



The State of Ethics & Compliance in the Workplace

A Look at Global Trends

► 2021 GLOBAL BUSINESS ETHICS SURVEY REPORT



ABOUT THE ETHICS & COMPLIANCE INITIATIVE

The Ethics & Compliance Initiative™ (ECI™) has a mission to empower individuals and organizations to build and sustain high-quality ethics & compliance programs. Established in 1922, the organization comprises the two oldest nonprofits in the ethics & compliance industry. As an association, ECI brings together ethics & compliance professionals and academics from all over the world to share techniques, resources and exciting new ideas.

Through its research, ECI identifies the practices that improve ethics & compliance program effectiveness and build institutional culture strength. ECI also has an established track record of providing support to organizations seeking to transform their cultures, often in the wake of significant challenges with noncompliance.

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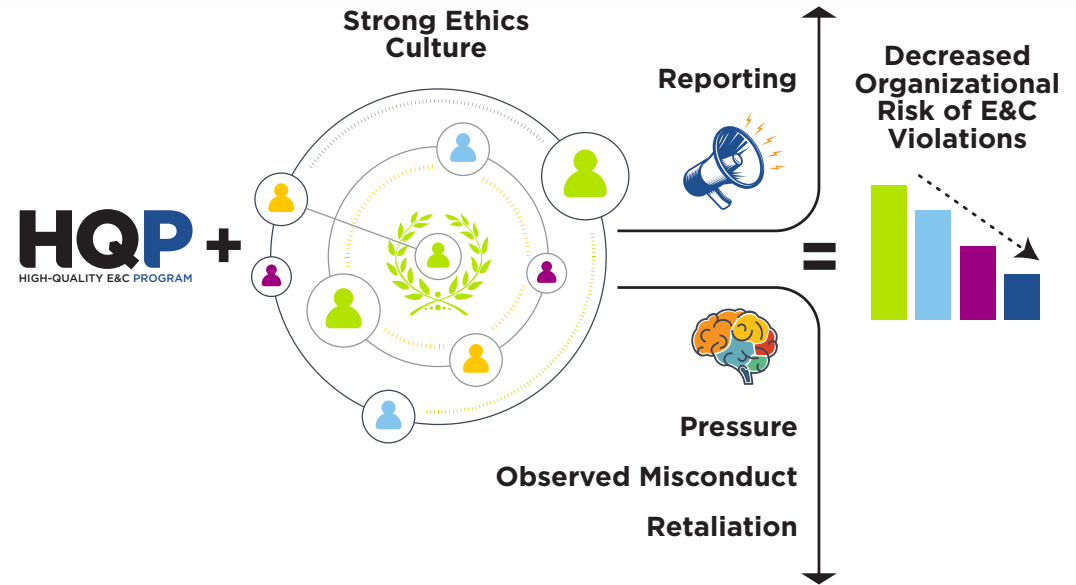
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About This Report

Since 1994, the Ethics & Compliance Initiative (ECI) has conducted a longitudinal, cross-sectional study of workplace conduct from the employee's perspective.¹ Now in its sixteenth iteration, ECI's Global Business Ethics Survey® (GBES®) data provide the global benchmark on the state of ethics & compliance (E&C) in business.²

Since its inception, ECI's research has provided leaders with reliable data on trends in workplace ethics focusing on the key drivers that improve ethical cultures in the workplace and how changes in culture impact ethics outcomes. The strength of an organization's ethics culture is measured through multiple indicators of employee behaviors at various levels within an organization, including leaders, supervisors and coworkers. These behaviors demonstrate and promote a commitment to ethics on a daily basis. A thriving ethics culture involves commitment, modeling and the right conduct by all employees in an organization. Our research shows that the quality of an organization's E&C program and the strength of the organization's ethics culture is key to achieving desired ethics outcomes.

In addition, while a multitude of factors influence ethical behavior, the interplay of four major ethics outcomes are tied to the daily micro decisions employees make with respect to how they behave in the workplace. These are: *pressure* in the workplace to compromise ethical standards; observations of *misconduct*; *reporting* misconduct; and ultimately, the *retaliation* perceived by employees after they reported misconduct.



