



Could trust cost you a generation of talent?

Global generations 3.0:
A global study on trust in
the workplace

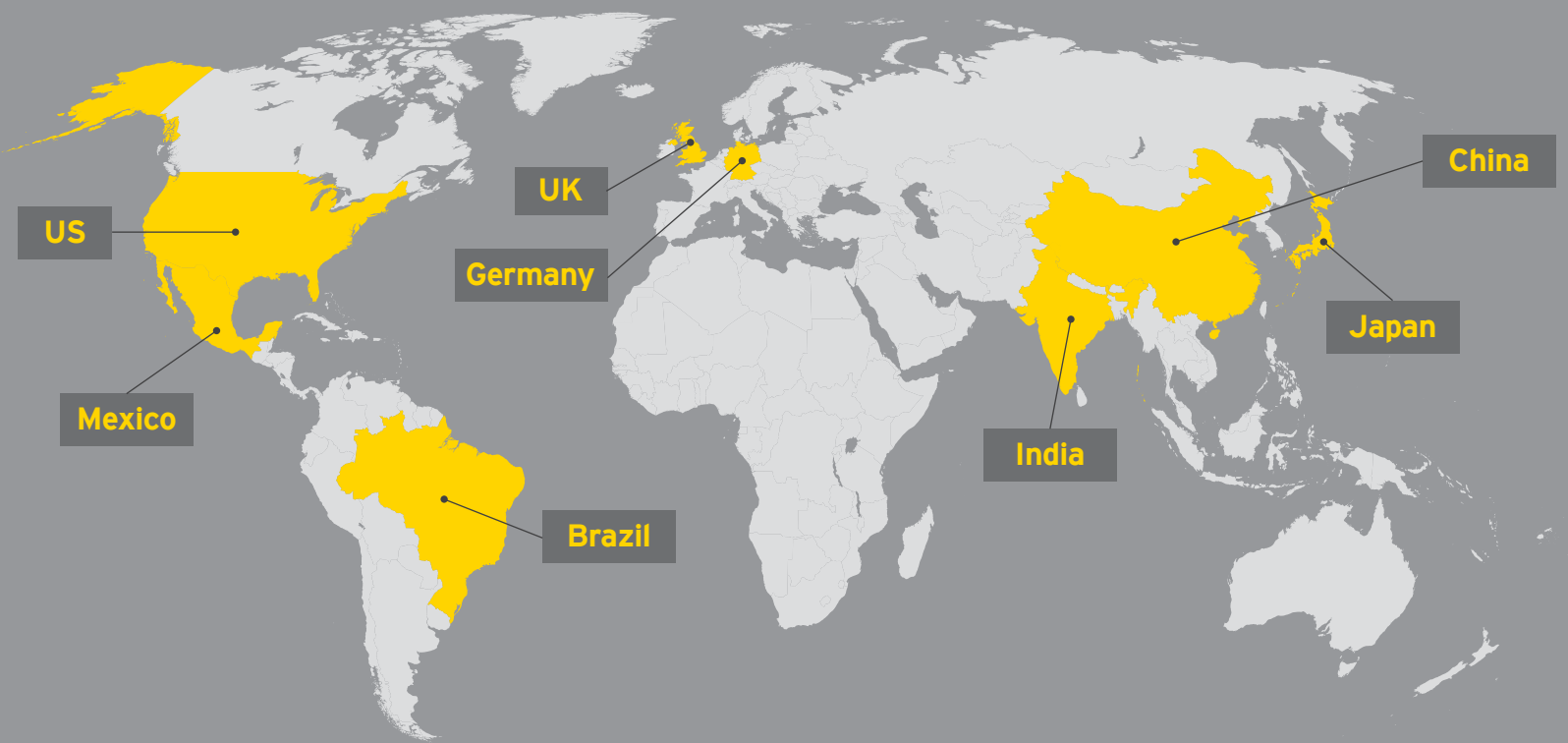


The better the question. The better the answer.
The better the world works.

The EY logo consists of the letters 'EY' in a bold, white, sans-serif font. A yellow diagonal line is positioned above the 'Y'.

Building a better
working world

EY's new global survey of full-time workers in eight countries reveals that **less than half** of global respondents have a "great deal of trust" in their employer, boss or team/colleagues.



EY surveyed more than 9,800 adults aged 19 to 68 who are employed full-time across a variety of companies in Brazil, China, Germany, India, Japan, Mexico, the UK and the US. EY also surveyed more than 3,200 teenagers – Generation Z, aged 16 to 18 – to understand how these soon-to-be professionals' perceptions of trust might influence their future employment decisions.

For more information, visit [ey.com/differencesmatter](https://www.ey.com/differencesmatter)

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Global generations 3.0

A global study on **trust** in the workplace

The EY *Global generations* study is the third EY has undertaken on generational issues in the workplace. For this research, our objective was to understand the factors influencing trust, and a lack of trust, in the workplace.

EY surveyed more than 9,800 adults aged 19 to 68 who are employed full-time across a variety of companies in Brazil, China, Germany, India, Japan, Mexico, the UK and the US. EY also surveyed more than 3,200 teenagers – Generation Z, aged 16 to 18 – to understand how these soon-to-be professionals' perceptions of trust might influence their future employment decisions.

Less than half of global professionals trust their employer

Research also finds Gen Z views equal opportunity for pay and promotion and opportunities to learn and advance as “very important” factors in trusting a future employer

“The purpose of this research is to present a global snapshot of the state of trust in the workplace today as well as to gain meaningful insight into what people around the world consider most important. Giving individuals a forum to voice their opinions on what factors truly influence their level of trust in an employer, boss or team not only helps guide us as we continue to build a culture that is more inclusive of all views and differences, but also helps pave the way for us to be more progressive as modern trustworthy organizations, well into the future.”

– **Karyn Twaronite, EY Global Diversity & Inclusiveness Officer**

Summary of findings

Observation 1

Trust in the workplace

Close to one in six respondents globally have “very little” or “no trust” in their current employer.

- ▶ In most countries, a **higher percentage of full-time workers surveyed trust their boss and colleagues more than their employer**, but less than half of full-time workers say they have “a great deal of trust” in these groups (employers 46%, bosses 49% and colleagues 49%).
- ▶ Full-time workers surveyed in **India, Mexico and Brazil** are among the most likely to place “a great deal of trust” in their

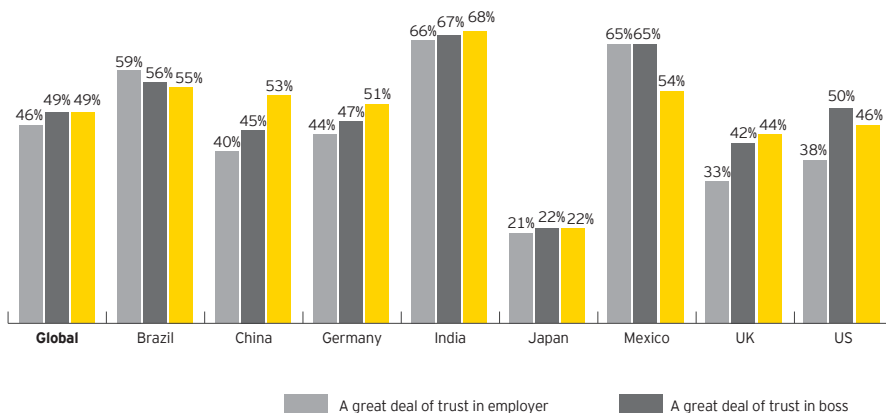
current employer (66%, 65% and 59%, respectively), boss (67%, 65% and 56%, respectively) and team/colleagues (68%, 54% and 55%, respectively).

- ▶ Respondents in **Japan** were the least likely to place “a great deal of trust” in their current employer (21%), boss (22%) or team/colleagues (22%).
- ▶ **The largest gap** among full-time workers between placing “a great deal of trust” in their boss, compared with their employer, is in the **United States with a 12-percentage-point difference between placing “a great deal of trust” in their boss (50%) versus their employer (38%).**

Trust breakdown by generation and gender

- ▶ Globally, baby boomers are the most trusting generation of their employer (51%), boss (52%) and team/colleagues (53%); while **Generation X is least likely to place “a great deal of trust”** in their employer, boss and team/colleagues.
- ▶ Significant generational trust gaps in **China, India and Mexico** surfaced, with **baby boomers more likely to place “a great deal of trust”** in their employer, boss and team/colleagues than millennials by approximately 9 to 21 percentage points.
- ▶ Globally, there is **no significant difference** between **men’s and women’s** levels of trust in their employer, boss and team/colleagues.

