



Defining the World's Best Workplaces™

Trust, Community, Safety,
Fairness and Sustainability.

Great Place to Work's largest-ever
workplace culture study.





Michael C. Bush
CEO, Great Place to Work®

Trust in Leaders is more relevant than ever before. But how do we know if we have trusting leaders in the workplace?

As business changes faster than ever, and uncertainty has become a common theme in every corner of the globe, the world's workers need to trust their leaders more than ever before.

According to our largest-ever workplace culture study, half of the global workforce says they are not having a great experience. People are unhappy, organizations are underperforming, and leaders are not fulfilling their responsibilities because they are not trusted by their workers.

But, there is good news! We've also found that there are fantastic organizations doing what it takes to build great workplaces no matter where they operate, who works for them or what they do. The common factor: a high-trust workplace led by For All leaders.

For 30 years, Great Place to Work has been researching workplaces all around the world and we know that no matter where people are, they all want the same thing: trust the people they work for, have pride in the work they do and enjoy the people they work with. This is what we survey.

Achieving a culture of trust is not simple, especially when you have to create consistency across borders. But here you will find how 25 organizations have been working to make sure that there is a sense of trust, community, safety, fairness and sustainability in their workplace. And how their leaders, For All leaders, have been fundamental in building this environment.

Congratulations to the 25 multinationals that are changing the rules of the workplace. You are inspiring and are proving that it is possible to have a better business, improve people's lives, and make the world a better one for all.

I hope that by 2025, we can celebrate 100 companies, and that no matter where you are, what you do, you all work at great places to work for all.

A handwritten signature in blue ink that reads "Michael C. Bush".

Our Global Study is the Largest in History

In the largest study of global workplace culture ever conducted by Great Place to Work, we asked 3.4 million employees in 90 countries to tell us about their experiences.



Survey Methodology

The 3.4 million employees work at some 10,000 organizations that partner with Great Place to Work across the globe. From 2018 through mid-2019, employees responded to more than 60 survey questions on our Trust Index® survey. Based on this data set, Great Place to Work recognizes Best Workplaces throughout the United States and Canada, Latin America, Europe, Africa, Asia and Oceania.

This study also includes data from the 2019 World's Best Workplaces. These 25 organizations stand out for creating globally great cultures, and employ roughly 300,000 people globally in industries ranging from manufacturing to technology to transportation.

In addition, we conducted a Global Pulse Survey including 9,000 workers across 23 countries to determine the average employee experience worldwide and in different regions.¹

Great Place to Work's data science team used advanced machine learning techniques to identify key themes by region.

11.5 Million

Employees Represented*

3.4 Million

People Responded

90 Countries

Surveyed

10,000

Organizations

92

Languages

* Great Place to Work collected surveys of 3.4 million workers worldwide. These surveys are statistically representative of workplaces employing a total of 11.5 million people.



Executive Summary

Political and economic upheaval in Latin America. Pressures to work 70-hour weeks in Asia. Concerns about rights and responsibilities in Europe. Frequent corporate restructurings in the United States and Canada. An ever-faster pace of business affecting virtually every industry in every corner of the globe.

Against this backdrop, employees around the world all want the same thing in a workplace: Trust. They define a great workplace as one where leaders demonstrate credibility, respect and fairness.

At the same time there are regional differences in what makes a workplace great. We discovered as much by surveying 3.4 million employees across 90 countries—the largest-ever study of workplace culture. Our research shows that a sense of community is vital in the United States and Canada, psychological safety is key in Latin America, fairness is at the forefront in Europe and sustainability in work and life is central in Asia.

This study builds on our foundation of examining workplaces across the globe for more than 30 years.

From a historical perspective, there's good news and bad news for the world's workers and organizations.

First the good news. At the Best Workplaces across the world, employees are thriving. Roughly 9 in 10 people in these companies are having a great experience. And these organizations are enjoying business benefits in the form of increased loyalty and retention, higher productivity and a greater cooperative spirit.

The good news is amplified at the 2019 World's Best Workplaces. These 25 global organizations, led by No. 1 ranked Cisco, not only are providing a great workplace culture for 300,000 people. But as a group they keep getting better. Employee ratings of the World's Best have increased 5 percent since Great Place to Work first produced this ranking nine years ago.

Now the bad news. Roughly half of employees worldwide don't have a great workplace experience. The result is unhappiness, lower business performance and wasted human potential on a planetary scale.