¹ Historically, ECI reported findings from the research under two titles: the National Business Ethics Survey® (NBES®), which provided measures of U.S. workplaces, and the Global Business Ethics Survey, which expanded the study to include workplaces globally. In 2017, ECI updated both the U.S. and global measures, now under a single banner as the Global Business Ethics Survey. The NBES and GBES have historically been fielded by the Ethics Resource Center (ERC). After a strategic alliance, ERC is now branded under the Ethics & Compliance Initiative (ECI).

² The NBES was administered in the U.S. only in 1994, 2000, 2003, 2005, 2007, 2009, 2011 (two times), 2012 (two times), 2013, 2015 and 2017, including subject-specific NBESs. The GBES was administered in countries outside of the U.S. in 2016 and 2019 were limited to 1,000 respondents (versus 5,000) and, thus, are not included in this report. Global results are presented for the following years: 2015, 2019 and 2020 (for comparability of the countries surveyed).

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U.S. TRENDS

In this report, GBES data collected from employees in 10 countries from August to September 2020 are summarized and compared with previous data. ECI has been tracking and reporting on the four ethics outcomes in the United States for 20 years. The 20-year U.S. trends are the primary focus in this report to provide a historic view of ECI's research.

As GBES is a longitudinal research study, most of the questions included in the 2020 data collection remained the same or similar to previous iterations. However, new questions have been added over time and the way in which questions are asked have evolved across iterations. Relevant modifications are noted throughout the report.



GLOBAL TRENDS

In 2015, data collection was expanded to countries outside of the U.S. Global trend data were examined for three years—2015, 2019 and 2020—for nine countries: Brazil, China, France, Germany, India, Mexico, Russia, Spain and the United Kingdom. Throughout this report, the 2020 global median (of all 10 countries) is depicted in graphs to provide a barometer of the global outlook. Global data are also discussed to provide context, though the trends cover a period of five years—from 2015 to 2020.

SPECIAL CONSIDERATIONS

It is important to mention that the 2020 GBES data collection occurred during the COVID-19 pandemic, which has had a significant impact on workplaces and employees across the globe. COVID-19 has led to employees working and organizations operating differently alongside a backdrop of upheaval in global and local economies. Within the context of these unusual times, it is not unexpected that employee perceptions of their workplaces and the behaviors that take place within the workplace have been impacted by circumstances that are far from “regular business operations.” Many of the GBES questions ask employees to base their observations on the past 12 months. This means that respondents were answering questions about their organizations within the context of the COVID-19 pandemic. While in some countries the period of impact has been longer than in others, workplaces were grappling with the pandemic during a large portion of the 12 months in which employees were asked about in the survey. To address this further, additional COVID-19-specific questions were added to the 2020 GBES to measure how employees have been impacted by the pandemic. These findings are reported in a separate section of the report.

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The 20-year U.S. trends are the primary focus in this report to provide a historic view of ECI's research. Global trends that cover a period of five years are also discussed.

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A Refresher on Workplace Culture and Ethical Behavior

In 2016, ECI convened an independent blue-ribbon panel of former enforcement officials and E&C practitioners and academics, and challenged the group to identify the traits that are common to “gold standard” E&C programs. The conclusions of the group were published in the report titled *Principles and Practices of High-Quality Ethics & Compliance Programs*. As part of our 2018 GBES research, ECI explored the impact of E&C program quality on employee perceptions and behavior. Specifically, we asked U.S. employees about the presence of E&C program practices in their workplace. We also inquired about the level of quality of those efforts, based on a framework developed by the blue-ribbon panel. Finally, we examined the impact of E&C programs based on their level of maturity, and on employees’ perceptions and behavior.

Two primary findings emerged that build the case for continually improving E&C practices and policies:

- 1) The stronger the culture, the greater the impact:** Eighty-four percent of employees working for organizations with an E&C program performing at the “optimizing” level perceived their organization as having a strong ethics culture, compared with just 13% of employees working for organizations with an “underdeveloped” E&C program.³
- 2) The higher the program quality, the stronger the ethics culture:** Eighty-five percent of employees working for organizations with a strong ethics culture indicated observing favorable outcomes, compared with 0% of employees working for organizations with a weak ethics culture.”

ECI research has also shown that organizations with high-quality E&C programs (HQPs) are not only more likely to have strong ethics cultures, they also have an impact on the four major ethics outcomes in the following ways:

- Less **pressure** to compromise ethics standards;
- Less observed **misconduct**;
- More **reporting of misconduct** observed; and,
- Less **retaliation** for reporting.

