



BAROMETER 2016
EDENRED - IPSOS

EMPLOYEE WELL-BEING AT WORK



2016 Edenred-Ipsos Barometer

The Millennials generation in the working environment

September 2016

GAME CHANGERS



Edenred

THE 2016 EDENRED-IPSOS BAROMETER

+ 14,000 employees interviewed by Ipsos in January 2016* including **3,552 employees under 30 or born after 1986**** ...

...in **15 countries** among the largest economies in the world: Belgium, Brazil, Chile, China, France, Germany, India, Italy, Japan, Mexico, Poland, Spain, Turkey, United Kingdom, USA

**Online survey undertaken in January 2016 by Ipsos*

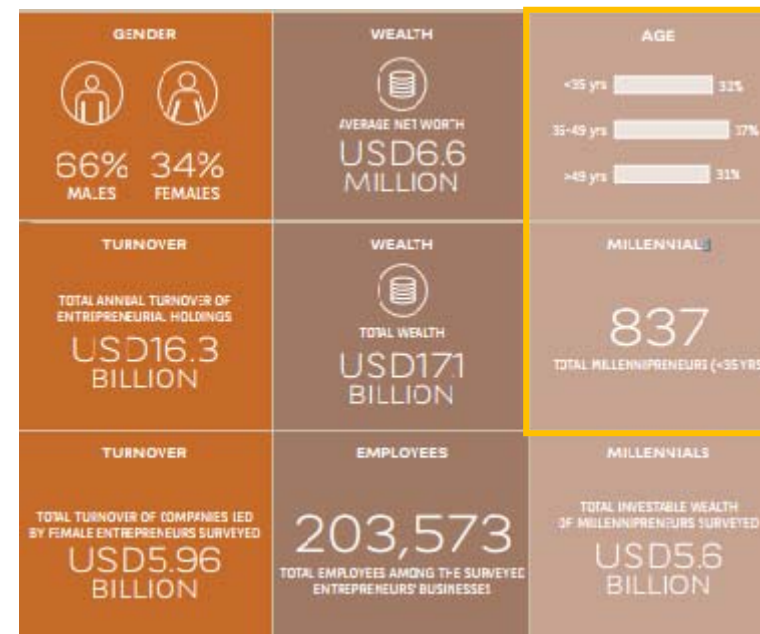
***In our Barometer, employees born after 1986 are considered as "Digital Natives"; they belong to the Millennium generation ("Millennials").*



REMINDER: THE BAROMETER DOESN'T INCLUDE THE 'MILLENNIPRENEURS'

Entrepreneurship is growing at an exponential rate worldwide - particularly among young people

→ Emergence of “Millennipreneurs”



(2016 BNP Paribas Global Entrepreneur Report)

APPROACH

1

Engaging the Millennials:
perceptions of the workplace

2

Attracting the Millennials:
employer's future HR challenges

3

Attracting the Millennials:
the 'ideal employer'

