

# 2018

## EMPLOYEE ENGAGEMENT TRENDS

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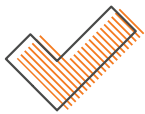


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# AUTHORS



## LIBBY DUONG

Libby partners with the sales development team to create informative and helpful resources about Quantum Workplace software. An expert communicator and organizational guru, Libby is the lead coordinator for all Quantum Workplace events and conferences.



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With a background in journalism and mass communications, Natalie partners with engagement experts and research analysts to create informative resources that organizations can leverage to improve employee engagement and company culture. Natalie is also responsible for the awesomeness that is Quantum Workplace's blog.



## DAN HARRIS, PH.D.

Dan is responsible for analyzing organizational data and articulating employees' perceptions in ways that facilitate meaningful change. He has years of experience with all phases of research, from spearheading data collection and logistics to advanced analysis and consulting.



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Hilary works closely with the client success team and sales team to ensure the educational resources Quantum Workplace publishes meet the needs of HR professionals. Burned by toxic workplace cultures of her past, she's passionate about helping organizations create positive environments where talent is nurtured and valued.



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# WELCOME TO THE **8TH ANNUAL** EMPLOYEE ENGAGEMENT TRENDS REPORT!

Based on the employee surveys from nearly 50 Best Places to Work contests, this comprehensive report is the one and only of its kind, examining employee engagement and culture trends at America's top workplaces. This year's study aggregates responses from more than **600,000 EMPLOYEES** from **8,000+ ORGANIZATIONS** across America.

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# THE CHALLENGES THAT LIE AHEAD

1

EMPLOYEE  
DEVELOPMENT  
IS EMPTY

WHEN MANAGERS  
DON'T DELIVER

2

EMPLOYEE  
RECOGNITION

IS UNSATISFYING

3

MERGERS &  
ACQUISITIONS FAIL

THROUGH LACK  
OF CLARITY

## IN THIS REPORT, WE'LL EXAMINE:

Overall Trends

Organizational Demographic Analysis

Professional Demographic Analysis

Personal Demographic Analysis

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# NAVIGATING THE REPORT

## THE E9 MODEL OF EMPLOYEE ENGAGEMENT

Quantum Workplace measures engagement using our e9 Model of Employee Engagement, a set of nine survey items that measure various aspects of employee engagement.

## SURVEY ITEM FAVORABILITY

In addition to the e9, the survey instrument in this study also included 25 actionable items. Employees responded to the survey items using a six-point Likert agreement scale (1 = strongly disagree and 6 = strongly agree). This report discusses how favorable employees were toward particular survey items, with favorability being the proportion of responses to a survey item that are either five or six on the six-point rating scale.

**Employee engagement** is the strength of the mental and emotional connection employees feel toward their places of work.

## EMPLOYEE ENGAGEMENT PROFILES

Throughout the report, we also look at employee engagement profiles. For 2016 and 2017's data, employees are classified into four groups based on the average of their responses to the e9.

HIGHLY ENGAGED	MODERATELY ENGAGED	BARELY ENGAGED	DISENGAGED
Average e9 Rating: 5-6	Average e9 Rating: 4-4.9	Average e9 Rating: 3-3.9	Average e9 Rating: 1-2.9
Strongly connected to workplace Brand advocates Go the extra mile Stick around	Moderately connected to workplace Something holds them back from full engagement	Barely connected to workplace Indifferent attitude Lack motivation Turnover risk	Disconnected from workplace Negative, disruptive Hinder productivity

**Prior to 2016, Quantum Workplace used a different model for calculating profiles.** In the previous model, employees were classified into four groups based on the average of their responses to all survey items, rather than just the e9 items. The new model removes employee sentiment about workplace culture elements and focuses only on employees' feelings of engagement. You'll notice this shift when looking at year-over-year trending prior to 2016.

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# OVERALL TRENDS



Examine aggregate trends in engagement, favorability, and more.

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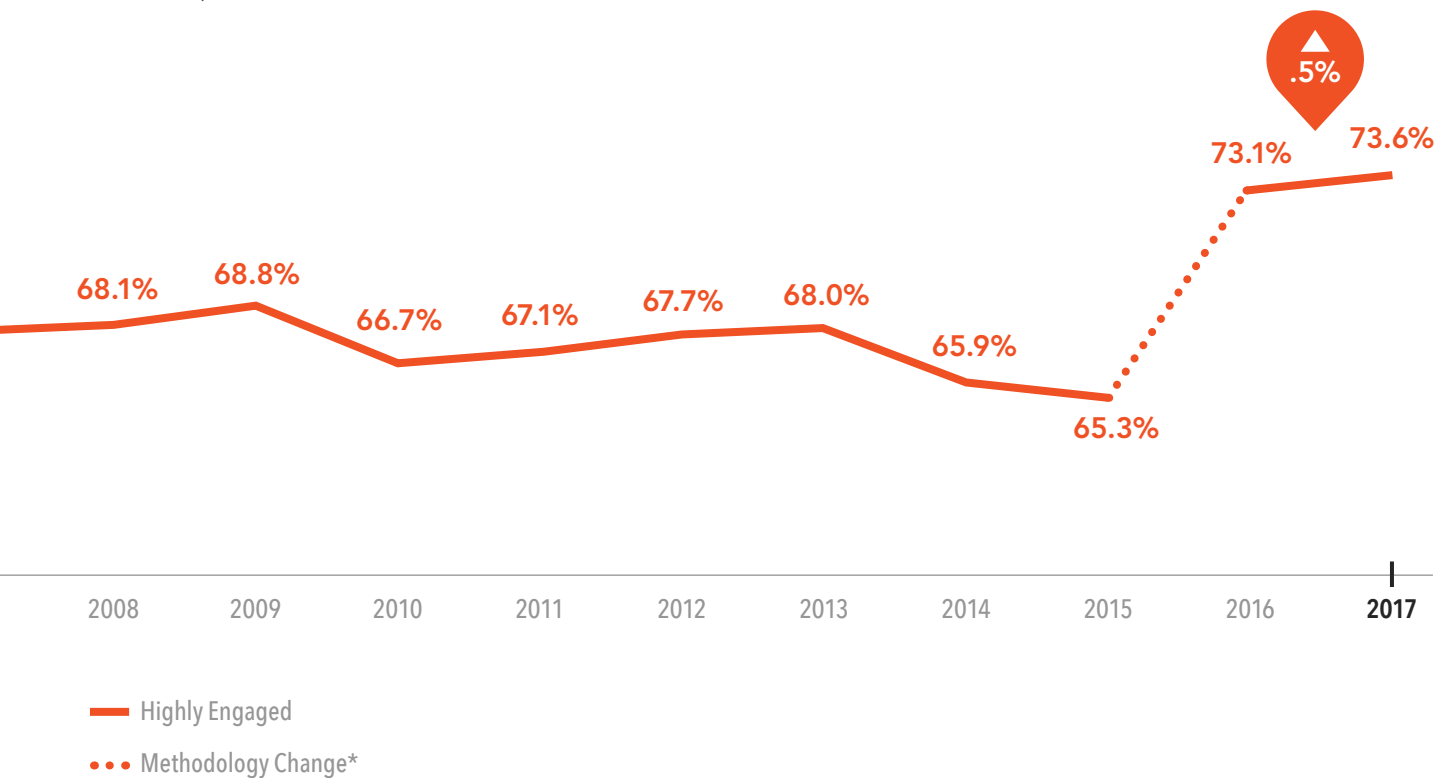
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# EMPLOYEE ENGAGEMENT UP SLIGHTLY

The number of highly engaged employees increased 0.50 percent from 2016 to 2017.



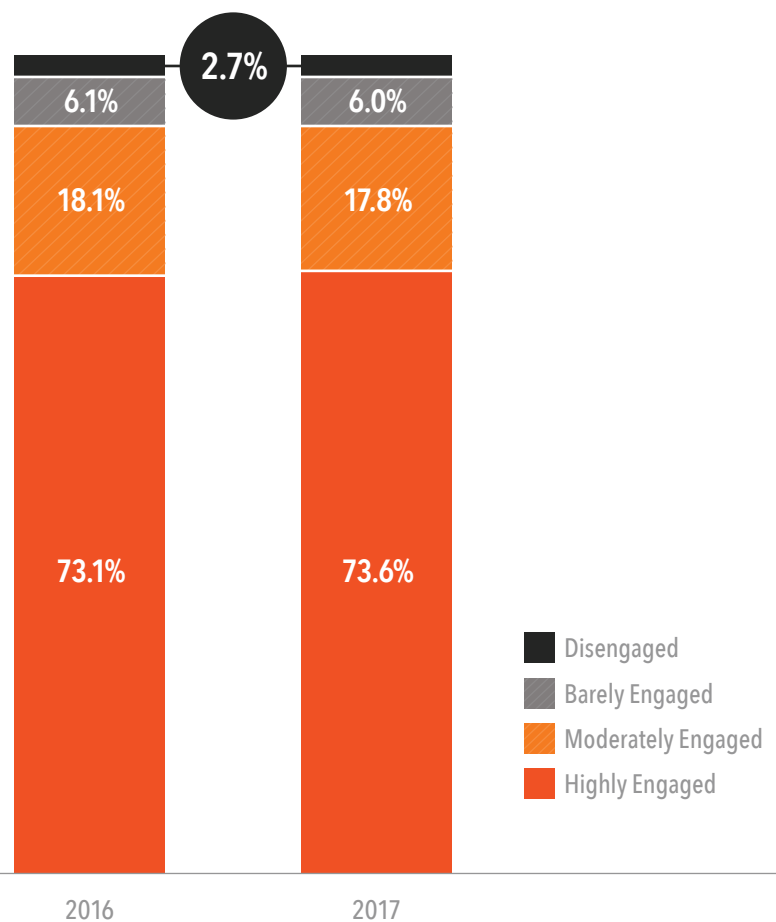
\*Reminder! Prior to 2016, Quantum Workplace used a different model for calculating profiles. See page 7 for more information.

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# NO MOVEMENT AMONG DISENGAGED EMPLOYEES

Despite a slight growth in highly engaged employees, the number of disengaged employees remained steady at 2.7 percent between 2016 and 2017.



\*Reminder! Prior to 2016, Quantum Workplace used a different model for calculating profiles. See page 7 for more information.

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# WORKPLACE CULTURE: THE HIGHS AND LOWS

The four items with the highest favorability were the same in 2017 as 2016. This indicates that these are strong indicators of being a Best Place to Work. The five items with the lowest favorability are consistent with last year's report, which indicates that most organizations, including Best Places to Work, struggle in these areas.

## 5 ITEMS WITH THE HIGHEST FAVORABILITY

1

I believe this organization will be successful in the future.

2

Everyone here is treated fairly regardless of race, gender, age, ethnic background, disability, sexual orientation, or other differences.

3

I am proud to work here.

4

The people I work with most closely are committed to producing top quality work.

5

My immediate manager cares about me as a person.

## 5 ITEMS WITH THE LOWEST FAVORABILITY

1

When the organization makes changes, I understand why.

2

I am paid fairly.

3

I see professional growth and career development opportunities for myself in this organization.

4

If I contribute to the organization's success, I know I will be recognized.

5

It would take a lot to get me to leave this organization.

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# EMPLOYEE SENTIMENT IMPROVES IN ALL AREAS BUT ONE

All but one survey item improved in favorability between 2016 and 2017. However, the degree of improvement was low, indicating perceptions of these items have been relatively stable between 2016 and 2017.

## 5 MOST SIGNIFICANT IMPROVEMENTS

**+1.35%**

I love the  
people I work  
with.

**+1.23%**

I am paid fairly.

**+1.21%**

If I contribute to  
the organization's  
success, I know I will  
be recognized.

**+1.10%**

The people I work  
with treat each  
other with respect

**+0.99%**

When the  
organization  
makes changes,  
I understand  
why.

**-0.03%**

## THE ONLY DECLINE IN 2017: RETENTION ►

It would take a lot to get me  
to leave this organization.

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# WHAT'S DRIVING EMPLOYEE ENGAGEMENT?

All items on the survey had a positive correlation with employee engagement. However, some had a greater correlation than others. Items with a correlation of 0.75 or higher were considered significant drivers of engagement.

## TOP DRIVERS OF ENGAGEMENT

My job allows me to utilize my strengths.

I trust the senior leadership team to lead the company to future success.

I believe this organization will be successful in the future.

The leaders of the organization value people as their most important resource.

If I contribute to the organization's success, I know I will be recognized.

I find my job interesting and challenging.

I see professional growth and career development opportunities for myself in this organization.

My opinions seem to count at work.

The leaders of this organization demonstrate integrity.