³ Results based on the 2018 GBES.

⁴ Improving Ethical Outcomes: The Role of Ethics Training (Ethics Research Center, 2008).

⁵ Reducing Perceived Pressure to Behave Unethically: The Role of Leaders and Coworkers (Ethics Research Center, 2008).

In short, when these conditions occur, organizations with HQPs and a strong ethics culture have decreased risk for E&C violations.

Results presented in this report provide an overview of the average strength of organizations’ ethical cultures, which significantly influences workplace conduct. When the strength of an organization’s ethics culture is weak, the listed outcomes suffer. ECI’s research has consistently demonstrated that when employees experience pressure to compromise their organization’s workplace ethics standards, there are higher incidences of misconduct, lower reporting of the same and higher rates of retaliation. In addition, when organizations are committed to ethical leadership, shared values and building an ethics-focused business culture,⁴ the organizations are more likely to have strong ethics health.⁵

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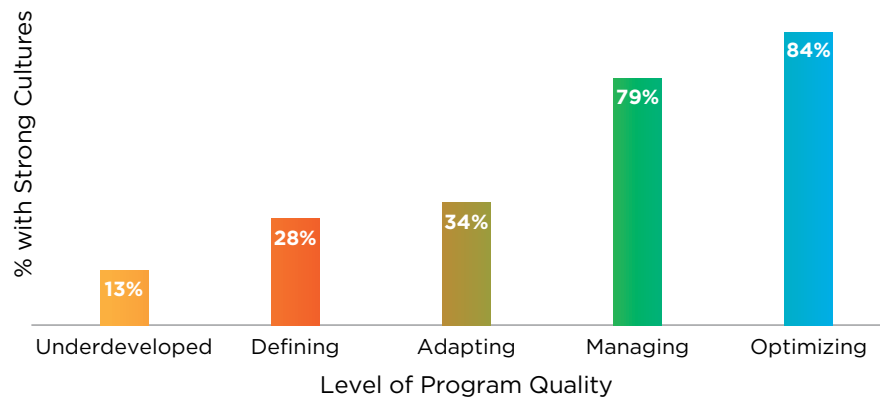
In 2000, only 10% of U.S. employees worked in an environment with a strong ethical culture (21% in 2020). In addition, only 56% of employees reported misconduct they observed in 2000 (86% in 2020).

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A Refresher on Workplace Culture and Ethical Behavior

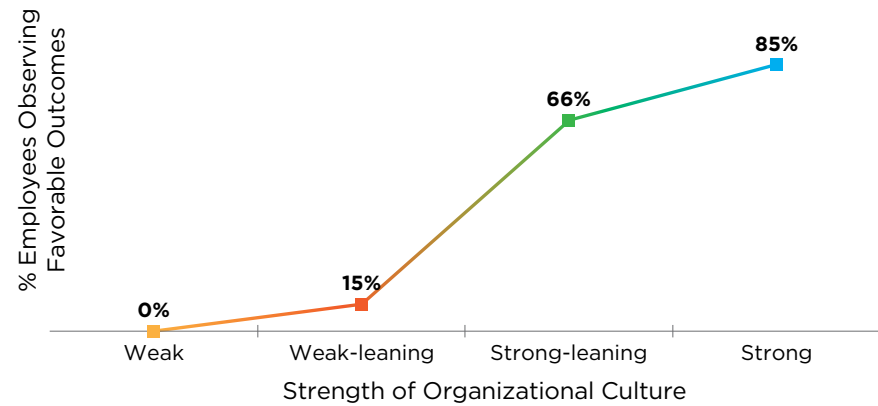
The Higher the Program Quality, the Stronger the Culture

Organizations with high-quality programs (shown here as optimizing) demonstrate a 546% increase in culture strength over organizations at the lowest level of program quality.



The Higher the Program Quality, the Stronger the Culture

As the culture strengthens, employee conduct improves. Organizations with strong cultures are 467% more likely to demonstrate a positive impact on employees than organizations with weak-leaning cultures. This impact includes employees' recognizing and adhering to organizational values, feeling prepared to handle key risks, reporting suspected wrongdoing, and reduced levels of misconduct overall.