4

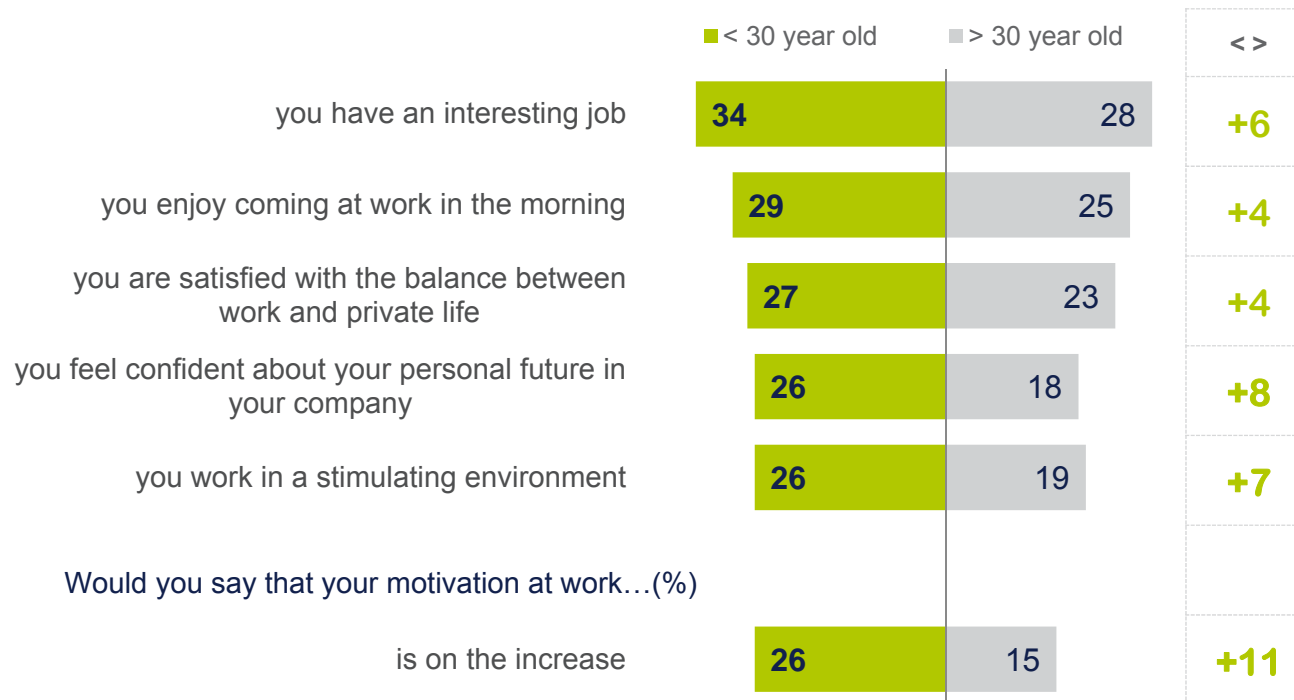
Managing the Millennials:
expectations toward managers



Key results

LIFE IN THE WORKPLACE (1/2)

Do you agree with the following statements ...(% absolutely)

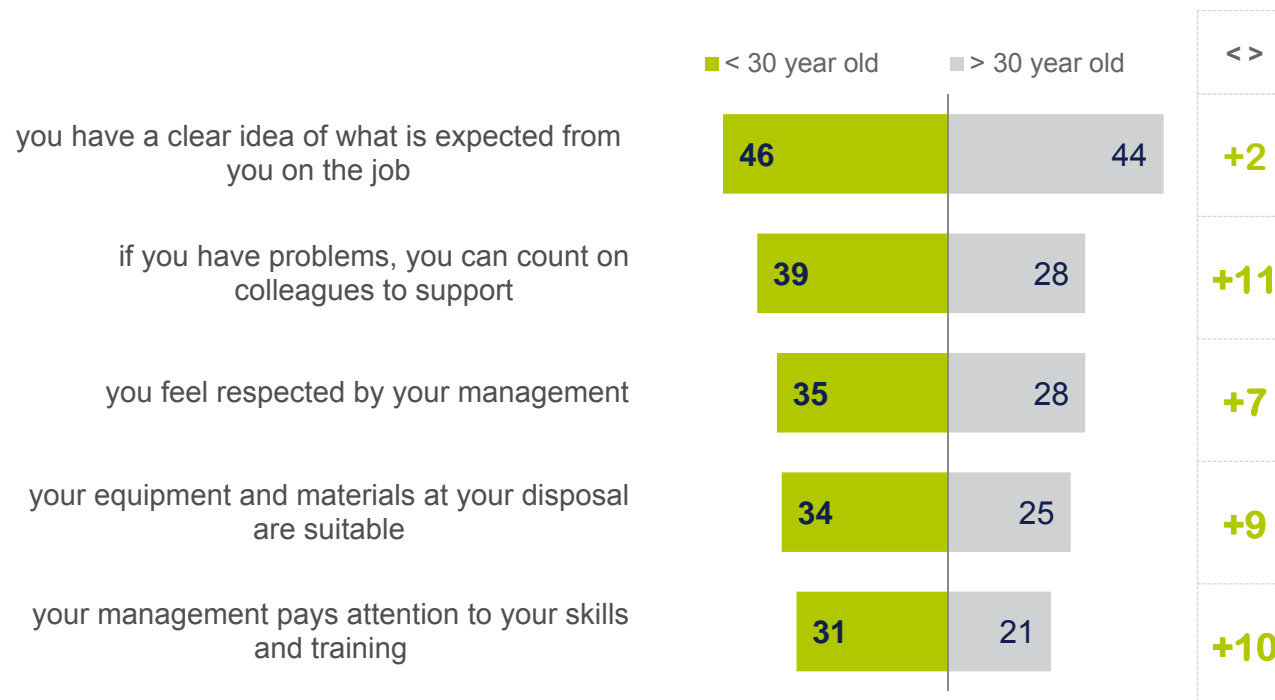


FINDINGS

Compared to their elders, Millennials are much **more enthusiastic and motivated**

