

The background of the cover features a person standing on a mountain peak, looking out over a vast landscape. A large, stylized map of Africa is overlaid on the scene, composed of several colored segments (green, orange, and yellow) that resemble puzzle pieces or a mosaic. The map is positioned in the upper left quadrant of the image. The overall color palette is dominated by warm tones like orange, yellow, and green, with a white and grey background for the text and some elements.

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**(EHC) African Employee
Engagement Outlook 2020/21**

Africa

An EHC Surveys Research Report

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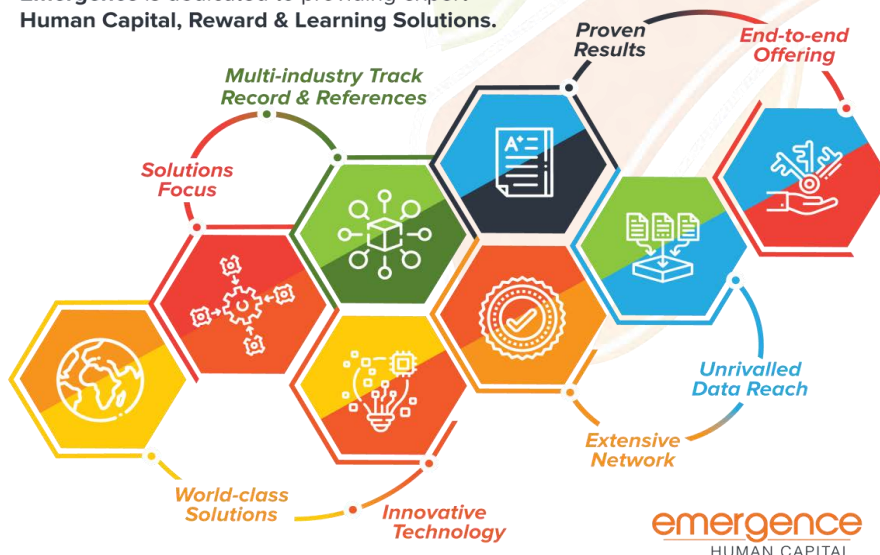
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Emergence is dedicated to providing expert
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EMERGENCE HUMAN CAPITAL

AFRICAN EMPLOYEE ENGAGEMENT OUTLOOK 2020/2021

1. Introduction

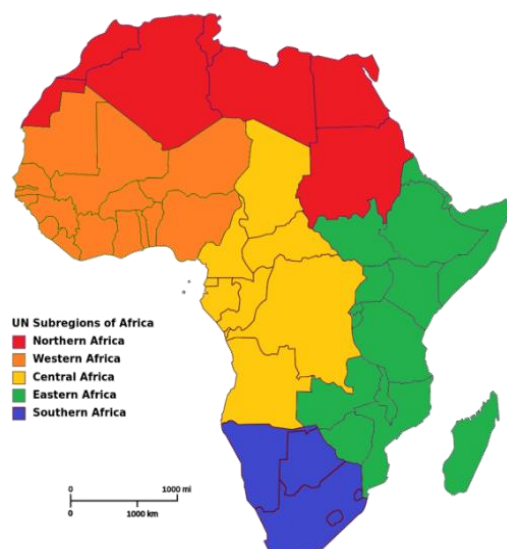


Engagement Surveys are utilised by organizations to identify trends which affect the level of employee engagement. Improved engagement leads to improved employee retention and higher productivity levels. This is evident in the increased interest in Engagement Surveys within organizations during the last decade. During this time, there has been a noticeable shift towards engaging staff to benefit from the inevitable increase in productivity and profitability.

Managers need to understand factors that can make remote work especially demanding, otherwise high-performing employees may experience a decline in work performance and engagement when working remotely, especially in the absence of preparation and training.

Emergence Human Capital is proud to publish the results of the ninth annual Employee Engagement Survey in Africa. The research includes aggregated feedback from over a thousand organizations across Africa and is currently regarded as the premier Employee Engagement survey in Africa. Due to the concentration of responses received in South Africa, we have split the analysis of responses for South Africa & the Rest of Africa. The following table outlines the separation of data for reporting purposes:

Responses	Percentage (%)
South Africa*	30,24%
Rest of Africa	69,76%



Although 31 countries participated in the research, 8 countries were not sufficiently valid to report on from a sample size perspective. In order to achieve a valid data set, countries were grouped into 5 regions as shown in the map.

***South Africa has further been separated from Southern Africa, as sample size allowed for this separation.**

More info on the separation of countries can be found at:

► https://en.wikipedia.org/wiki/List_of_regions_of_Africa

The continent of Africa is commonly divided into five regions or subregions, four of which are in Sub-Saharan Africa. **These regions are as depicted by the United Nations, and should not be confused with the regions depicted by the African Union.**

2. Participation Rates

The table below depicts the overall region participation rates across Africa, inclusive of South African respondents, who made up a large portion of our responses in previous years. This year's results mark a significant shift in the uptake from different regions across the continent, with Eastern Africa taking the top spot in terms of number of responses submitted during the survey period:

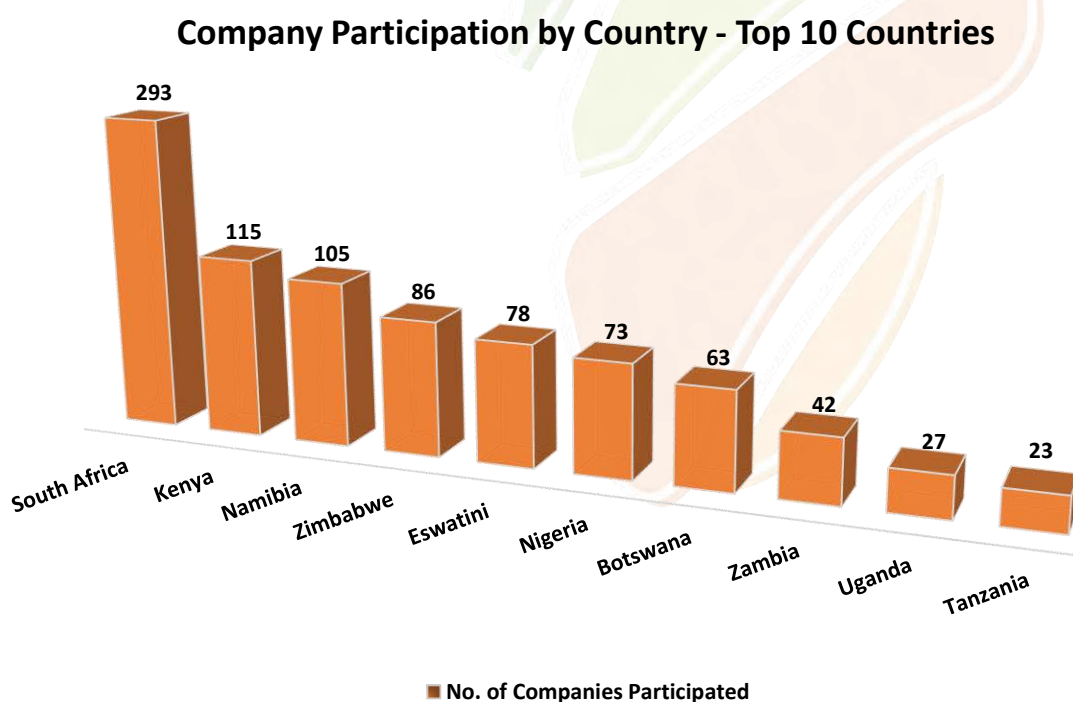
<i>African Regions - Employee Engagement Scores</i>	<i>Participation Rates (%)</i>
Eastern Africa	40.51%
South Africa	30.24%
Southern Africa	12.82%
Western Africa	6.37%
Central Africa	3.65%
Northern Africa	3.41%

The table below depicts the overall region participation rates across Africa, exclusive of South Africa respondents:

<i>African Regions - Employee Engagement Scores</i>	<i>Participation Rates (%)</i>
Eastern Africa	63.67%
Southern Africa	20.70%
Western Africa	8.05%
Central Africa	3.97%
Northern Africa	3.61%

The following section highlights the key demographic participation rates, as received from respondents, that show the depth of data collected during the survey period. Over 1,000 companies participated throughout Africa during the survey period.

The table and graph below show the Top 10 countries with the largest number of organizations that participated in the survey:



Further participation statistics can be viewed below, for the Top 10 Countries by Participation. It is evident from this information that while Zambia played its part in the higher participation rate from Eastern Africa, South Africa still leads in terms of the total number of companies that participated from within its borders:

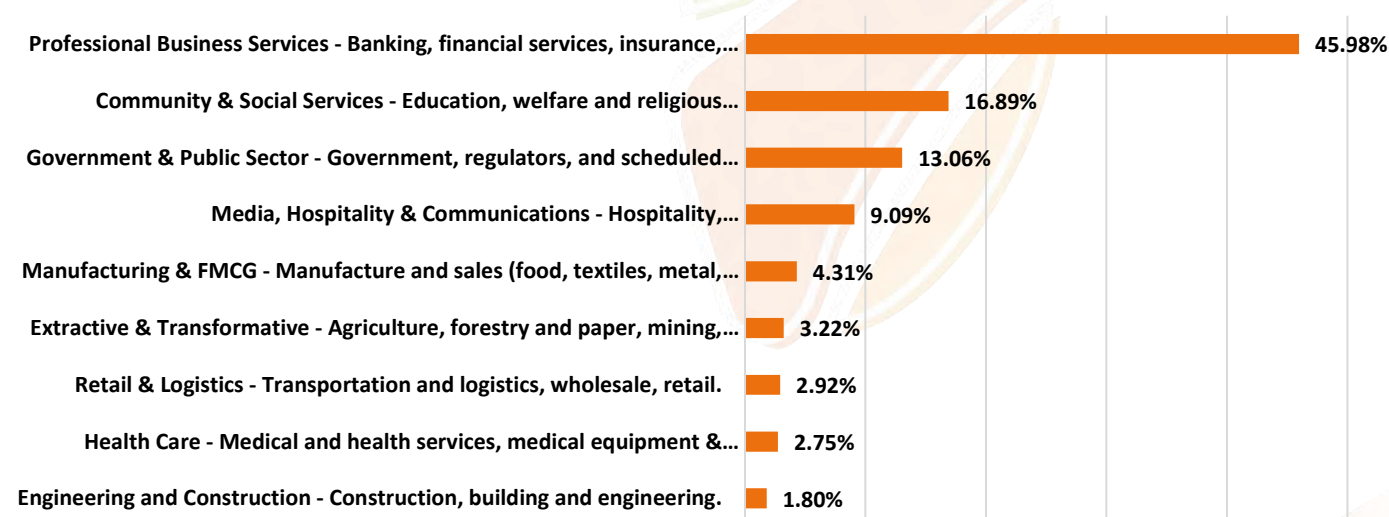
Country	Region	No. of Companies Participated
South Africa	South Africa	293
Kenya	Eastern Africa	115
Namibia	Southern Africa	105
Zimbabwe	Eastern Africa	86
Eswatini	Southern Africa	78
Nigeria	Western Africa	73
Botswana	Southern Africa	63
Zambia	Eastern Africa	42
Uganda	Eastern Africa	27
Tanzania	Eastern Africa	23

The following tables and graphs depict the responses received, by industry across Africa, as well as the different demographic categories measured during our 2020 survey:

Industry Participation Statistics:

Industry	Percentage (%)
Professional Business Services - Banking, financial services, insurance, IT, real estate, accounting, consulting, legal, and professional service organizations.	45.98%
Community & Social Services - Education, welfare and religious services, non-profit organizations.	16.89%
Government & Public Sector - Government, regulators, and scheduled organizations.	13.06%
Media, Hospitality & Communications - Hospitality, telecommunication, media, and advertising.	9.09%
Manufacturing & FMCG - Manufacture and sales (food, textiles, metal, electrical, machinery, chemicals, automobile manufacture, and miscellaneous manufacture).	4.31%
Extractive & Transformative - Agriculture, forestry and paper, mining, oil, gas, utilities, and energy.	3.22%
Retail & Logistics - Transportation and logistics, wholesale, retail.	2.92%
Health Care - Medical and health services, medical equipment & supplies, pharmaceutical.	2.75%
Engineering and Construction - Construction, building and engineering.	1.80%

Participation Rate by Industry (%)

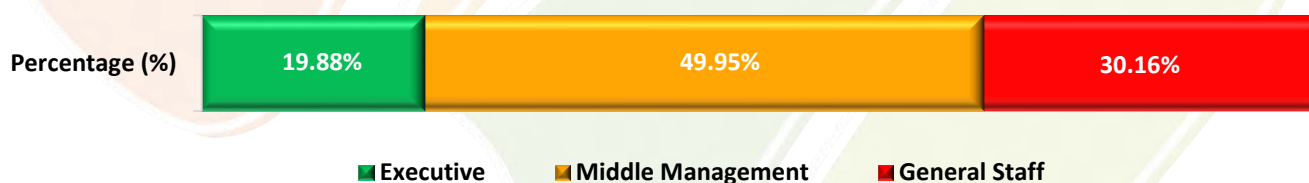


General Demographics – Participation Statistics:

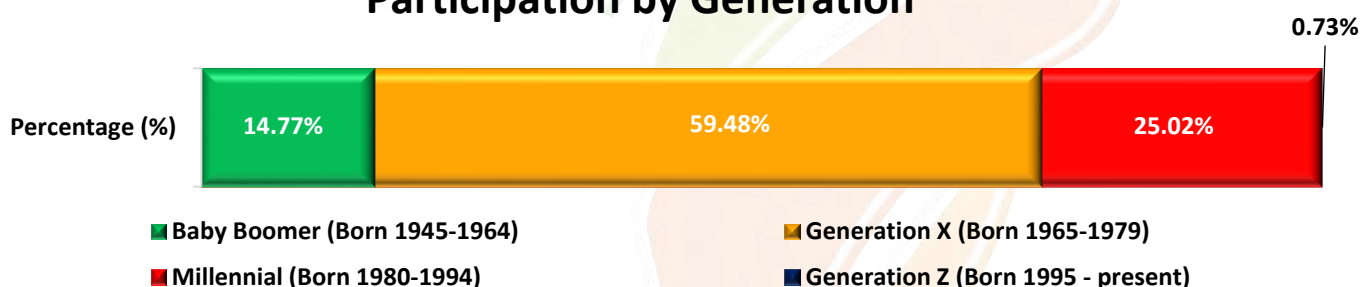
<i>Gender</i>	<i>Percentage (%)</i>
<i>Male</i>	54.05%
<i>Female</i>	45.95%

Participation by Gender

<i>Job Level</i>	<i>Percentage (%)</i>
<i>Executive</i>	19.88%
<i>Middle Management</i>	49.95%
<i>General Staff</i>	30.16%

Participation by Job Level

<i>Generation</i>	<i>Percentage (%)</i>
<i>Baby Boomer (Born 1945-1964)</i>	14.77%
<i>Generation X (Born 1965-1979)</i>	59.48%
<i>Millennial (Born 1980-1990)</i>	25.02%
<i>Generation Z (Born 1991-Present)</i>	0.73%

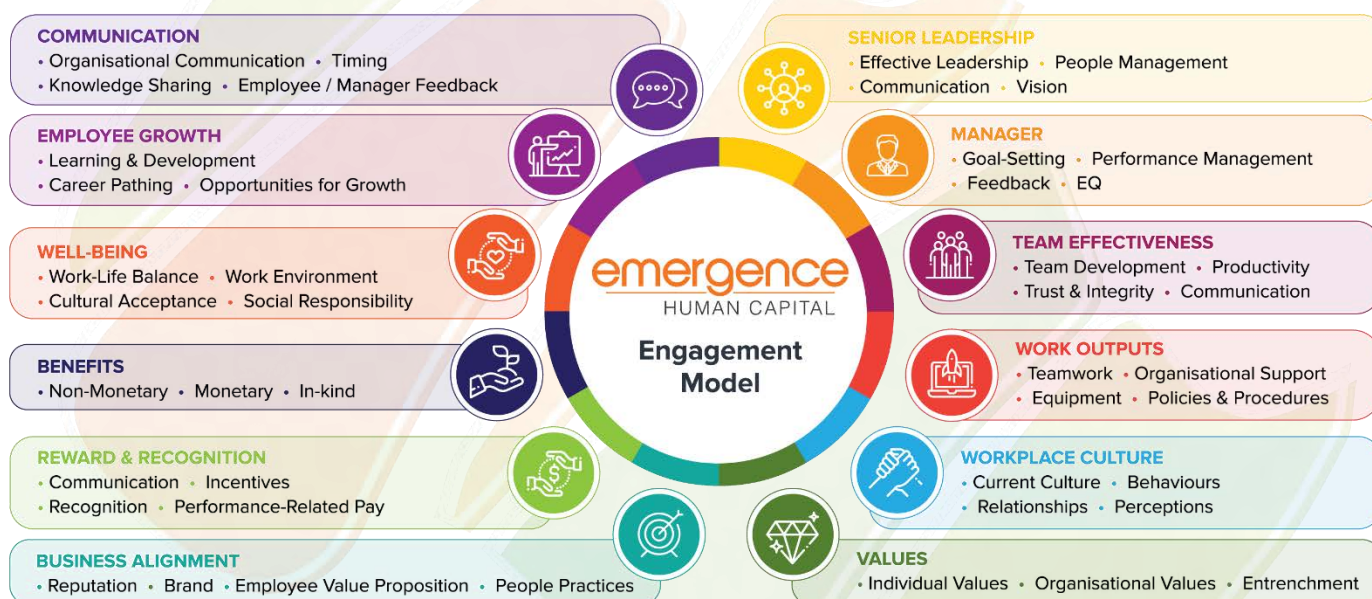
Participation by Generation

An interesting point should be made about the complete lack of Generation Z within the sample, with only 0.73% of all participants falling within this category. In 2020, the estimated youth unemployment rate in South Africa was at 55.75 percent.

Inadequate education and lack of productivity is costing jobs. Unemployment increases progressively with decreased educational levels; and the education system is not producing the skills for the labor market. Labor supply is affected by the increase in the number of job seekers over the years.

3. The EHC Engagement Model

The value of any survey data lies with the validity of its underpinning model and approach to what is being surveyed. This engagement survey is based on Emergence Human Capital's engagement model, which has been validated over 9 years, across over 6,000 organizations. Through consistent research and client interaction, we have revised our engagement model, to include further elements that we have deemed valuable, certainly within the uncertain environment in which organizations found themselves during 2020/early 2021.



Survey questionnaire:

The survey questionnaire has been designed to be “fit-for-purpose” to provide insight into the perceptions held by employees across the continent, for each area surveyed. The following key areas are covered in the survey:

- ▶ Senior Leadership
- ▶ Manager
- ▶ Work Outputs
- ▶ Business Alignment
- ▶ Reward & Recognition
- ▶ Benefits
- ▶ Wellbeing
- ▶ Employee Growth

The above topics are part of our targeted strategy to measure and portray benchmarks scores in key elements of the Employee Experience, allowing Organizations to measure and compare the results of their own surveys versus Continental and National survey benchmark data. Other topics such as Team Effectiveness, Effectiveness of Communication, Workplace Culture, Values, etc. require more intimate & direct surveying within a particular Organization to establish the intricacies that influence the overall experience that employees are subjected to while employed there. It also requires direct knowledge of the HR Policies & overall strategy to understand the mission that drives the Organization.

Engagement with employees through various forms of data capture and communication, can assist Organizations in realising the needs of their employees and providing targeted reforms to assist in driving both a positive Employee Experience; and the resulting business performance associated with a happy and engaged workforce.

4. Research Approach

The following steps outline the process used in creating and managing the survey process:



Design Questionnaire

- ▶ Following customisation of the question set, the survey is built on our web-survey platform. Accessibility is ensured through the use of our trusted survey platform, allowing participants to access the survey from both smartphone and computer.

Securing Participation

- ▶ Emergence Human Capital contacted organizations across Africa to participate in this research. Marketing activities were also conducted through various social media platforms and via our newsletter. A summary report is provided, in exchange for the participation of individual employees, situated in Africa.

Data Input

- ▶ The engagement model used in defining and developing the employee engagement questionnaire is based on the Emergence Human Capital's Engagement model; The EHC EE Model and research approach has been validated globally by leading global universities;
- ▶ Individual responses are captured via a web-based platform;
- ▶ Each participating company was sent an individualised link, to be shared with employees within their organization only; and
- ▶ Individuals within participating organizations completed an online questionnaire and submitted responses to be included in the aggregated results.

Data Validation

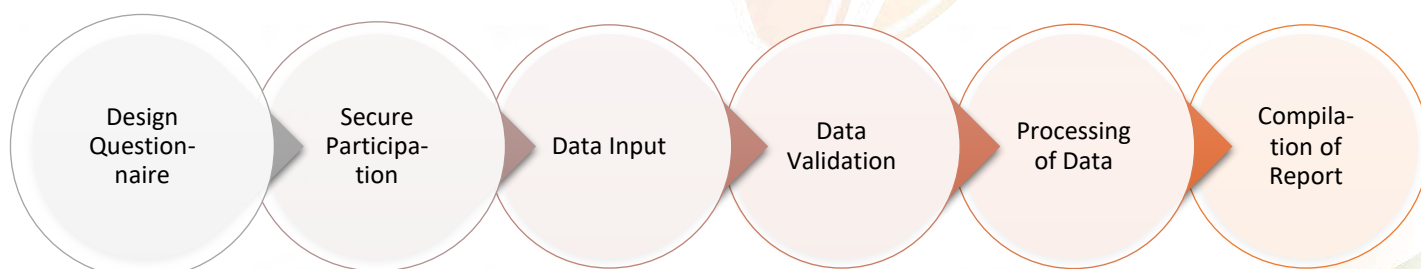
- ▶ Each individual response was reviewed, and partially completed responses were removed from the research analysis; and
- ▶ The aim of the data validation process is to ensure consistency in data modelling and accurate representation of the data.



Processing of data and compilation of report

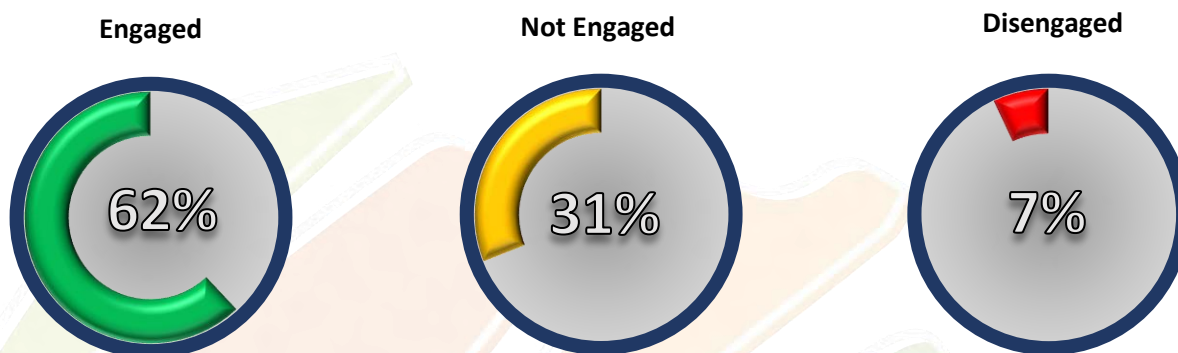
- ▶ The research data was analysed using statistical analysis methodologies; and
- ▶ A final report was compiled with the findings.

Represented Diagrammatically:



5. Key Findings

► Finding 1 - Overall Africa Engagement Score



“Engaged” employees are psychologically committed to their jobs and are likely to be making positive contributions to their organization.

“Not engaged” employees lack motivation and are less likely to invest discretionary effort in organizational goals or outcomes.

“Disengaged” employees are unhappy and unproductive at work and liable to spread negativity to co-workers.

***This Engaged score is approximately 3% lower than last year. This continues the continents downward trend from a high of 70% Engaged, in 2016, and 72% in 2014.**

► Finding 2- Global Regional Employee Engagement Scores

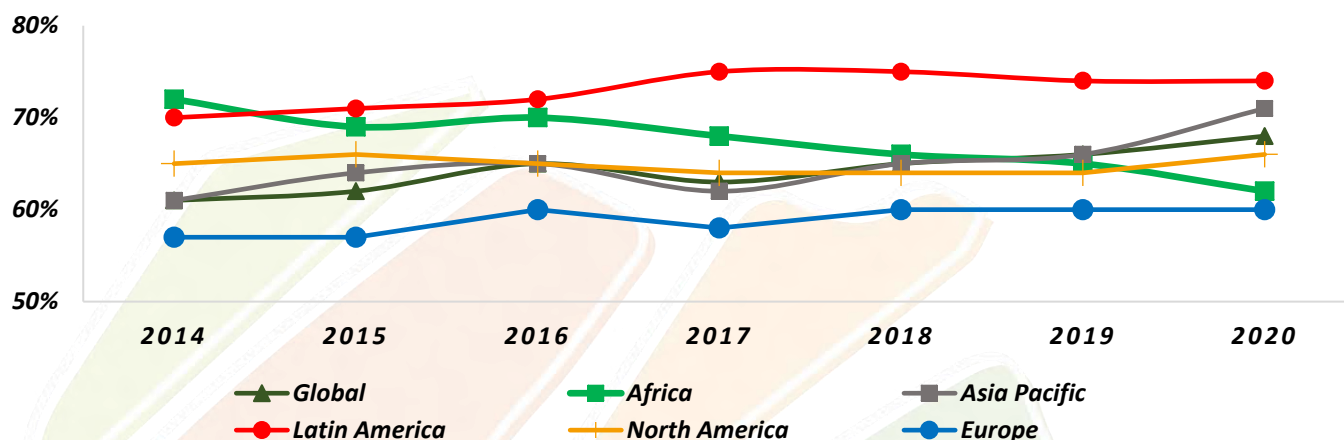
Employee engagement scores differ across the Globe, according to internal and external factors that influence Employee sentiment. In previous reports, we stated that Africa scores broadly correlated with the Asia Pacific region. In the past year, this trend seems to have fallen away as Asia Pacific increased its Engagement score by 5% during the period, while Africa experienced a 3% decrease continuing a general downtrend that has been occurring since 2016. Typically, Emerging Markets tend to have higher employee engagement scores overall (Latin America, Asia Pacific, etc.), due to employee loyalty in areas where job markets are tight and have experienced minimal growth, or even possible regression due to the Coronavirus pandemic.