Global trust in employers, bosses and team/colleagues



Global trust by generation



Observation 2

Equal opportunity for pay and promotion is among top factors influencing trust

- ▶ Globally, the leading factors impacting trust among those who have “very little” or “no trust” in their employer are “employee compensation is not fair” (53%) and employer “does not provide equal opportunity for pay and promotion” (48%). Lack of transparency, collaboration and communication is among the factors impacting individual trust in their bosses and teams.

Observation 3

Generation Z’s perspectives on trust in the workplace

Two-thirds of the global Gen Z respondents say a top factor in trusting an employer is “providing equal opportunity for pay and promotion.”

- ▶ **The majority (58%) of Gen Z respondents globally say their parents’ or guardians’ work experiences** will have a “very or somewhat positive” impact on how much trust they will place in future employers.
- ▶ The top five “very important” **factors globally that could make Gen Zers trust their bosses** are: “treats me with respect” (71%); “behaves ethically” (71%); “fairly

compensates and promotes people of all differences” (64%); “communicates openly/transparently” (62%); and “makes wise business decisions” (61%).

- ▶ **Globally, Gen Zers trust their mother more than their father to help them make employment decisions** as 58% say that “when making an employment decision for your future full-time jobs,” they are “very likely” to trust their mother, followed by their father (53%). In third place, teacher/professor was cited at 39%.
- ▶ **Large businesses are Gen Zers’ ideal place to work**, globally, as half of the respondents say that when they are ready to enter the workforce on a full-time basis, they “would consider working for” a large business.

Top 10 factors influencing lack of trust globally*

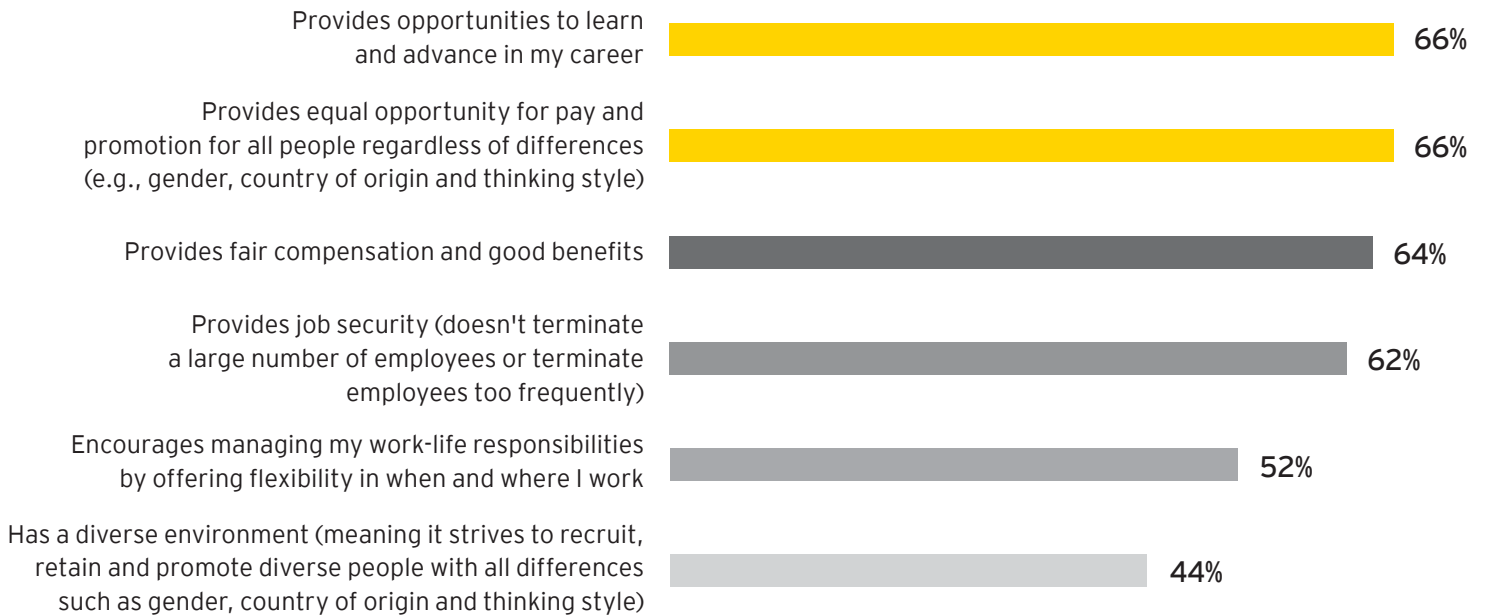
Employer	Boss	Team/colleagues
Employee compensation is not fair	Is not open/transparent in communication	They do not do quality work
Does not provide employees with equal opportunity for pay and promotion	Is not appreciative/does not provide recognition and praise for a job well done	They are not collaborative/cooperative
Lack of strong senior leadership	Does not communicate with me enough	They do not communicate openly/transparently
Too much employee turnover (voluntary and/or involuntary)	Does not value my point of view	They do not assist me when I am overwhelmed/busy with other tasks
Does not foster a collaborative work environment	Does not make wise business decisions	They do not communicate with me enough
Does not provide opportunities for employees to learn and grow	Does not provide timely constructive feedback	They do not behave ethically
No opportunity for managing my work-life responsibilities	Does not treat me with respect	They do not value my opinions and contributions
Leadership pay (e.g., CEO) is disproportionate to the company's financial performance	Is not ethical	They do not value my opinions and contributions
Does not operate in an ethical manner	Is not open to exploring new ideas and approaches to help achieve results	They are not appreciative and/or do not provide recognition for a job well done
Lack of strong financial performance	Does not take time to help me develop and succeed	They do not make wise business decisions

* Those with “very little” or “no trust”

“We found that parents of Gen Z often both positively and negatively impact the level of trust this next wave of talent are looking for in their future employers. The impact of this could be far-reaching, so by understanding these factors, and proactively taking action on them, employers, bosses and teams can help to build trust for the workforce of today as well as tomorrow.”

– **Karyn Twaronite**, EY Global Diversity & Inclusiveness Officer

The top factors for global Gen Z in trusting their employer are ...



Observation 1

Who trusts their employer, boss and team/colleagues?

Less than half of full-time workers surveyed globally place a “great deal of trust” in their current employer (46%), boss or team/colleagues (both 49%).

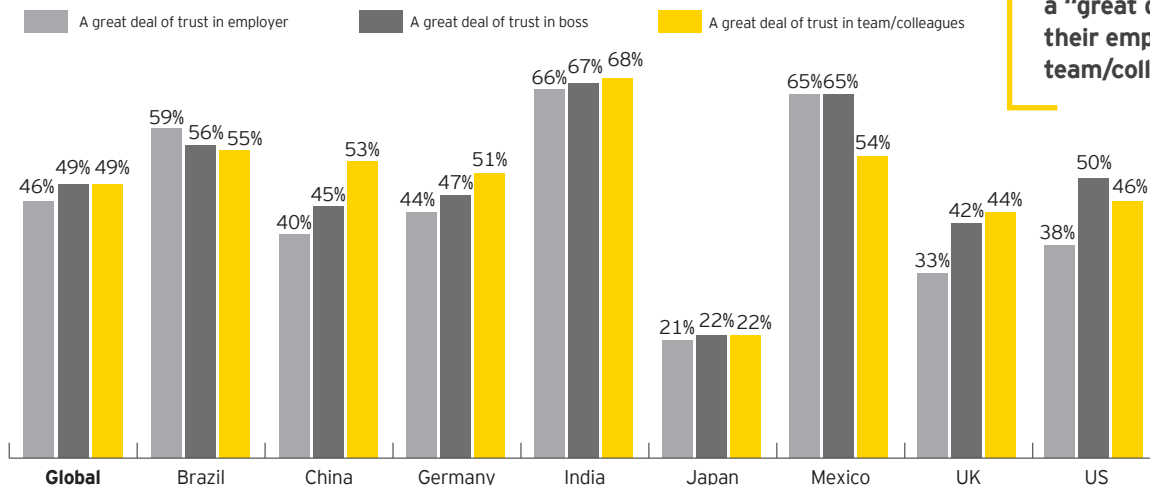
- ▶ Respondents in India, Mexico and Brazil are among the most likely to place “a great deal of trust” in their current employer (66%, 65% and 59%, respectively). Respondents in Japan (21%), the UK (33%) and the US (38%) are least likely to do so. Respondents in Germany (44%) and China (40%) are in the middle.
- ▶ Full-time workers surveyed in India, Mexico and Brazil are also the most likely to have a “great deal of trust” in their current boss (67%, 65% and 56%, respectively) and team/colleagues (68%, 54% and 55%, respectively). Respondents in Japan are

the least likely to place the same level of trust in their boss and team colleagues (22% each).