LIFE IN THE WORKPLACE (2/2)

Do you agree with the following statements ...(% absolutely)

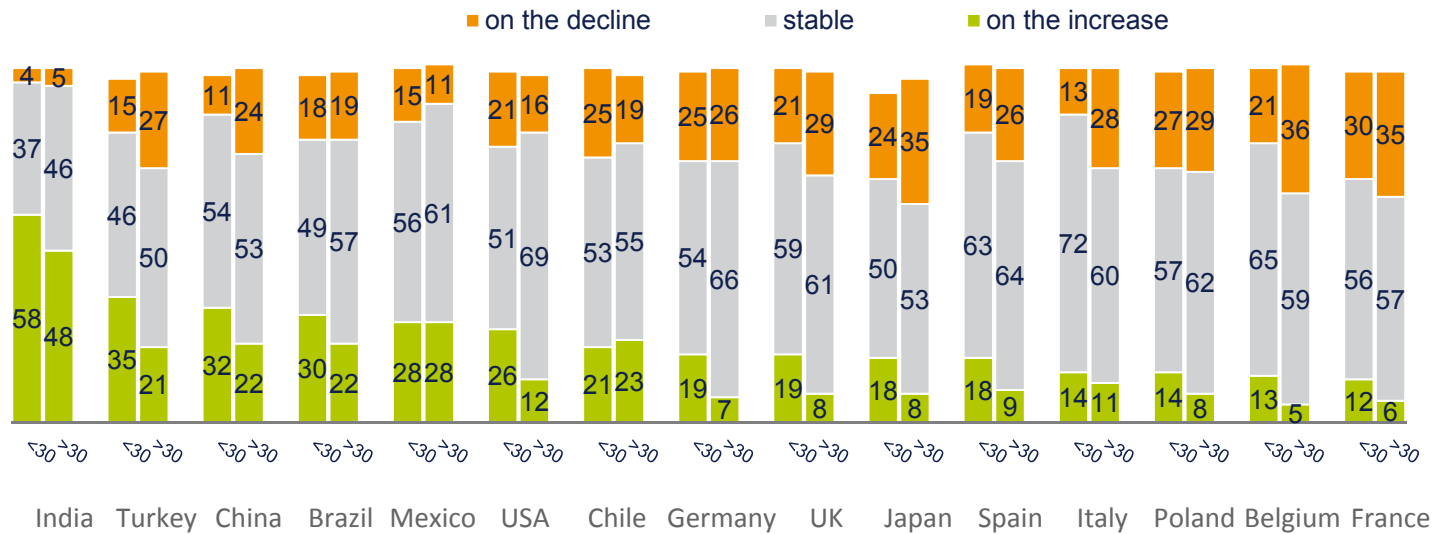


FINDINGS

- Under 30s employees also have the feeling to work in **a more trusty and supportive environment**
- They feel **better managed and trained**

MOTIVATION [COUNTRIES]

Your motivation at work is... (%)