Executive Summary

NOTE ON U.S. AND GLOBAL DATA:

To compare findings across survey years, U.S. data in this report were based on responses from employees working in for-profit organizations. Global data were based on responses from employees working in the for-profit, nonprofit and governmental sectors. For a more detailed explanation of the methodology, please see the “Methodology” section.



U.S. TRENDS

Amid the COVID-19 pandemic, ECI’s 2020 GBES revealed a year of extremes. The promising news is that culture strength is at one of its highest points in the 20-year look at U.S. data, and employees continued to report misconduct they had observed at very high rates. Despite the turbulence of the pandemic, culture strength and rates of reporting misconduct remained intact or improved:

- Slightly more than one in five U.S. employees (21%) were in workplaces with a strong ethical culture, mirroring ECI’s finding in 2017.
- Continuing a positive trend that began after 2013, employees who observed misconduct in 2020 were more likely to report their observation than they were in 2017 (86% vs. 69%).

These findings reveal that the E&C profession in the United States continues to make substantial progress by instilling elements that encourage ethical behavior and promote ethical culture in the workplace. A strong ethical culture is characterized by accountability for wrongdoing, trust in and communication from leadership, and all employees setting a good example of ethical workplace behavior.

However, despite these positive findings, there were also some troubling indicators:

- Employees were more likely to feel pressure to compromise their organization’s ethics standards (e.g., to “bend the rules”)⁶ during periods of organizational change. In 2020, employee pressure was at the highest it has been in the United States since 2000, and it had more than doubled since 2017.

⁶ Will the COVID-19 Pandemic Increase Pressure for Employees to Bend the Rules? (EthicsStat, 2020)

U.S. Trends: The Ethics Landscape (2000-2020)

	STRONG ETHICAL CULTURE	PRESSURE	OBSERVED MISCONDUCT (Based on Specific Observed Misconduct Index)	REPORTING (Based on General Misconduct Reporting Question)	RETALIATION
U.S.	▲ 21%	▲ 30%	▲ 49%	▲ 86%	▲ 79%

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

- Based on ECI’s previous research, we know that when there is increased pressure, the rate of observed misconduct also increases. This pattern held for 2020, although the rate of observed misconduct in the United States increased only slightly since 2017 and remains steady in relation to the 20-year trend.
- Employee perceptions that they experienced retaliation after reporting misconduct is also the highest it has ever been in the United States and has nearly doubled since 2017.

NOTES ON U.S. DATA

- The Specific Observed Misconduct Index consists of 16 types of misconduct that have been asked about in each survey year since 2000. The rate of observed misconduct is based on the percentage of respondents who observed at least one of the 16 types of misconduct.
- The percentages for reporting and retaliation are based on the general observed misconduct question. This is to allow for year-over-year comparisons beginning in 2000.

“Based on ECI’s previous research, we know that when there is increased pressure, the rate of observed misconduct also increases.”

Management Level—U.S.⁷

When analyzing the data, ECI found that an employee's level within their organization was associated with employee's perspectives across all five of the key indicators. The differences between top managers and individual contributors were particularly pronounced.

These findings revealed a mixed picture regarding management level and ethics culture. Top managers were more likely to say they worked in strong ethical cultures, but they were also more likely to say they experienced pressure, observed misconduct and experienced retaliation. Some of this may be due to top managers' tendencies to ignore issues and evaluate themselves, their coworkers and their peers more favorably than may be warranted. However, other factors are likely at play, and those are explored in more detail throughout this report.

Ethics & Compliance Program Effectiveness

ECI also examined the extent to which management level was associated with E&C program effectiveness.⁸ The data showed that employees working in management positions were much more likely to indicate they worked in organizations with effective programs. However, rates of program effectiveness are still far behind where they need to be. Only slightly more than one-half (55%) of top-management employees indicated working in an organization with an effective E&C program, and fewer than one in four (23%) non-management employees indicated the same.