- ▶ In most countries, a higher percentage of respondents placed a “great deal of trust” in their boss and teams/colleagues than employers. The biggest exception is in Mexico (employer and boss, 65%; team/colleagues, 54%), although respondents in Mexico were still among the most likely to place “a great deal of trust” in their team.
- ▶ In the US, there was a notable percentage-point difference in placing a “great deal of trust” in their boss (50%) compared with their employer (38%), the largest gap among all eight countries. Additionally, a higher percentage of US respondents placed “a great deal of trust” in their team/colleagues (46%) than in their current employer.

- ▶ China (53%), Germany (51%) and the UK (44%) had a higher percentage of respondents who place a “great deal of trust” in their team/colleagues than in employers (China 40%, Germany 44%, UK 33%) or bosses (China 45%, Germany 47%, UK 42%). China had the biggest percentage-point difference between respondents trusting their team/colleagues and employer, than any other country.

Full-time workers surveyed in Brazil, India and Mexico are the most likely to place a “great deal of trust” in their employer, boss and team/colleagues.



What are the top factors influencing trust?

The top four factors influencing “a great deal of trust” in employers are: “delivers on promises” (67%), “provides job security” (64%), “provides fair compensation and good benefits” (63%) and “communicates openly/transparently” (59%).

- ▶ There is a tie for fifth place between “provides equal opportunity for pay and promotion for all people regardless of differences” and “operates ethically” (both 57%).
- ▶ Other factors that are also “very important” to about half of global respondents include the following: “provides opportunities to learn and advance in my career” (52%); “has a strong senior leadership team” (50%); “encourages managing my work-life responsibilities by offering flexibility in when and where I work” (49%); and “has strong financial performance” (48%).
- ▶ Close to two in five respondents (38%) say a “very important” determinant of trust is working for a company that has a “diverse environment.”
- ▶ More than a quarter of respondents (27%) say “provides opportunities to do community service on behalf of the company” is a “very important” trust factor. A slightly larger percentage of boomers say this than younger generations (boomers 29%, Gen X and millennials 27%).

What factors influence lack of trust for employers?

- ▶ Close to one in six (15%) respondents globally had “very little” or “no trust” in their current employer.
- ▶ Among those who say they have “very little” to “no trust” in their current employer, the top five factors for global respondents that led them to say this are: “employee compensation is not fair” (53%); “does not provide employees with equal opportunity for pay and promotion” (48%); “lack of strong leadership” (46%); “too much employee turnover – voluntary and/or involuntary” (43%); and “does not foster a collaborative work environment” (43%).
- ▶ About a third or more of respondents globally who say they have “very little” to “no trust” cite other factors, including: “does not provide opportunities for employees to learn and grow” (37%); “no opportunity for managing my work-life responsibilities” (31%); “leadership pay (e.g., CEO) is disproportionate to the company’s financial performance” (31%); and “does not operate in an ethical manner” (31%). Close to a quarter (23%) of these respondents cited “lack of strong financial performance.”
- ▶ Mostly, there were no significant differences between men and women, globally, except that more than a third of men (34%) versus just about a quarter of women (27%) who say they have “very little” or “no trust” in their current

employer cite “leadership pay (e.g., CEO) is disproportionate to the company’s financial performance” as a factor that led to their lack of trust.

- ▶ When comparing parents and non-parents who say they have “very little” or “no trust” in their current employer, the factor that led to this lack of trust on which they differ the most is “does not foster a collaborative work environment” (non-parents 46% and parents 38%).

What influence would a high level of trust have on full-time workers?

- ▶ When asked what impact a high level of trust in their company may have, respondents globally say it would have a “major influence” on their likelihood to be “happier in my job” (55%); “stay with the company” (52%); “do higher quality work” (50%); “be more engaged/productive” (48%); and “recommend my company to others” (44%).

What impact would a low level of employee trust have on full-time workers?

- ▶ Respondents with a low level of trust in their company say this would have a “major influence” on their likelihood to “look for another job” (42%); “work only the minimum number of hours required” (30%); and “be less engaged/productive” (28%).
- ▶ Globally, women were more likely than men to be majorly influenced to take all of these actions if they had a low level of trust

in their employer, particularly “looking for another job” (44% women, 40% men) and “working only the minimum number of hours required” (33% women, 27% men).

What factors influence trust for bosses?

- ▶ The top factors viewed as “very important” for trusting bosses are “treats me with respect” (67%), “meets commitments (i.e., does what they say they are going to do)” (62%), “communicates openly/transparently” (61%) and “behaves ethically” (60%). There is a tie between “values my point of view/opinion” and “is appreciative/provides recognition and praise for a job well done” (both 55%).
- ▶ More than half of global respondents cite other “very important” factors : “communicates with me enough” (54%); “makes wise business decisions” (53%); “fairly compensates and promotes people with all differences (such as gender, country of origin and thinking style)” (52%); and “is open to exploring new ideas and approaches to help achieve results” (51%).
- ▶ About half of respondents cite “encourages managing my work-life responsibilities by offering flexibility in when and where I work” and “gives timely constructive feedback” (both 50%); “is inclusive of people with all differences (such as gender, country of origin and thinking style)” (48%); and “takes time to help me develop and succeed” (46%) as “very important.”

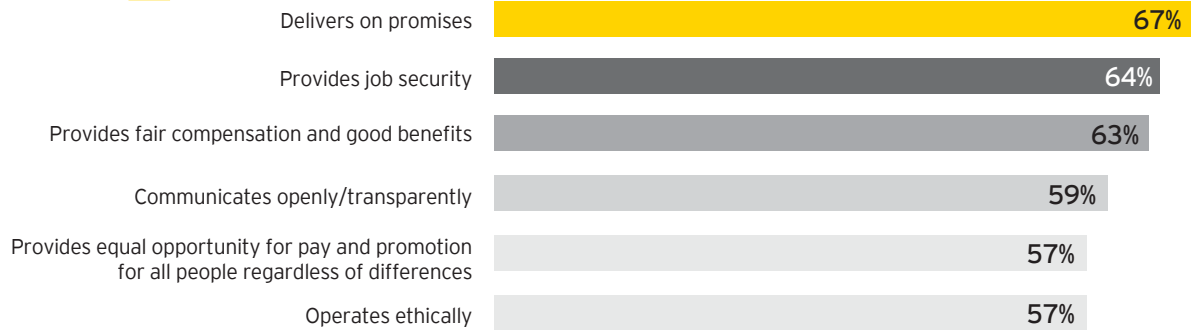
What factors influence trust for teams/colleagues?

- ▶ Globally, the top five factors that are “very important” for trusting teams/colleagues are: “treat me with respect” (64%); “do quality work” (62%); are “collaborative/cooperative” (61%); “communicate openly/transparently” (59%); and “behave ethically” (59%).
- ▶ Other “very important” factors to nearly half of respondents include the following: “assist me when I am overwhelmed/busy with other tasks” (51%); “are appreciative/provide recognition and praise for a job well done” (49%); “are inclusive of people with all differences (such as gender, country of origin, and thinking style)” (48%); “make wise business decisions” (47%); and “encourage me to manage my work-life responsibilities” (46%).

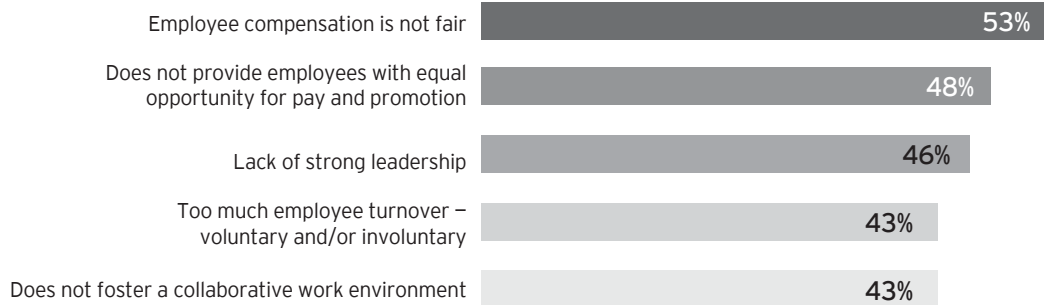


Respondents with a low level of trust in their company said this would have a major influence on their likelihood to look for another job (42%), work only the minimum number of hours required (30%) and be less engaged/productive (28%).

Factors influencing high levels of trust.



Factors influencing low levels of trust.



Consequences to a lack of trust.



What factors will influence Generation Z's trust in future employers?