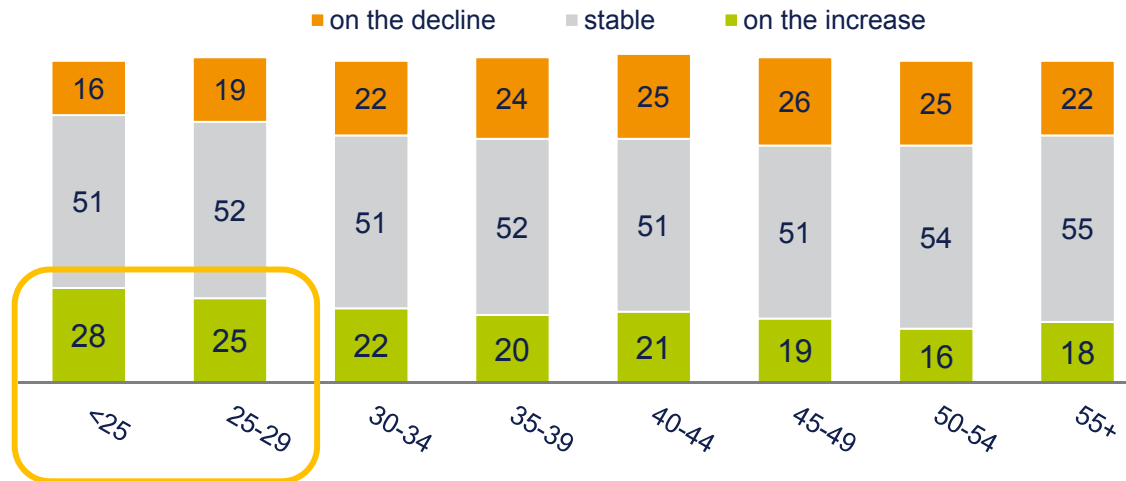


FINDINGS

In all countries (exc. Chile and Mexico), **Millennials are more motivated than their elders**

MOTIVATION... 10 YEARS AGO*

Your motivation at work is... (%)



(worldwide perimeter)

FINDINGS

- 10 years ago, under 30's were also more motivated
- These more positive results among Millennials more reflect classical attitudes of new joiners on the job market rather than a "generation effect"

*Results extracted from Ipsos Red© Survey 2006

POTENTIAL CHALLENGES

In your opinion, what are the main challenges your company will face in the coming years? (%) (several answers possible)

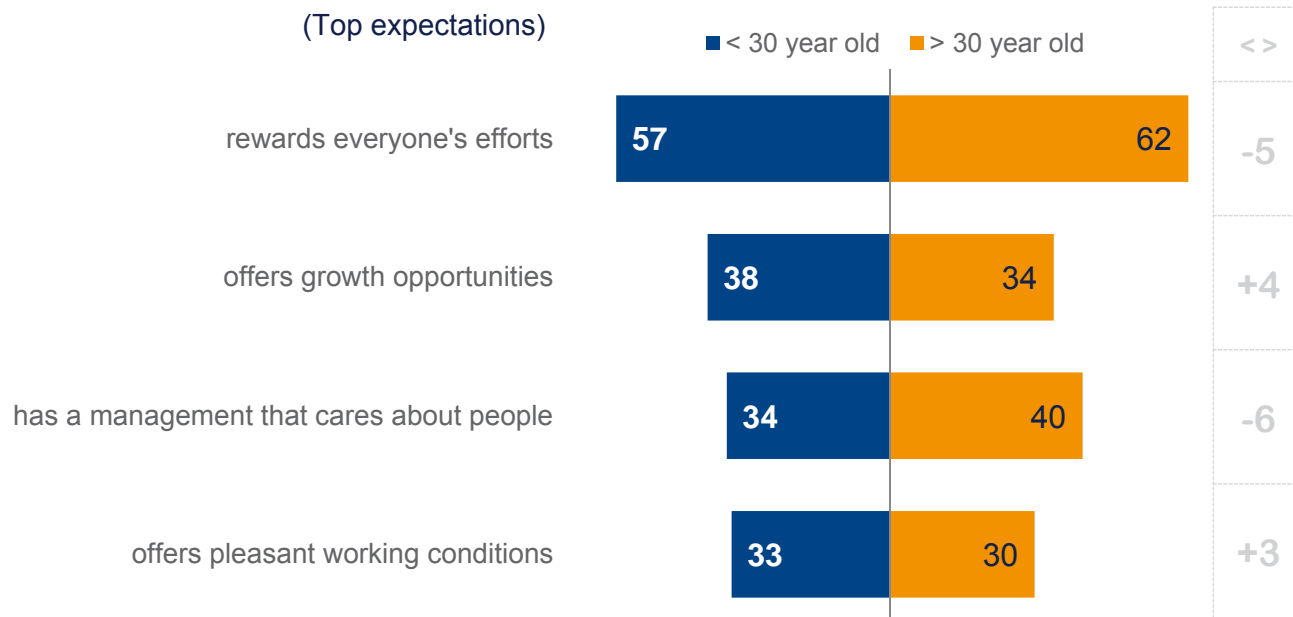


FINDINGS

- Perception of the potential challenges faced by companies are also similar between Millennials and their elders : **managing talent, taking care of employees and managing change**
- Diversity, intergenerational relationships or digitalization** appear to be less critical challenges even among the under 30s.