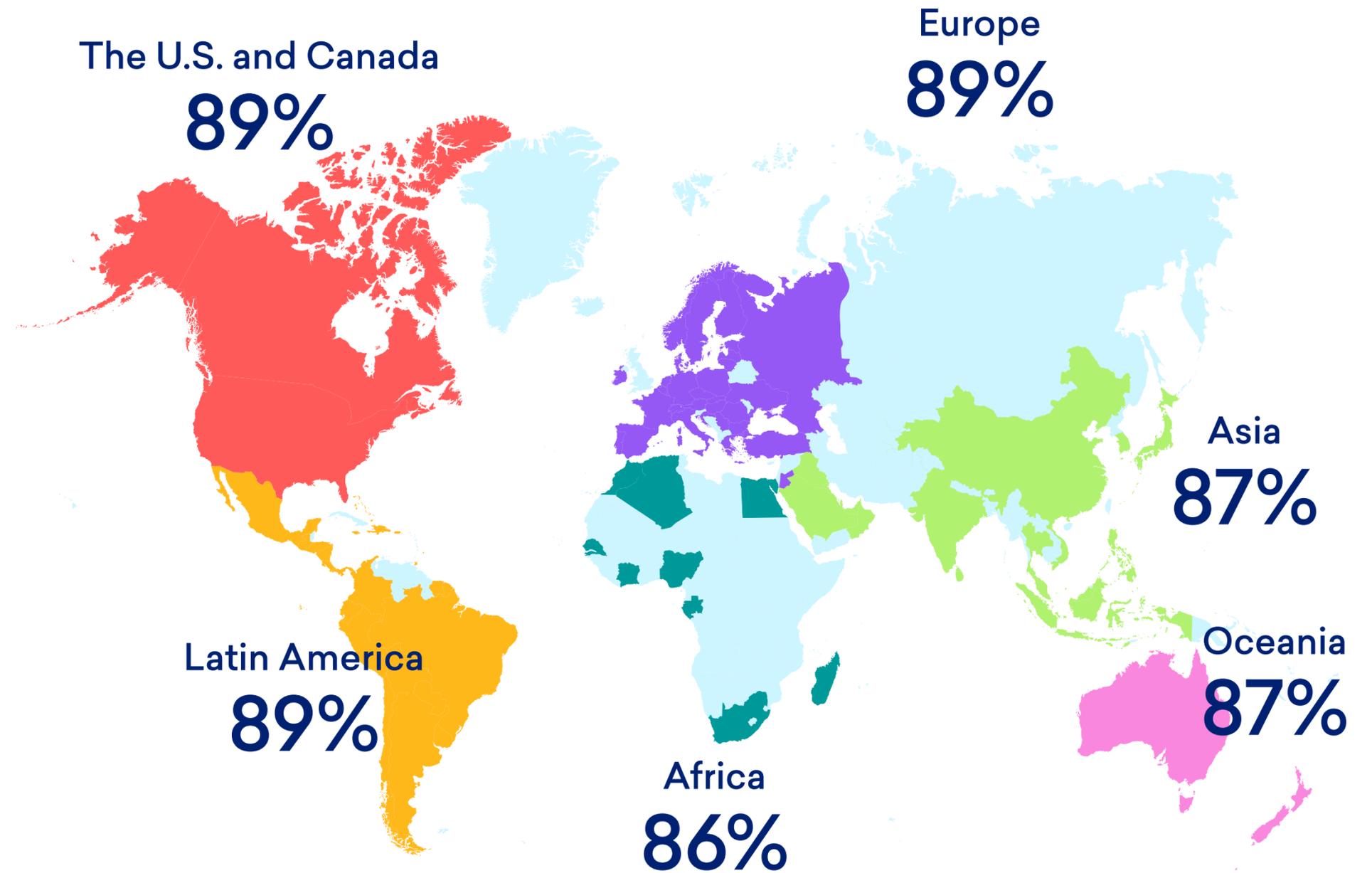
But there's hope. You find it in the 2019 World's Best Workplaces as well in the Best Workplaces recognized by Great Place to Work in 60 countries.

With those organizations as beacons and based on the data analysis in this report, there is more good news: Every organization in every region can advance in ways that are better for business results, better for the people working there and better for our world.

Greatness the World Over

The Best Workplaces that we recognize through rankings in more than 60 countries demonstrate that people in every corner of the globe can find organizations that enable them to thrive.

Here, we show the average employee response to the statement “Taking everything into account, I would say this is a great place to work” in recognized Best Workplaces in major regions.



The World's Best Are Great...

The good news is amplified at the 2019 World's Best Workplaces. At these 25 global organizations, 85 percent of employees say they experience a great workplace.

TRULY GLOBAL

The 25 World's Best Companies:

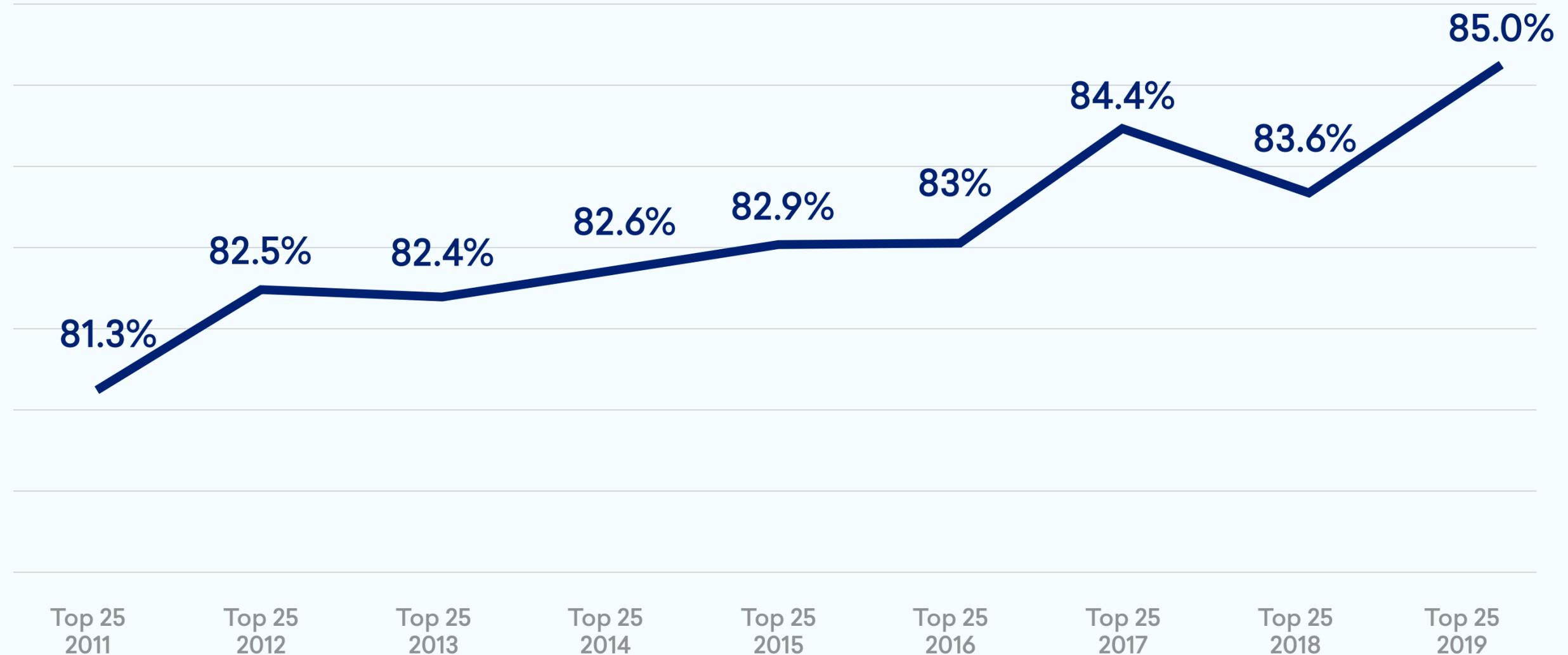
- Employ at least 5,000 employees
- At least 40% (or a minimum of 5,000 employees) of their workforce are based outside their home country
- Recognized on at least five of Great Place to Work's national Best Workplaces lists



...and Getting Even Better

What's more, the World's Best Workplaces have seen their levels of trust, pride and camaraderie rise over the past nine years. The best are getting better.