EY also surveyed more than 3,200 Gen Zers for the study. The top factors Gen Z respondents globally say are “very important” in trusting an employer are: “provides equal opportunity for pay and promotion,” and “provides opportunities to learn and advance in my career,” tied for first place at 66% each.

- ▶ Other “very important” factors include: “provides fair compensation and good benefits” (64%); “provides job security (doesn’t terminate a large number of employees or terminate employees too often)” (62%); and “encourages managing my work-life responsibilities by offering flexibility in when and where I work” (52%). More than 4 in 10 (44%) say “has a diverse environment” (44%) is “very important.”
- ▶ US Gen Z respondents (71%) are more likely than the average global Gen Z respondent (62%) to say job security is a “very important” factor when determining whether they trust an employer. The US is followed by Germany (69%), India and Brazil (both 67%), the UK 62%, Mexico (58%), China (57%) and Japan (47%).
- ▶ In the US, Gen Z women respondents (86%) are 13-16 percentage points more likely to say “equal opportunity for pay and promotion” is “very important” when determining how much trust to place in an employer compared with millennial (70%) and Gen X women (73%). The only female generation with a similar percentage in the US is boomer women (81%).

Parents' work experiences positively impact Gen Z.

- ▶ The majority of global (58%) and US (53%) Gen Z respondents report their parents' or guardians' work experience had a “very or somewhat positive” impact on how much trust they will place in future employers.
- ▶ Close to one in five US Gen Z respondents (18%) and about one in 10 globally (11%) report that their parents' work experience had a “very or somewhat negative” impact on how much they will trust future employers.
- ▶ The remainder of global (23%) and US (20%) respondents say there is “no impact” on their level of trust based on their parents' work experience or they are “not sure” about the impact (8% global, 7% US).
- ▶ Among the global Gen Z respondents who say their parents' work experience had a negative impact on them, the top factors cited for why they feel this way are that their parent/guardian: “hasn't had a good raise in years” (39%); “doesn't like/trust boss (33%); “doesn't like their job” and “doesn't like/trust their colleagues” (both 30%); and “doesn't like/trust top executives at the company” (28%).
- ▶ One quarter (25%) of these global Gen Z respondents say a factor for this negative impact is their parent/guardian “works for a company that has terminated employees,” and 17% say their “parent/guardian was terminated.”

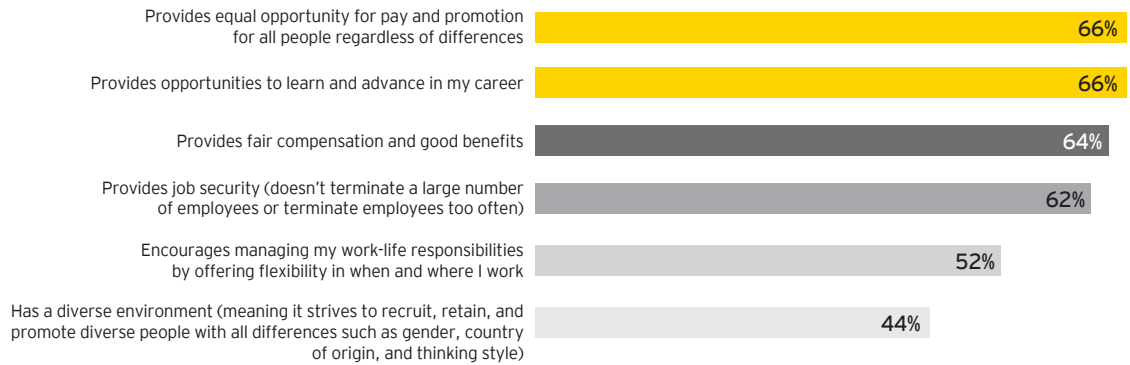
- ▶ A smaller percentage of these respondents say their parent/guardian works for a company that “lacks diversity” (18%); is “an unethical company” (16%); or they worked for “a company that went bankrupt” (13%).

What could make Gen Zers trust their bosses?

- ▶ The top five “very important” factors for placing trust in a boss for Gen Z are: “treats me with respect” (71%); “behaves ethically” (65%); “fairly compensates and promotes people of all differences (such as gender, country of origin and thinking style)” (64%); “communicates openly/transparently” (62%); and “makes wise business decisions” (61%).
- ▶ Gen Z respondents in the US (83%) are 13 percentage points more likely than US millennials (70%) and 9 percentage points higher than US Gen Xers (74%) to say “ethical behavior” in a boss is “very important” in determining whether to trust them.
- ▶ Gen Z women are more likely than their male counterparts to consider inclusiveness as a “very important” factor in trusting a boss (63% and 47%, respectively). Additionally, a larger percentage of Gen Z women (70%) cite “fairly compensates and promotes people of all differences” as a “very important” trust factor in a boss versus Gen Z men (57%).

Two-thirds of Gen Z respondents say a top factor in trusting an employer is "providing equal opportunity for pay and promotion."

"Very important" factors for Gen Z respondents in trusting an employer are...



Whom does Gen Z trust to help them make employment decisions? Their mothers.

- ▶ When asked who they will trust "when making an employment decision for your future full-time jobs," Gen Zers say they are "very likely" to trust their "mother" (58%) followed closely by their "father" (53%). A third or more say they are "very likely" to trust: "teacher/professor" (39%), "siblings" (36%); and "current employees of the company, including interns" (35%).
- ▶ Mothers are the top influencer Gen Z are "very likely" to trust in an employment decision for both genders in all eight countries, with the exception of men in Japan.

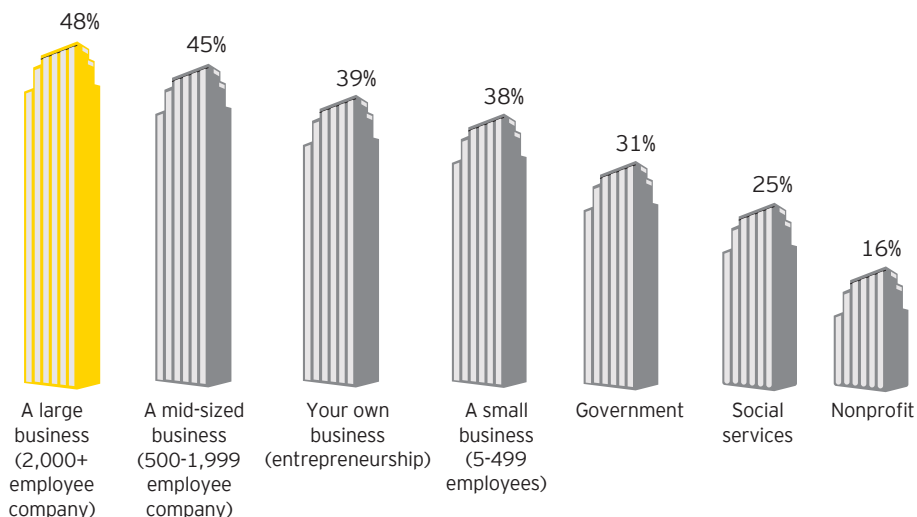
Gen Zers prefer large businesses as an ideal place to work.

- ▶ Globally, close to half of Gen Z respondents say that when they are ready to enter the workforce on a full-time basis, they would consider working for a large business (48%), defined as a 2,000-plus employee company, or a mid-sized business (45%), with 500-1,999 employees. A fairly equal percentage would consider their own business (39%) or a small business (38%) with 5-499 employees.
- ▶ About a third (31%) would consider a government position. A quarter or less would consider working in a social services position (25%) or at a nonprofit (16%). The remainder either say they "don't know"

(7%), selected "other" (8%) or say they don't plan to enter the workforce full time (3%). Respondents in China are the most likely to want to work in the government (40%) and respondents in Japan (21%) are the least likely.

- ▶ A slightly larger percentage of Gen Z women than men say they'd consider working at a mid-sized company (49% women, 42% men); in social services (28% women, 21% men); and at a nonprofit (19% women, 13% men). Men and women are relatively similar in all other categories.
- ▶ When asked what types of employers they would consider working for on a full-time basis, roughly two in five (41%) US Gen Z respondents choose entrepreneurship. This is virtually the same for women (42%) and men (41%). Gen Z respondents in the US may not consider starting their own company, but they would consider working at a small business over a large one. Over half of US respondents would consider working at a small business (58%) and less than half (48%) would consider a large one.
- ▶ Approximately half of Gen Z respondents in Brazil (50%), Mexico (49%) and Germany (46%) say they'd consider becoming an entrepreneur. Only about one in 10 in Japan say so (13%).

When asked which types of employers they would consider working for, Gen Zers said ...



How do work-life, compensation and other workplace issues influence trust?

Perceptions of trust and flexibility

Do workers trust they can take time off for parental leave, childcare and eldercare without negative consequences?