THE 'IDEAL' COMPANY (1/2)

What are the main qualities of an 'ideal company'? (%) (up to 3 answers)
It is a company that...

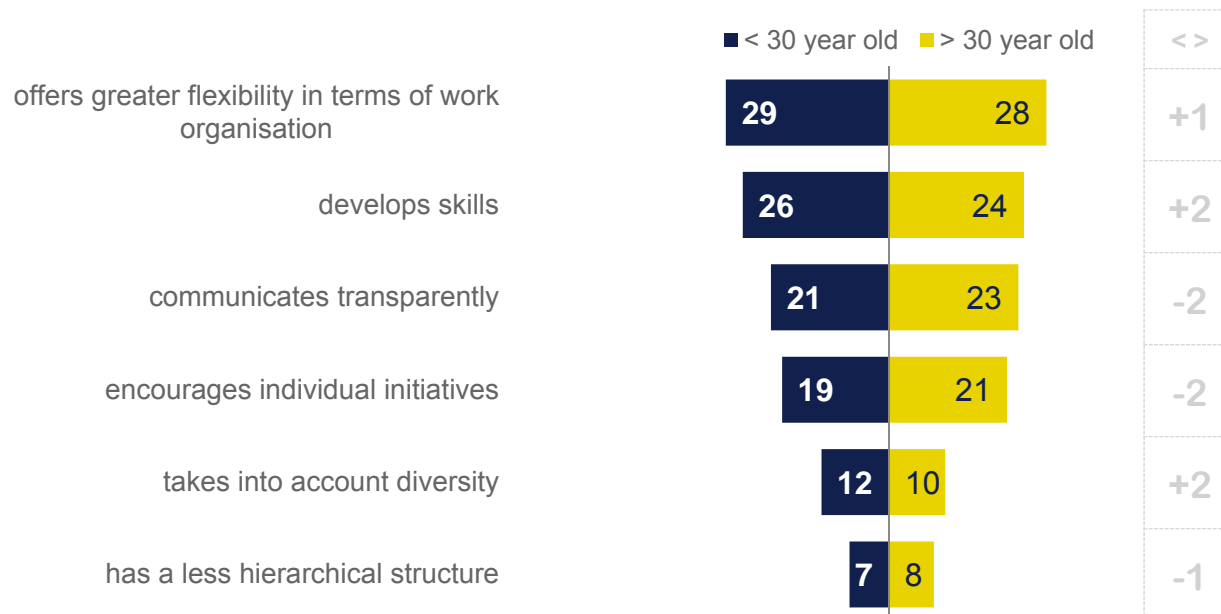


FINDINGS

The hierarchy of responses is almost identical between age categories : **reward, opportunities for growth and care** are ranked as the top 3 expectations among Millennials, as well as for older employees

THE 'IDEAL' COMPANY (2/2)