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# EMPLOYEES STILL LACK CONFIDENCE ON SAME FOUR ITEMS

Last year's report examined four items where employees had a great deal of uncertainty.\* Though uncertainty decreased slightly in 2017, these same four items rose to the top again with greater than 20.0 percent uncertainty.

## AREAS OF HIGH UNCERTAINTY

When the organization makes changes, I understand why.	25.9%
I am paid fairly.	23.4%
I see professional growth and career development opportunities for myself in this organization.	21.4%
If I contribute to the organization's success, I know I will be recognized.	20.9%

TOP  
ENGAGEMENT  
DRIVER

TOP  
ENGAGEMENT  
DRIVER

\*Uncertainty is the proportion of responses to a survey item that are either a three or four (somewhat disagree or somewhat agree) on the six-point rating scale.

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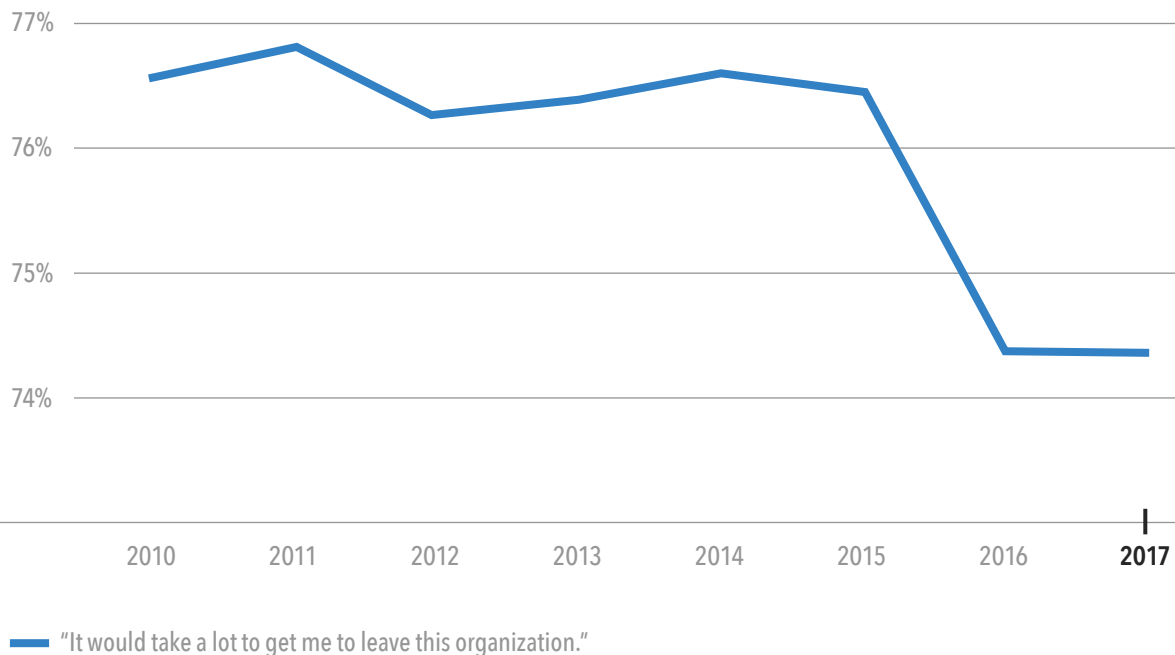
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# RETENTION IS STILL A STRUGGLE

In a year of improved favorability, the survey item, “It would take a lot to get me to leave this organization,” was the lone detractor. Since 2014, this survey item has declined in favorability, with its most drastic decline between 2015 and 2016. Unfortunately, 2017 didn’t recoup 2016’s loss.

In [a previous study](#), low favorability on this item has been found to be a top predictor of employee turnover.



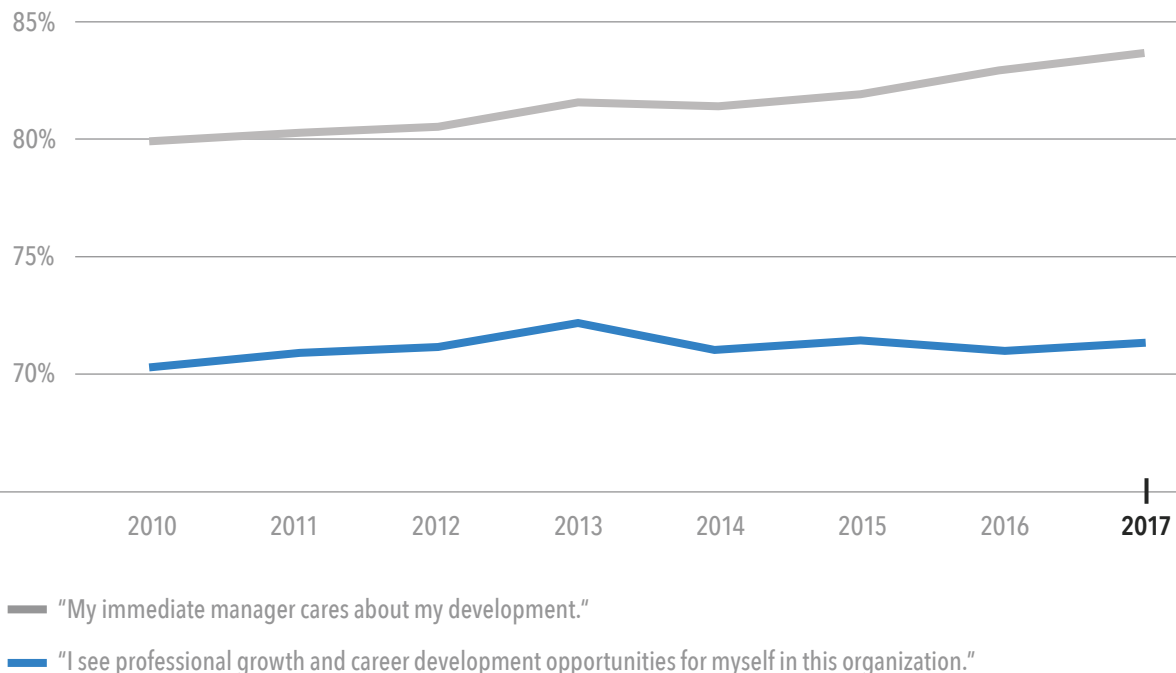
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# MANAGERS CARE ABOUT EMPLOYEE DEVELOPMENT BUT CAN'T DELIVER

The gradual increase in the item, "My immediate manager cares about my development," is a great indication that managers understand the importance of developing their teams. However, when coupled with whether employees have visibility to growth opportunities, we see an average 10 percent gap in favorability over the past eight years. That gap has gradually widened from 9 percent in 2013 to 12 percent in 2017. This represents the gap between managers' intent and their ability to deliver.

The survey item, "I see professional growth and career development opportunities for myself in this organization," is consistently a top driver of engagement. Unfortunately, it's also consistently been among the bottom in favorability. Empowering managers to close this gap could greatly impact engagement.



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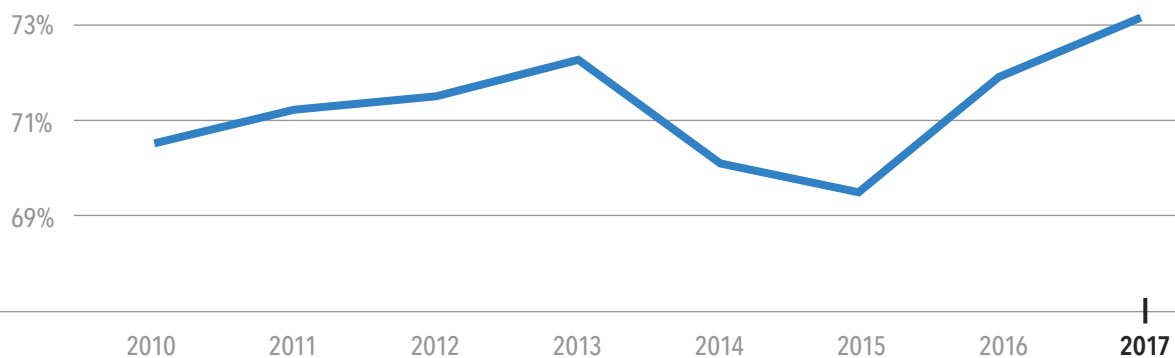
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# RECOGNITION IMPROVES

## BUT EMPLOYEES ARE UNSATISFIED AND EMPLOYERS AREN'T LISTENING

Despite the improvement in favorability on the item, "If I contribute to the organization's success, I know I will be recognized," it maintained its consistently low ranking and high uncertainty. While employers are improving employee recognition efforts, it might not be enough.



— "If I contribute to the organization's success, I know I will be recognized."

In fact, a [recent Quantum Workplace study](#) found **only 11.8 percent of respondents named employee recognition as a top people priority**. In addition, only 36.8 percent said their organizations used employee recognition software. This data represents a low focus of effort being put toward a top driver of engagement.



## How Are Your Peers Addressing Employee Engagement?

### DOWNLOAD THIS EBOOK TO SEE:

- The most popular engagement tools
- Top people priorities for 2018
- The biggest engagement hurdles to watch

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# ORGANIZATIONAL DEMOGRAPHIC ANALYSIS

No two organizations are alike, and with different organizations comes different engagement challenges. In this section, we'll uncover the relationship between engagement and various organizational demographics, including:

- ▣ CORPORATE STATUS
- ▣ SIZE
- ▣ INDUSTRY
- ▣ LOCATION
- ▣ MERGERS AND ACQUISITIONS

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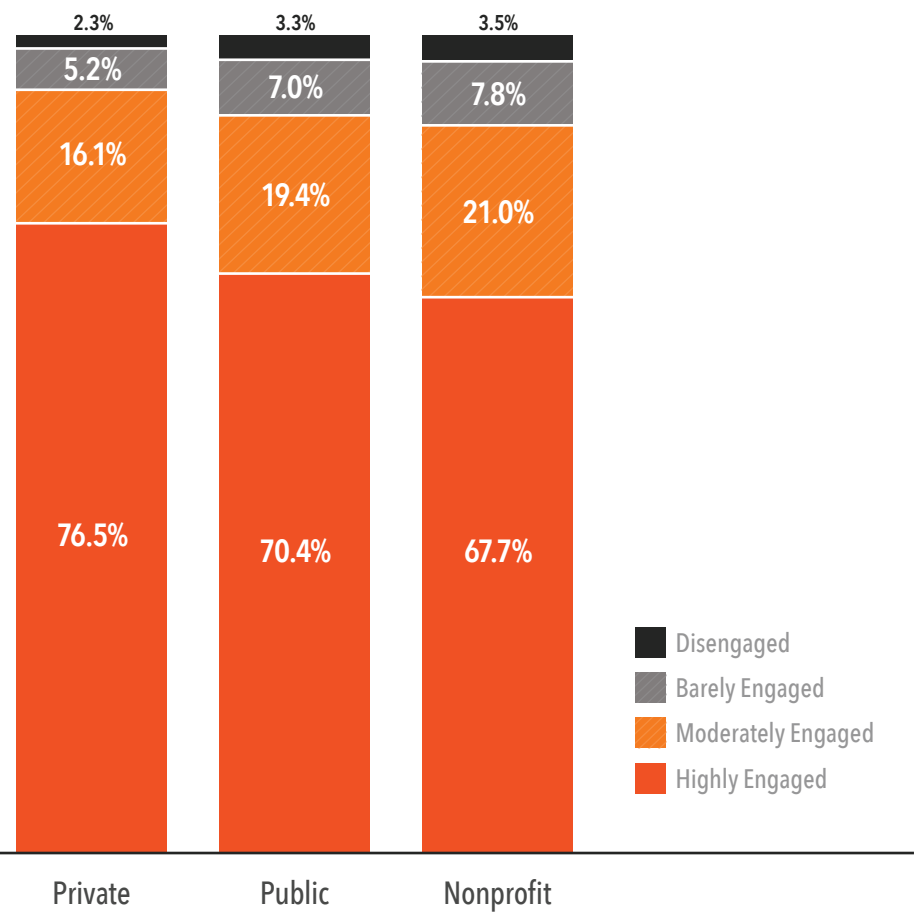
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# NONPROFITS

## STILL TRAILING BEHIND

Similar to past years, the nonprofit sector ranks lowest in highly engaged employees.