- ▶ Only about a third of full-time workers surveyed globally (32%) say they have a “great deal of trust” that “there won’t be any negative consequences” to their career for taking time off for child or eldercare, and less than half (39%) say this about parental leave.
- ▶ Close to half (49%) of respondents globally cite “encourages managing my work-life responsibilities by offering flexibility in when and where I work” as a “very important” factor in trusting their current employer. And of those who say they have “little or no trust” in their employer, close to one-third (31%) say that having “no opportunity for managing my work-life responsibilities” leads to this lack of trust. Yet only about a third of respondents globally say they have a “great deal of trust” that “there won’t be any negative consequences” to their career for “taking time off for childcare or eldercare” (32%) or “working flexibly” (34%). Less than two out of five (39%) say this about “taking parental leave.”

- ▶ Fewer than half of respondents have a “great deal of trust” that there would be no repercussions for “taking paid time off” (47%) and “missing work due to illness – for myself” (48%). Less than three in five (59%) say this about “taking leave for the death of a family member.”

About a quarter of respondents globally agree that they will be penalized if they don’t work overtime.

- ▶ Globally, 28% of respondents “somewhat disagree” or “strongly disagree” that they “won’t get penalized” if they “don’t work overtime (more than my standard work week).” The highest percentage of respondents that disagree are in Japan (42%), followed by Mexico (33%), China (28%) and Brazil (27%). Germany (25%), the UK (24%), the US (24%) and India (22%) are close behind.
- ▶ Among those who disagree they will not get penalized, the top reasons respondents cite for disagreeing are: “the nature of my work demands it” (45%) and “my boss demands it” (30%). There’s a three-way tie for “my company demands it,” “most employees at company work overtime (evenings, weekend, etc.)” and “we don’t have enough staff due to turnover/budgets, so existing resources have to overcompensate” (29%).



Perceptions of trust and compensation

About one in three global respondents don’t expect to get a raise or bonus this year.

- ▶ Globally, 36% of respondents don’t expect to get a raise or bonus this year or “will get extra paid time off, but no raise/bonus” with Germany, Japan, the UK and the US in the lead (54%, 51%, 44% and 38%, respectively).
- ▶ The biggest percentage of those that do anticipate a raise/bonus in these four countries report the raise/bonus is expected to be “1-3% of my current salary” (US 40%, UK 39% and Japan and Germany 23%).
- ▶ Only 14% of respondents in India do not expect to get a raise/bonus this year and 30% say the raise will be in the 11-20% range, the highest of any country.
- ▶ In all countries but India (17% men, 11% women), a higher percentage of women don’t expect to get a raise/bonus in 2016 than men. The percentage-point difference is highest for women in the UK (50% women, 39% men), followed by Germany (58% women, 49% men). Close behind are Japan (55% women, 48% men) and Brazil (32% women, 25% men), both have a seven-percentage-point gap.
- ▶ In every country, a larger percentage of non-parents don’t expect a raise/bonus in 2016. The biggest gaps are in Brazil (34% non-parents, 22% parents) and China (44% non-parents and 23% parents).

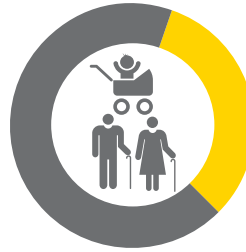
Perceptions of performance recognition



35%

More than a third (35%) of global respondents have “very little” to “no trust” that their current employers will recognize their hard work and good performance with a raise or promotion.

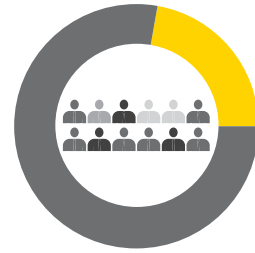
Perceptions of taking time off for child or eldercare



32%

Only about a third of full-time workers say they have a “great deal of trust” that “there won’t be any negative consequences” to their career for taking time off for child or eldercare, and less than two in five say this about parental leave.

Perceptions of diversity and inclusion on trust



22%

One in five (22%) full-time workers globally say they have “very little” to “no trust” that their employers value diversity.

Globally, a significantly larger percentage of women versus men lack trust that they will be rewarded with “increased pay or promotion.”

- ▶ A third (34%) of global respondents have “very little” to “no trust” in their current employer that if they “work hard” and “meet performance goals” they will be rewarded with “increased pay or a promotion.”
- ▶ Among global respondents who had “very little trust” or “no trust at all” that they would be rewarded with “increased pay or a promotion” if they “work hard” and “meet performance goals,” the highest percentages occur in Japan (46%), the UK (45%), Germany (45%) and the US (43%).
- ▶ India, Mexico and Brazil remain optimistic outliers; these countries have the largest percentage of respondents with a “great deal of trust” (50%, 35% and 35%, respectively) that they’ll be fairly rewarded. These were also the countries with the highest percentage of respondents that trusted their employer (India, 66%; Mexico, 65%; and Brazil, 59%).
- ▶ Globally, a significantly larger percentage of women (36%) versus men (33%) have “very little” to “no trust” they would be rewarded. And there are bigger percentage-point differences in certain countries—particularly in the US (women 48%, men 38%), Brazil (women 34%, men 28%) and the UK (women 48%, men 43%).

- ▶ In India, men (19%) are significantly more likely than women (13%) to have “very little” or “no trust” they would be rewarded with increased pay or a promotion if they “work hard” and “meet performance goals.” Conversely, there is a significant 16-percentage-point difference in India between women (58%) and men (42%) in having a “great deal of trust” that they would be rewarded – a greater percentage-point difference than in any other country.

Perceptions of trust and diversity and inclusion

About one in five full-time workers globally don’t trust that their employer values diversity.

- ▶ About one in five (22%) full-time workers globally say they have “very little” to “no trust” that their employers value diversity.
- ▶ Japan (39%) has the largest percentage of respondents with “very little” to “no trust” that their employer values diversity, followed by Germany (27%), the UK (23%), China (21%) and the US (19%).
- ▶ Fewer than one in five respondents in Mexico (18%), Brazil (17%) and India (14%) responded with “very little” to “no trust” that their employer values diversity.
- ▶ Among those that responded that they have “very little” to “no trust” that their employer values diversity, the top five reasons cited that led to this lack of trust

include “we don’t have many employees who are racially or ethnically diverse” (32%), “we don’t have any hiring initiatives that foster diversity” (31%) and “we don’t have many people who are racially and ethnically diverse among our leadership team” (30%). There is a tie between “we don’t have much gender diversity among our top executives” and “we don’t have many people from outside our home country among our top executives” (both 29%). Another reason is “we recruit, but don’t retain, diverse employees (or employees of different ethnicities, genders and also people from different countries)” (19%).

About 1 in 3 global respondents don’t expect to get a raise/bonus this year.

What do specific demographics have to say about trust?



Differences by generation, gender and parental status

Trust varies by generation: boomer, Gen X and millennial

Globally, full-time working baby boomers are slightly more likely than other generations to trust their employers, bosses and teams/colleagues, and Gen Xers are the least likely to place a “great deal of trust” in employers.

- ▶ Globally, a higher percentage of full-time working boomers (ages 51-68) place a “great deal of trust” in their employers (51%), boss (52%) and teams/colleagues (53%) than other generations. Gen X (ages 35-50) are the least likely to place “a great deal of trust” in their employers (41%) and boss (46%).
- ▶ Millennials (ages 19-34) are in the middle for placing “a great deal of trust” in their employers (45%) and boss (50%).

Millennials in the US trust their employers, boss and teams more than other generations.

- ▶ In the US, a larger percentage of millennials place “a great deal of trust” in their employer (42%), boss (52%) and teams/colleagues (48%) than other generations.
- ▶ In the US, Gen X (32%) has a 10-percentage-point gap in placing “a great deal of trust”

in their employer versus US millennials (42%) – the biggest generation gap in the US. US Gen X is also less likely to place “a great deal of trust” in their team/colleagues (43%) than other generations.

- ▶ US boomers follow close behind US millennials in placing “a great deal of trust” in their employer (40%) and team/colleagues (47%), but trail US Gen X (51%) and US millennials (52%) in placing “a great deal of trust” in their boss.

Gaps in trust vary by generation significantly in China, India and Mexico.

- ▶ In China, India and Mexico, a significant split exists between younger generations and boomers in placing a great deal of trust in their employer, boss and team/colleagues.
- ▶ In China, there is a 17- to 19-percentage-point gap between boomers and Gen X in placing “a great deal of trust” in their employer (boomers 49%, Gen X 32%), boss (boomers 55%, Gen X 36%) and team/colleagues (boomers 63%, Gen X 44%).
- ▶ In India, there is a 16- to 20-percentage-point gap between boomers and Gen X in placing “a great deal of trust” in their employer (boomers 75%, Gen X 59%) and boss (boomers 79%, Gen X 59%) and a 19-percentage-point split between boomers (81%) and Gen X (62%) in placing “a great deal of trust” in their team/colleagues.