Global Region	Engagement Scores Per Year						
	2014	2015	2016	2017	2018	2019	2020
Global	61%	62%	65%	63%	65%	66%	68%
Africa	72%	69%	70%	68%	66%	65%	62%
Asia Pacific	61%	64%	65%	62%	65%	66%	71%
Latin America	70%	71%	72%	75%	75%	74%	74%
North America	65%	66%	65%	64%	64%	64%	66%
Europe	57%	57%	60%	58%	60%	60%	60%

This environment has led to a slowdown in growth within the various African economies, although some African economies are embracing policies that are beginning to show signs of growth, albeit slowly. Due to Covid-19 and the related lockdowns that were experienced globally, unemployment rates are expected to increase in regions across the world.

Represented Diagrammatically:

GLOBAL REGIONS - ENGAGEMENT SCORES (2014-2020)



While the picture shown above paints a negative outlook for Africa, many positive changes are being sought on the continent. Businesses should take measures to correct potential engagement issues within their organization by improving internal communications, and overall employee confidence in their senior leaders. A major element that has found traction in the global arena in recent times is **Remote Working**.

Now, well into the pandemic, the limitations and the benefits of remote work are clearer. Many people are returning to the workplace on a full-time basis, as economies reopen (many employees could not work remotely during this time). During 2020, we ran our “Covid-19 Remuneration and Business Practices” two-part survey series in April and October. According to our research in South Africa during October 2020, one-third of participating organizations across South Africa indicated that hybrid or full-time models of remote work were here to stay. The Covid-19 pandemic, and the resulting global lockdowns have broken through cultural and technological barriers that prevented remote work in the past, setting in motion a structural shift in where work takes place, at least for some people.

► **Finding 3 – African Regional Engagement Scores**

Africa is not one homogeneous geographical location in terms of employee engagement. Significant regional differences in engagement scores are apparent in this context. These differences, and historical context, are provided in the table below based on our continuous research across the continent for the last decade:

African Regions	Engagement Scores Per Year						
	2014	2015	2016	2017	2018	2019	2020
Eastern Africa	82%	75%	65%	66%	70%	65%	61%
Southern Africa	62%	68%	69%	68%	62%	57%	60%
Western Africa	87%	82%	50%	77%	68%	66%	58%
Central Africa*	-	-	-	-	-	73%	72%
Northern Africa*	71%	68%	-	-	71%	67%	67%
South Africa	72%	68%	72%	69%	64%	66%	61%

*Due to insufficient data or the introduction of new categories (Central Africa), we were unable to report on engagement for certain years/regions.

The latest set of results coming out of the individual African regions, shown on the previous page, show sustained decreases in some areas. The largest decreases in the overall Engaged scores came from Western Africa (-8%), South Africa (-5%), Eastern Africa (-4%), and Central Africa with a decrease of 1 percentage point. Northern Africa remained at 67% after the last three years of research conducted, in which sample sizes were sufficient to report on. Central Africa was only recently introduced into our standard African regions for reporting, based on the regions provided by the United Nations. Southern Africa saw a substantial increase of 3% in employee engagement, which is interesting considering the downtrend that was experienced in previous years.

With the above in mind, the evolving development landscape – with its emerging opportunities, shocks and vulnerabilities– makes it imperative for Africa to accelerate the advancement of sustainable and equitable human development. This can be achieved by building economic, social and environmental resilience for women and men, enhancing their productivity, and accelerating the pace of structural economic transformation in the region.

► **Finding 4 – Importance of Benefits from an Employee perspective**

Each aspect of total rewards attracts a differentiated level of importance and satisfaction in employee engagement. There are the main aspects that are prevalent in most companies and affect employees directly in terms of their financial well-being, such as increases/bonuses and/or employee development through training. Other niche elements such as maternity/paternity leave are aimed at improving the lives have certain groups of employees, reducing their prevalence across the entire sample.



The following were identified as the top five most important total rewards elements for Africa, versus employee's satisfaction of the same:

Reward Element	Importance
Salary	99%
Family Responsibility / Compassionate Leave	98%
Medical Aid / Healthcare	96%
Performance Related Increases	95%
Performance Bonuses / Incentives	95%

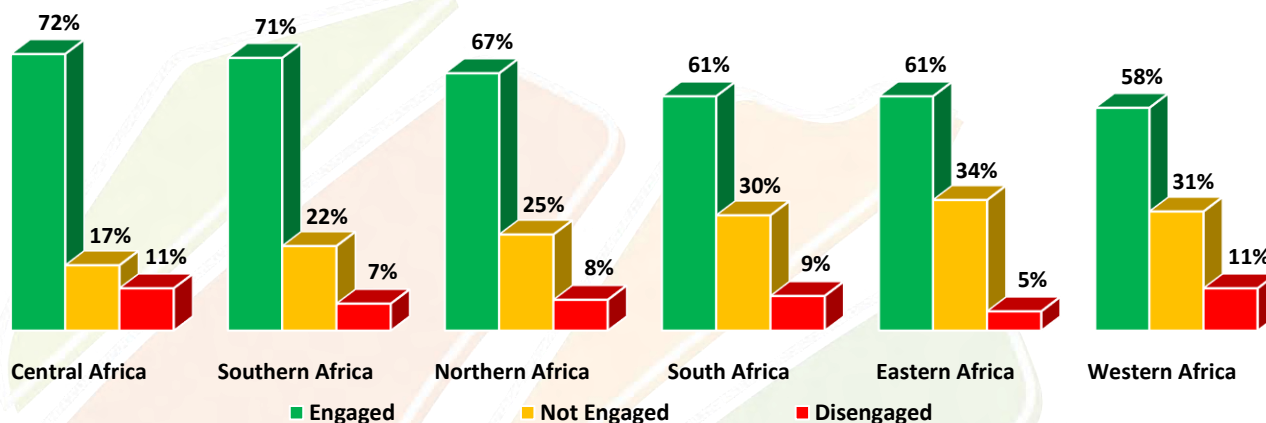
It is quite common to see a desire for more money and it is notable that some of the most common elements of a remuneration package, i.e. Performance Bonuses/Increases, Salary, Medical Aid/Healthcare, etc. across various levels within organizations, scored the highest in terms of importance. Employees placed high importance on that of family responsibility / compassionate leave, showing that empathy on the part of the employer goes a long way to generating the desired level of loyalty of individual employees to their teams and/or the organization as a whole. Organizations should look to improve their leave offering, with regards to the above table, in order to promote a well-rounded EVP (EX).

Note: An increasing number of employees want their performance to be recognised both in terms of financial incentives and increases in exchange for their loyalty.

6. Engagement Scores - General Demographics

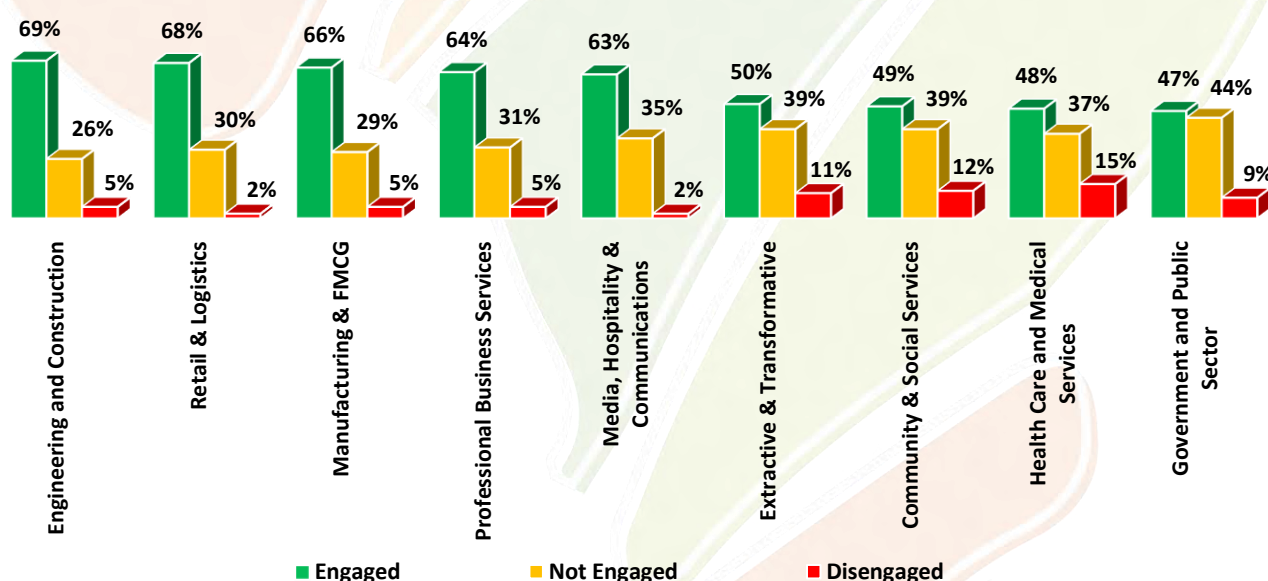
The graph below represents the overall level of engagement in Africa, by region, in 2020:

Engagement Scores by African Regions



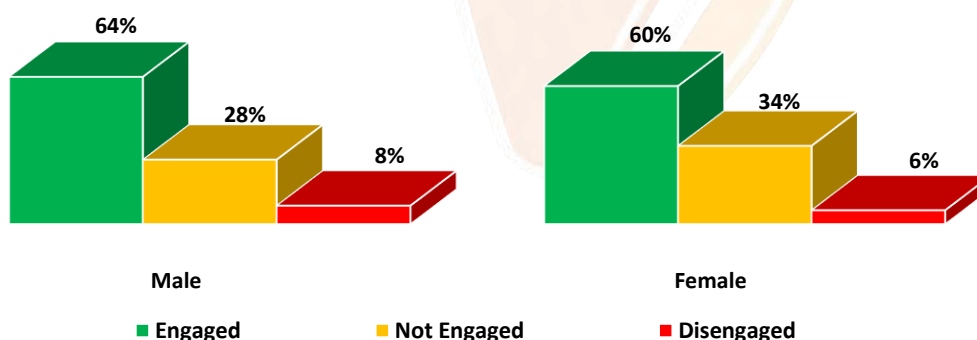
The graph below represents the overall level of engagement in Africa, by industry, in 2020:

Engagement Scores by Industry



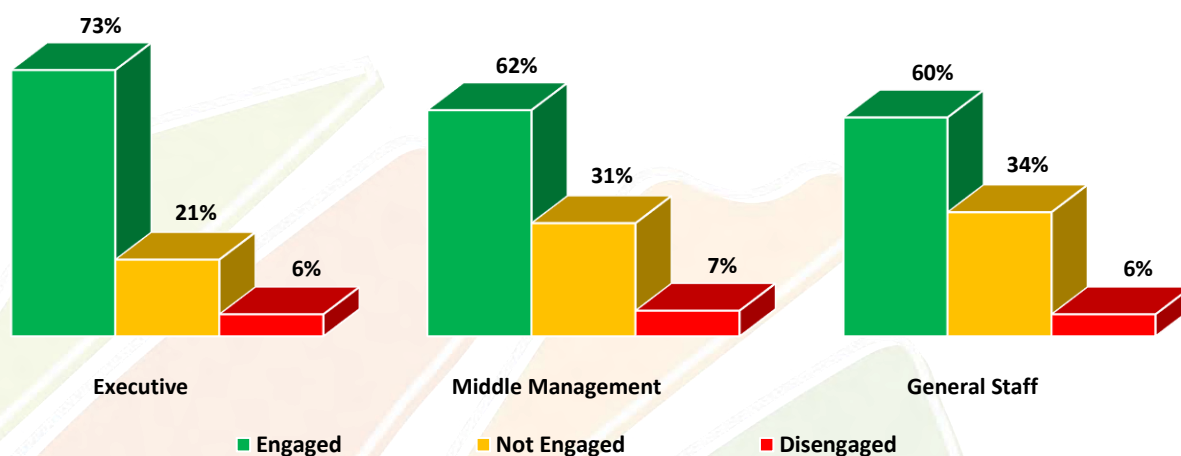
The graph below represents the overall level of engagement in Africa, by gender, in 2020:

Engagement Scores by Gender



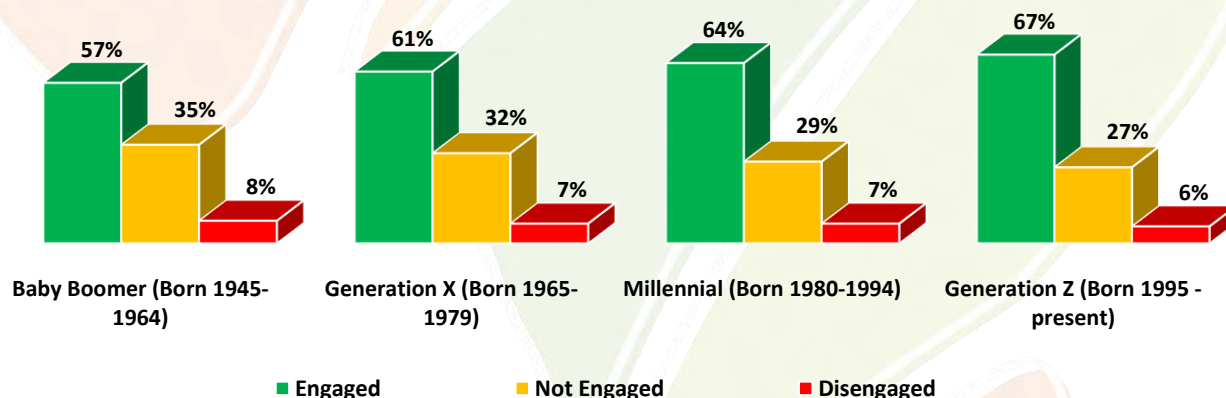
The graph below represents the overall level of engagement in Africa, by job level, in 2020:

Engagement Scores by Job Level



The following graph depicts the levels of engagement for each generation in 2020:

Engagement Scores by Generation



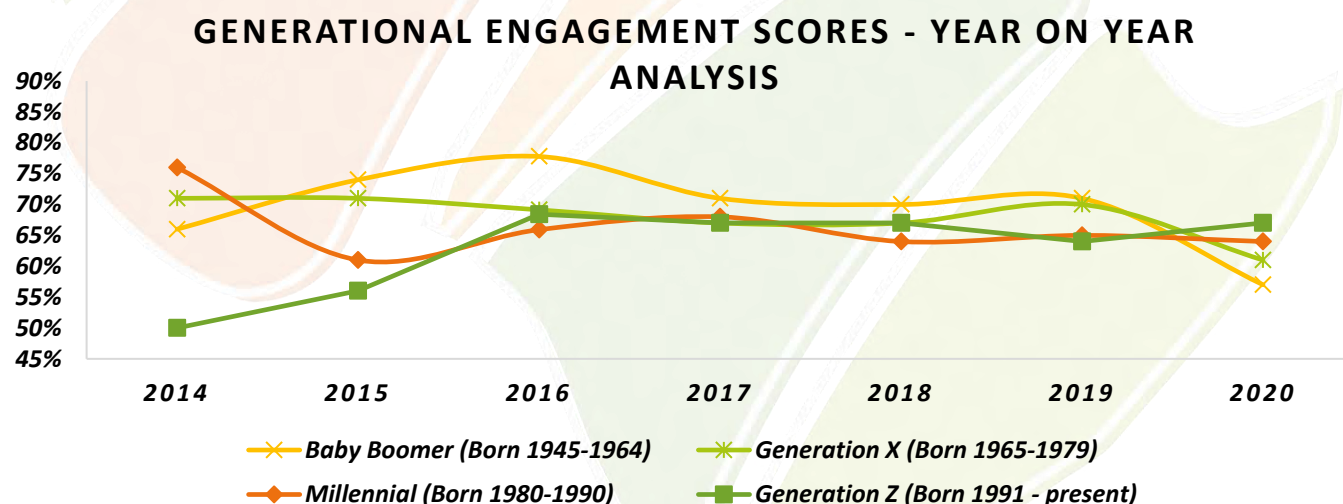
There were a number of patterns that emerged from the analysis of generation differences regarding current practices within organizations. Generation X decreased by 9 percentage points over the period moving from 70% to 61%, while Generation Z's increasing by 3 percentage points (64% - 67%), moving to the highest level of engagement of all the generations in 2020. While this is true, it must be remembered that Gen. Z responses made up only 0.73% of the total sample surveyed in 2020. Conversely, Baby Boomers Engagement scores decreased substantially (-14%) in light of the current pandemic, moving from 71% - 57%. Lastly, Millennials experienced an increase of 2% to 64%.

The stark difference in scores between the older generations versus younger generations is apparent, and most likely a reason for concern, as older employees feel more alienated as the amount of technology required for remote working may be more than they would have been willing to use before lockdown. Another reason could be due to less tech-savvy Baby Boomers & Generation X employees who were unable to work during implemented lockdowns. As organizations evolve through the various stages of organizational maturity, it is important to remain aware of the differences and possible reasons for differing levels of engagement. With the influx of Millennials and Generation Z

into the workforce, a modern style of management needs to be adopted by organizations. This modern style of management (adaptive and collaborative) will mitigate Millennials and Generation Z from becoming disengaged.

Whilst it is important to understand what drives the success of an organization, it is equally important from an engagement perspective to understand where the biggest business gains can be made in terms of engagement. With unemployment levels high throughout Africa, Generation Z may often be grateful for having a job, and most likely only in their first or second year of employment. This could give rise to “false” perceptions of engagement. Conversely, Baby Boomers and Generation X’s have had to adapt to the requirements of **Remote Working**. Working from home, or “Remote Working”, has forced many individuals to adapt to new ways of working, such as hybrid schedules to minimise the amount of people that are in the office at any given time, or full-time at home.

The graph below represents the overall level of engagement in Africa, over the past six years, by generation:



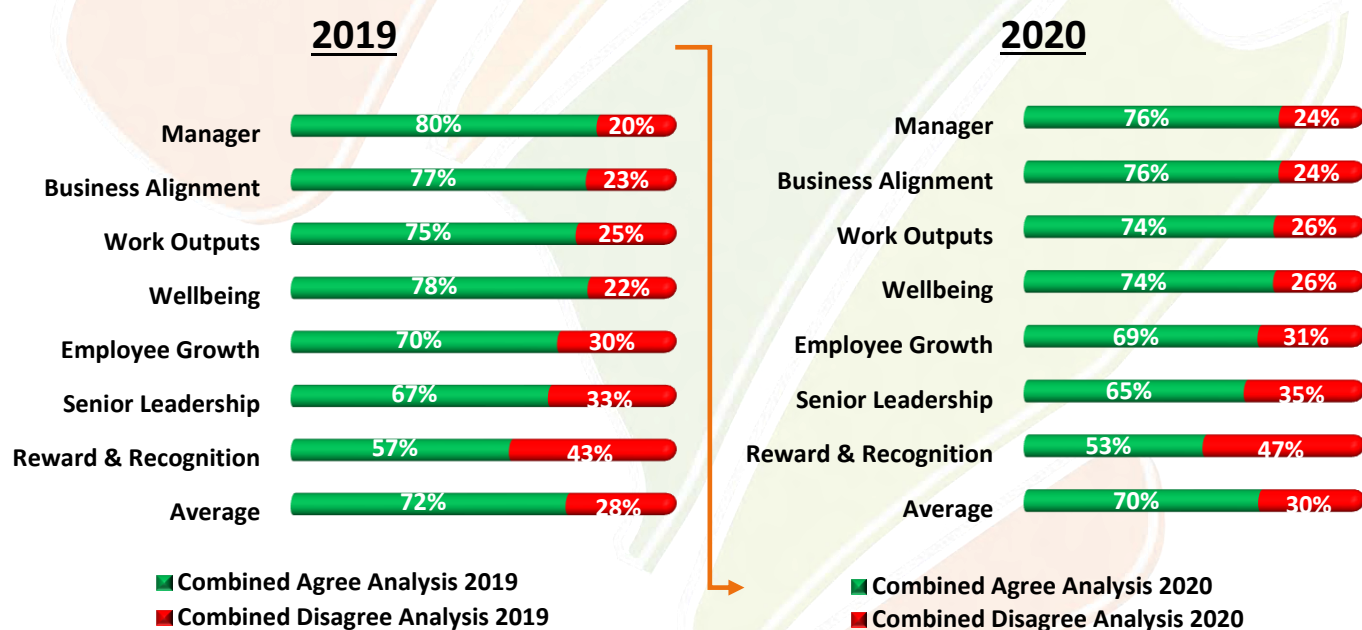
*“You’ll attract the employees you need if you can explain why your mission is compelling; not why it is important in general, but why you’re doing something important that no one else is going to get done.” – **Peter Thiel** (PayPal cofounder)*

7. Question Cluster Averages – 2019/2020 Comparison

This section covers the comparison of each question cluster average, summarising the total scores for each of the subsequent Question Clusters, as detailed in the next section of this report. The table and graph below depict the movement of each Question Cluster's average score, from 2019 to 2020:

Question Cluster Average Comparison	Combined Agree Analysis 2019	Combined Disagree Analysis 2019	Combined Agree Analysis 2020	Combined Disagree Analysis 2020	% Gap (2019-2020)
Manager	80%	20%	79%	21%	-1%
Business Alignment	77%	23%	76%	24%	-1%
Work Outputs	75%	25%	74%	26%	-1%
Wellbeing	78%	22%	74%	26%	-4%
Employee Growth	70%	30%	69%	31%	-1%
Senior Leadership	67%	33%	67%	33%	0%
Reward & Recognition	57%	43%	53%	47%	-4%
Average	72%	28%	70%	30%	-2%

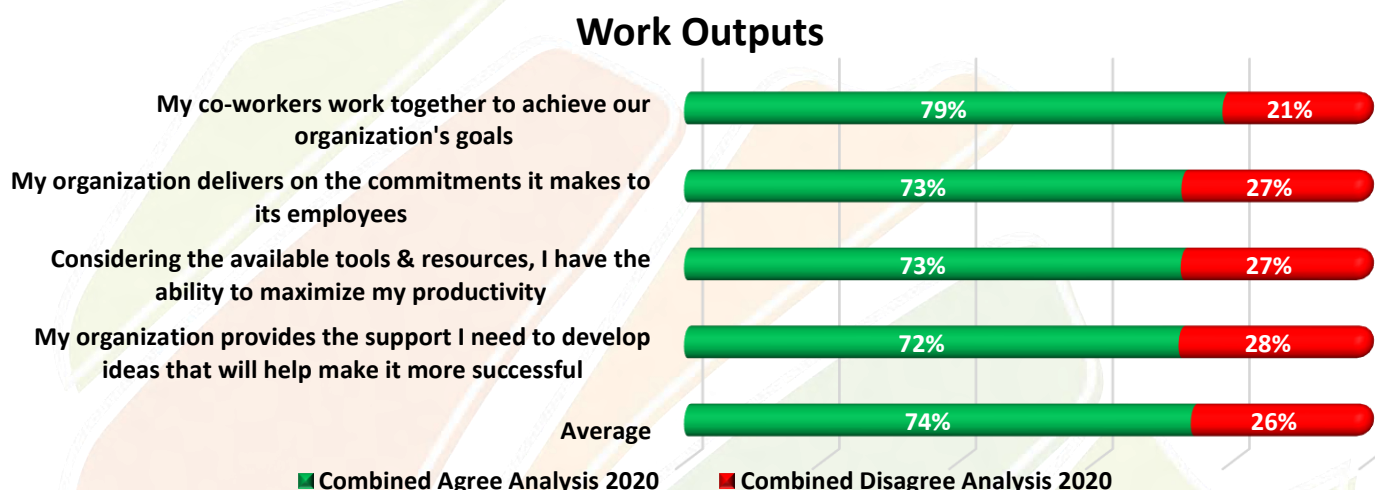
Represented diagrammatically:



The results above show a slight decrease in all areas over the past year, except the “Manager” category, which is in line with the slight decrease of 3% shown in the overall Engagement score for Africa. What is interesting to see is that for most organizations, employees continue to rate their own direct report highly (80%), which depicts a trend that has remained over the last couple years. Additionally, we are seeing a maintained emphasis on wellbeing as organizations investigate and maintain alternative methods & policies, that are aimed at keeping their employees happy and productive. In implementing these interventions, organizations positively impact areas that directly affect the livelihood and health of their workforce. In doing so, they create loyalty to the organization, and improve retention rates, while experiencing a high level of morale and productivity through the added discretionary effort given by employees. Also highly rated was the “Business Alignment” and “Work Outputs” section, with an average of 74% of participants agreeing with the statements provided.

8. Work Outputs

Work Outputs” covers employees’ perceptions on the working dynamics that they experience within their individual teams. The specific question elements for each question cluster are defined in the table and graph below, along with aggregated scores:



The table below shows the difference in scores per question and question cluster average for “Work Outputs”, from 2019 to 2020:

Work Outputs	Combined Agree Analysis 2019	Combined Disagree Analysis 2019	Combined Agree Analysis 2020	Combined Disagree Analysis 2020	% Gap (2019-2020)
My co-workers work together to achieve our organization's goals	82%	18%	79%	21%	-3%
My organization delivers on the commitments it makes to its employees	73%	27%	73%	27%	0%
Considering the available tools & resources, I have the ability to maximize my productivity	76%	24%	73%	27%	-3%
My organization provides the support I need to develop ideas that will help make it more successful	68%	32%	72%	28%	4%
Average	75%	25%	74%	26%	-1%

It’s highly likely that if people are engaged at work, they’re going to invest more discretionary effort, in order to help the organization reach its goals and vice versa. This will lead to higher performance, happier customers, higher profits and happier shareholders/stakeholders. Extensive research shows that organizations with a highly engaged workforce have higher rates of productivity, and that highly engaged employees take less days off sick, making the effect that engagement has on an employee’s performance much clearer.