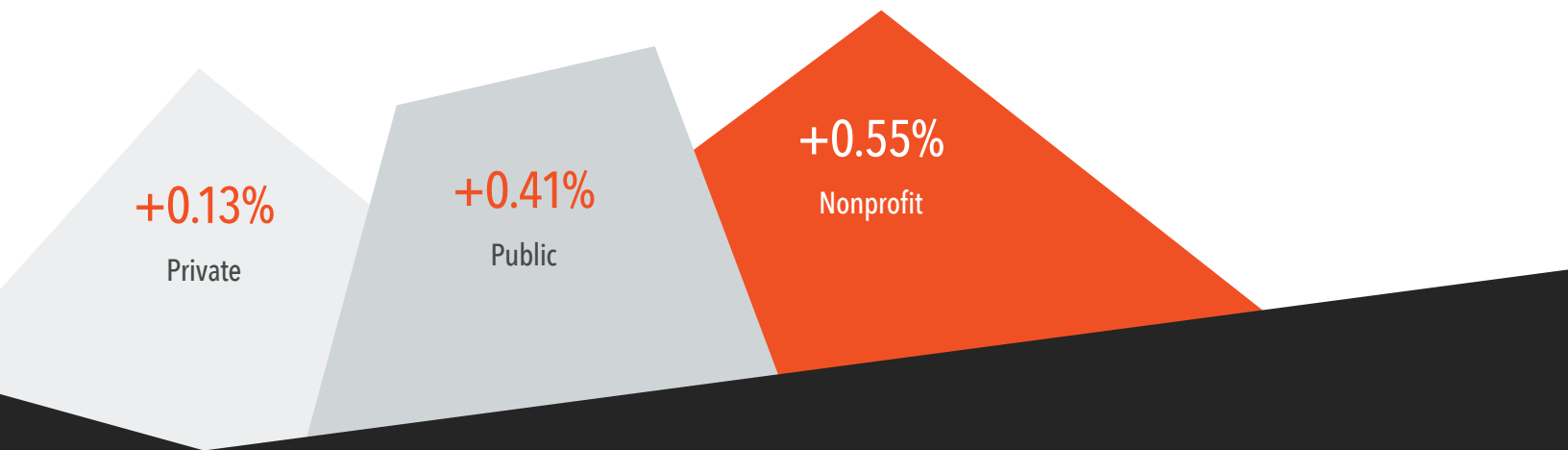


# NONPROFITS' PERCENTAGE OF HIGHLY ENGAGED EMPLOYEES IMPROVES

FOR FIRST TIME SINCE 2014

Previous years have shown that nonprofits have low engagement scores – especially when compared to privately owned companies. This trend is still true for this year's report, but for the first time since 2014, the nonprofit industry experienced a positive change in the percentage of highly engaged employees.

## CHANGE IN PERCENTAGE OF HIGHLY ENGAGED EMPLOYEES FROM 2016 TO 2017



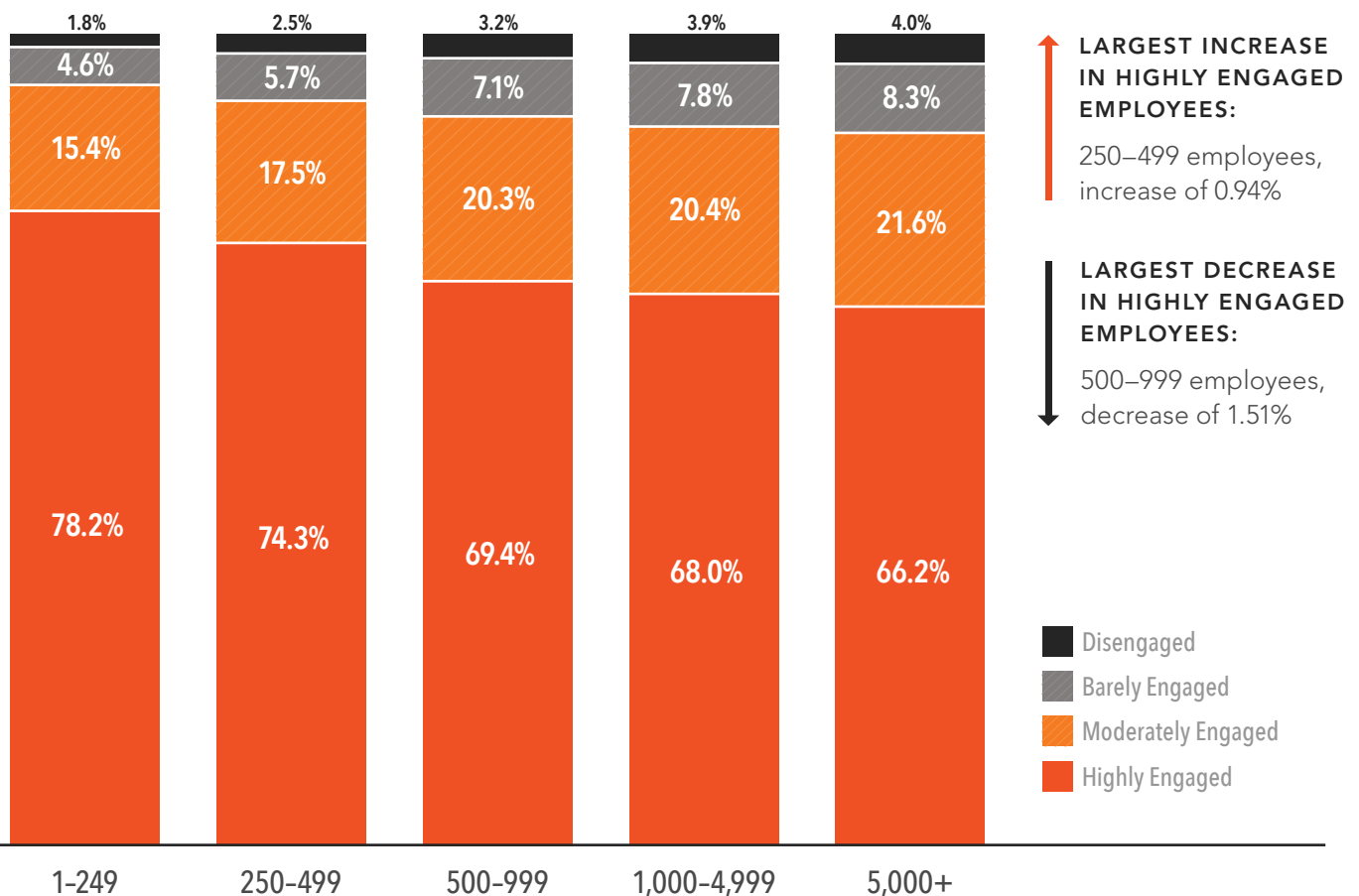
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# AS COMPANY SIZE INCREASES, HIGHLY ENGAGED EMPLOYEES DECREASE

ENGAGEMENT BY ORGANIZATION SIZE



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# UTILITIES MAKES A COMEBACK, WHILE LOGISTICS FALLS

The chart below lists the 18 industries analyzed in rank order by percent of highly engaged employees. To the left, you'll see rank order and change in rank from 2016 to 2017. On the right, you'll see the percent of highly engaged employees in the industry.

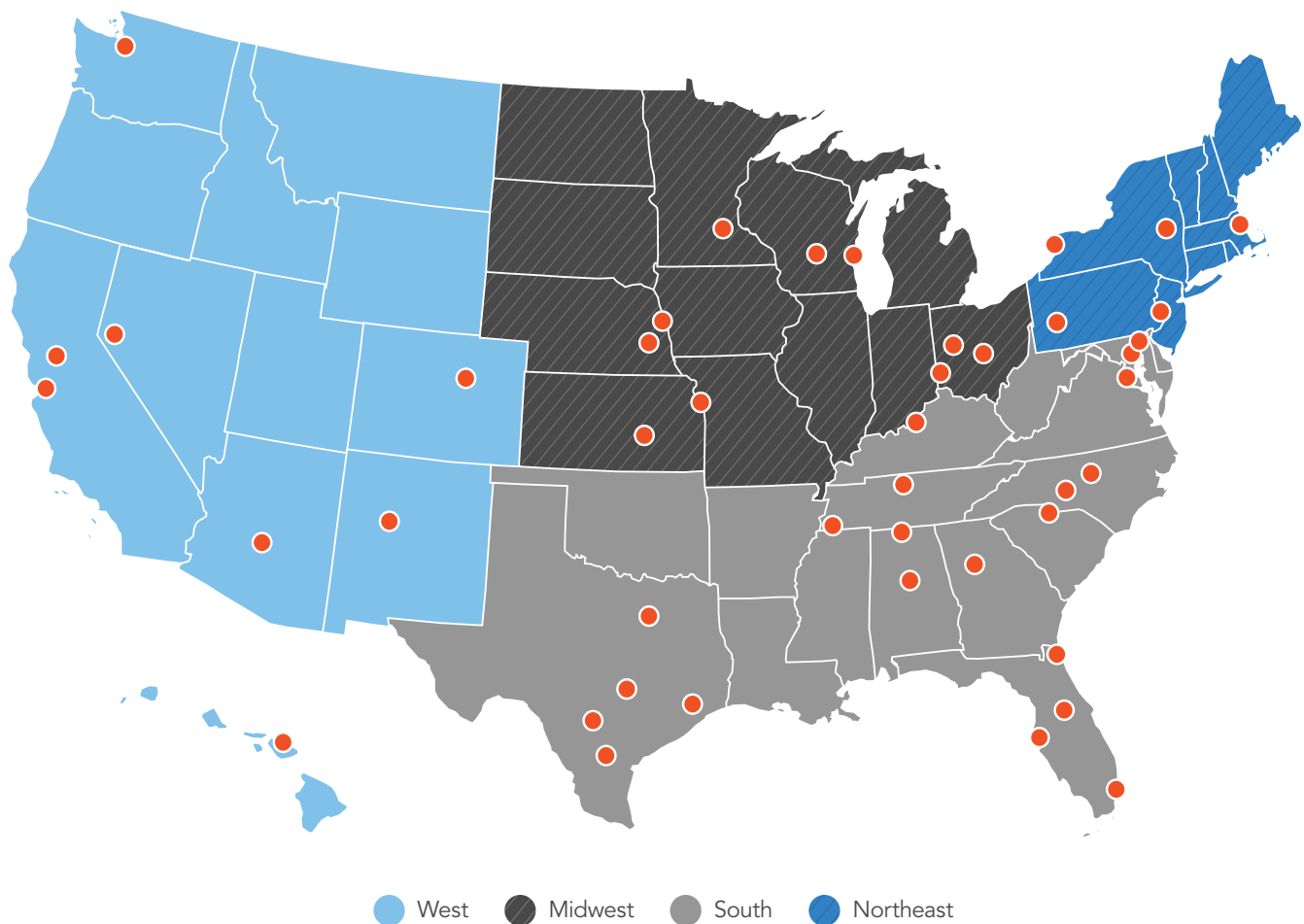
## INDUSTRY TRENDS

RANK	YOY CHANGE IN RANK	INDUSTRY	PERCENT HIGHLY ENGAGED	YOY CHANGE IN % HIGHLY ENGAGED
1	▲ +1	Construction	81.41%	▲ +1.05%
2	▲ +2	Real Estate	79.30%	▲ +0.94%
3	No Change	Professional Services	76.92%	▲ +0.41%
4	▲ +1	Technology	76.53%	▲ +0.40%
5	▲ +5	Finance & Insurance	74.39%	▲ +2.65%
6	▲ +1	Other Services	74.15%	▼ -0.03%
7	▲ +1	Transportation & Warehousing	72.26%	▲ +0.65%
8	▲ +8	Utilities	71.50%	▲ +8.17%
9	▼ -3	Accommodation & Food Services	71.40%	▼ -2.24%
10	▲ +1	Education	69.46%	▼ -0.82%
11	▼ -2	Retail	68.62%	▼ -1.41%
12	▼ -11	Logistics	68.22%	▼ -13.88%
13	▲ +2	Healthcare	68.00%	▲ +0.49%
14	▼ -6	Management of Enterprises	67.79%	▼ -7.13%
15	▼ -3	Arts and Entertainment	66.97%	▼ -0.63%
16	▼ -3	Wholesale Trade	66.89%	▲ +0.67%
17	▼ -3	Manufacturing	64.17%	▼ -3.33%
18	▼ -1	Government	60.53%	▼ -2.96%