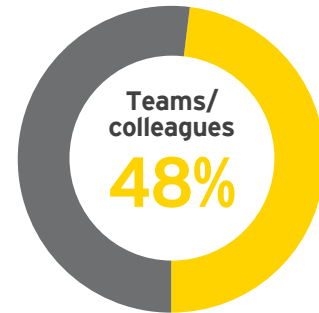
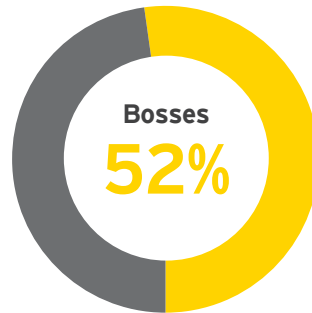
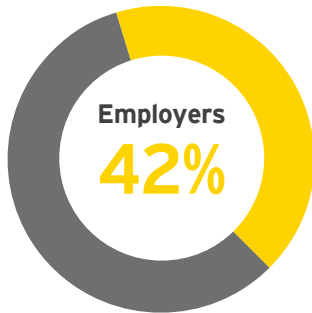
- ▶ For respondents in Mexico there is a 9- to 19-percentage-point difference between boomers (76%) and millennials (57%) in placing a great deal of trust in their employer, boss (boomers 71%, millennials 61%) and team/colleagues (boomers 60%, millennials 51%).

The biggest differences between men and women relate to equal pay and promotion, work-life issues and diversity and inclusiveness

There are gaps in factors for trusting a boss by country.

- ▶ Among the leading “very important” factors for trusting a boss globally, there is a significant percentage-point gap by gender for “encourages managing my work-life responsibilities” (11-point difference; 56% women, 45% men) and “fairly compensates and promotes people” (10-point difference; 57% women, 47% men).
- ▶ The US, Germany and India have the biggest percentage-point gaps between genders for “fairly compensates and promotes people” as a “very important” factor for trust (18, 16 and 13 percentage points, respectively).
- ▶ The US (19 percentage points) has the widest split between women and men for “is inclusive of people with all differences” followed by India (15), Brazil (14), Germany (12) and the UK (11).

Global millennial respondents who say they have “a great deal of trust” in...



Women cite pay and promotion and diverse workplace more than men in trusting an employer

- ▶ The biggest percentage-point differences between women and men are “provides equal opportunity for pay and promotion for all people regardless of differences” (women 61%, men 52%) and “has a diverse environment” (42% women, 33% men).
- ▶ In the US, there is a greater gender gap in the factors of trust in some areas than for global respondents. “Provides equal opportunity for pay and promotion” had a 24-percentage-point difference in the US for women and men, compared with 9 percentage points globally.
- ▶ In the US, three-fourths of women (74%) cite “provides equal opportunity for pay and promotion” as a “very important” trust factor but only half of men (50%) do the same.

- ▶ A higher percentage of women in the US (74%) say this is a “very important” factor than respondents in any other country, followed by Brazil (72%) and the UK (68%). The UK (68% women, 51% men) and Germany (63% women, 48% men), also have a significant percentage-point gap by gender.

Women in the US have a slightly lower level of trust for employers than men.

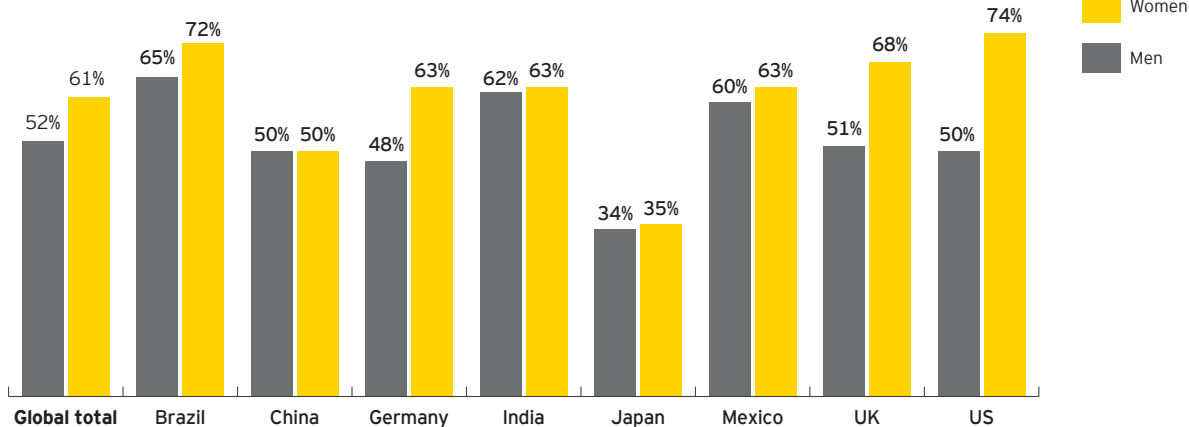
- ▶ In the US, a slightly lower percentage of women than men have a “great deal of trust” in their employer (37% women, 40% men), boss (49% women, 51% men) or team/colleagues (44% women, 48% men). Also, a larger percentage of US

women who report having “very little” to “no trust” that if they “work hard” and “meet performance goals” they will be rewarded with “increased pay or a promotion” (48% women, 38% men).

- ▶ By contrast, in India, a higher percentage of women have a great deal of trust in their employer (71% women, 61% men), boss (73% women, 60% men) and team/colleagues (women 74% women, men 61% men) – and they’re more likely to have “a great deal of trust” that they will be rewarded with “increased pay or a promotion” for their hard work (58% women, 42% men).

Respondents who view employers providing equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style) as “very important”

Women value pay and promotion and diverse workplace more than men





When trusting teams, men and women both seek respect and quality work.

- ▶ When trusting teams, the highest percentage of both men and women cite “treat me with respect” (68% women, 60% men) and “do quality work” (66% women, 59% men) as “very important” factors.
- ▶ When it comes to factors viewed as “very important” for trusting teams, the biggest percentage-point differences by gender include “are appreciative/provide recognition and praise for a job well done” (53% women, 45% men) and “treat me with respect” (68% women, 60% men). Being “inclusive of people with all differences” (52% women, 44% men) is another “very important” factor.

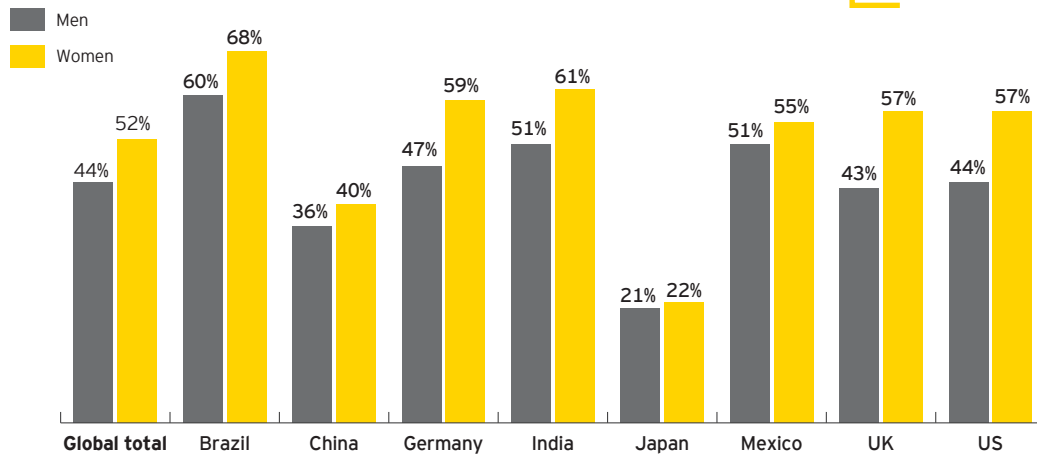
There are significant differences globally between parents and non-parents for trusting their employer, boss and team/colleagues.

Parents in the US, China and Brazil place greater trust in teams/colleagues than non-parents.

- ▶ Parents are more likely than non-parents to place a “great deal of trust” in their employer (48% parents, 44% non-parents), boss (53% parents, 46% non-parents) and team/colleagues (53% parents, 45% non-parents).
- ▶ By country, there are some differences between parents and non-parents for trusting their employer and boss.