Trust Index[®] Average of All Survey Statements



World's Best Workplaces 2019



- | | | |
|------------------------|-----------------------|------------------------|
| 1. CISCO | 10. WORKDAY | 19. BELCORP |
| 2. HILTON | 11. THE ADECCO GROUP | 20. SCOTIABANK |
| 3. SALESFORCE | 12. ROCHE | 21. ATENTO |
| 4. DHL EXPRESS | 13. MERCADO LIBRE | 22. NATURA |
| 5. MARS, INCORPORATED | 14. AMERICAN EXPRESS | 23. MCDONALD'S |
| 6. SAP SE | 15. ADOBE | 24. SANTANDER |
| 7. EY | 16. ABBVIE | 25. AT&T LATIN AMERICA |
| 8. STRYKER CORPORATION | 17. INTUIT, INC. | |
| 9. SAS | 18. ADMIRAL GROUP PLC | |



The New No. 1

Cisco Connects its People Everywhere with a Culture of Service

Chuck Robbins had a dream. And a new reality surfaced at Cisco—with a spirit of service connecting employees of the networking giant across the globe.

Robbins is the Chief Executive Officer of Cisco, the new No. 1 World's Best Workplace in 2019.

Robbins took the reins of the 75,000-employee company in 2015. About two years ago, he had a vivid

and disturbing dream. In it, Robbins says he visited a homeless encampment and while there he saw the faces of his pastor and his father. When he woke up, he knew he had to take action on the homelessness that plagues San Jose, the Silicon Valley city that Cisco calls home.

“The next day, I called the mayor,” he recalls. “I said, ‘I wanted to get involved in solving this problem.’”

What's happened since then is a surge of social responsibility at Cisco. For starters, the company made a \$50 million, 5-year donation to Destination: Home, a non-profit group devoted to ending homelessness in the San Jose region. And Robbins' commitment to giving back proved contagious. Or to hear him say it, his visibility on homelessness simply prompted “Cisconians” throughout the world to share what they were already doing to serve their communities—and to increase their efforts.

“There's this immense desire to give back,” Robbins says. “We just made it Ok. People have embraced it. It's blown me away.”

The do-good efforts range from Cisco employees in Italy volunteering to teach data networking classes to prisoners, to a South African employee who started an orphanage in Rwanda, to an Indian employee who feeds victims of flooding in the country. Closer to Cisco's headquarters in California, a Cisco staffer started an

organization to help victims of sex trafficking in Oakland. She has since left the company to focus on her non-profit—but Cisco continues to support her with grant money.

Or consider what happened when Cisco's partnership with Destination: Home resulted in a new, 155-unit supportive housing complex. Cisco employees donated the money for the furnishings, and volunteered to move residents into their new homes.

You might wonder if all the attention to giving back has distracted from Cisco's business execution. On the contrary. Under Robbins, Cisco launched a new subscription networking gear service—the fastest growing product in the company's history. And Cisco stock has risen above \$50—its highest point in 20 years.

Robbins says the business boost is fueled by doing the right thing, because employees everywhere are fired up to work at a company they're proud of.

And in the long run, Robbins argues, if powerful organizations like Cisco don't take the lead on social problems, our global future will look more like a nightmare than a dream.

“We have to cultivate healthy communities,” he says. “Or it's not going to work for anybody.”

Now the bad news.

Only about half of employees worldwide have a great experience at work. That means more than a billion people are not thriving on the job, and their organizations are failing to tap their full potential.

In 2019

46%

of the global workforce **DOES NOT** experience the behaviors of a great workplace.