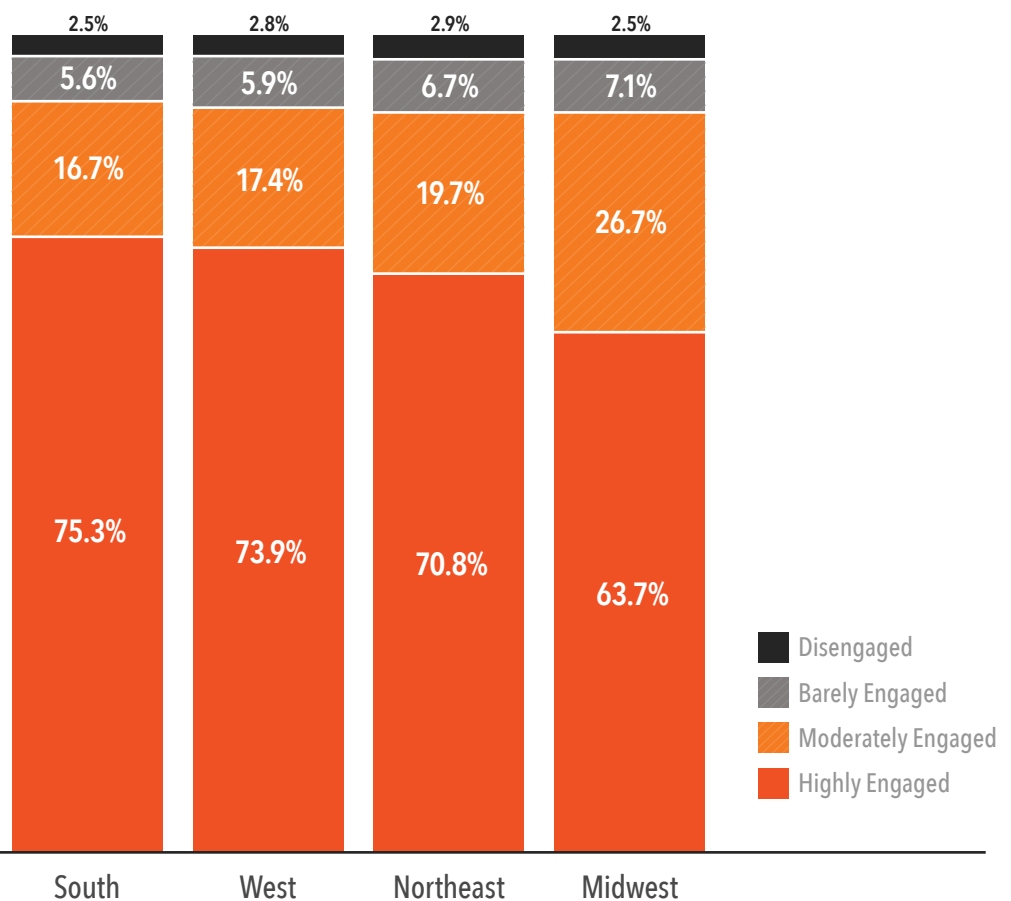


# LOCATION

The next section will cover geographic trends, based on data collected from Best Places to Work regional contests. Forty-four cities participated in a Best Places to Work program in 2017.



# THE MIDWEST HAS THE LOWEST PERCENTAGE OF HIGHLY ENGAGED EMPLOYEES



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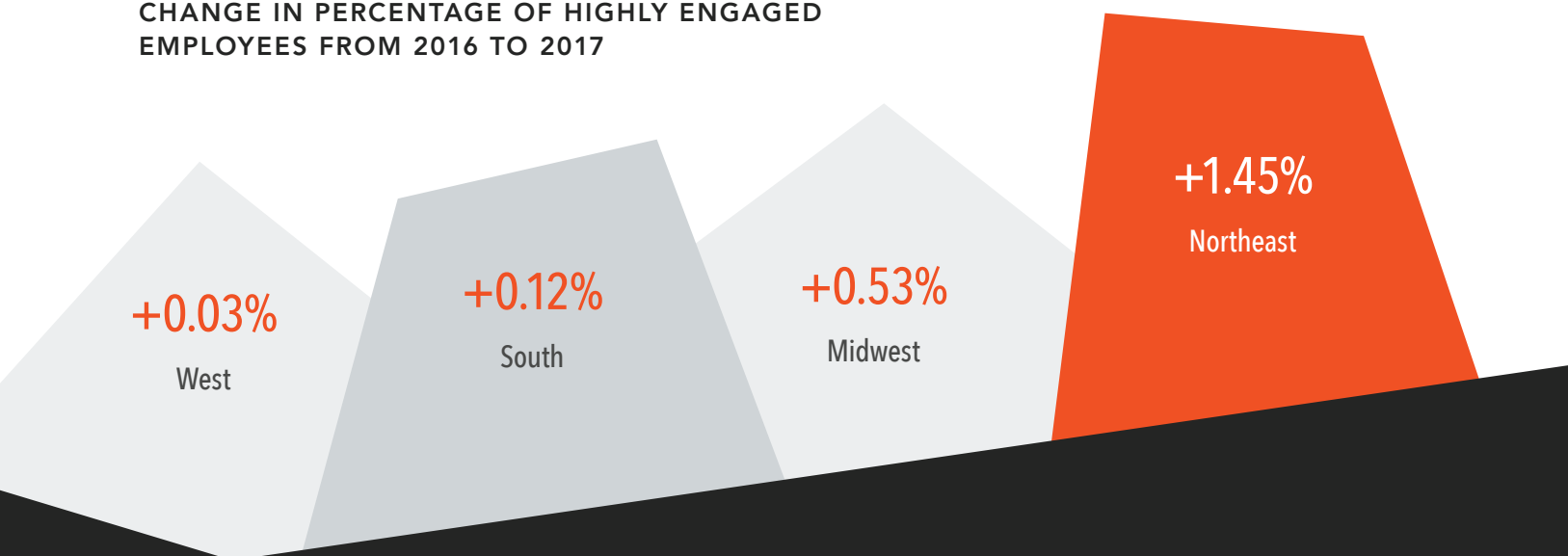
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# THE NORTHEAST SEES HIGHEST CHANGE IN HIGHLY ENGAGED EMPLOYEES

Northeast soared with a growth of 1.45 percent in highly engaged employees, bumping the Midwest into last place.

CHANGE IN PERCENTAGE OF HIGHLY ENGAGED EMPLOYEES FROM 2016 TO 2017



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# NASHVILLE IS AMERICA'S MOST ENGAGED CITY

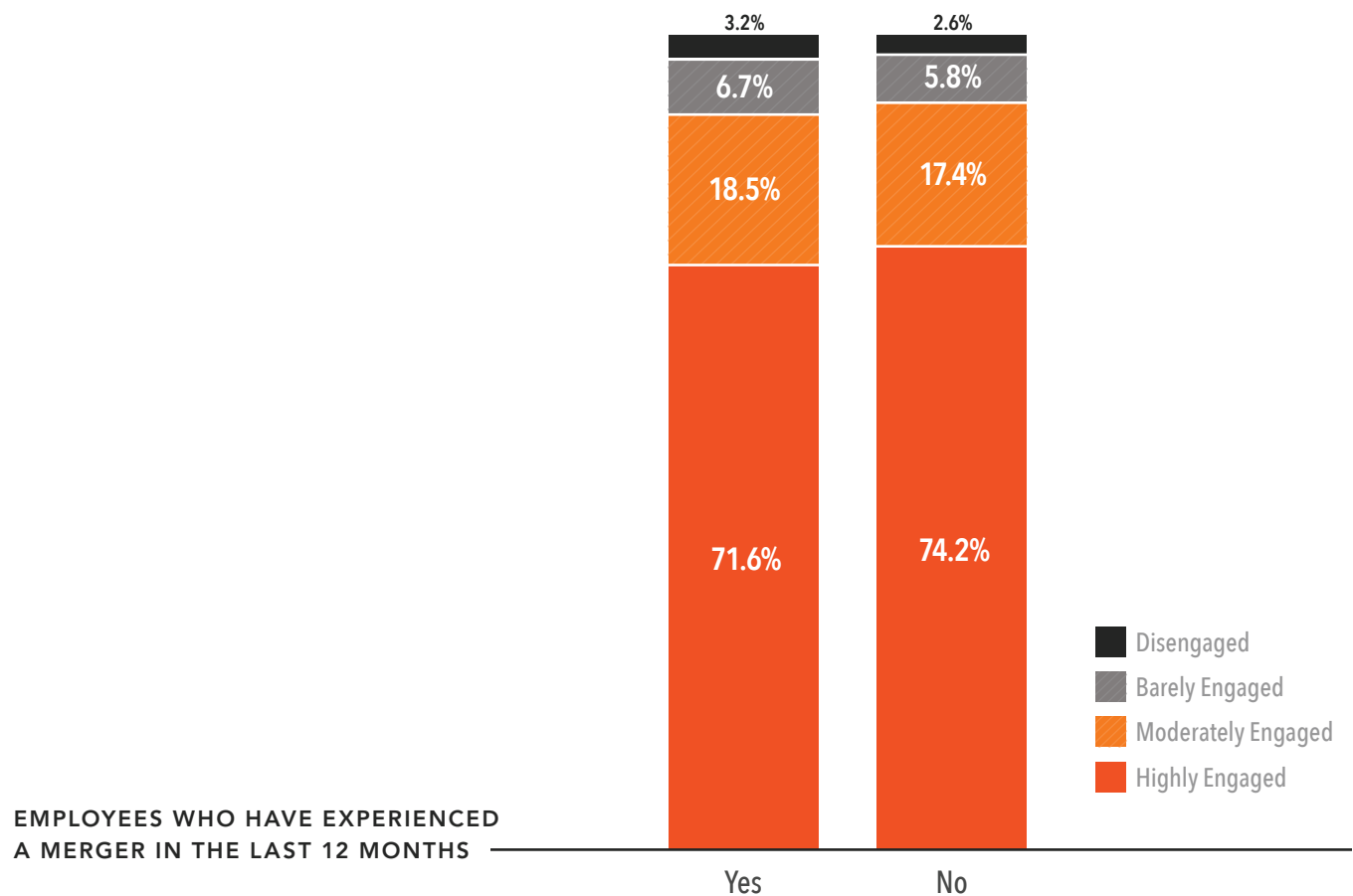
1	Nashville	80.42%
2	Sacramento	80.08%
3	Birmingham	79.71%
4	Baltimore	78.44%
5	Austin	77.40%
6	Huntsville	77.35%
7	Atlanta	77.26%
8	Miami-Dade	76.95%
9	Washington, D.C.	76.32%
10	Tampa	75.81%

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# EMPLOYEES WHO HAVE RECENTLY EXPERIENCED A MERGER ARE LESS ENGAGED

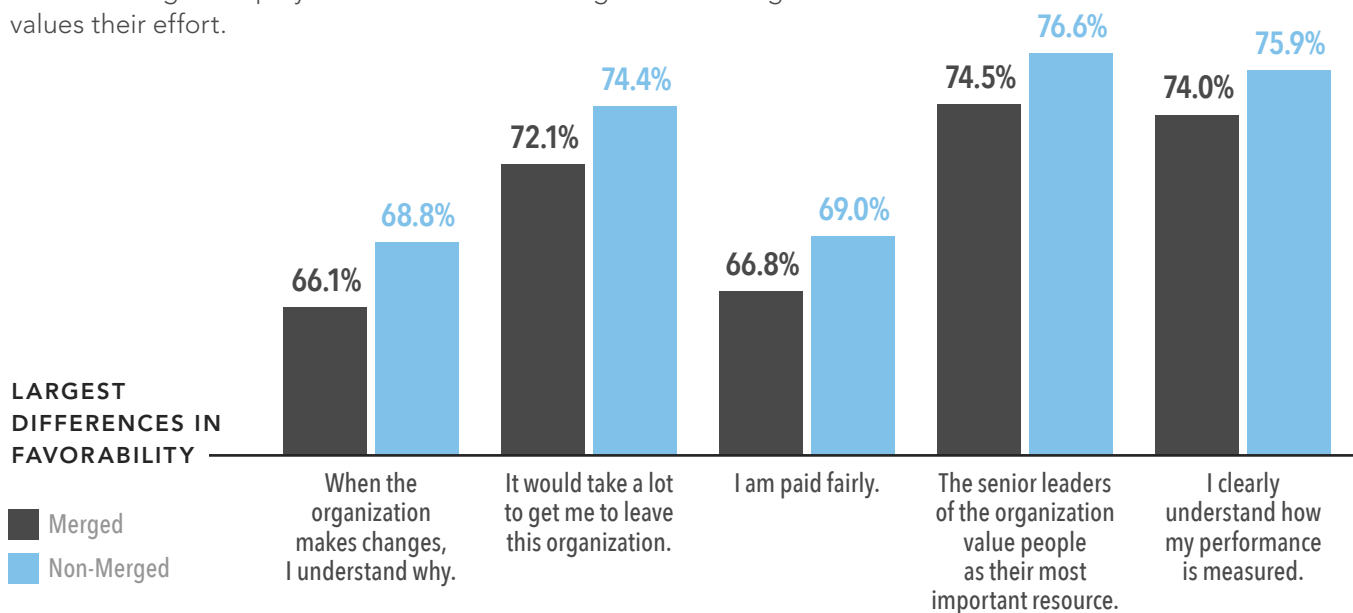


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# EMPLOYEES AT MERGED ORGANIZATIONS NEED CLARITY AND COMMUNICATION

Items with the largest difference in favorability among merged and non-merged employees demonstrate two themes: that merged employees don't have a clear understanding of how the new organizational structure works, and that merged employees need more visible signs that the organization values their effort.