Management Level—U.S. (2020)

	STRONG ETHICAL CULTURE	PRESSURE	OBSERVED MISCONDUCT (Based on Specific Observed Misconduct Index)	REPORTING (Based on General Misconduct Reporting Question)	RETALIATION
Top Managers	33%	51%	62%	95%	92%
Non-management	17%	12%	34%	64%	45%

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends* (ECI, 2021)

“ Culture strength in the U.S. is at one of its highest points in 20 years, yet more can be done, and little progress has been made since 2017 to implement one of the most important strategies to mitigate wrongdoing. ”

⁷ Management-level data are based on GBES U.S. data from 2020 or 2017. Unless noted, all management-level data is based on GBES U.S. data from 2020.

⁸ ECI measures program effectiveness through a series of questions about program elements and the extent to which employees feel comfortable raising concerns.



GLOBAL TRENDS

Overall, the global trends largely mirrored those of the U.S. trends. The most promising news is that reporting is at one of its highest points since ECI began collecting global data in 2015. However, pressure to compromise standards and rates of retaliation are also at their highest points since 2015. And following a decrease in 2019, observed misconduct is now at the same level it was in 2015.

- Employees in China were most likely to say they experienced pressure (53%), while employees in Russia were least likely to say the same (16%).
- Rates of observed misconduct are highest in China (46%) and lowest in Germany (20%).
- Employees in India were most likely to report the misconduct they observed (97%), and employees in Russia were least likely to say the same (64%).
- Rates of retaliation are highest in India (90%) and lowest in Russia (41%).

NOTES ON GLOBAL DATA

- The “global median” refers to the median of all 10 countries surveyed in the 2020 GBES. While U.S. data was included in the calculation of global median data, the U.S. data are not shown in charts comparing data at the country level. U.S. data are displayed separately within U.S. Trends sections of the report.
- In contrast to U.S. trend data, the rate of misconduct for global data is based on one general question about observed misconduct. This is to allow for year-over-year comparisons beginning in 2015. Prior versions of the global survey did not include questions about specific types of misconduct.
- Reporting and retaliation data were based on responses to the general observed misconduct question. This is to allow for year-over-year comparisons beginning in 2015.

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In contrast to U.S. trend data, the rate of misconduct for global data is based on one general question about observed misconduct.

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Global Trends: The Ethics Landscape (2015 to 2020)

	PRESSURE	OBSERVED MISCONDUCT (Based on General Misconduct Question)	REPORTING (Based on General Misconduct Reporting Question)	RETALIATION
Global Median	▲ 29%	▲ 33%	▲ 81%	▲ 61%

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends* (ECI, 2021)



Trend 1 Ethical Culture Strength Remains High

Higher-quality E&C programs are linked with stronger cultures. The single most significant influence on employee conduct is culture. In strong cultures, wrongdoing is significantly reduced.



U.S. TRENDS

Based on ECI's Culture Strength Index,⁹ more than one in five U.S. employees (21%) indicated that their organization has such an environment. **While culture strength is among the highest it has been since 2000, it remained mostly unchanged over the past decade (and since 2017).** Given that culture is the most influential determinant of employee conduct,¹⁰ more work needs to be done to improve culture strength, especially during these challenging times.

Management Level and Culture Strength—U.S.

Top managers have consistently had more favorable views of their organizations' ethical culture than all other employees. This pattern held in 2020; however, the gap between top management and non-management employees decreased to its smallest point since 2011. Between 2013 and 2020, the percentage of top management employees who experienced a strong culture decreased by 11 percentage points while there was only a one percentage point decrease among non-management employees.

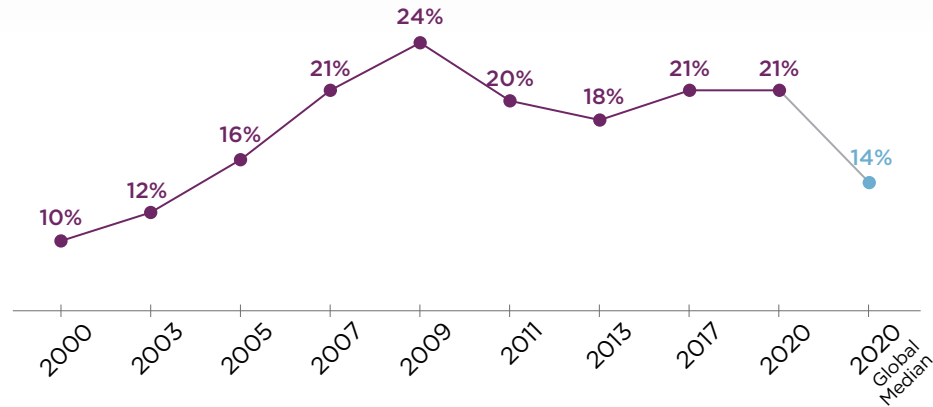
The weakening of a perceived ethical culture (in their organization) among top management is mirrored by increases in three key ethics outcomes—pressure, misconduct and retaliation—and these three areas will be explored in more detail throughout this report.