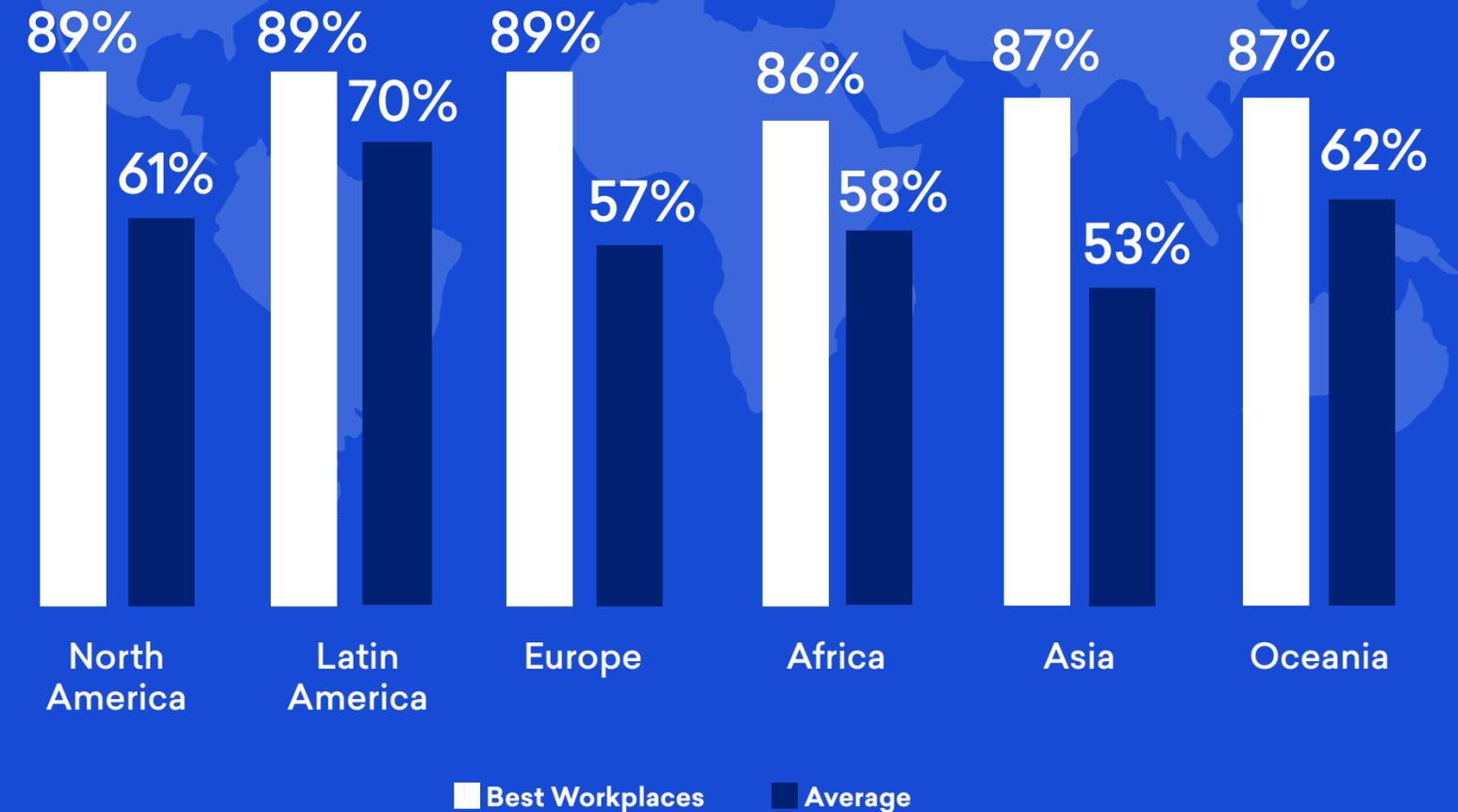
The best are much better than the rest

In every region, the best workplaces create a much better experience for their people than the average organization.

In addition, there are variations in the average employee experience across regions. Latin American employees in general give higher marks than their peers in other regions. Workers in Asia on average give the lowest scores to their workplaces.

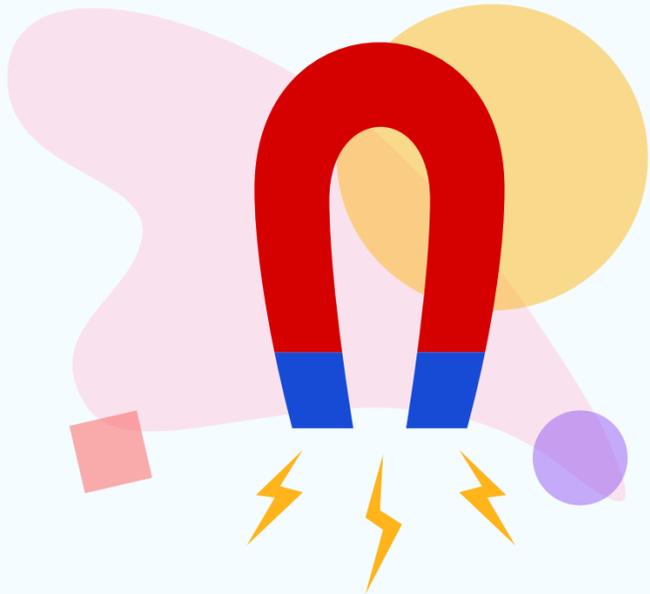


Positive employee responses to the statement: “Taking everything into account, I would say this is a great place to work..”



Great Workplaces Get Great Results

Retention



86%

Plan to stay a long time

Productivity



88%

Willing to give extra

Collaboration



86%

You can count on people to cooperate

Trust Index Employee Survey results at the 2019 World's Best Workplaces

The average company is missing opportunities

At average workplaces around the globe, a poor employee experience undermines companies' ability to take advantage of emerging market opportunities and outpace their competitors.



Trust Index Employee Survey results at average workplaces from the Global Pulse Survey

The Way Forward Varies By Region

Our research shows everyone wants a high-trust culture. But the way forward for organizations has regional variations. Just as we see regional differences in the average employee experience, our research shows different themes distinguish the best workplaces from the rest in different geographies.*

A sense of community is vital in the United States and Canada, psychological safety is key in Latin America, fairness is at the forefront in Europe and sustainability in work and life is central in Asia.



*We determined the regional themes using a machine learning algorithm that pinpointed the unique characteristics of winning workplaces compared to other organizations in each region. This analysis involved examining more than 60 workplace culture themes such as fair treatment, celebrations, values and work-life balance. Oceania and Africa were not included because of a smaller sample size in those regions.

In Africa, we started surveying in Nigeria in 2012. Last year we began operations in Kenya and Cote d'Ivoire. We aim to have our first Africa Regional List by 2022.

Community

At the Best Workplaces in this region, employees express a sense of winning together when times are good—and sticking together when times are tough. Top features separating the Best Workplaces from other organizations include celebrating special events, sharing profits and treating layoffs as a last resort. The importance of unity extends to giving back to the community, and being able to count on people to cooperate.

“Incredible sense of community and inclusive environment for all colleagues, and a management team that genuinely cares about well-being and work/life balance for all.”

American Fidelity Assurance Company employee



Community

U.S. and Canadian organizations are wrestling with turbulent business conditions and have responded with frequent restructurings and “lean” management styles.² Those tactics, though, can mean job cuts, **inadequate resources** and little room for fun.³

The Best Workplaces in the U.S and Canada recognize that amid disruption it is important to **convey a sense of solidarity**—in good times and bad.

U.S. and Canadian companies seeking to improve their culture and business results will want to create a workplace where it’s clear everyone is in the same boat. If they do—celebrating wins and protecting jobs as much as possible—they can expect employees to row hard for results.

Top Factors Distinguishing the Best U.S. and Canadian Workplaces

People celebrate special events around here.

I believe management would lay people off only as a last resort.

I feel good about the ways we contribute to the community.

I feel I receive a fair share of the profits made by this organization.

You can count on people to cooperate.