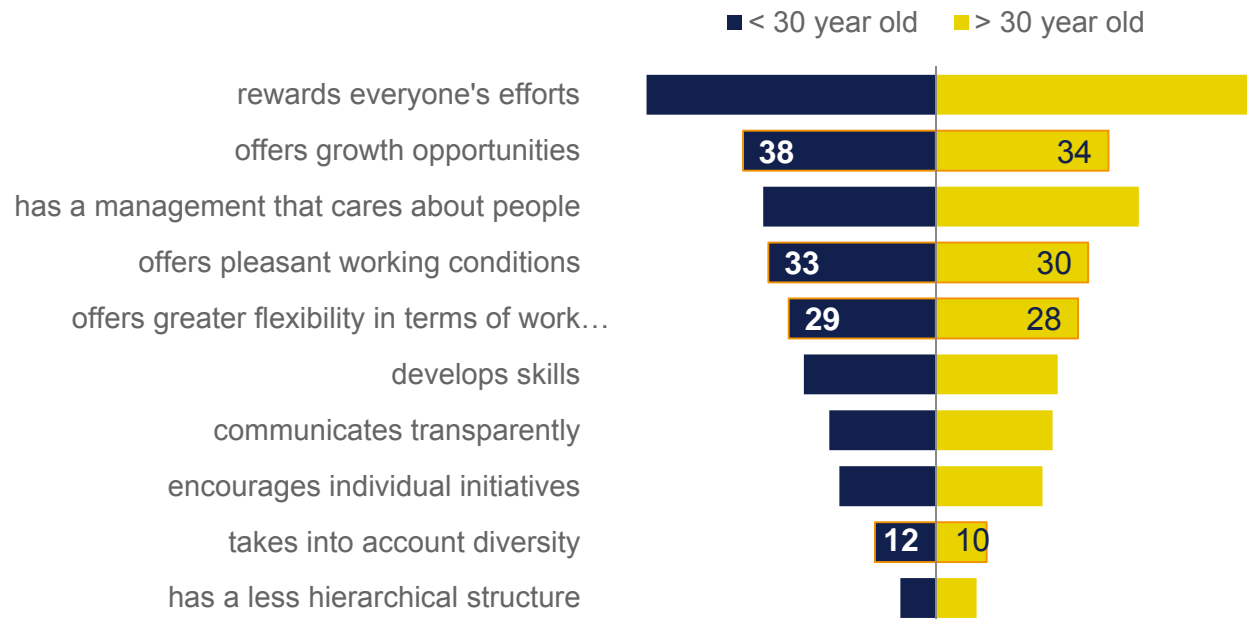
What are the main qualities of an 'ideal company'? (%) (up to 3 answers)
It is a company that...



FINDINGS

Diversity, intergenerational relationships or organizational issues linked to digitalization (flexibility, less hierarchy...) appear to be less critical challenges, even among the under 30s.

THE 'IDEAL' COMPANY [COUNTRIES]

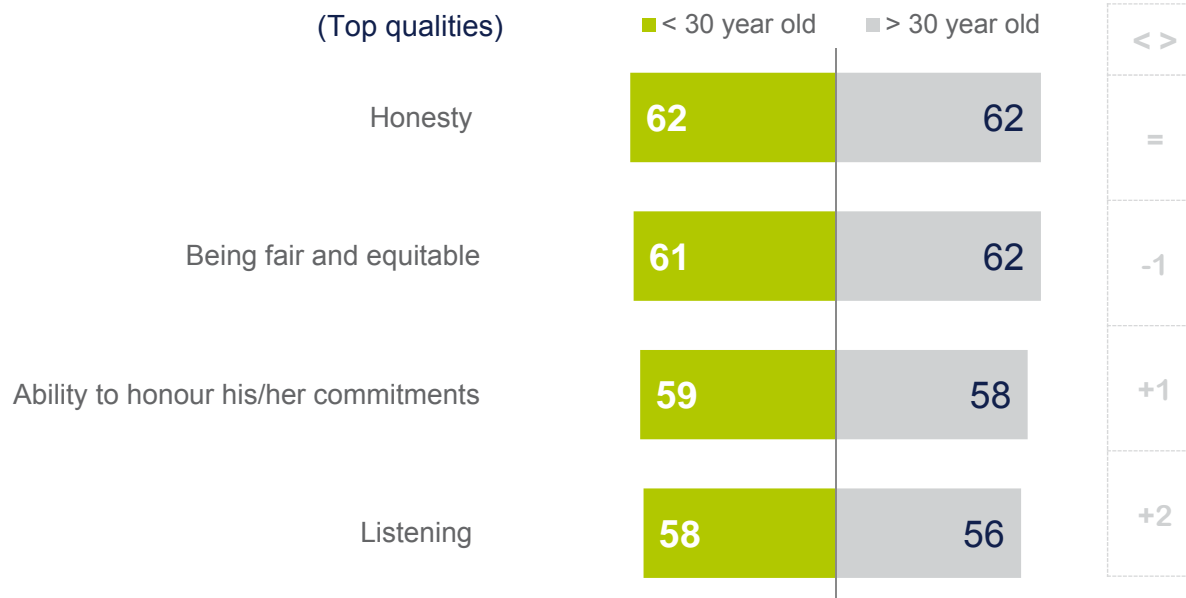


FINDINGS

- Within the 15 countries of the barometer, some qualities are significantly **more expected by Millennials** than their elders:
 - Growth opportunities and skills in the US, UK + Belgium and Poland**
 - Pleasant working conditions in Brazil**
 - Organization flexibility in India, China or Japan**
 - Diversity in France and Spain**