- ▶ In China (63% parents, 42% non-parents), Brazil (62% parents, 47% non-parents), Mexico (57% parents, 51% non-parents) and the US (50% parents, 42% non-parents) there was a more substantial split in placing a “great deal of trust” in team/colleagues.
- ▶ A significantly higher percentage of non-parents versus parents in Brazil (parents 24%, non-parents 38%) and China (parents 16%, non-parents 30%) also have “very little” to “no trust” in their current employer that if they work hard and meet performance goals they will be rewarded with “increased pay or promotion.”


Respondents who view their team/colleagues being inclusive of people with all differences such as gender, country of origin, and thinking as “very important”



Appendix

Top factors “very important” for trust

By generation



	Employer	Boss	Team/Colleagues
Overall	1. “Delivers on promises” (67%)	1. “Treats me with respect” (67%)	1. “Treats me with respect” (64%)
	2. “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” (64%)	2. “Meets commitments (i.e., does what they say they are going to do)” (62%)	2. “Do quality work” (62%)
	3. “Provides fair compensation and good benefits” (63%)	3. “Communicates openly/transparently” (61%)	3. “Are collaborative/cooperative” (61%)
	4. “Communicates openly/transparently” (59%)	4. “Behaves ethically” (60%)	4. “Communicate openly/transparently” (59%)
	5. Tie between: “Operates ethically” and “Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)” (each 57%)	5. Tie between: “Values my point of view/opinion” and “Is appreciative/provides recognition and praise for a job well done” (each 55%)	5. “Behave ethically” (59%)

	Employer	Boss	Team/Colleagues
Millennial (aged 19-34)	1. “Delivers on promises” (62%)	1. “Treats me with respect” (64%)	1. “Treats me with respect” (61%)
	2. “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” (60%)	2. “Meets commitments (i.e., does what they say they are going to do)” (59%)	2. “Do quality work” (59%)
	3. “Provides fair compensation and good benefits” (60%)	3. “Communicates openly/transparently” (58%)	3. “Are collaborative/cooperative” (58%)
	4. “Communicates openly/transparently” (55%)	4. “Behaves ethically” (56%)	4. “Communicate openly/transparently” (56%)
	5. “Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)” (55%)	5. “Is appreciative/provides recognition and praise for a job well done” (54%)	5. “Behave ethically” (56%)

By generation


	Employer	Boss	Team/Colleagues
Gen X (aged 35-50)	1. "Delivers on promises" (68%)	1. "Treats me with respect" (67%)	1. "Treats me with respect" (64%)
	2. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (65%)	2. "Meets commitments (i.e., does what they say they are going to do)" (62%)	2. "Do quality work" (63%)
	3. "Provides fair compensation and good benefits" (64%)	3. "Communicates openly/transparently" (62%)	3. "Are collaborative/cooperative" (61%)
	4. "Communicates openly/transparently" (59%)	4. "Behaves ethically" (61%)	4. "Communicate openly/transparently" (59%)
	5. "Operates ethically" (57%)	5. "Values my point of view/opinion" (55%)	5. "Behave ethically" (59%)


	Employer	Boss	Team/Colleagues
Boomers (aged 51-68)	1. "Delivers on promises" (70%)	1. "Treats me with respect" (70%)	1. "Treats me with respect" (66%)
	2. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (67%)	2. "Meets commitments (i.e., does what they say they are going to do)" (65%)	2. "Do quality work" (65%)
	3. "Provides fair compensation and good benefits" (64%)	3. "Communicates openly/transparently" (65%)	3. "Are collaborative/cooperative" (64%)
	4. "Communicates openly/transparently" (62%)	4. "Behaves ethically" (64%)	4. "Communicate openly/transparently" (62%)
	5. "Operates ethically" (62%)	5. Tie between: "Values my point of view/opinion" and "Is appreciative/provides recognition and praise for a job well done" (each 58%)	5. "Behave ethically" (62%)

Appendix


Top factors “very important” for trust


By geography

	Employer	Boss	Team/Colleagues
Overall	1. “Delivers on promises” (67%)	1. “Treats me with respect” (67%)	1. “Treats me with respect” (64%)
	2. “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” (64%)	2. “Meets commitments (i.e., does what they say they are going to do)” (62%)	2. “Do quality work” (62%)
	3. “Provides fair compensation and good benefits” (63%)	3. “Communicates openly/transparently” (61%)	3. “Are collaborative/cooperative” (61%)
	4. “Communicates openly/transparently” (59%)	4. “Behaves ethically” (60%)	4. “Communicate openly/transparently” (59%)
	5. Tie between: “Operates ethically” and “Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)” (each 57%)	5. Tie between: “Values my point of view/opinion” and “Is appreciative/provides recognition and praise for a job well done” (each 55%)	5. “Behave ethically” (59%)

	Employer	Boss	Team/Colleagues
Brazil	1. “Operates ethically” (75%)	1. “Treats me with respect” (81%)	1. “Treat me with respect” (80%)
	2. “Delivers on promises” (75%)	2. “Behaves ethically” (76%)	2. “Behave ethically” (74%)
	3. “Provides opportunities to learn and advance in my career” (72%)	3. “Meets commitments (i.e., does what they say they are going to do)” (74%)	3. “Do quality work” (74%)
	4. “Provides fair compensation and good benefits” (71%)	4. “Communicates openly/transparently” (73%)	4. “Are collaborative/cooperative” (70%)
	5. Tie between: “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” and “Communicates openly/transparently” (each 70%)	5. “Is appreciative/provides recognition and praise for a job well done” (71%)	5. “Communicate openly/transparently” (69%)

By geography


	Employer	Boss	Team/Colleagues
China	1. "Delivers on promises" (63%)	1. "Meets commitments (i.e., does what they say they are going to do)" (58%)	1. "Are collaborative/cooperative" (57%)
	2. "Provides fair compensation and good benefits" (62%)	2. "Treats me with respect" (49%)	2. "Do quality work" (50%)
	3. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (55%)	3. "Behaves ethically" (47%)	3. "Behave ethically" (48%)
	4. "Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)" (50%)	4. "Communicates openly/transparently" (47%)	4. "Treat me with respect" (47%)
	5. "Has a strong senior leadership team" (48%)	5. "Communicates with me enough" (47%)	5. Tie between "Communicate openly/transparently" and "Communicate with me enough" (and #4 above) (each 47%)


	Employer	Boss	Team/Colleagues
Germany	1. "Delivers on promises" (73%)	1. "Treats me with respect" (73%)	1. "Treat me with respect" (71%)
	2. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (73%)	2. "Meets commitments (i.e., does what they say they are going to do)" (70%)	2. "Communicate openly/transparently" (66%)
	3. "Provides fair compensation and good benefits" (65%)	3. "Behaves ethically" (63%)	3. "Do quality work" (63%)
	4. "Communicates openly/transparently" (59%)	4. "Communicates openly/transparently" (62%)	4. "Behave ethically" (62%)
	5. "Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)" (55%)	5. "Values my point of view/opinion" (56%)	5. "Are collaborative/cooperative" (61%)

Appendix

Top factors “very important” for trust


By geography

	Employer	Boss	Team/Colleagues
India	1. “Has a strong senior leadership team” (67%)	1. “Treats me with respect” (69%)	1. “Do quality work” (69%)
	2. “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” (67%)	2. “Communicates openly/transparently” (66%)	2. “Treat me with respect” (67%)
	3. “Provides opportunities to learn and advance in my career” (67%)	3. “Behaves ethically” (65%)	3. “Communicate openly/transparently” (66%)
	4. “Delivers on promises” (66%)	4. “Meets commitments (i.e., does what they say they are going to do)” (63%)	4. “Are collaborative/cooperative” (65%)
	5. “Communicates openly/transparently” (65%)	5. Tie between “Values my point of view/opinion” and “Makes wise business decisions” (each 62%)	5. “Value my opinions and contributions” (65%)

	Employer	Boss	Team/Colleagues
Japan	1. “Delivers on promises” (50%)	1. “Communicates openly/transparently” (37%)	1. “Are collaborative/cooperative” (44%)
	2. “Provides fair compensation and good benefits” (49%)	2. “Is appreciative/provides recognition and praise for a job well done” (35%)	2. “Communicate openly/transparently” (38%)
	3. “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” (45%)	3. “Behaves ethically” (35%)	3. “Do quality work” (37%)
	4. “Has strong financial performance” (38%)	4. “Encourages managing my work-life responsibilities by offering flexibility in when and where I work” (34%)	4. “Communicate with me enough” (34%)
	5. “Encourages managing my work-life responsibilities by offering flexibility in when and where I work” (36%)	5. “Values my point of view/opinion” (34%)	5. “Behave ethically” (33%)