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# PROFESSIONAL DEMOGRAPHIC ANALYSIS

Just as we saw differences among demographic groups in the previous section, we also see differences when looking at employment designations and professional demographics. In this section, we'll compare and contrast perceptions through the lens of the following demographics:

- ▣ TENURE
- ▣ POSITION LEVEL
- ▣ DEPARTMENT
- ▣ PAY TYPE

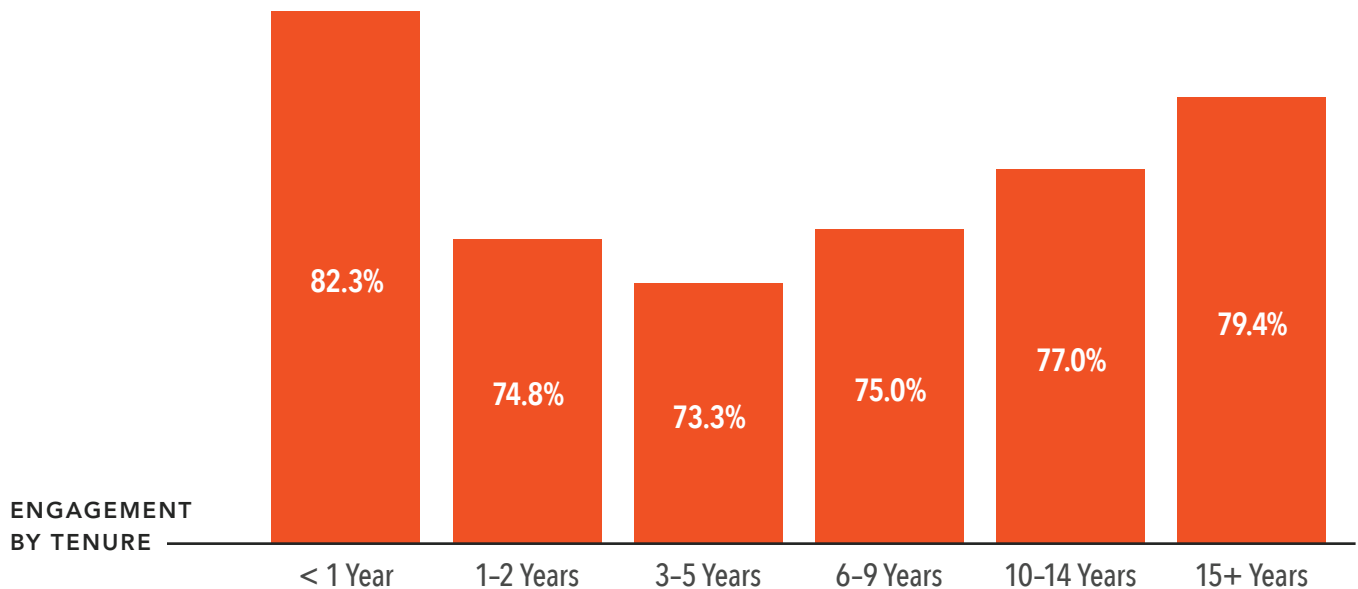
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# NEW EMPLOYEES REMAIN MOST ENGAGED

While engagement remained high among the newest employees, employees who have been employed 6–9 years with an organization experienced a substantial increase from last year.



## CHANGE IN ENGAGEMENT BY TENURE



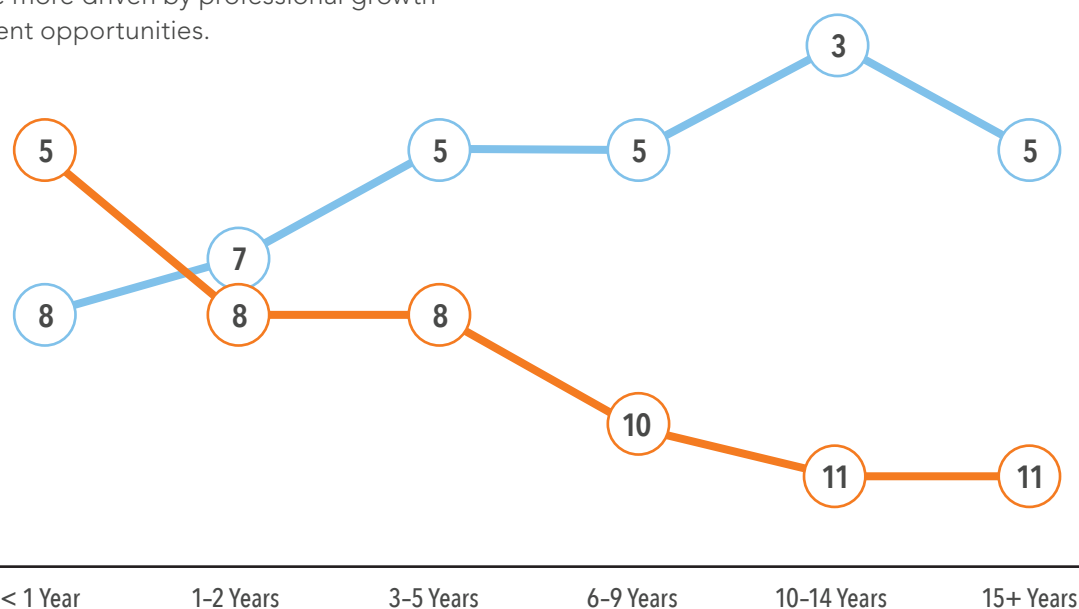
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# TENURED EMPLOYEES NEED TO FEEL VALUED

## NEWER EMPLOYEES WANT OPPORTUNITIES

The longer an employee works at an organization, the more engagement is driven by feeling valued. Newer employees, on the other hand, are more driven by professional growth and career development opportunities.



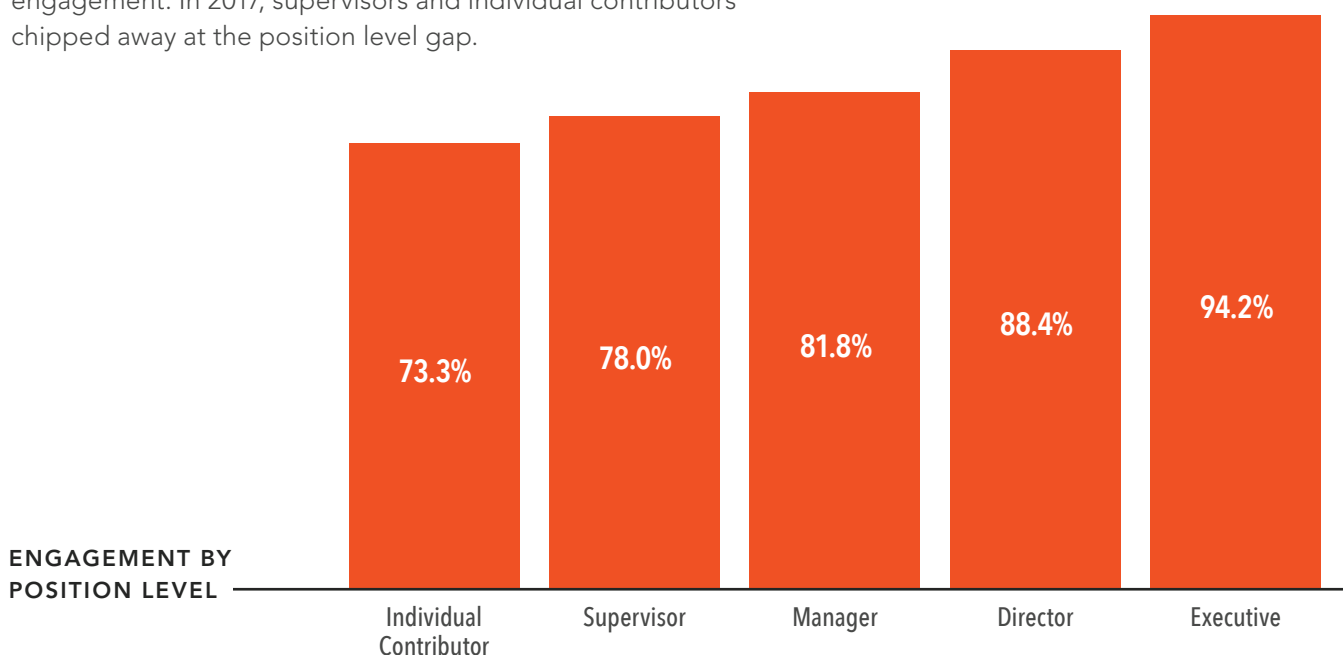
DRIVER RANK  
BY TENURE

- "The leaders of this organization value people as their most important resource."
- "I see professional growth and career development opportunities for myself at this organization."



# ENGAGEMENT INCREASES WITH RANK; GAP LESSENS

Historically, the higher the position level, the higher the level of engagement. In 2017, supervisors and individual contributors chipped away at the position level gap.



## CHANGE IN ENGAGEMENT BY POSITION LEVEL



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# CHANGE IN LOWER LEVEL EMPLOYEES' ENGAGEMENT

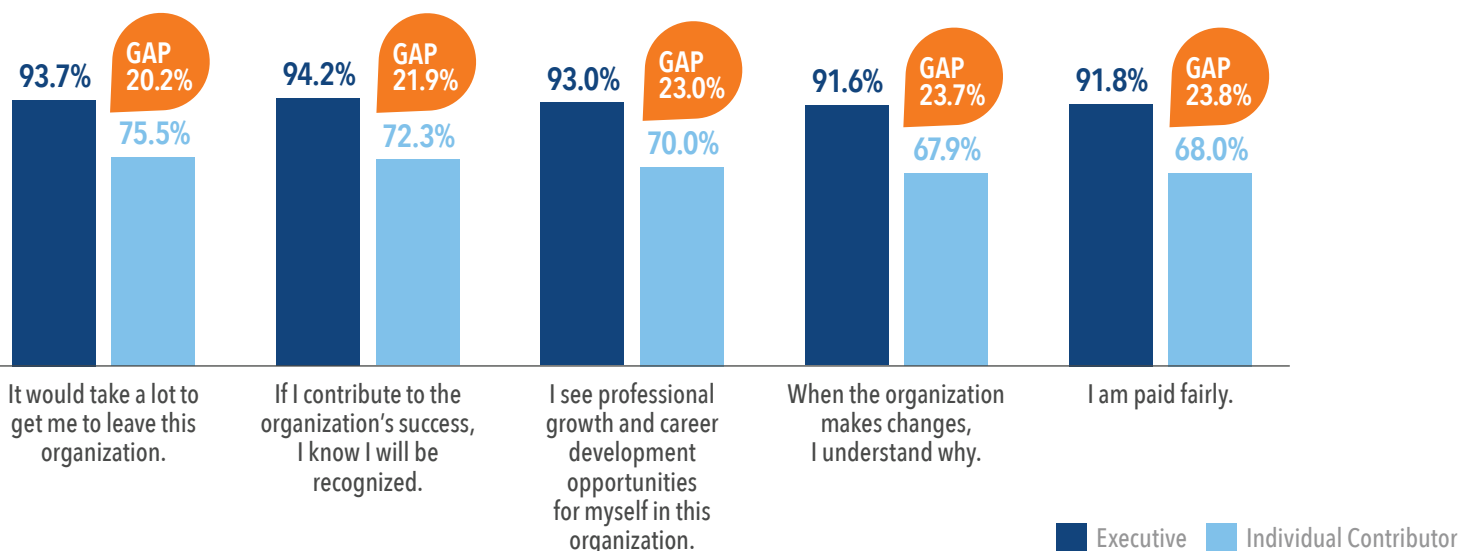
## DUE TO INCREASE IN FAVORABILITY ACROSS ALL ENGAGEMENT ITEMS

Both supervisors and individual contributors saw an increase in favorability across every engagement survey item. There were five items where supervisors experienced a 2 percent or more increase in favorability from last year.