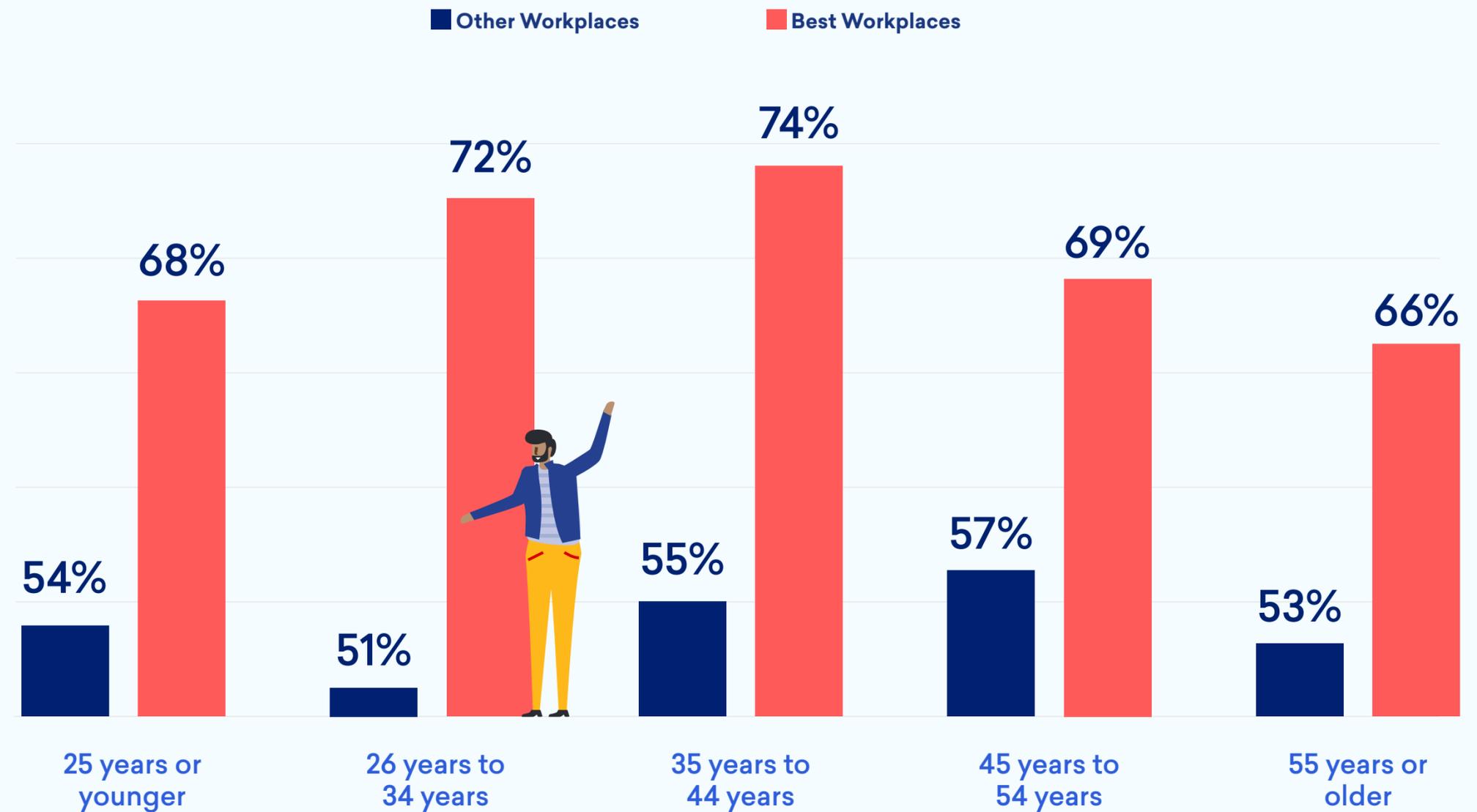
The Best in the U.S. and Canada Show Millennials the Money

A deeper dive into our data for U.S. and Canadian workplaces shows that the Best Workplaces in this region do a particularly good job of sharing their success with employees across different generations.

Profit sharing is especially important to members of the Millennial generation. As a group, Millennials owe a great deal in student loans. Millennials (many of whom are in the 26 to 34 age range) also have struggled to catch up since the Great Recession.⁴ This is something great workplaces are accounting for.

For more analysis of Millennials at work in the U.S., see our 2019 report, *Managing Millennials*.

Employees who say
“I feel I receive a fair share of the profits.”



Safety

At the Best Workplaces in this region, employees say their organizations provide a psychologically safe environment, with clear communication and caring bonds that extend to the broader community. Key factors distinguishing the Best Workplaces in Latin America include the experience of an emotionally health workplace, management keeping people informed on important issues and good feelings about the organization's contributions to the community.

“What I like most is the horizontal treatment. To be able to express myself with my collaborators and managers without fear of reprisals, to be able to contribute with ideas to improve everyone's work, to be heard is something valuable that I appreciate. The managers are always willing to listen to ideas, there is very good communication and companionship.”

DHL employee



Safety

Latin America has weathered significant social, economic and political turmoil in recent years. This includes upheaval in Venezuela, humanitarian crises in Central America and deep political divisions in Brazil, Bolivia, and Argentina.⁵

The Best Workplaces in Latin America realize that in a climate of great uncertainty, **two-way communication** with leadership is especially important. So is **a fundamental sense of caring among colleagues**, and employees' ability to bring their full selves to work.

When companies do everything they can to create workplaces that are as safe as possible in the midst of turmoil, employees return the care by giving the very best they can.