⁹ Employee perceptions are grouped together to form ECI's Culture Strength Index. Survey items that make up the index include the following: (1) accountability of top management, supervisors and non-management employees; (2) satisfaction with information from top management and supervisors about what is going on in the organization; (3) trust that top management and supervisors will keep their promises and commitments; and (4) top management, supervisors and coworkers set a good example of ethical workplace behavior.

¹⁰ See "A Refresher on Workplace Culture" on page 7.

Culture Strength Index—U.S.

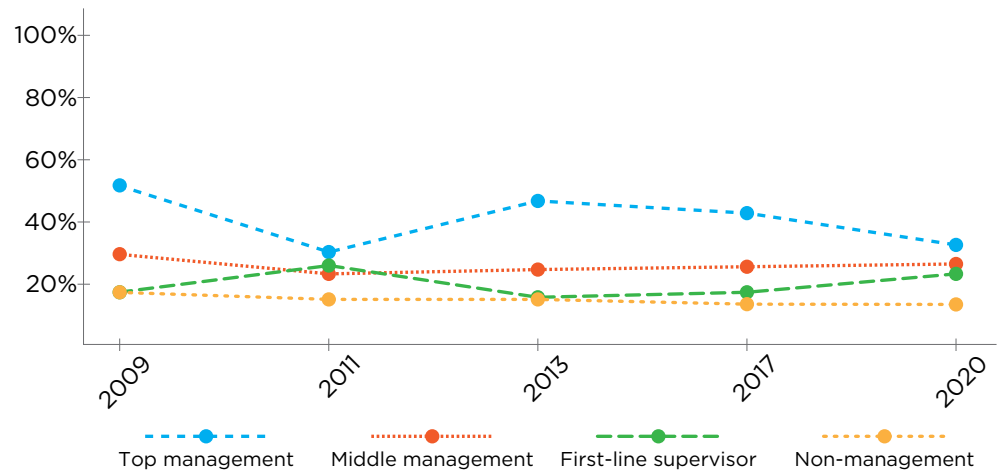
Percentage of Employees Experiencing Strong Ethical Cultures



Source: The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)

Culture Strength Index—Management Level—U.S.

Percentage of Employees Experiencing Strong Ethical Cultures



Source: The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)



GLOBAL TRENDS

Regardless of the country, most employees did not work in organizations with strong ethical cultures. The global median for strong cultures was 14%. Employees from India were the most likely to perceive working in a strong ethics culture (28%); employees from France were the least likely (8%).

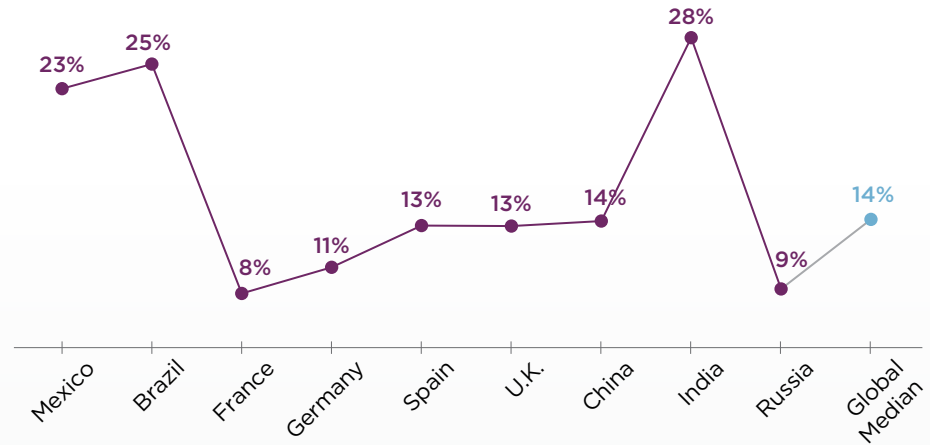
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Regardless of the country, most employees did not work in organizations with strong ethical cultures.