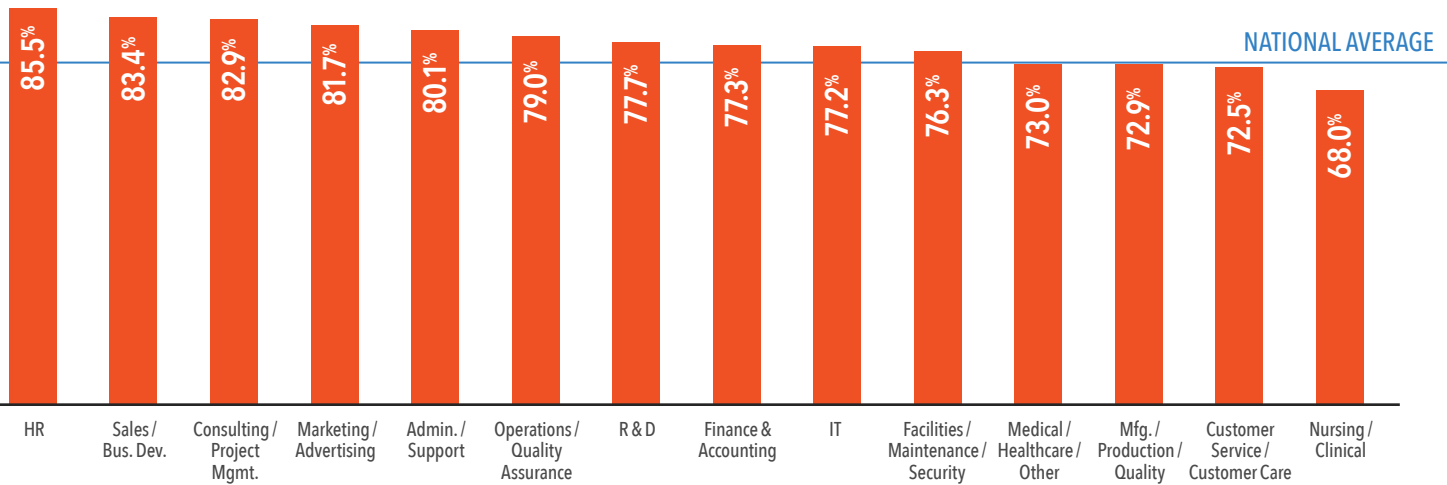


## GAP BETWEEN C-SUITE AND INDIVIDUAL CONTRIBUTOR FAVORABILITY STILL STAGGERING

Executives had greater favorability than individual contributors on every single item. Below are the biggest gaps between the two, with a more than 20 percent difference in favorability.



# HR: MOST ENGAGED DEPARTMENT



## NURSING

### ONLY DEPARTMENT WITH DECREASING ENGAGEMENT

Nursing/clinical was the only department that saw a decrease in employee engagement this year. Meanwhile, four departments increased engagement by 1.5 percent or more.



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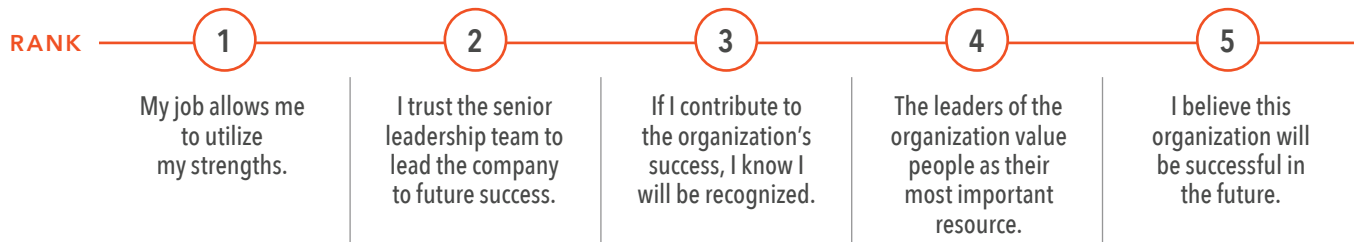
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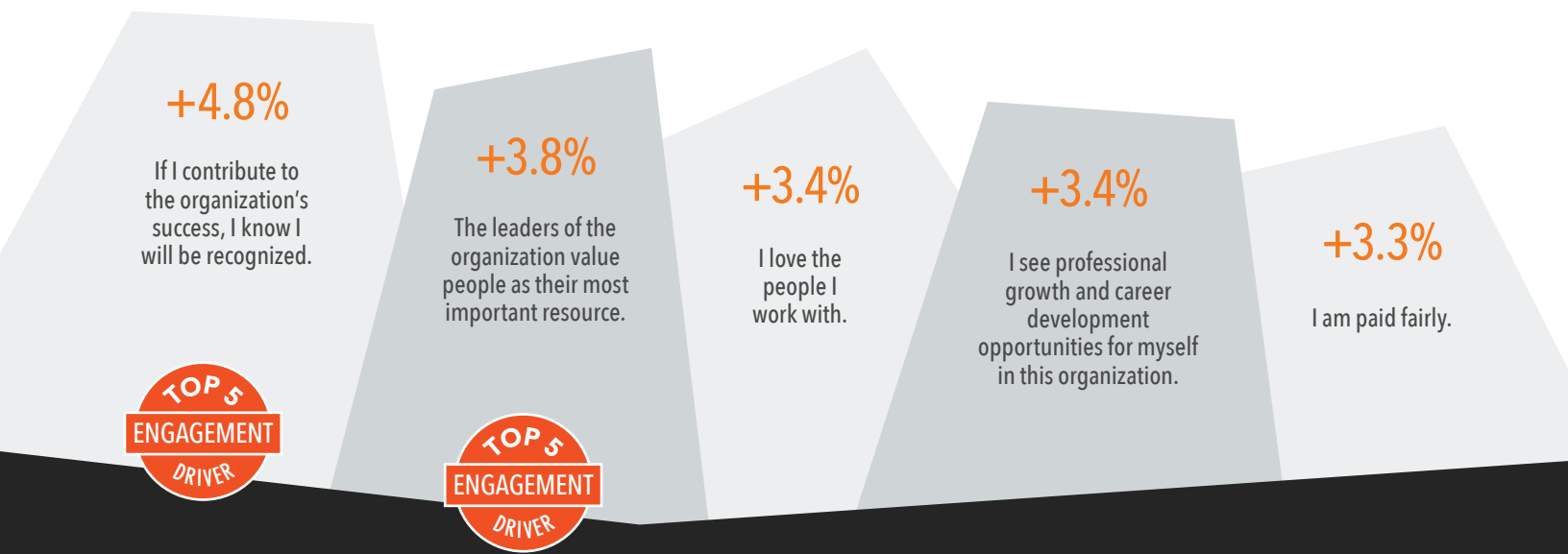
# VALUING INDIVIDUALS LEADS TO MANUFACTURING'S INCREASED ENGAGEMENT

At 3.7 percent, manufacturing, production, and quality employees saw the largest increase in engagement from last year's report (as shown on the previous page). Four of the top five item increases deal with valuing individuals.

## TOP 5 ENGAGEMENT DRIVERS FOR MANUFACTURING EMPLOYEES



## TOP 5 ITEM FAVORABILITY INCREASES FOR MANUFACTURING EMPLOYEES

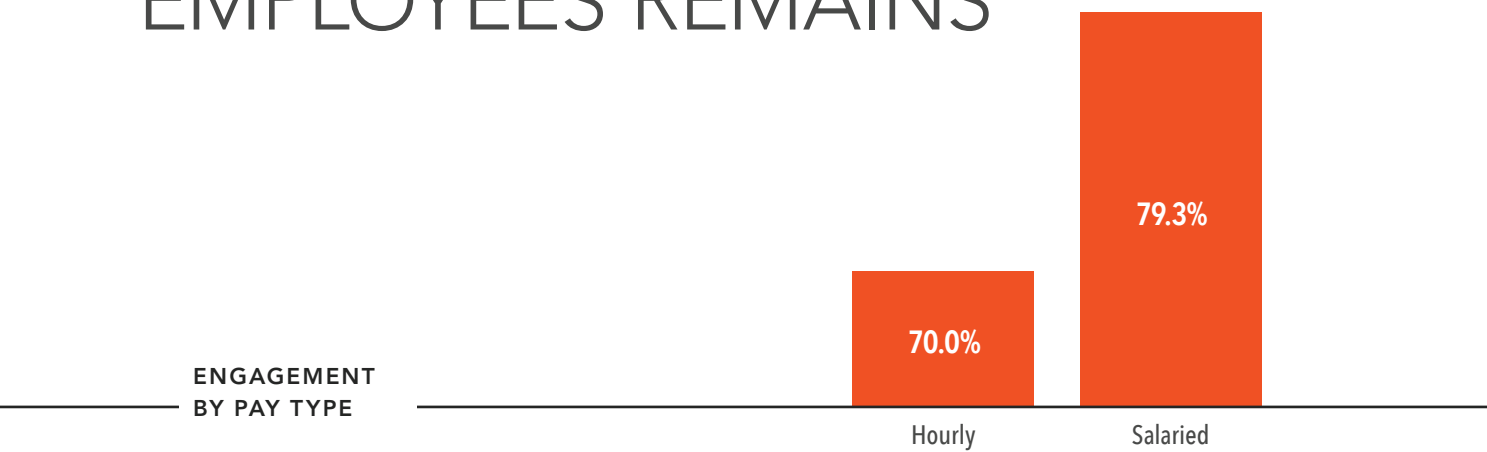


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# ENGAGEMENT GAP BETWEEN HOURLY AND SALARIED EMPLOYEES REMAINS



## RECOGNITION DRIVES ENGAGEMENT AMONG HOURLY EMPLOYEES

The top five drivers by pay type are almost identical – except hourly employees would prefer recognition while salary employees are driven by challenging careers.

RANK	1	2	3	4	5
HOURLY	My job allows me to utilize my strengths.	I trust our senior leaders to lead the company to future success.	If I contribute to the organization's success, I know I will be recognized.	I believe this organization will be successful in the future.	The leaders of the organization value people as their most important resource.
SALARY			I believe this organization will be successful in the future.	I find my job interesting and challenging.	



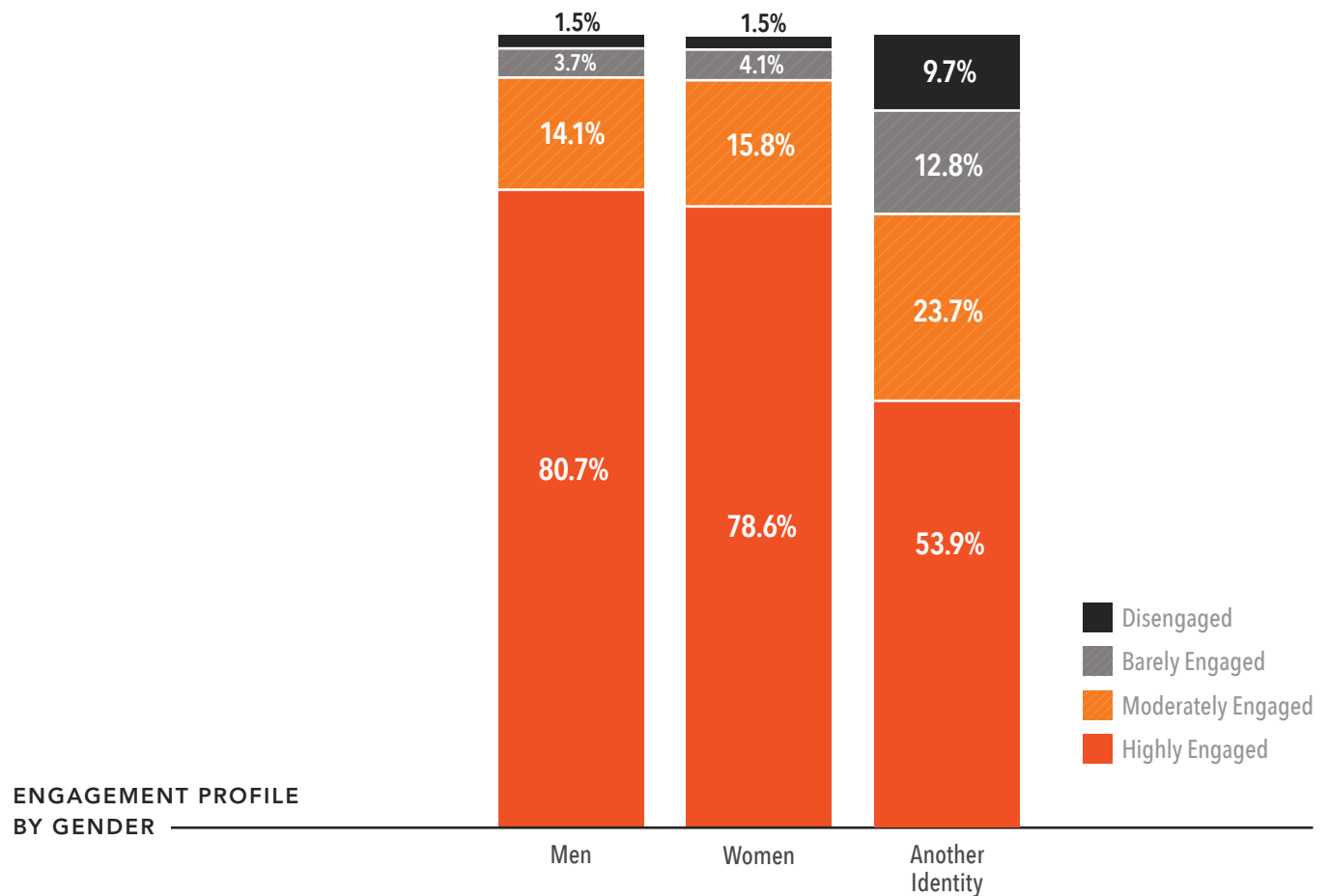
# PERSONAL DEMOGRAPHIC ANALYSIS

People experience and perceive the workplace in different ways. In this section, we'll examine how different demographic groups perceive the workplace and how this impacts their engagement. The personal demographics we'll analyze include:

- ▣ GENDER
- ▣ AGE
- ▣ EDUCATION
- ▣ RACE

# MEN AND WOMEN MOST ENGAGED

ANOTHER IDENTITY LAGS BEHIND



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# ANOTHER IDENTITY INCREASES EMPLOYEE ENGAGEMENT SUBSTANTIALLY

After an almost 5 percent increase in engagement from 2016, more than half of employees who identify as another gender are considered engaged.