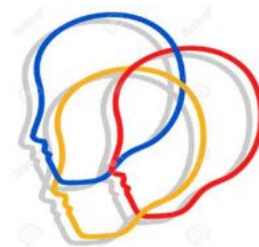
This effect is not only limited to those inside the organization, either. Engagement also largely influences factors such as customer satisfaction and the organization’s brand. Recent Master’s degree research conducted using the Emergence Human Capital engagement model as its basis, now provides validated evidence of this view. It’s clear to customers when they speak to someone who really believes in and values the organization. This type of confidence in the organization from an employee, will likely spread to those potential and existing customers that the employee interacts with, impacting how enthused they feel about doing business with the organization.

Employees also expect to be treated with respect and to be rewarded for this discretionary effort. They want the business to deliver on the commitments that the organization has made to employees. They want to be supported in their own career advancement through learning opportunities, opportunities to prove themselves with guidance from mentors within the business.

One of the biggest negative contributors to Employee Engagement comes from a lack of the necessary tools and resources to be more productive, which results in frustration and disinterest for employees in the organization. The 4th industrial revolution is likely to exacerbate this problem as the tools used in the workplace are transformed together with the way work is performed. This also applies to those employees who do not get the necessary support from members within their team, resulting in these employees either picking up the slack from those that are not performing or even worse, joining those that are not adding value to the team and dragging the team down with them.

9. Senior Leadership

The perception of Senior Leadership from the employees' point of view. In order for an incumbent to be more engaged in their role, there needs to be a satisfactory level of trust and communication between an employee and their team as well as their reporting manager and senior leadership team.



Senior Leadership



The table below shows the difference in score for "Senior Leadership", from 2019 to 2020:

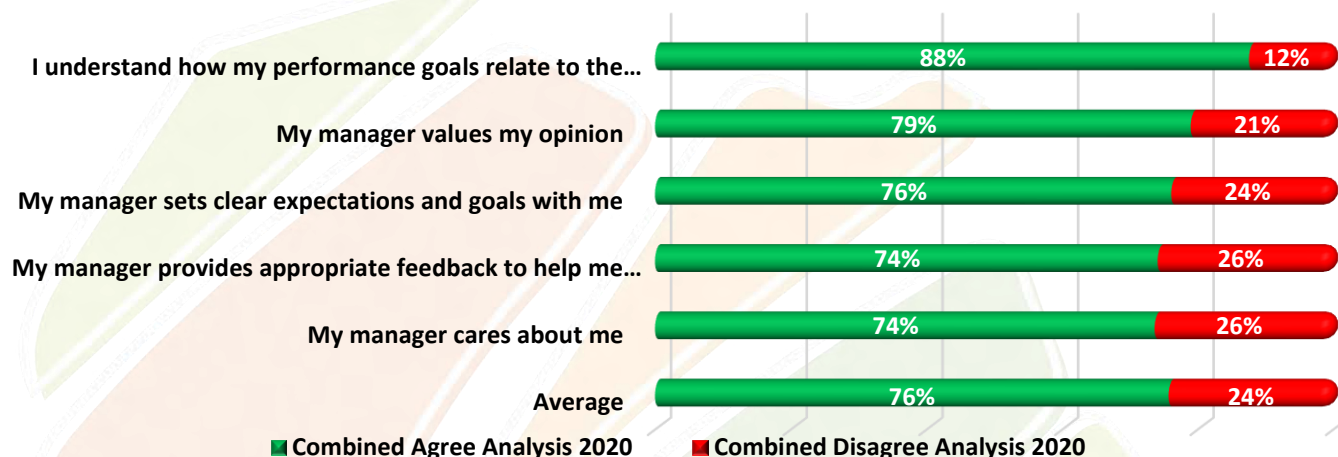
Senior Leadership	Combined Agree Analysis 2019	Combined Disagree Analysis 2019	Combined Agree Analysis 2020	Combined Disagree Analysis 2020	% Gap (2019-2020)
Our senior leaders display good ethics	71%	29%	69%	31%	-2%
There are clear signs of effective leadership from our senior leaders	69%	31%	68%	32%	-1%
Our senior leaders provide clear direction for the future	70%	30%	66%	34%	-4%
Our senior leaders treat employees as the organization's most valued asset	63%	37%	64%	36%	1%
Our senior leaders are comfortable and honest in communication	64%	36%	62%	38%	-2%
Average	66%	34%	65%	35%	-1%

One thing is certain, traditional leadership practices have produced the enemy that is low engagement. To succeed, we must have the courage of our convictions and reject many of our archaic practices, and adopt ones known to have the greatest impact on enhancing human performance in the workplace. More effort should be made in creating a honest work environment, where employees are "kept in the loop" with regards to changes within the organization. This can be done by communicating changes timeously to all employees, conducting surveys within the organization to get a general feel of employees' reactions to these changes and implementing an open-door policy throughout the organization so that individuals feel more comfortable asking questions about these changes that will invariably affect the lives of employees throughout the organization.

10. Manager

The relationship between an employee and their immediate manager. The graph below represents the overall level of satisfaction within organizations, with regard to the effectiveness of an employee's direct line manager:

Manager



The table below shows the difference in score for “Manager Effectiveness”, from 2019 to 2020:

Manager	Combined Agree Analysis 2019	Combined Disagree Analysis 2019	Combined Agree Analysis 2020	Combined Disagree Analysis 2020	% Gap (2019-2020)
<i>I understand how my performance goals relate to the organization's goals</i>	89%	11%	88%	12%	-2%
<i>My manager values my opinion</i>	80%	20%	79%	21%	-1%
<i>My manager sets clear expectations and goals with me</i>	80%	20%	76%	24%	-4%
<i>My manager provides appropriate feedback to help me improve my performance</i>	77%	23%	74%	26%	-2%
<i>My manager cares about me</i>	75%	25%	74%	26%	-1%
Average	78%	22%	76%	24%	-2%

Ongoing feedback is an important factor in the work place. Managers need to continue to provide guidance and insight into their subordinates talents and development areas. As the age demographics of the workforce change, managers may need to replace traditional forms of guidance to a coaching approach. No longer can we just manage employees through control. There needs to be effort put in to building relationships with employees. Managers need to be cogniscent of how they treat their employees as this can have an effect on the overall workplace. Managers that treat their employees as commodities, often have disengaged staff, leading to a decrease in performance, creating a cycle of enmity that has no productive outcome. Managers should make an effort to show their subordinates that they care about them, value their opinions and want them to succeed. Managers within organizations need to adopt a modern approach, such as regular performance feedback. By consistently and openly communicating with staff in respect of their talents/strengths, a more engaging management style is achieved. This will benefit the engagement of younger generations in the workplace. This approach to development will ensure improved retention and engagement which will enhance performance.

11. Employee Growth

Employee Growth refers to career development, training and succession planning within an organization. The graph below represents the overall level of satisfaction with regard to opportunities that exist within organizations researched:



The table below shows the difference in score for “Employee Growth”, from 2019 to 2020:

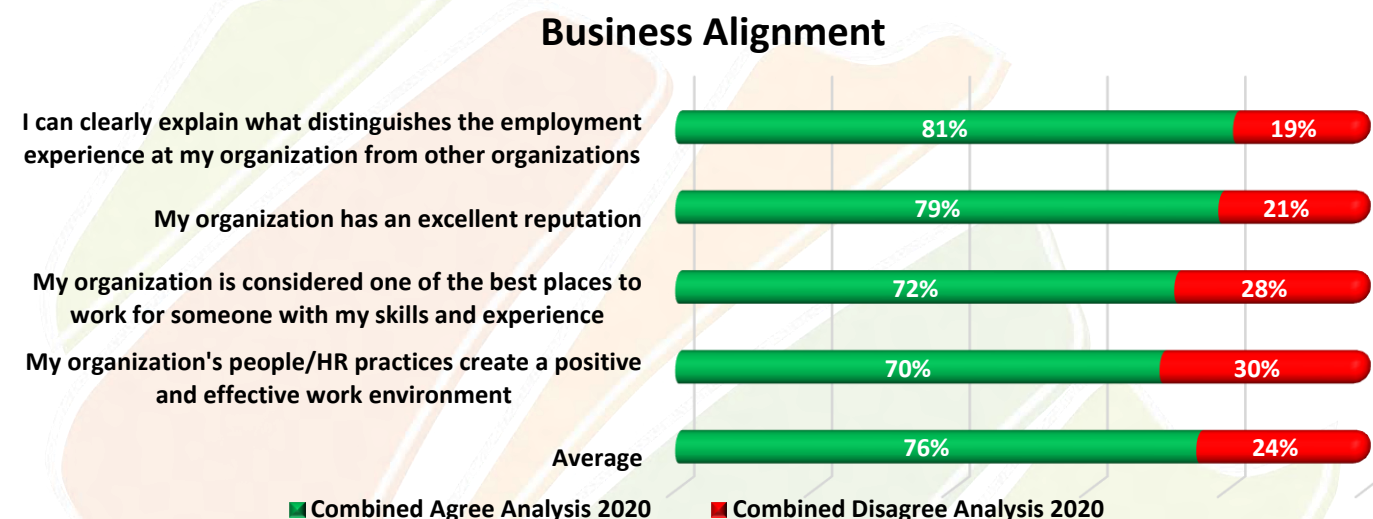
<i>Employee Growth</i>	<i>Combined Agree Analysis 2019</i>	<i>Combined Disagree Analysis 2019</i>	<i>Combined Agree Analysis 2020</i>	<i>Combined Disagree Analysis 2020</i>	<i>% Gap (2019-2020)</i>
<i>My organization strongly supports the learning and development of its employees</i>	75%	25%	74%	26%	-1%
<i>My Manager encourages my personal development</i>	74%	26%	72%	28%	-2%
<i>I have received sufficient training to perform my role effectively</i>	72%	28%	71%	29%	-1%
<i>My organization offers good career opportunities to employees who are strong performers</i>	64%	36%	61%	39%	-3%
Average	71%	29%	69%	31%	-2%

Organizations who fail to provide career growth opportunities run the risk of lower employee engagement. By failing to implement initiatives, such as Coaching & Personal Development Plans, organizations risk losing high-performing talent and critical skills. Attraction is a key organizational necessity within organizations, and in order to attract key skills in the market, a defined career path and development of talent is imperative. Retention of talent is critical to meeting the organization’s growth requirements. Employees who feel their organizations do not develop their talents are likely to look for new opportunities outside their organizations, the consequences of which are increased staff turnover and the loss of skills to the organization.

The ability to inspire and recognise employees requires a specific type of leadership / management style. The global trend of moving away from a “control style” of management to one that connects and enables employees, is gaining momentum globally and is particularly appropriate in the management of Millennials in the workplace. 20% of employees generate 80% of the wealth of an organization. If these 20% “walk”, 80% of the profits “walk” out of the organization with them.

12. Business Alignment

Business alignment refers to how committed employees are to the policies, procedures and processes organizations have in place, as well as the level of commitment of employees to furthering the goals of their organization. The graph below represents the overall level of satisfaction, in regard to business alignment that exists within organizations researched:



The table below shows the difference in score for “Business Alignment”, from 2019 to 2020:

Business Alignment	Combined Agree Analysis 2019	Combined Disagree Analysis 2019	Combined Agree Analysis 2020	Combined Disagree Analysis 2020	% Gap (2019-2020)
<i>I can clearly explain what distinguishes the employment experience at my organization from other organizations</i>	83%	17%	81%	19%	-2%
<i>My organization has an excellent reputation</i>	81%	19%	79%	21%	-2%
<i>My organization is considered one of the best places to work for someone with my skills and experience</i>	77%	23%	72%	28%	-5%
<i>My organization's people/HR practices create a positive and effective work environment</i>	68%	32%	70%	30%	3%
Average	77%	23%	76%	24%	-1%

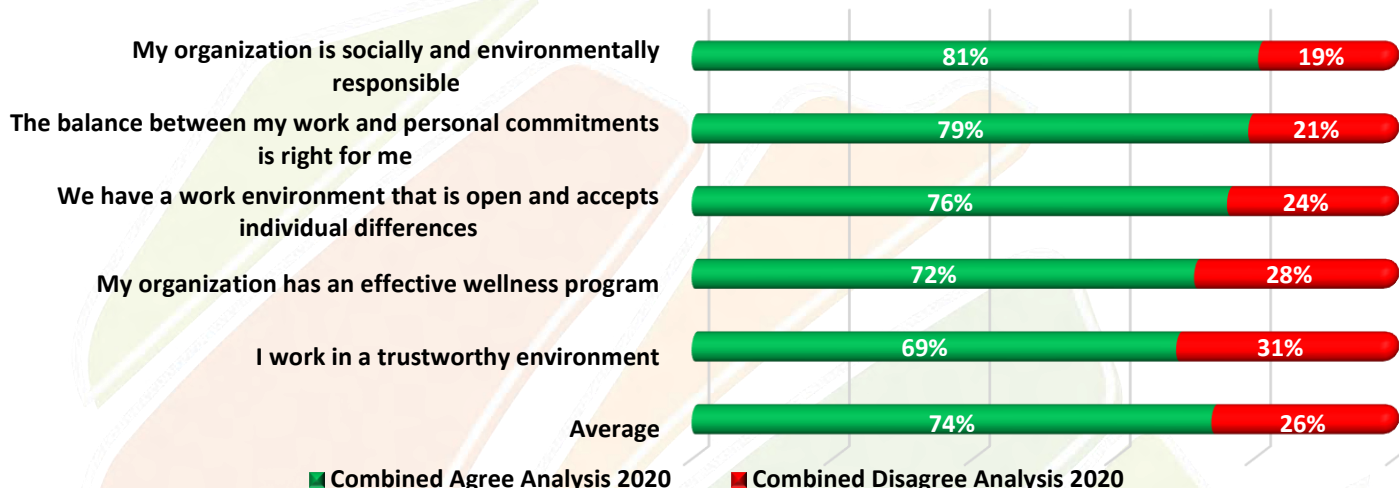
Technology enables talented candidates to research organizations that seek to employ them. This enables them to assess the brand and reputation of these organizations. A significant number of employees do not believe that organizations are utilising their talents effectively. This is also reflected by a partly negative view of HR practices, particularly with regard to an effective work environment. Because mission and purpose are so important to employees, managers may also want to spend time collaborating with their team members on a shared mission to guide team actions and decisions. This action could also help improve team alignment. Organizations need to:

- ▶ Ensure that the goals of the organization are communicated effectively;
- ▶ Develop employees to maximise their talents; and
- ▶ Articulate how employees’ work contributes to the overall organizational success.