EXPECTATIONS RE. MANAGERS (1/2)

More specifically, in your opinion, is each of the following qualities important to be a good manager today? (% very important).



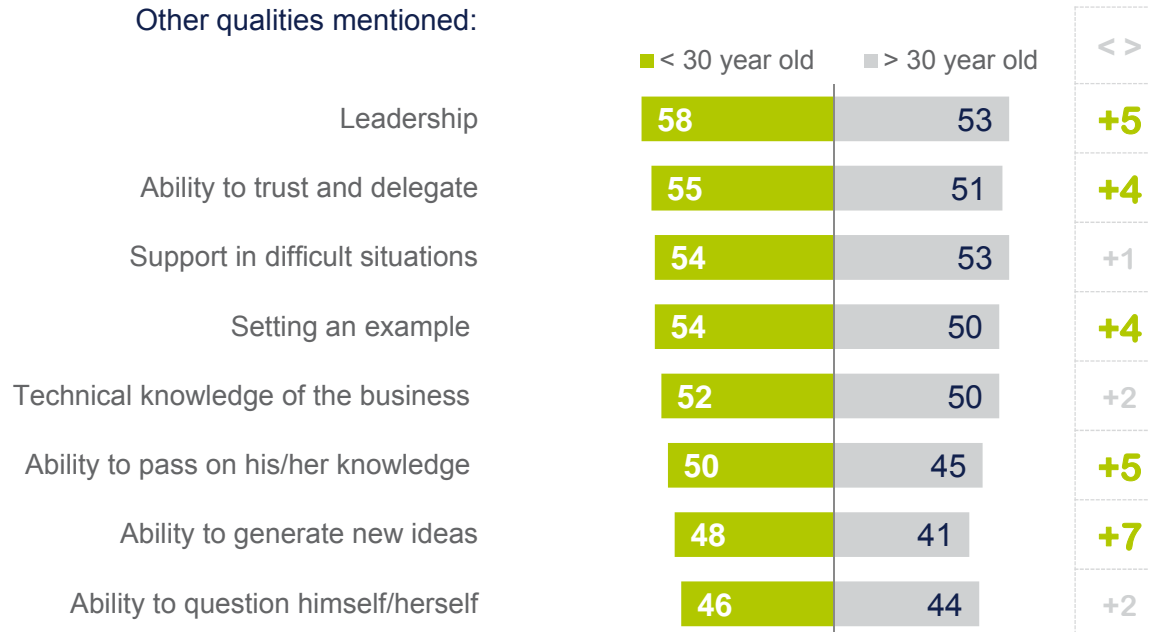
FINDINGS

For most employees (Millennials as well as > 30 year old), **fairness, honesty** + listening are the main qualities when describing the 'ideal manager'

EXPECTATIONS RE. MANAGERS (2/2)

More specifically, in your opinion, is each of the following qualities important to be a good manager today? (% very important).

Other qualities mentioned:

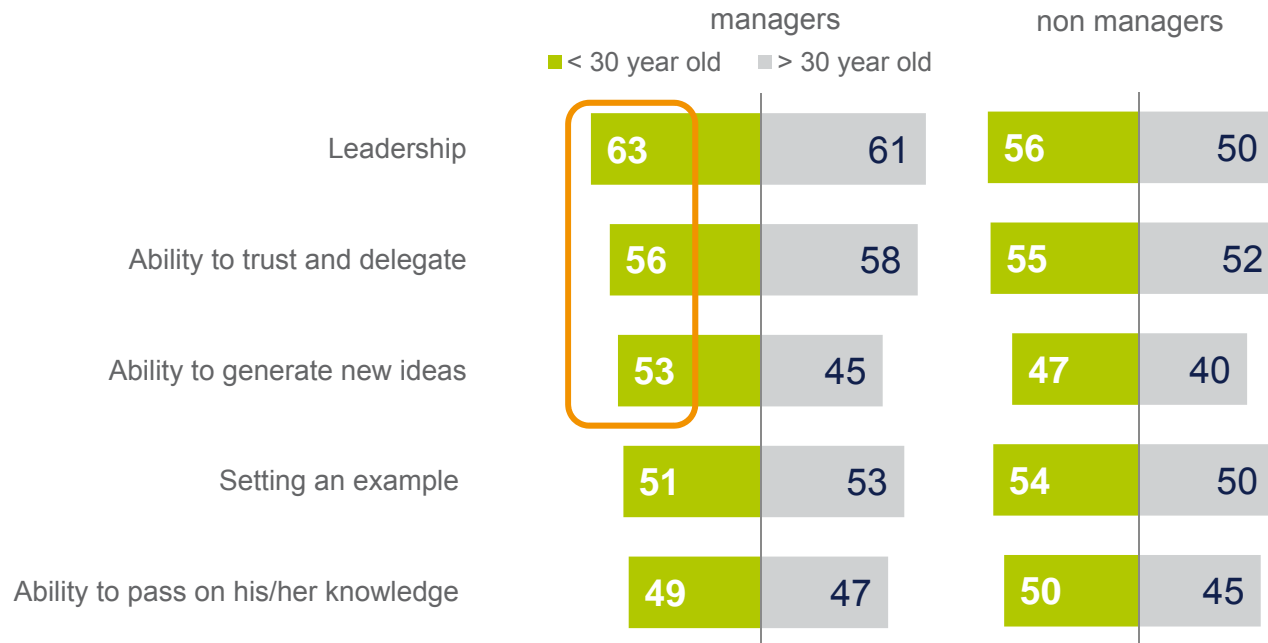


FINDINGS

- Millennials add a **supplement of leadership, trust, ability to generate new ideas and share knowledge**
- Millennials desire for a **more engaging management style**
- Impact of the level of occupation (see below)
- No strong differences between Millennials of all countries → **adapting managerial behaviors, a global issue in a digitalized world?**

EXPECTATIONS RE. MANAGERS [LEVEL OF OCCUPATION]

More specifically, in your opinion, is each of the following qualities important to be a good manager today? (% very important)



FINDINGS

- Leadership, trust and ability to generate new ideas is **clearly more challenging for managers** than non managers
- ...and particularly **managers under 30's**



Key findings

KEY FINDINGS (1/2)

Millennials: **more enthusiastic and motivated, work in a more trusty and supportive environment** and feel better managed and trained.

- However is it a generation effect or just the classic attitudes of new joiners on the job market? Actually ten years ago, under 30s were also more motivated than their elders.

About employees expectations: **reward, opportunities for growth and care** are ranked as the top 3 expectations among under 30s as well as for older employees.

Perception of the potential challenges faced by companies: **managing talent, taking care of employees and managing change** are the most frequent challenges. Diversity, intergenerational relationships or digitalization appear to be less critical challenges even among the under 30s.

KEY FINDINGS (2/2):

“ *A digital native is someone who was raised in a digital, media-saturated world,* ” Marc Prensky

Is the Millennials as a **disruptive generation, a myth?**

Millennials' early experiences with digital probably shaped their behaviors but **not to the extent that they are radically different at work from older employees.**

Edenred-Ipsos barometer identifies **adaptation of managerial behaviors to the digital world as the real challenge**: fairness and honesty are the main qualities when describing the 'ideal manager'. It is also true for Millennials who add a supplement of leadership, trust, ability to generate new ideas and share knowledge.

CONCLUSION: MANAGING IN DIGITAL TIMES RATHER THAN MANAGING MILLENNIALS?

- For motivation, Millennials desire for a **more engaging management style** is not a surprise and reflects what is commonly expected by young / “fresh” employees.
- However **in a workplace under accelerating digitalization**, it is clearly more challenging for managers. **HR Directors also have a key role to play in this transformation.**
- More than having to deal with a generational related issue, **the challenge that managers face from now is about developing leadership capabilities in a new, virtual, horizontal, multi-tasks working environment.**

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GAME CHANGERS