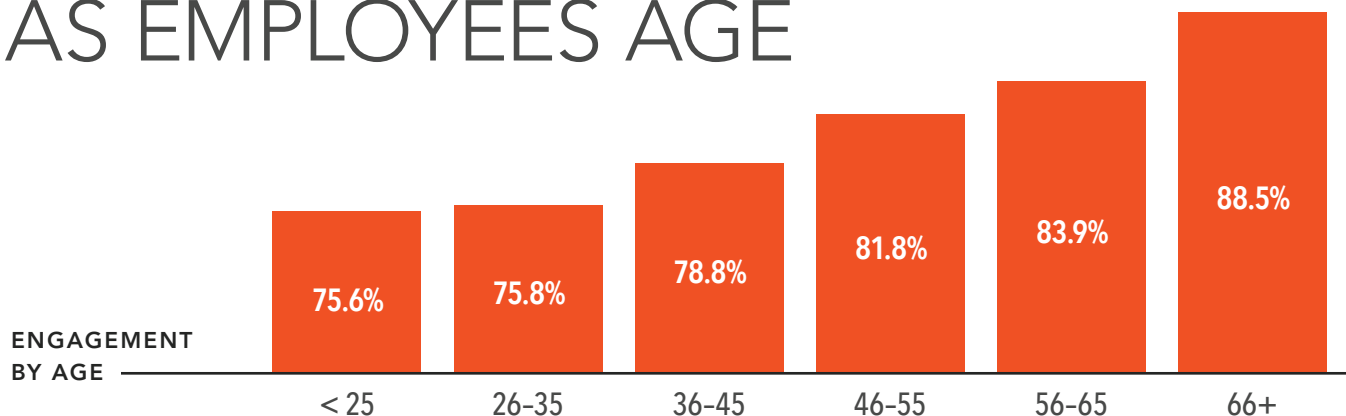
+1.4%  
Men

+1.0%  
Women

+4.9%  
Another Identity

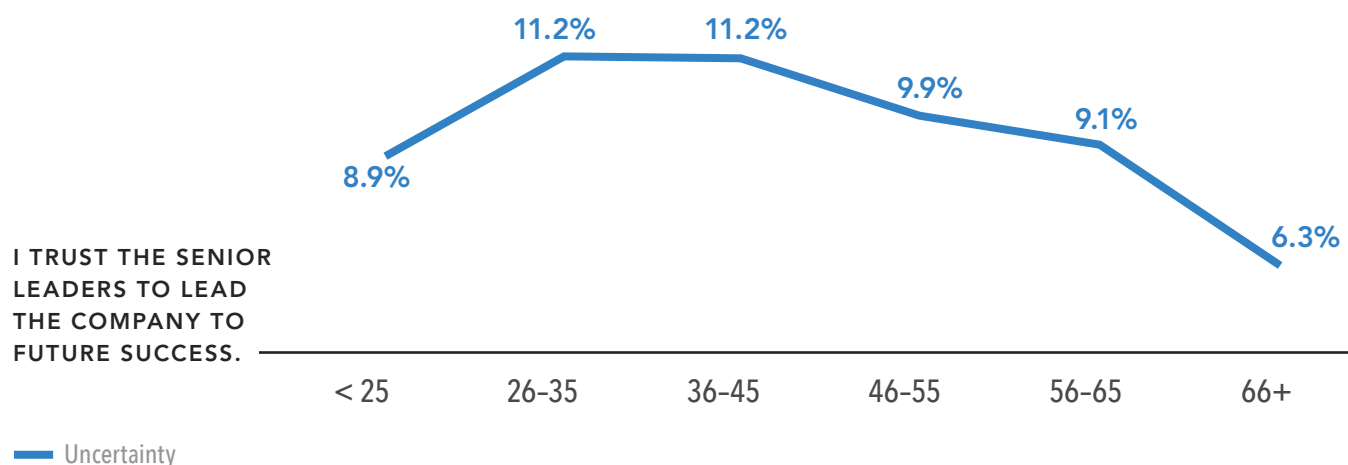
RANK	1	2	3	4	5
MEN	My job allows me to utilize my strengths.	I trust our senior leaders to lead the company to future success.	If I contribute to the organization's success, I know I will be recognized.	I find my job interesting and challenging.	The leaders of the organization value people as their most important resource.
WOMEN			I believe this organization will be successful in the future.	If I contribute to the organization's success, I know I will be recognized.	
ANOTHER IDENTITY		I find my job interesting and challenging.	I see professional growth and career development opportunities for myself in this organization.	I trust our senior leaders to lead the company to future success.	If I contribute to the organization's success, I know I will be recognized.

# ENGAGEMENT INCREASES AS EMPLOYEES AGE



# EMPLOYEES WAIVER ON TRUST IN LEADERS

Employees in young to mid-adulthood, between 26 and 45, were least confident that senior leaders would lead the company to future success.

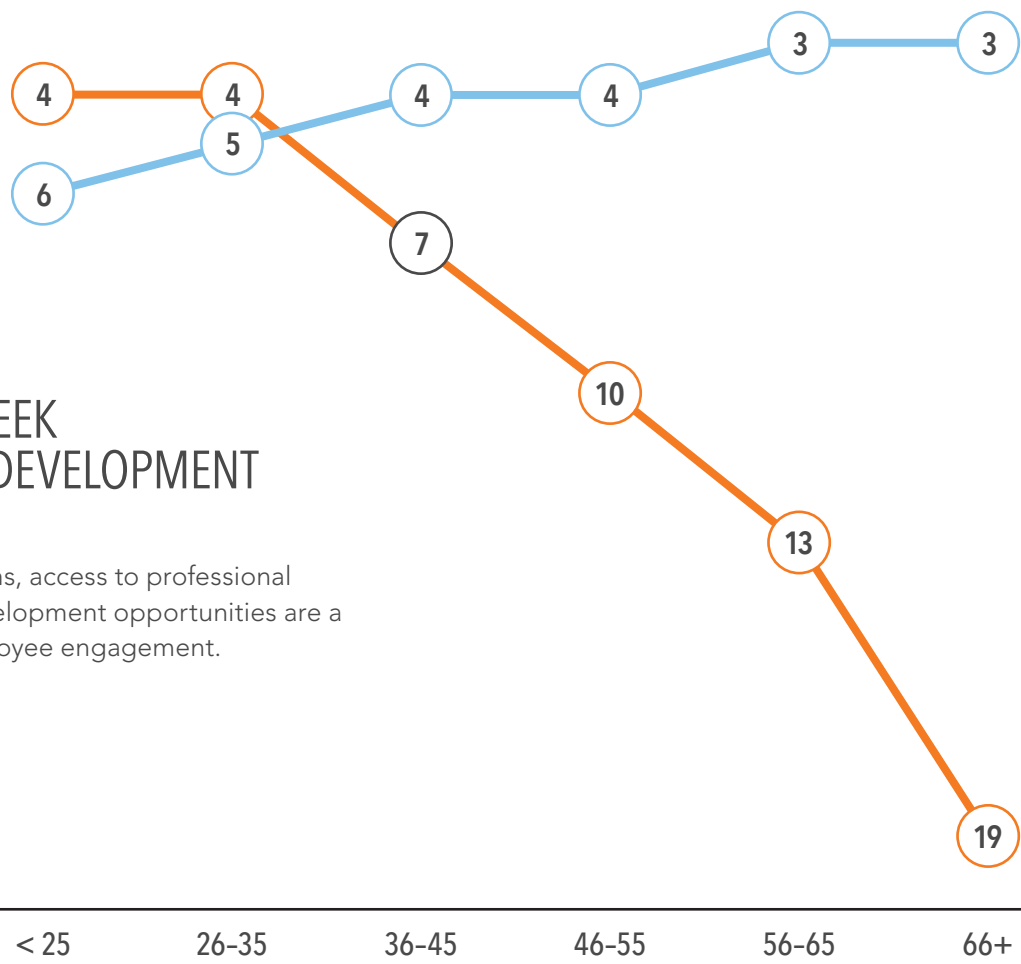


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# FUTURE SUCCESS IS IMPORTANT TO OLDER EMPLOYEES

As employees get older, the item, "I believe this organization will be successful in the future," becomes more important to their engagement.



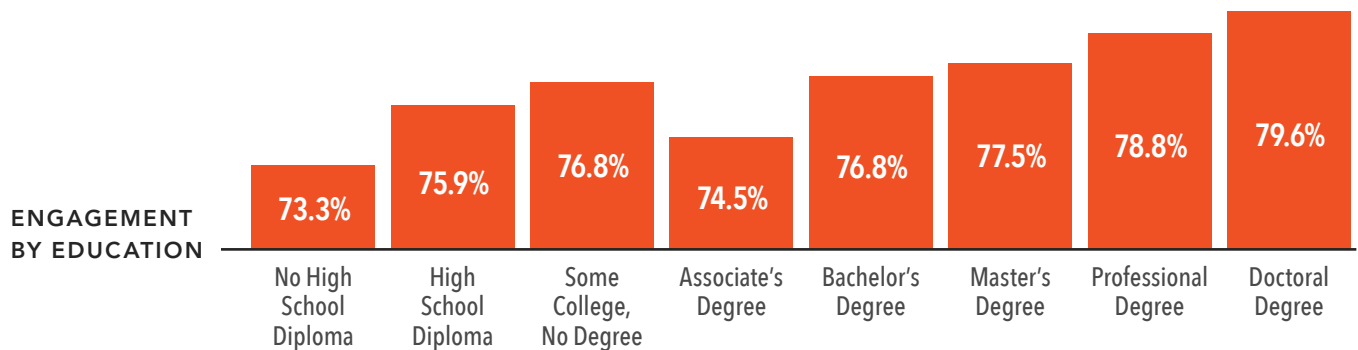
## MILLENNIALS SEEK GROWTH AND DEVELOPMENT

For younger generations, access to professional growth and career development opportunities are a stronger driver of employee engagement.