13. Wellbeing

Wellbeing deals with employee perceptions of the organization's work environment, wellness programs, and work/life balance within organizations. The graph below represents the overall work environment within Africa:

Wellbeing



The table below shows the difference in score for “Wellbeing”, from 2019 to 2020:

Wellbeing	Combined Agree Analysis 2019	Combined Disagree Analysis 2019	Combined Agree Analysis 2020	Combined Disagree Analysis 2020	% Gap (2019-2020)
My organization is socially and environmentally responsible	85%	15%	81%	19%	-4%
The balance between my work and personal commitments is right for me	79%	21%	79%	21%	0%
We have a work environment that is open and accepts individual differences	78%	22%	76%	24%	-2%
My organization has an effective wellness program	75%	25%	72%	28%	-3%
I work in a trustworthy environment	72%	28%	69%	31%	-3%
Average	76%	24%	74%	26%	-2%

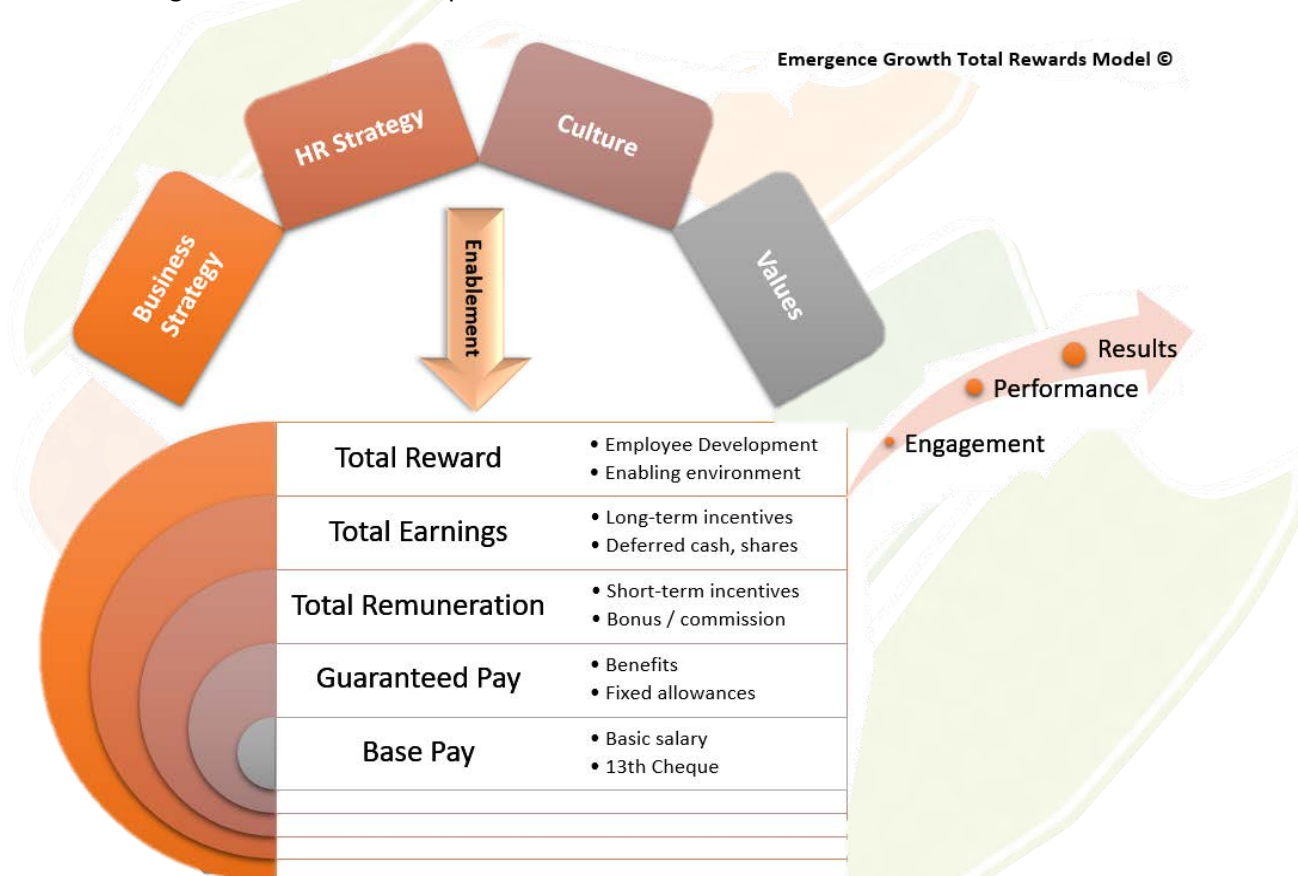
It is important for organizations to consider how they treat their employees, and make an effort to create a positive work environment, as this has a direct impact on Employee Engagement. The implementation of wellness programs within an organization, increases engagement scores, by providing employees with the opportunity to participate in programs designed specifically to benefit employees in their personal needs.

As scores for this section have been maintained since 2018, this may indicate that some progress is being made in this area. Branding your organization as a workplace which maintains a great organization culture, combined with a team of employees who love what they do, makes it incredibly appealing to the best new talent available in the market. This of course also means you have a high-performing team who put in discretionary effort, build successful team and customer relationships, and make great profits or deliver great service.



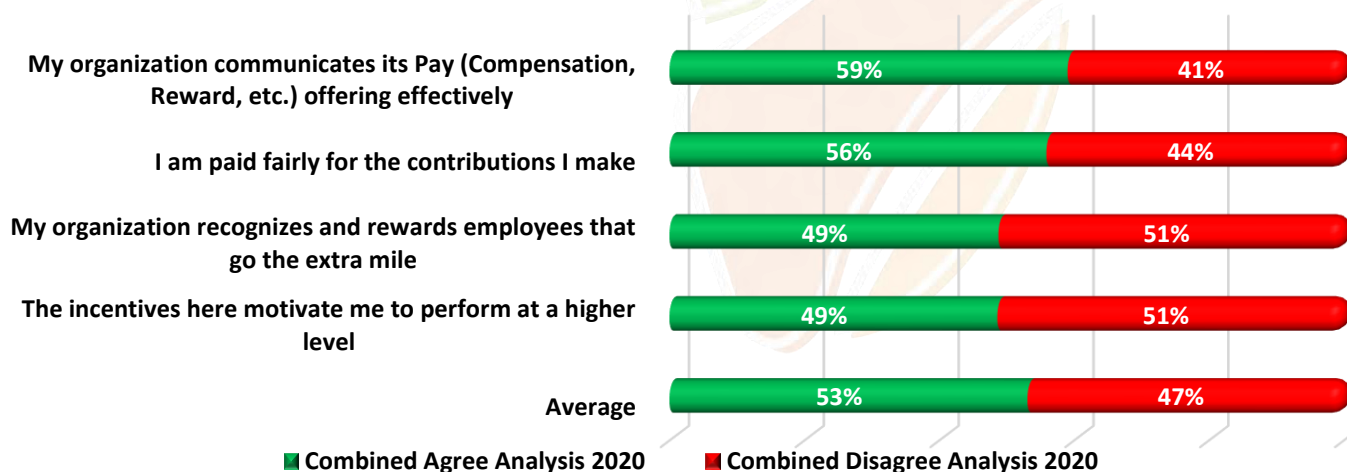
14. Reward & Recognition

Total Reward (Reward & Recognition) comprises all elements of pay, benefits and incentives utilized by an organization. These elements are essentially used to remunerate employees related to skill, market stance and job level. Elements of remuneration also enforce engagement, performance and recognition for the individual which in turn feeds an organization's succession plan.



The graph below represents the overall level of satisfaction, with regard to Reward and Recognition, that exist within organizations researched:

Reward & Recognition



The table below shows the difference in score for “Reward & Recognition”, from 2019 to 2020:

Reward and Recognition	Combined Agree Analysis 2019	Combined Disagree Analysis 2019	Combined Agree Analysis 2020	Combined Disagree Analysis 2020	% Gap (2019-2020)
<i>My organization communicates its Pay (Compensation, Reward, etc.) offering effectively</i>	61%	39%	59%	41%	-2%
<i>I am paid fairly for the contributions I make</i>	60%	40%	56%	44%	-4%
<i>My organization recognizes and rewards employees that go the extra mile</i>	54%	46%	49%	51%	-5%
<i>The incentives here motivate me to perform at a higher level</i>	53%	47%	49%	51%	-4%
Average	57%	43%	53%	47%	-4%



A significant number of employees throughout Africa continue to believe that they are not adequately compensated for their contribution to their organizations. This is nothing new and continues a similar downtrend as illustrated before, in previous research reports. This is particularly evident in the

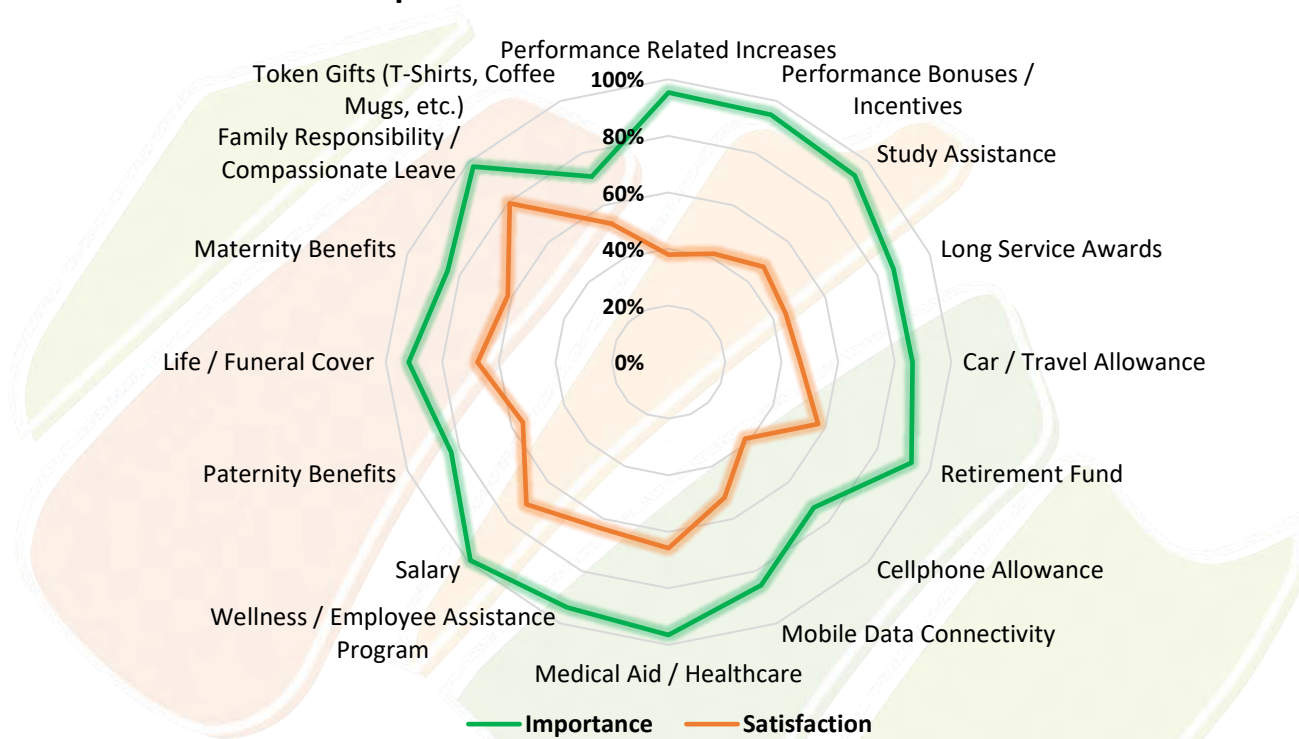
table above, with 44% of participants surveyed, saying that they do not believe that they are being paid fairly for the contributions they make to their organization. Another factor that organizations should find concerning, is the section related to incentives. 51% of employees believe their organizations incentives are inadequate, up 4 percentage points from 2019.

