Drivers of the world's relationship were identified through a multistep process to select and quantify key dimensions of one's relationship with work. Factor analysis was carried out on 50+ variables to identify the common variance patterns in the data, and a subset of variables per factor were then selected for statistical analysis. Throughout the paper, "drivers" refers to six distinct strategic factors, out of a total set of seven, identified as significant in shaping the world's relationship with work based on the outputs of the statistical analysis.



# Market distribution of knowledge workers, IT decision makers and business leaders:



	 Knowledge Workers	 IT Decision Makers	 Business Leaders
United States	n=1,001	n=304	n=100
France	n=1000	n=300	n=100
India	n=1003	n=301	n=100
United Kingdom	n=1002	n=301	n=101
Germany	n=1002	n=300	n=100
Spain	n=1001	n=300	n=100
Australia	n=1002	n=300	n=100
Japan	n=1000	n=303	n=103
Mexico	n=1002	n=300	n=100
Brazil	n=1000	n=301	n=100
Canada	n=1000	n=300	n=100
Indonesia	n=999	n=302	n=100