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Culture Strength Index—Global

Percentage of Employees Experiencing Strong Ethical Cultures



Source: The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)

Trend 2 Pressure to Compromise Standards Is the Highest It Has Ever Been

Pressure to compromise standards serves as a warning signal for both ongoing and future misconduct. Employees working in high-pressure organizations are much more likely to observe misconduct in their workplace.



U.S. TRENDS

In 2020, 30% of U.S. employees agreed that they experienced pressure to compromise their organization's workplace ethics standards, a 14 percentage point increase since 2017.¹¹ This is part of an ongoing trend; pressure has consistently increased over the last decade. **Some of the double-digit increase in pressure between 2017 and 2020 was likely due to the COVID-19 pandemic (See Special Section: COVID-19 and the Impact on Employees).** In the U.S., 44% of employees said they were experiencing more work-related pressure compared with the time before the COVID-19 pandemic.

Management Level and Pressure to Compromise Standards—U.S.

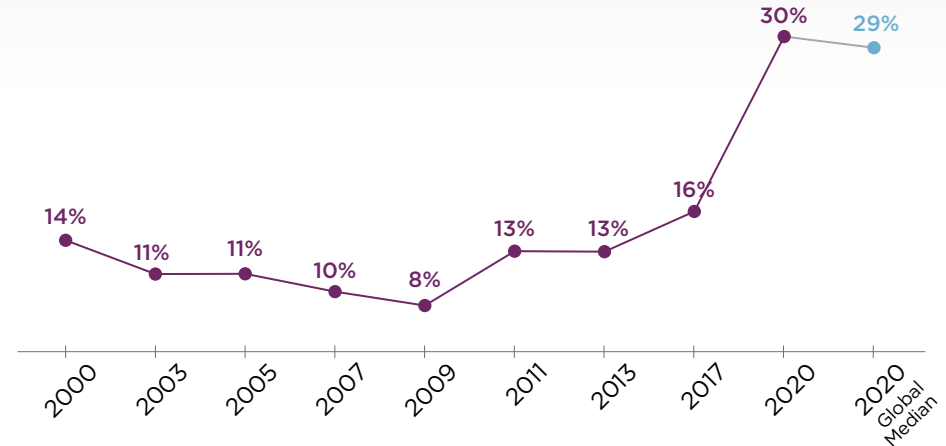
Historically, ECI research has shown that top management and middle management have experienced more pressure than first-line supervisors or non-management employees. Results from the 2020 GBES reveal a similar relationship between management level and pressure; however, the difference between non-management and top-management is much more pronounced.

In 2020, 12% of non-management employees said they experienced pressure to compromise standards, while 51% of top managers and 63% of middle managers said the same.

One reason for the shift in 2020 appears to be the increase in organizational transitions that are taking place, largely due to COVID-19 and its economic impact. Research by ECI has shown that organizational change adversely

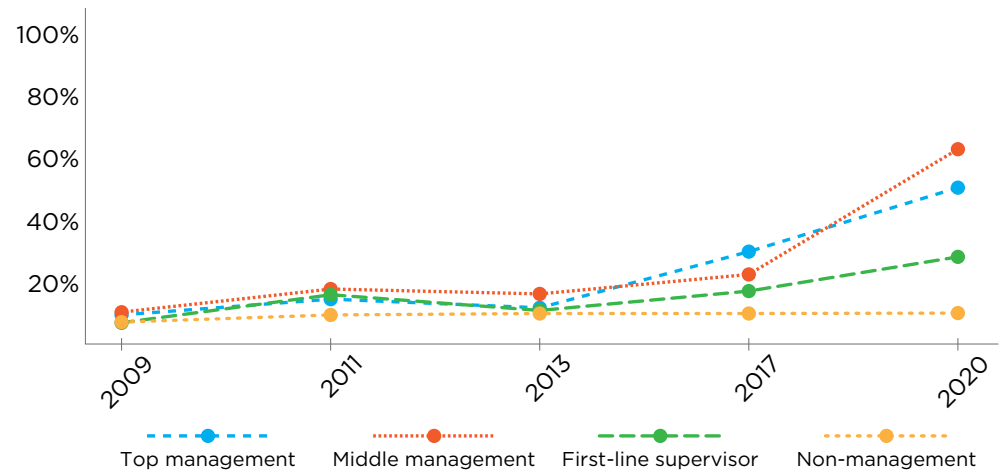
¹¹ Response options changed from "Yes" and "No" in 2017 to an agreement scale ("Strongly agree" to "Strongly disagree") in 2020. The percentage of employees who indicated "Strongly agree" or "Agree" in 2020 were combined and compared with the percentage of employees who indicated "Yes" in 2017.