Top Factors Distinguishing the Best Latin American Workplaces

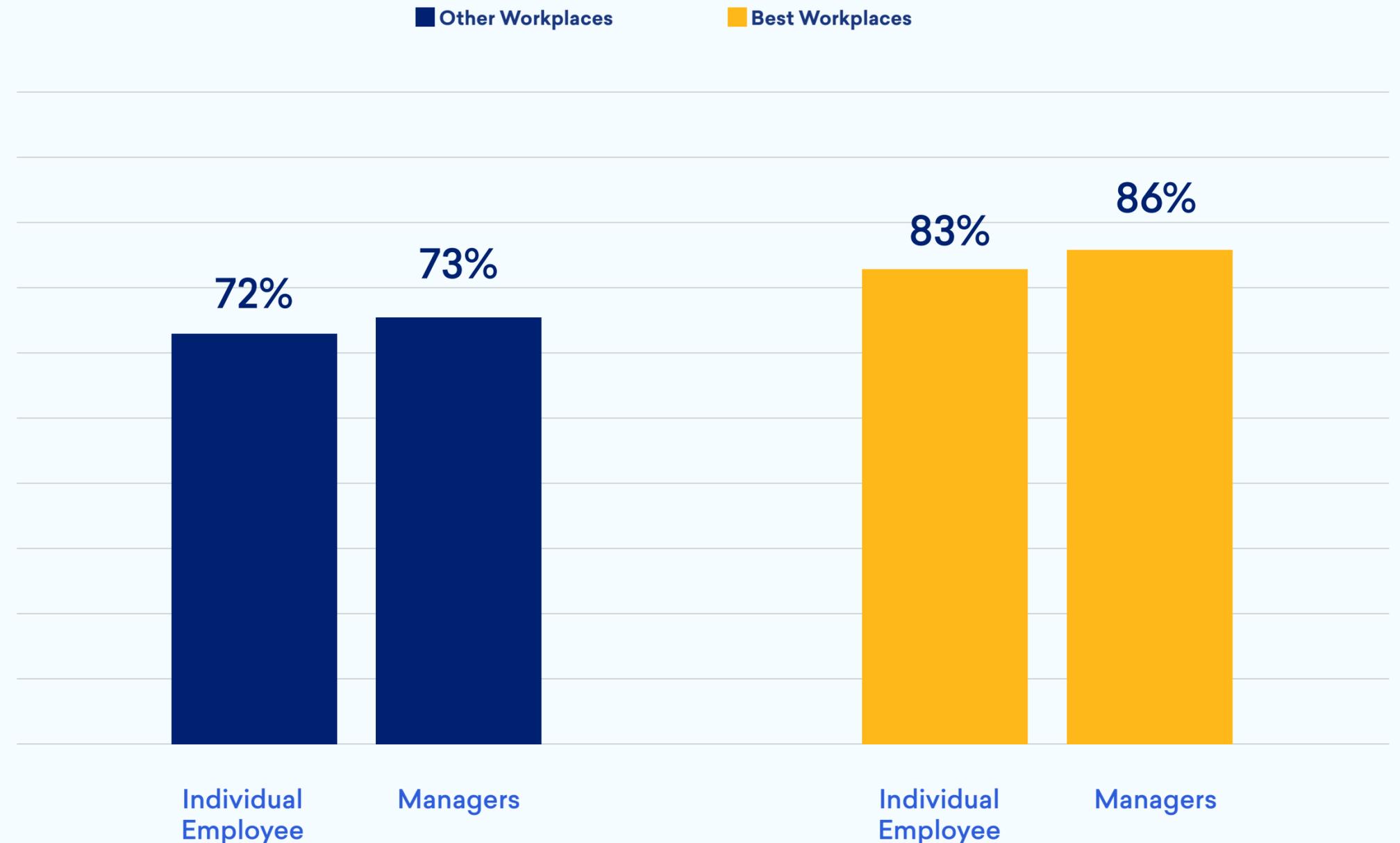


The Best Workplaces in Latin America Create Safety For All

A closer examination of our data for Latin America workplaces shows that the Best Workplaces in Latin America create a strong sense of psychological safety, regardless of whether someone is on the front lines or sitting in a corner office.

At the Best Workplaces in Latin America, 83% of employees in individual contributor roles experience an emotionally health workplace. This is just a few percentage points lower than managers at those Best Workplaces—and significantly higher than the level of psychological safety experienced even by managers at non-Best Workplaces in Latin America.

Employees who say
“This is a psychologically and emotionally healthy place to work.”



Fairness

At the Best Workplaces in this region, employees experience equity in a variety of ways. Employees believe promotions are fair, that there is equal opportunity for special recognition and that profits are shared fairly. Two other factors that distinguish the Best Workplaces speak to a sense of just treatment on the job: management matches its actions with its words and people avoid politicking as a way to get things done.

“This is a great place to work because everyone is treated equally and even if one is lower in the chain, then one is treated as important.”

AbbVie employee



Fairness

European countries are making sense of a great influx of migrants and with the issue of Brexit. Questions of rights, responsibilities and fairness are front and center.⁶

The Best Workplaces in Europe are ensuring that their employees have a **thoroughly equitable experience**.

When people in this region feel their employers are committed to fair treatment, they will reciprocate with extra effort and loyalty—fueling greater performance.

Top Factors Distinguishing the Best European Workplaces

I feel I receive a fair share of the profits made by this organization.

Management's actions match its words.

Promotions go to those who best deserve them.

Everyone has an opportunity to get special recognition.

People avoid politicking and backstabbing as ways to get things done.