Well-designed reward for performance programmes ensures a win – win for employee and employer. As multinationals continue to establish themselves in Africa, and the pay philosophy of developed economies is felt, smaller local employers will need to find innovative ways of ensuring that their Employee Value Proposition meets the aggregate needs of the employees. Organizations should:

- ▶ Regularly benchmark their Pay & Benefits against the market;
- ▶ Communicate to employees regularly regarding their EVP (Including benefits offered by the organization. Providing a summary in an employee handbook will not “cut it”; and
- ▶ If organizations are to retain employees, they should be given the ability to structure their packages according to their individual lifestyle needs.

Respondents were also asked to rate their level of satisfaction in relation to various reward elements. The diagram and table below provides a description of the difference between the respondents' level of satisfaction in relation to the importance of the benefits listed below:

Importance vs Satisfaction of Benefits



The following table outlines the above diagram, in detail, with relation to following reward elements:

Reward Element	Importance	Satisfaction	Difference
Performance Related Increases	95%	38%	57%
Performance Bonuses / Incentives	95%	42%	53%
Study Assistance	93%	48%	46%
Long Service Awards	86%	45%	41%
Car / Travel Allowance	86%	47%	40%
Retirement Fund	93%	57%	36%
Cellphone Allowance	73%	38%	34%
Mobile Data Connectivity	85%	52%	34%
Medical Aid / Healthcare	96%	66%	31%
Wellness / Employee Assistance Program	94%	63%	30%
Salary	99%	71%	28%
Paternity Benefits	83%	56%	27%
Life / Funeral Cover	92%	68%	24%
Maternity Benefits	85%	62%	23%
Family Responsibility / Compassionate Leave	98%	79%	18%
Token Gifts (T-Shirts, Coffee Mugs, etc.)	71%	53%	18%

Various themes are evident regarding disparity between importance and satisfaction of pay and Employee Benefits elements currently offered in organizations. The largest gap is the Performance Related Increases (57%). Performance Bonuses / Incentives were also reported as being unsatisfactory (with a gap of 53%). The third and fourth highest gaps are associated with Study Assistance (46%) and Long Service Awards (41%). Salary has moved

down significantly in the rankings, with a gap of only 28%, showing that some progress is being made in terms of differentiating pay based on performance.

By implementing Pay for Performance Plans and by providing employees regular feedback on their performance, organizations achieve improved engagement levels which leads to improved performance. This in turn leads to improved customer service as a consequence, improved profit. Organizations should regularly benchmark their compensation and benefits packages against the market to ensure they stay competitive.

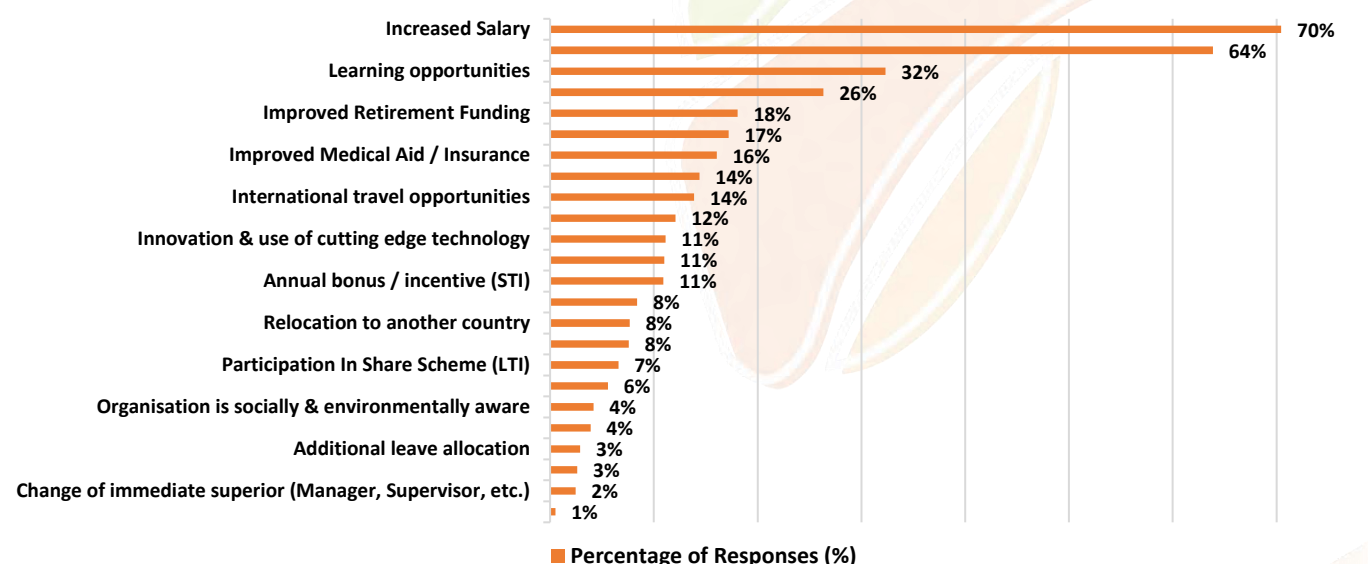
15. Talent Attraction Grid (TAG)

The grid below outlines those factors that are most important to employees, differentiated between each combined Job Level and Generation, where possible. "Increased Salary" has been excluded from the table, due to the frequency of selection made for the option:

Job Level / Generation	Baby Boomer (Born 1945-1964)	Generation X (Born 1965-1979)	Millennial (Born 1980-1994)	Generation Z (Born 1995 - Present)
Executive	- Flexibility in Working Hours - Learning Opportunities - Coaching & Mentoring Opportunities	- Career Growth - Flexibility in Working Hours - Improved Retirement Funding	- Organizational Culture - Career Growth - Annual bonus / incentive (STI)	Insufficient Data
Middle Management	- Career Growth - Flexibility in Working Hours - Improved Retirement Funding	- Career Growth - Learning opportunities - Flexibility in Working Hours	- Career Growth - Improved Medical Aid / Insurance - Improved Retirement Funding	Insufficient Data
General Staff	- Career Growth - Flexibility in Working Hours - Learning opportunities	- Career Growth - Learning opportunities - Improved Retirement Funding	- Career Growth - Improved Medical Aid / Insurance - Learning Opportunities"	- Career growth - Annual bonus / incentive (STI) - Learning opportunities

The graph below provides the frequency in selections made by employees in Africa, based on the provided benefits/pay elements/conditions that they feel would improve their work lives most:

TAG Questions - Employee Selection (%)



16. Executive Summary

Keeping remote employees motivated and engaged.

The COVID-19 pandemic has changed how companies operate – many have put in place remote working policies, providing flexible working hours and appropriate tools and remote communication tools.

While it is not easy to keep jaded teams engaged and productive when working from home during uncertain times, there are ways to enhance good team dynamics. With minor adjustments to leadership styles and the way they collaborate with their team, you can be there for everyone and keep your employees motivated and focused to support improved remote management.

Do not try to control everything

Managers have a key role in leading team members to embrace the changes while remaining motivated and committed to their work.

Everything starts with the manager. Look at yourself and the way you do things to make the necessary changes to become a better leader. Focus on providing solutions rather than focusing on issues. Use a positive approach to show understanding, effective and flexible solutions to any challenges your Organization might face. This will help you build positive relationships with your co-workers. Such an attitude fosters creativity and encourages transparency and inclusion, which, in turn, supports motivation and productivity.

Focus on well-being

To work with engaged and motivated employees, you need to show that you care about them and their well-being. Let them know that you are here for them if they need anything to help deal with any situation.

Knowing you can provide a well-being support program helps them feel more comfortable and supported. Also, you should be ready to give your team members the freedom and flexibility they need to better deal with uncertainty. Try to facilitate informal socialising and connection between team members and encourage teamwork.

Provide an efficient virtual working environment

For your team to remain engaged, motivated and productive at work, they need rely on a structured virtual workplace with all the tools they need. From communication to task management, provide professional and comprehensive set of tools for your team with which to communicate efficiently.

Remote working necessitated that many companies start using conference call services, but, just any conferencing solution is not ideal, as you need to find the right one for your business size and requirements.

Alternative remote work.

Harry Potter author JK Rowling wrote from local cafés and, eventually, at a five-star hotel. She found that working from home had too many distractions, including child-care responsibilities. Instead, she simply needed a quiet and simulating place to work that was free of distractions and allowed her to be productive. Remote work has resulted in many employees working from home to struggle for a variety of reasons, just as Rowling did. Perhaps it's time to rethink the concept of working from home versus remote working from anywhere safely.

The vast majority of employees want to go back to the office, with safety measures in place. Having a dedicated, distraction-free working environment can keep workers focused and foster deeper cognitive processing. It can also help draw boundaries between work hours from non-work hours.

Nonetheless, returning to the office is not a likely option since many Organizations may remain closed well into 2021, or some will move permanently to a remote working model. Meanwhile, the hotel industry has been severely impacted by the lockdowns. Many hotels are on the brink of collapse.

A solution may be within reach that solves both problems...

Similar to “shop local”, working remotely from a nearby hotel or guesthouse could be a solution that benefits both remote workers and local hotels.

The negative side of remote working

Remote working has left some workers feeling isolated, depressed and disengaged. While there are many benefits associated with remote working, emotional exhaustion levels of workers increase when working from home extensively.

The blurring of personal and professional space causes employees to struggle switching off from work. This reduces cognitive well-being and may negatively affects sleep patterns. People working in a home crowded with family members also suffer from a “time elasticity illusion.” That happens when others assume the worker can spend time on household tasks without it having an impact on the amount of time spent on paid work. This involuntary overlap of household and work commitments leads to fatigue.

There is a spillover effect of that fatigue. End-of-day work exhaustion leads to difficulties starting work and staying focused the following day. This can become a difficult cycle to break. Workers who focus on finding dedicated, distraction-free work spaces during peak efficiency hours are more productive and less stressed.

Some people also thrive on the structure in the workplace. Parents who want to get away from the distractions of their children’s home schooling see the mundane routines of everyday working life like getting ready, eating breakfast and commuting as a buffer between personal and professional time.

While hotels traditionally provide overnight accommodation, they can attract different clients by marketing themselves as safe, distraction-free, dedicated places to work for those who work from home and need to break the cycle of exhaustion.

The use of hotel space by remote workers, even temporarily, can create a dual benefit at a time of uncertainty.

And according to the World Health Organization, working from a hotel is safe if basic Covid-19 precautions are followed. These include washing hands frequently, wearing masks and maintaining a safe distance from others.

“There are only three measurements that tell you nearly everything you need to know about your organization’s overall performance: Employee Engagement, Customer Satisfaction, and Cash Flow” – Jack Welch (Ex-CEO, General Electric)

17. What Can Organizations Do to Encourage Employee Engagement?

The first step to determining which initiatives an organization should focus on is to compare your organization to the general market. There are many “fly-by-night” surveys in the market that claim to be engagement surveys. The risk of using these is that if they are not validated and have no index against which to compare, they could give distorted results which creates a false sense of “**Engagement Complacency**”.

LEADERSHIP

One thing is certain, “old fashioned” leadership practices have produced the enemy that is low engagement. To succeed, we must have the courage to reject many of our archaic practices and adopt those known to have the greatest impact on enhancing human performance in the workplace. An organization with a great organizational culture and a workforce full of enthusiastic, engaged employees is more likely to be able to retain talent. Research has established a strong correlation between engagement and staff turnover. If the majority of employees are devoted to their work and don’t just get by in order to get their monthly pay, but genuinely love what they’re doing, they are far more likely to stay with the organization and invest their efforts there.

A recent survey revealed that 76% of CEO’s believe they are the most important employee in their organization. Large egos are a barrier to admitting things are bad, as this is perceived to be an admission of their poor leadership skills. In his address at Davos, the President of South Africa has admitted that there has been mismanagement of state-owned enterprises. A large portion of the South African population and some global investors believe that he will now do something to correct the situation. According to the global engagement expert, Jill Christensen, “if your leader has the confidence to admit that things are not where they need to be, but they are going to champion an initiative to change it, employees will be grateful and will begin to trust the CEO, which is a major element of engagement.”



GREAT CUSTOMER SERVICE LEADS TO GREAT PERFORMANCE AND GREAT PROFITS

According to Sir Richard Branson, there is no better sales person than one who loves their job and sings its praises. By putting employees first, the customer effectively comes first by default, and in the end, the shareholder comes first by default as well. Disengagement therefore goes beyond customer satisfaction, company profitability and decreased productivity.