DRIVER RANK BY AGE

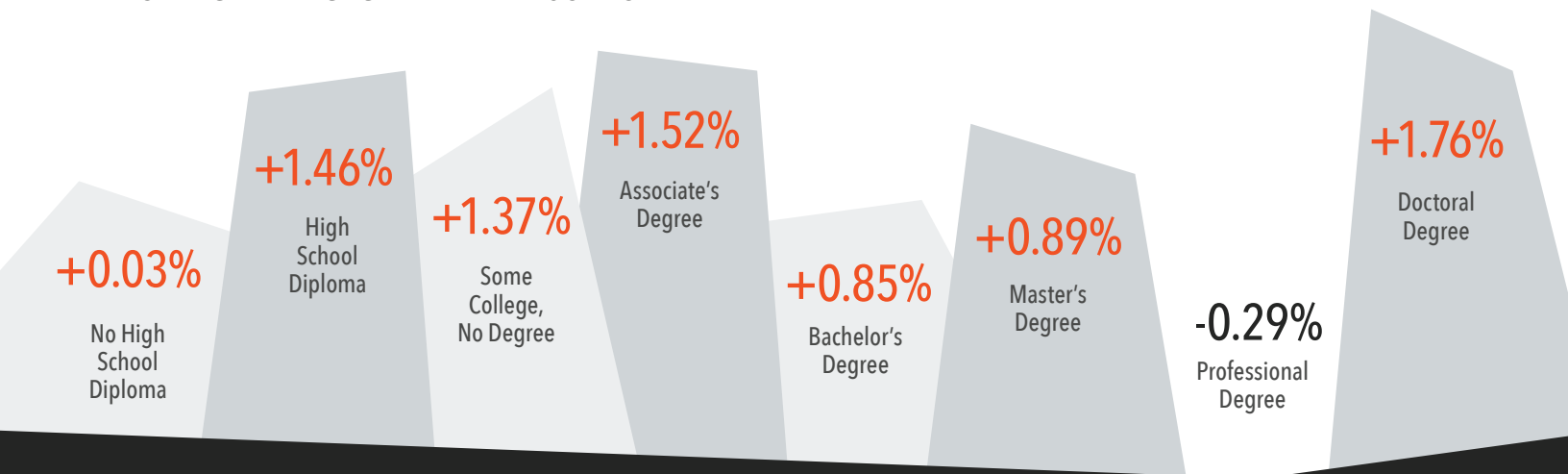
- "I believe this organization will be successful in the future."
- "I see professional growth and career development opportunities for myself in this organization."

# HIGHER EDUCATION = HIGHER ENGAGEMENT



## ENGAGEMENT AMONG PROFESSIONAL DEGREES DROP

CHANGE IN ENGAGEMENT BY EDUCATION LEVEL

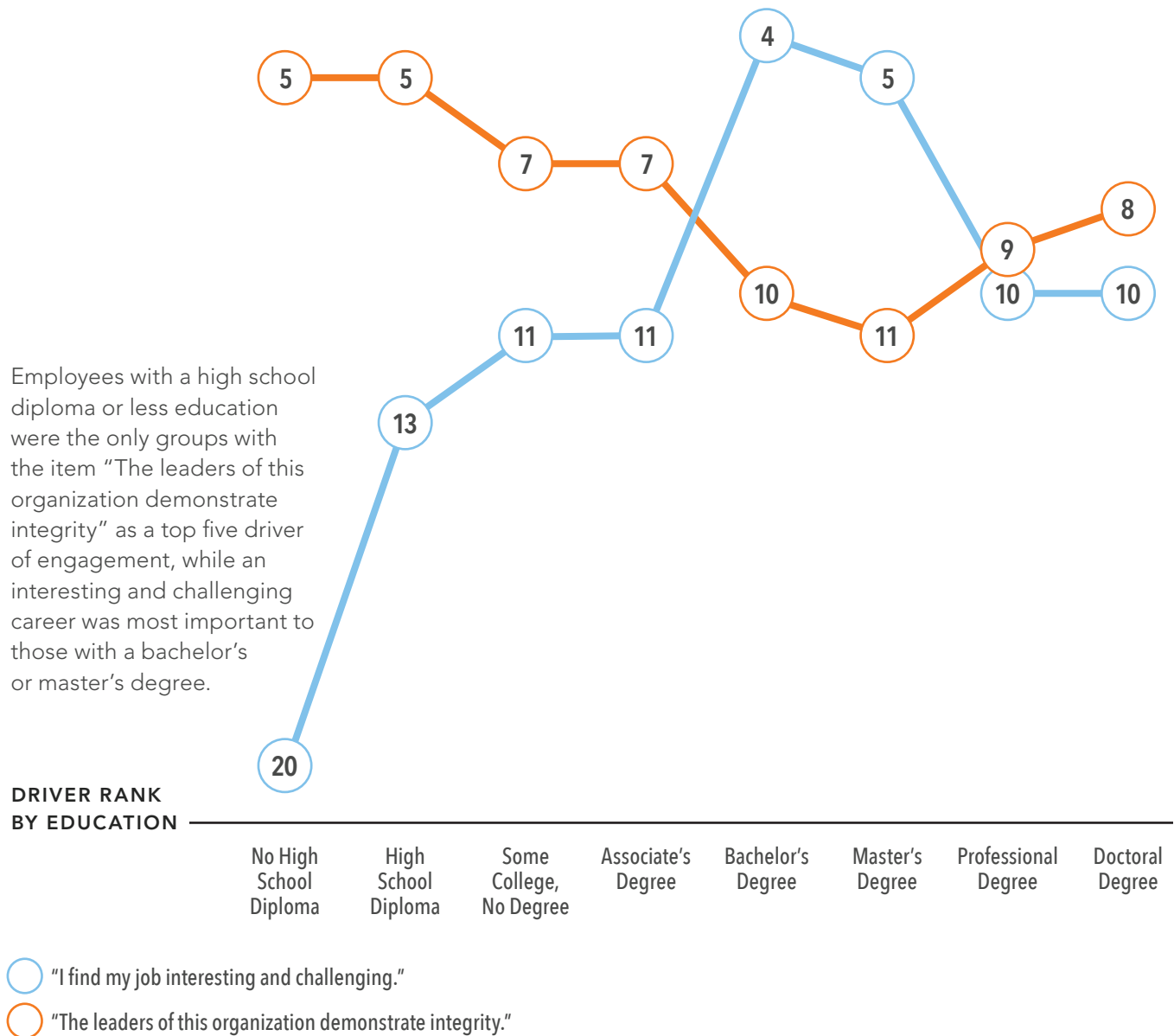


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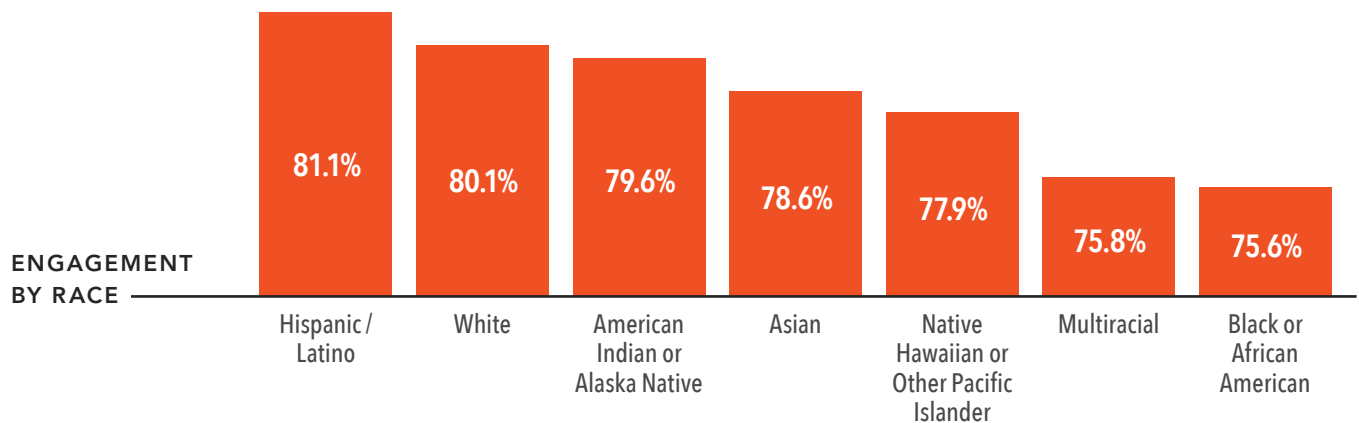


# DRIVERS DIFFER BY EDUCATION LEVEL



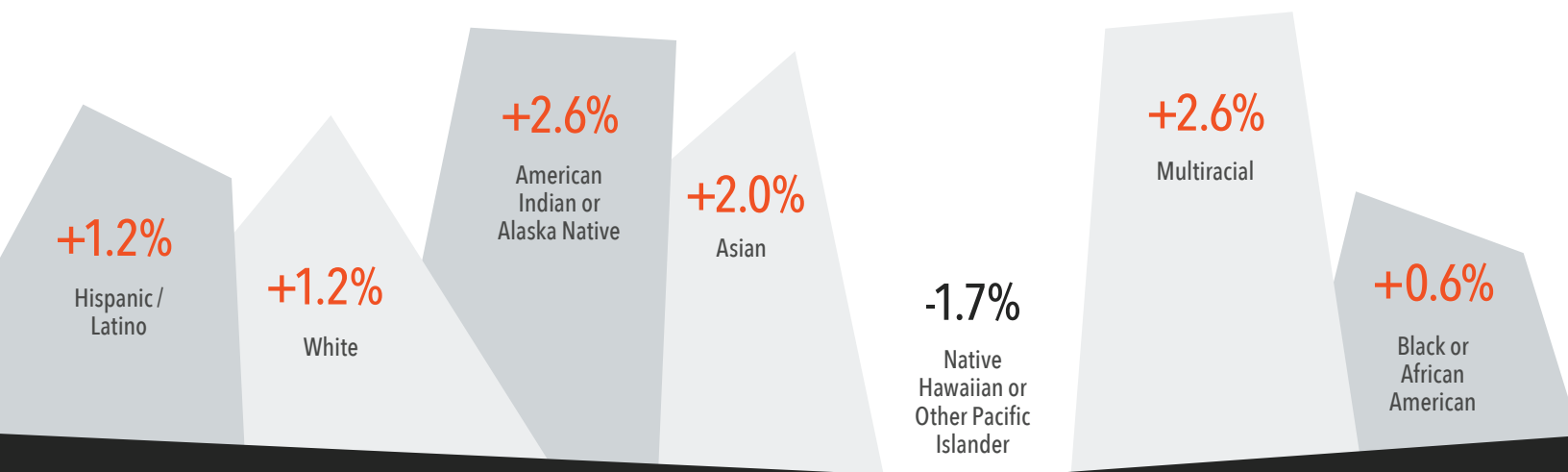
# HISPANIC / LATINO EMPLOYEES ARE MOST ENGAGED

MULTIRACIAL AND BLACK EMPLOYEES LEAST ENGAGED



## NATIVE HAWAIIAN / PACIFIC ISLANDER ENGAGEMENT DROPS SECOND YEAR IN A ROW

Native Hawaiian/Pacific Islander engagement has decreased the past two years, with a startling 1.7 percent decrease in 2017. The cause? Native Hawaiian/Pacific Islander employees dropped in favorability across 28 out of 30 survey items.



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# METHODOLOGY

## SURVEY INSTRUMENT

Employee engagement is the strength of the mental and emotional connection employees feel toward their places of work. Quantum Workplace measures engagement using our e9 Model of Employee Engagement ("the e9"), a set of nine survey items that measure various aspects of employee engagement. The e9 has been found to be a reliable measure of employee engagement and has been validated against a variety of indicators.

Other survey items shown throughout this report largely represent actionable items, referred to as cultural diagnostics, from Quantum Workplace's Best Places to Work survey instrument.

## ANALYSIS METHODS

### EMPLOYEE ENGAGEMENT PROFILES

Another analysis used in this report is employee engagement profiles. Employees are classified into four groups based on the average of their responses to the e9. Highly engaged employees have an average rating between 5.0 – 6.0 on a 6-point rating scale. Moderately engaged employees have an average rating between 4.0 – 4.9. Barely engaged employees have an average rating between 3.0 – 3.9, and disengaged employees have an average rating between 1.0 – 2.9.

### DRIVER ANALYSIS

One key analysis in this report is the driver analysis. Quantum Workplace evaluated the relationship between actionable survey items and the e9 to reveal which factors have the highest correlation with employee engagement.

### SURVEY PARTICIPANTS

This report examines data collected through Best Places to Work over the course of the past 11 years. The 2017 data were collected from more than 600,000 employees from over 8,000 organizations that took the survey between January 1, 2017 and December 31, 2017.

### ABOUT BEST PLACES TO WORK

Founded in 2004, Best Places to Work is the original contest created to honor companies where talent is valued and engaged. The contest is held annually in nearly 50 markets and garners participation from more than 8,000 organizations. Quantum Workplace partners with various local publications, professional organizations, and other sponsors to conduct the survey and recognize America's Best Places to Work.

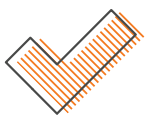


# SO, ARE YOU READY FOR 2018?

It's not too late to equip your organization with the software that will help it weather the coming challenges.

With Quantum Workplace you can:

- PROVIDE ONE CENTRAL SPOT FOR ENGAGING EMPLOYEES
- EMPOWER EMPLOYEES TO TAKE ENGAGEMENT INTO THEIR OWN HANDS
- MEASURE AND MONITOR EMPLOYEE ENGAGEMENT
- GIVE MANAGERS WHAT THEY NEED TO DRIVE WORKPLACE CULTURE



SURVEYS



GOALS



RECOGNITION



FEEDBACK



ONE-ON-ONES



IDEAS & ALERTS



ANALYTICS

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