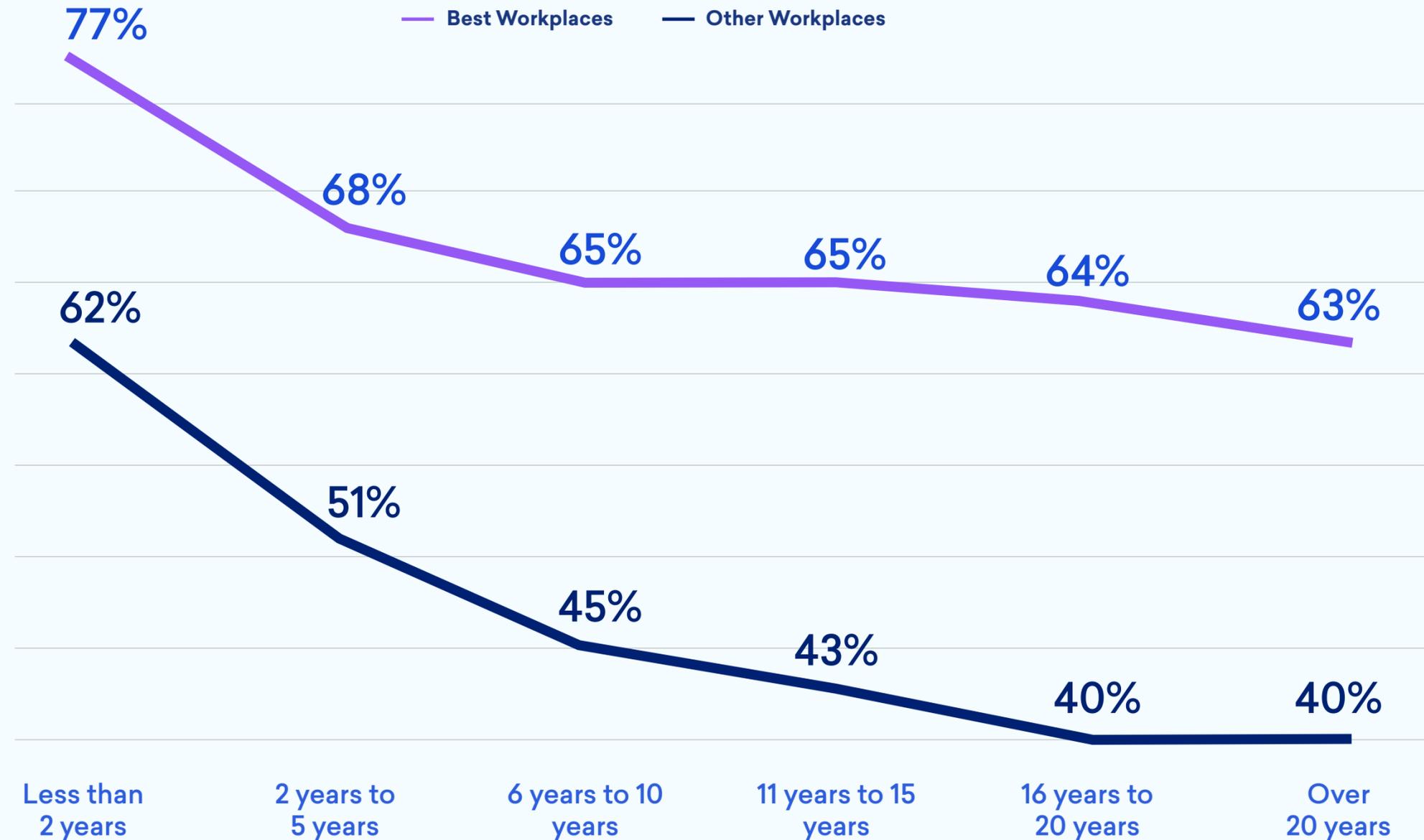
The Best in Europe Promote Fairly Regardless of Tenure

When we dug into our data for European workplaces, we discovered that the Best do a better job of promoting people fairly no matter how long they've been on the job.

All organizations struggle to promote people fairly. Promotion decisions generally involve confidential deliberations, which can breed distrust.

Newly hired employees typically have higher levels of confidence in the fairness of promotions than veteran employees. But the Best Workplaces in Europe see perceptions of fair promotions dip far less than at non-Best Workplaces in the region. Employees across tenure levels at Europe's Best generally feel these important decisions are made equitably.

Employees who say "Promotions go to those who best deserve them."



ASIA

Sustainability

In Asia, the Best Workplaces stand out by creating sustainability when it comes to work and life.

Employees at Asia's Best Workplaces experience balance and deeply human relationships on the job. For this region, the survey statement that most strongly predicted a Best Workplace experience overall was "people are encouraged to balance their work life and their personal life." Other distinguishing features were management showing "a sincere interest in me as a person, not just an employee," the ability to take time off from work when necessary and leaders recognizing extra effort.

"Respecting everyone means that there will be no demanding work requirements for ordinary employees, and the working hours are reasonable and flexible, creating an efficient working environment. Moreover, Hulu provides all kinds of snacks, fruit every day, all kinds of breakfast, and the employees can play billiards and table tennis in the pantry during rest time."

Hulu employee



Sustainability

Asia has some of the longest working hours in the world today.⁷ Demanding time expectations on the job have led to controversy over the “966” work practice in China. This refers to working 9 am to 9 pm six days a week, and said to be common among the country’s big technology companies and start-ups.⁸

Asia’s Best Workplaces **avoid burning out** their people and ensure employees have an experience that makes them **feel fully human** rather than like a cog in a machine.

When people in Asia experience a workplace that allows for their sustainable wellbeing, they give their best and advance their organizations.

Top Factors Distinguishing Asia’s Best Workplaces

People are encouraged to balance their work life and their personal life.

I am able to take time off from work when I think it’s necessary.

Management shows appreciation for good work and extra effort.

Management shows a sincere interest in me as a person, not just an employee.