By geography

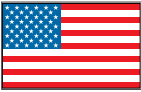
	Employer	Boss	Team/Colleagues
Mexico	1. "Operates ethically" (71%)	1. "Treats me with respect" (75%)	1. "Treat me with respect" (72%)
	2. "Delivers on promises" (66%)	2. "Behaves ethically" (69%)	2. "Do quality work" (66%)
	3. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (64%)	3. "Communicates openly/transparently" (65%)	3. "Behave ethically" (64%)
	4. "Communicates openly/transparently" (63%)	4. "Values my point of view/opinion" (63%)	4. "Are collaborative/cooperative" (61%)
	5. "Provides opportunities to learn and advance in my career" (63%)	5. "Meets commitments (i.e., does what they say they are going to do)" (62%)	5. "Communicate openly/transparently" (58%)

	Employer	Boss	Team/Colleagues
UK	1. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (66%)	1. "Treats me with respect" (73%)	1. "Treat me with respect" (69%)
	2. "Delivers on promises" (65%)	2. "Communicates openly/transparently" (68%)	2. "Do quality work" (65%)
	3. "Communicates openly/transparently" (63%)	3. "Meets commitments (i.e., does what they say they are going to do)" (64%)	3. "Are collaborative/cooperative" (62%)
	4. "Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)" (59%)	4. "Values my point of view/opinion" (58%)	4. "Communicate openly/transparently" (61%)
	5. "Provides fair compensation and good benefits" (55%)	5. "Is appreciative/provides recognition and praise for a job well done" (57%)	5. "Communicate with me enough" (58%)


Appendix

Top factors “very important” for trust

By geography

	Employer	Boss	Team/Colleagues
US	1. “Delivers on promises” (75%)	1. “Treats me with respect” (81%)	1. “Treat me with respect” (77%)
	2. “Provides fair compensation and good benefits” (75%)	2. “Behaves ethically” (76%)	2. “Do quality work” (75%)
	3. “Operates ethically” (74%)	3. “Meets commitments (i.e., does what they say they are going to do)” (74%)	3. “Behave ethically” (73%)
	4. “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” (69%)	4. “Communicates openly/transparently” (73%)	4. “Communicate openly/transparently” (68%)
	5. “Communicates openly/transparently” (69%)	5. “Values my point of view/opinion” (64%)	5. “Are collaborative/cooperative” (67%)

By gender



	Employer	Boss	Team/Colleagues
Overall	1. "Delivers on promises" (67%)	1. "Treats me with respect" (67%)	1. "Treats me with respect" (64%)
	2. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (64%)	2. "Meets commitments (i.e., does what they say they are going to do)" (62%)	2. "Do quality work" (62%)
	3. "Provides fair compensation and good benefits" (63%)	3. "Communicates openly/transparently" (61%)	3. "Are collaborative/cooperative" (61%)
	4. "Communicates openly/transparently" (59%)	4. "Behaves ethically" (60%)	4. "Communicate openly/transparently" (59%)
	5. Tie between: "Operates ethically" and "Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)" (each 57%)	5. Tie between: "Values my point of view/opinion" and "Is appreciative/provides recognition and praise for a job well done" (each 55%)	5. "Behave ethically" (59%)


	Employer	Boss	Team/Colleagues
Women	1. "Delivers on promises" (68%)	1. "Treats me with respect" (71%)	1. "Treats me with respect" (68%)
	2. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (67%)	2. "Meets commitments (i.e., does what they say they are going to do)" (65%)	2. "Do quality work" (66%)
	3. "Provides fair compensation and good benefits" (66%)	3. "Communicates openly/transparently" (65%)	3. "Are collaborative/cooperative" (65%)
	4. "Communicates openly/transparently" (62%)	4. "Behaves ethically" (64%)	4. "Communicate openly/transparently" (63%)
	5. "Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)" (61%)	5. "Is appreciative/provides recognition and praise for a job well done" (60%)	5. "Behave ethically" (63%)

Top factors “very important” for trust

By gender

	Employer	Boss	Team/Colleagues
Men	1. “Delivers on promises” (65%)	1. “Treats me with respect” (63%)	1. “Treats me with respect” (60%)
	2. “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” (60%)	2. “Meets commitments (i.e., does what they say they are going to do)” (59%)	2. “Do quality work” (59%)
	3. “Provides fair compensation and good benefits” (59%)	3. “Communicates openly/transparently” (58%)	3. “Are collaborative/cooperative” (57%)
	4. “Communicates openly/transparently” (56%)	4. “Behaves ethically” (56%)	4. “Communicate openly/transparently” (55%)
	5. “Operates ethically” (53%)	5. “Values my point of view/opinion” (52%)	5. “Behave ethically” (55%)

By parental status



	Employer	Boss	Team/Colleagues
Overall	1. "Delivers on promises" (67%)	1. "Treats me with respect" (67%)	1. "Treats me with respect" (64%)
	2. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (64%)	2. "Meets commitments (i.e., does what they say they are going to do)" (62%)	2. "Do quality work" (62%)
	3. "Provides fair compensation and good benefits" (63%)	3. "Communicates openly/transparently" (61%)	3. "Are collaborative/cooperative" (61%)
	4. "Communicates openly/transparently" (59%)	4. "Behaves ethically" (60%)	4. "Communicate openly/transparently" (59%)
	5. Tie between: "Operates ethically" and "Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)" (each 57%)	5. Tie between: "Values my point of view/opinion" and "Is appreciative/provides recognition and praise for a job well done" (each 55%)	5. "Behave ethically" (59%)

	Employer	Boss	Team/Colleagues
Parents	1. "Delivers on promises" (66%)	1. "Treats me with respect" (67%)	1. "Treats me with respect" (64%)
	2. "Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)" (63%)	2. "Meets commitments (i.e., does what they say they are going to do)" (62%)	2. "Do quality work" (63%)
	3. "Provides fair compensation and good benefits" (63%)	3. "Communicates openly/transparently" (62%)	3. "Are collaborative/cooperative" (62%)
	4. "Communicates openly/transparently" (59%)	4. "Behaves ethically" (61%)	4. "Communicate openly/transparently" (60%)
	5. Tie between: "Operates ethically" and "Provides equal opportunity for pay and promotion for all people regardless of differences (e.g., gender, country of origin, and thinking style)" (each 57%)	5. "Values my point of view/opinion" (57%)	5. "Behave ethically" (60%)

Top factors “very important” for trust

By parental status

	Employer	Boss	Team/Colleagues
Non-parents	1. “Delivers on promises” (67%)	1. “Treats me with respect” (67%)	1. “Treats me with respect” (64%)
	2. “Provides job security (doesn't terminate a large number of employees or terminate employees too frequently)” (64%)	2. “Meets commitments (i.e., does what they say they are going to do)” (62%)	2. “Do quality work” (62%)
	3. “Provides fair compensation and good benefits” (62%)	3. “Communicates openly/transparently” (61%)	3. “Are collaborative/cooperative” (60%)
	4. “Communicates openly/transparently” (58%)	4. “Behaves ethically” (60%)	4. “Communicate openly/transparently” (58%)
	5. “Operates ethically” (57%)	5. “Is appreciative/provides recognition and praise for a job well done” (55%)	5. “Behave ethically” (58%)

Methodology

The Global generations survey was conducted online by Harris Poll on behalf of EY between March 31 and May 3, 2016 among 9,859 adults in Brazil, China, Germany, India, Japan, Mexico, the UK and the US, aged 19-68 who are employed full time. Roughly 1,200 each were surveyed in Brazil (n=1,239), China (n=1,228), Germany (n=1,226), India (n=1,234), Japan (n=1,237), Mexico (n=1,233), the UK (n=1,229), and the US (n=1,233). Quotas were set for even distribution by gender, age groups and parent status.

The Global Generation Z study was conducted online by Harris Poll on behalf of EY between March 31 and April 25, 2016 among 3,207 teenagers aged 16-18, with roughly 400 each in eight countries, including the U.S. (400), Mexico (401), Brazil (400), the U.K. (400), Germany (401), Japan (400), China (402) and India (403). Quotas were set for even distribution by gender.

For both surveys, the data were not weighted and are therefore representative only of the individuals interviewed. A post weight was applied in the Global generations survey to give each country equal weight when showing results in an eight-country "global" total. All analyses were performed by FleishmanHillard. All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, the words "margin of error" are avoided as they are misleading. Respondents for this survey were selected from among those who have agreed to participate in Harris Poll surveys. Because the sample is based on those who agreed to participate in the Harris panel, no estimates of theoretical sampling error can be calculated.

Contacts

Jaime Paldin
jaime.paldin@ey.com
+1 212 773 8671

Armando Diaz
armando.diaz@ey.com
+1 202 327 6114

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