PERFORMANCE

It’s fairly certain that if people are engaged at work, they’re going to put in more discretionary effort. This will lead to higher performance, happier customers, higher profits and happier shareholders/stakeholders. Research shows that organizations with engaged employees have higher rates of productivity, and that highly engaged employees take less days off sick, the effect that engagement has on people’s performance becomes clear. It’s not limited to those inside the organization, either. Engagement also largely influences factors like customer satisfaction. It’s clear to customers when they are speaking with someone who really believes in and values the organization and its aims, it will impact how enthused they feel about doing business with the organization.

A SUCCESSFUL ORGANIZATION

Having an organization full of engaged employees who are openly passionate about their work also builds its reputation as a great place to work; something that is becoming more and more important to the employee and prospective talent. Branding your organization as a workplace which maintains a great organization culture, combined with a team of employees who love what they do, makes it incredibly appealing to the best new talent available in the market. This of course also means you have a high-performing team who put in discretionary effort, build successful team and customer relationships, and make great profits or deliver great service. Employee engagement isn't just an Human Resources fad, it's a key part of running a great organization, and, when people are really engaged in the workplace, it works in everyone's favour.



How can managers increase employee engagement?

Since a relatively low percentage of employees really know what is expected of them at work, setting clear expectations is a good way to drive employee engagement in the short term.

Collaborate. “Be a good listener. Encourage others to talk about themselves.” This underlines that it is critical for companies to get workers’ input regarding role expectations. This approach makes employees feel valued and increases the likelihood of their succeeding. Having the opportunity to offer opinions makes them feel respected, and discussing the role’s expectations sets them up for success because they clearly understand what is expected of them.

Aim higher. Think about what inspires you to go above and beyond both in your personal and professional life. Employees aren’t inspired by average goals; rather they are inspired when they are motivated to achieve a superior goal. Managers who lead by example in terms of performance and productivity, and those who reveal what top performers do differently, set a high standard. When they set high standards and clear expectations, employees understand what they need to do differently to emulate leaders’ and top performers. The critical “DREAM” factors that ensure employee engagement by influencing the willingness of employees to remain engaged and applying discretionary effort:

- ▶ **Develop a Charter of Shared Values** – align employee’s personal values with the organization’s stated values;
- ▶ **Relate to and communicate effectively with employees** – request input and opinions from employees to earn trust and respect;
- ▶ **Engender a positive working relationship with co-workers** – promote teamwork and customer service;
- ▶ **Align recognition and reward systems to performance** – elicit recognition from the employee’s manager in addition to commensurate rewards for superior performance; and
- ▶ **Make ongoing performance feedback part of the DNA** – Make ongoing performance discussions that focus on what the employee is doing well, part of your management development programmes.

Managing Generations

Many organizations believe that millennials are mercenaries, always looking for a new and better deal. Research shows what they're really looking for is a compelling reason to stay with their organizations. When Gen-X workers were at the same stage of life as where most Millennials are today, they moved jobs more frequently. But at some point they made a final commitment to one organization – a decision many millennials themselves are getting ready to make. Where talented Millennials end up will be in response to how your organization chooses to lead.

Employee engagement is essential and yet it is floundering. It's a perilous chasm, and HR is often left trying to fill that void. But needless to say, HR can't fix engagement on its own. In fact, some of the biggest engagement drivers — relationships with managers, trust and belief in company leaders, having a feeling of personal accomplishment at work are often out of HR's control.

The trick for strategic HR professionals is to create the environment that allow the organization and employee engagement to flourish. While every company is different and requires its own engagement approach, there are critical areas every company should focus on.

Requirements for engagement driven managers:

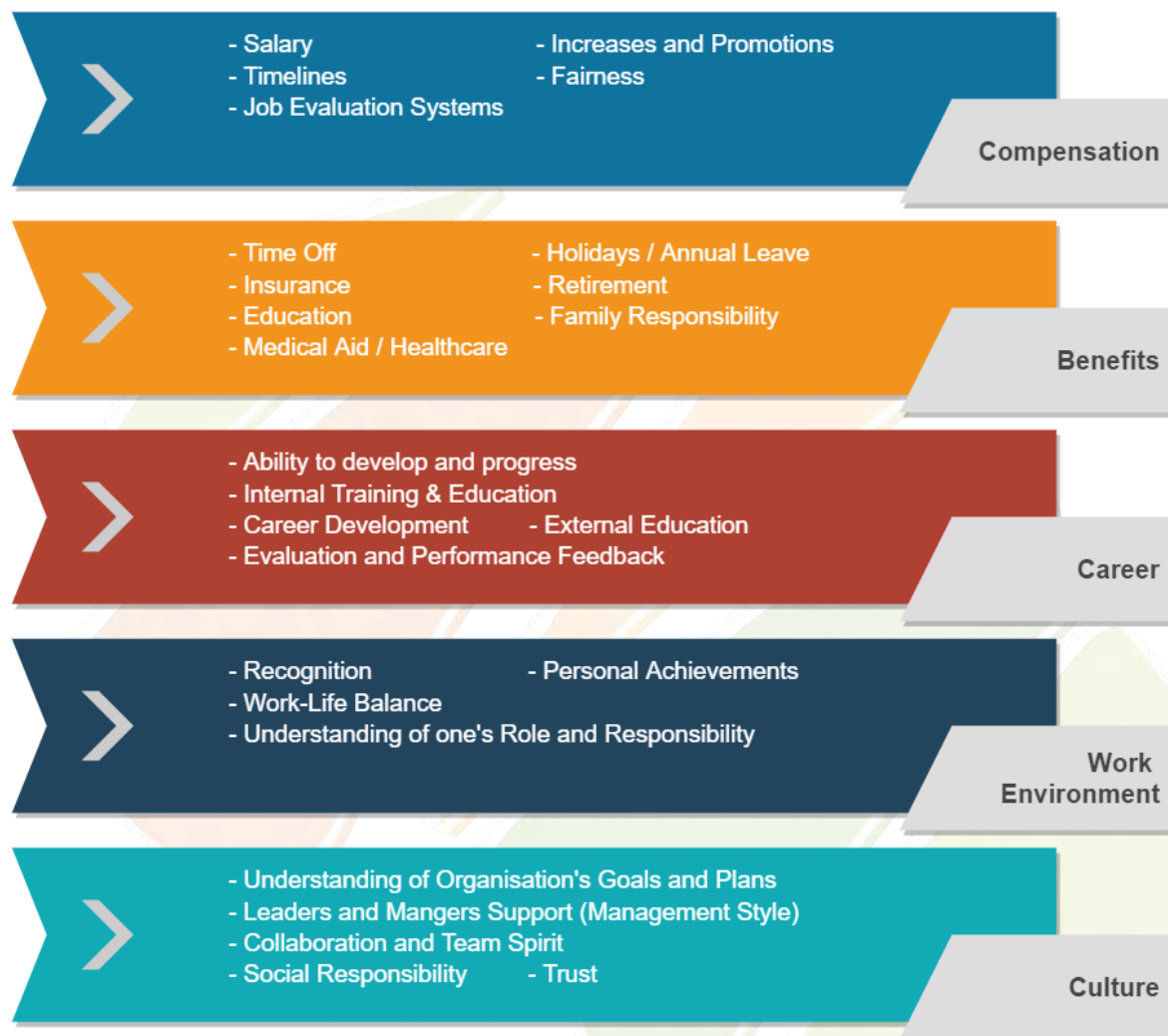
- ▶ Competent communicators;
- ▶ Employee coaches;
- ▶ Enablers and proponents of collaborative management; and
- ▶ Interested in employee's development.

Employee Value Proposition (EVP) – Employee Experience (EX)?

Globally, the demographics of workforces across all organizations has changed. Millennials, as of 2020, now make up 50% of the global workforce – this is true for Africa as well. Millennials are no longer interested in a pre-set menu from which they can choose. The new norm that is about to replace the Employee Value Proposition is “Employee Experience (EX)”. The EVP (Employee Value Proposition or Employee Experience (EX)), is a set of values, conditions of employment, benefits, and work environment (career and culture) that organizations offer to employees in order to attract and retain workforces.

Too often, employers offer employees and prospective employees what they think may appeal to them. A number of organizations offer incredible benefits but are either unable to articulate these benefits or think they may be unimportant. The model below outlines possible benefits that employers could consider. This list is not all-encompassing and could be used as a starting point. The EVP/EX should not just be used as an onboarding process, but as part of an on-going communication to employees (not less than quarterly) – just to remind your employees what a great organization they are working for, and what they would be losing out on if they were to jump ship, for whatever reason.

The following diagram outlines the different pillars that should make up part of your Employee Experience:



18. Confidentiality of Data

It is Emergence Human Capital's policy that all detailed survey information submitted by employees of the various organizations' who participated in this survey will always be regarded as confidential and only for use in surveys in a format that will sufficiently prevent identification of any individual sources. These surveys are regarded as being of a highly sensitive nature and are treated as such.

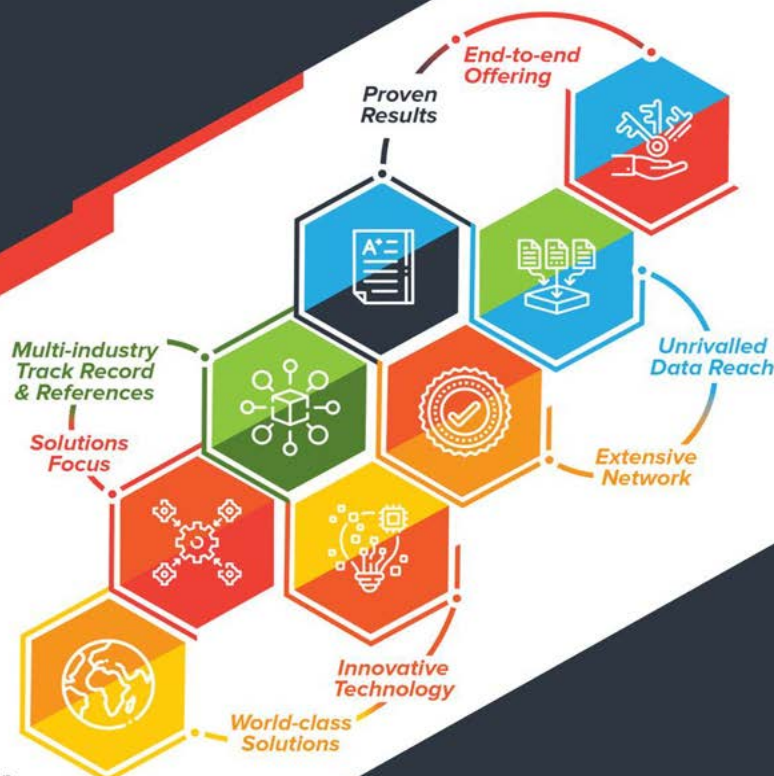


WHY EMERGENCE HUMAN CAPITAL?

Emergence is dedicated to providing expert **Human Capital, Reward & Learning Solutions.**

Talk to us about how to unleash performance by better attracting, rewarding, engaging, developing and retaining highly skilled & talented people.

All solutions design & consulting services are based on proven methodologies and a deep set of research & IP. Our extensive network of African offices is underpinned by tools, technologies and skills that allow us to tailor-make lasting and pragmatic solutions for your most complex and pressing HR problems.


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19. Profile - Emergence South Africa



● Office | Full Service | Data ● Data | Fly-In

Emergence South Africa is a specialist Human Capital, Reward & Learning solutions provider. We specialise in enabling greater performance by assisting Organizations to better attract, reward, engage, develop and retain highly talented people. We base our solutions design on a deep set of research and IP within various areas of expertise. Strengthened by a network of offices across Africa and underpinned by appropriate skills, tools, technology and resources, we offer lasting and pragmatic solutions for your most complex and pressing HR problems.

We understand the importance of getting the right people in the right place at the right time – a critical part of our success is matching the skills of our consultants to the requirements of each client, for each component of work, in every project. Our services are summarised on the next page:



Emergence Growth South Africa is a level 2 B-BBEE Contributor.

CSD Registration Number: MAAA0392839

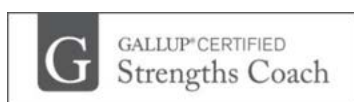
We are members of the following associations:



As an independent third party, we are able to present an objective and unbiased standpoint without fear of pressure for promotion of a particular solution / outcome.

Strategic Partnerships

Our partners include a number of highly regarded global consulting, reward, legal and learning solutions providers. These partnerships give us unsurpassed reach, capacity and capability in the most remote countries. Together, we provide access to specialised market intelligence in over 180 countries.



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20. Conclusion

Employee development initiatives and the talent pipeline will provide the key to economic growth. Crucial to this is the engagement strength that an organization fosters. Today's organizations compete on the strength of their leadership and talent pipelines. Success in these areas is critical if organizations want to secure a competitive advantage.

We sincerely hope that leadership teams and HR Professionals throughout the continent are in some way better informed regarding their organizations' employee engagement levels, areas for focus and self – reflection. In years ahead, Emergence Human Capital will continue to provide information on Africa's engagement trends, particularly as new generations start to penetrate the leadership ranks.

We would like to thank all our participants for allowing us to be part of their Employee Engagement journey.

A research report by Emergence Human Capital & The EHC Surveys Team:



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