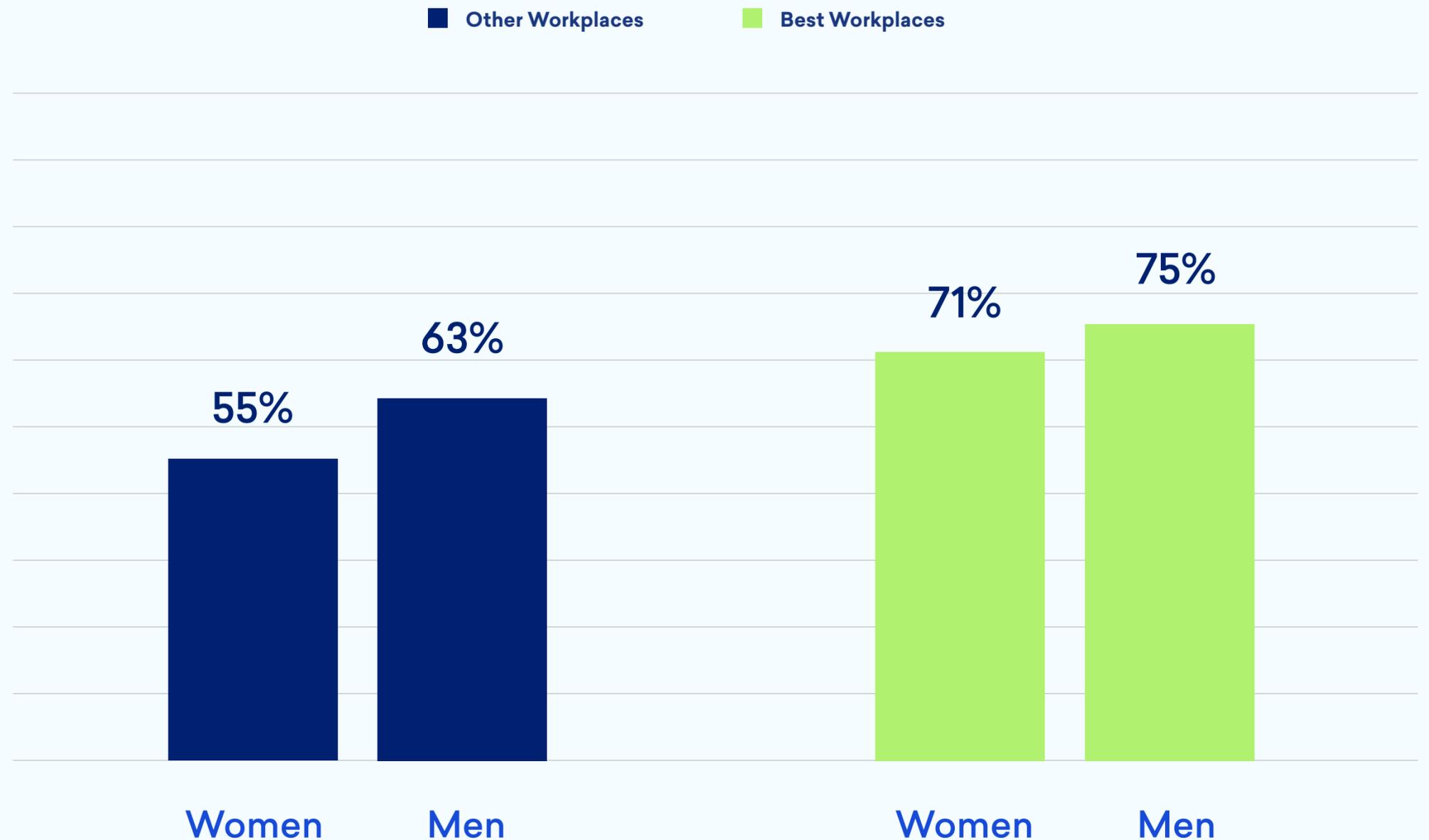


Asia's Best Workplaces Narrow the Gender Pay Gap

When we studied our data for Asia's workplaces in detail, we found that the Best close the gender pay gap between men and women.

At the Best Workplaces in Asia, 71% of women employees feel people are paid fairly for the work they do. That's four percentage points lower than the 75% of men at Best Workplaces who view pay as fair. At non-Best Workplaces, the gender gap in perceptions of fair pay is twice as big. And overall, employees see pay as much less equitable. Just 55% of women at those other organizations believe pay is fair, compared to 63% of male employees.

Employees who say
“People here are paid fairly for the work they do.”



Toward a Better Future

In conducting the largest study in the history of workplace culture, we found that many people are thriving in Best Workplaces around the world. And that the 25 World's Best Workplaces are getting better.

Sadly, more than a billion people worldwide are not experiencing a workplace where they feel their leaders are credible, respectful and fair. At these low-trust workplaces, human potential is being wasted. And business results are lagging.

But there's great cause for hope. The Best Workplaces are showing the way. And our research shows what matters most in every region—community, safety, fairness or sustainability.

With the Best Workplaces as role models and through data-driven strategies, a better future is in sight. Organizations that take time to understand the employee experience and address what matters can improve in ways that are better for business, better for people and better for the world.



Getting Started

No matter where your people work around the globe, the first step to building a world-class culture is understanding your employees' experience with the most trusted survey in the world: the Trust Index.

Great Place to Work offers the research-based Trust Index Employee Survey in more than 90 languages and in 90 countries. We empower leaders around the world with the employee experience data and insights they need to make strategic people decisions.

Using our unparalleled global, annually collected benchmark data, Great Place to Work recognizes the Best Workplaces™ in more than 60 countries. If you'd like to assess your performance against industry and global peers, give us a call today. Our team of Culture Experts is ready to support your culture journey, no matter where you or your teams work.

Join the movement of organizations and leaders worldwide who share our mission: to build a better world by helping organizations become great places to work For All™.

To learn more, visit www.greatplacetowork.com
or call +1 415. 844. 2500

Are you caring for your employees' real needs?





About Great Place to Work®

Great Place to Work® is the global authority on workplace culture.

Since 1992, we have surveyed more than 100 million employees around the world and used those deep insights to define what makes a great workplace: trust.

We help organizations quantify their culture and produce better business results by creating a high-trust work experience for all employees.

Everything we do is driven by our mission: to build a better world by helping every organization become a great place to work For All™.

To learn more about how you can create a great workplace for all, visit www.greatplacetowork.com.

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Countries Surveyed



Our mission is to build a better world by helping organizations become great places to work for all.

*Countries also surveyed in Global Pulse Survey.

1. Algeria
2. Andorra
3. Argentina
4. Australia*
5. Austria
6. Bahrain
7. Barbados
8. Belgium
9. Bolivia
10. Brazil*
11. Bulgaria
12. Canada*
13. Chile*
14. China*
15. Colombia*
16. Costa Rica
17. Côte d'Ivoire
18. Croatia
19. Czech Republic
20. Denmark
21. Dominican Republic
22. Ecuador
23. Egypt
24. El Salvador
25. Estonia
26. Finland
27. France*
28. French Guiana
29. Gabon
30. Germany*
31. Greece
32. Guatemala
33. Haiti
34. Honduras
35. Hungary
36. India*
37. Indonesia
38. Iraq
39. Ireland
40. Italy*
41. Jamaica
42. Japan*
43. Jordan
44. Kuwait
45. Latvia
46. Lithuania
47. Luxembourg
48. Madagascar
49. Malaysia
50. Mexico*
51. Morocco*
52. Netherlands*
53. New Zealand
54. Nicaragua
55. Nigeria*
56. Norway
57. Oman
58. Panama
59. Paraguay
60. Peru*
61. Philippines
62. Poland
63. Portugal
64. Puerto Rico
65. Qatar
66. Romania
67. Russia (Europe)
68. Saudi Arabia
69. Scandinavia
70. Senegal
71. Serbia
72. Singapore
73. Slovakia
74. South Africa*
75. South Korea*
76. Spain
77. Sri Lanka
78. Suriname
79. Sweden*
80. Switzerland
81. Thailand
82. The Bahamas
83. Trinidad and Tobago
84. Turkey*
85. Ukraine
86. United Arab Emirates*
87. United Kingdom*
88. United States*
89. Uruguay
90. Vietnam

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