Percentage of Employees Experiencing Pressure—U.S.



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Percentage of Employees Experiencing Pressure—Management Level—U.S.



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

affects ethics outcomes, including pressure to compromise standards.¹² When compared with 2017, top managers and middle managers in 2020 were more likely to say they experienced at least one organizational change, while first-line supervisors and non-managers were less likely to say that their organization had undergone at least one organizational change.

While not the only reason for the increase in pressure, top management and middle management’s awareness of and/or involvement in major organizational changes appears to be a key driver of the higher rates of pressure that occurred in 2020.

	AT LEAST ONE ORGANIZATIONAL CHANGE— MANAGEMENT LEVEL—U.S.		
	2017 At Least One Organizational Change	2020 At Least One Organizational Change	PERCENTAGE POINT CHANGE SINCE 2017
Top Management	53%	63%	+10
Middle Management	65%	71%	+6
First-line Supervisor	66%	53%	-13
Non-management	58%	40%	-18

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

¹² Pressure to Bend the Rules? - EthicsStat (ECI, 2019)



GLOBAL TRENDS

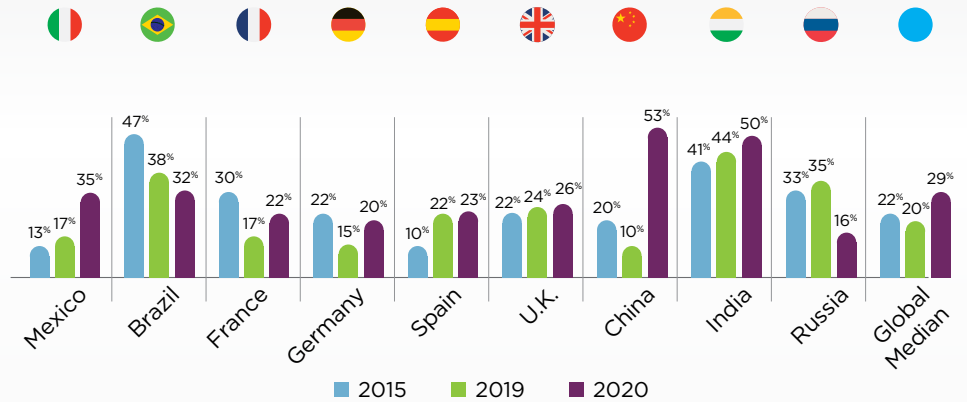
In 2020, the 10 country global median (29%) also showed higher levels of employees reporting pressure compared with 2015 (22%) and 2019 (20%). A country-by-country comparison revealed mixed results, with some countries experiencing higher levels of pressure than before (China, India, Mexico, Spain, United Kingdom and the United States) and others less pressure (Brazil and Russia). Employees from China experienced the highest pressure (53%), more than a fivefold increase from 2019 (10%).

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Employees in China are experiencing more than a fivefold increase in pressure.

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Percentage of Employees Experiencing Pressure



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Trend 3 Observed Misconduct—While Steady—Is Inching Upwards

The rate at which employees observe misconduct is a fundamental indicator of the strength of an organization’s ethics culture. Organizations with high rates of misconduct are likely to have ineffective E&C programs, a lack of accountability, and senior leaders that fail to communicate the importance of ethics in the workplace.



U.S. TRENDS

In 2020, 49% of U.S. employees reported observing misconduct (based on the Specific Observed Misconduct Index) that violated their organization’s ethics standards,¹³ an increase of two percentage points from 2017. The percentage of observed misconduct reached its peak at 54% in 2007 (prior to the Great Recession), and then trended downward until 2011 (45%). In 2013, it reached another peak of 51%. The 2020 finding reveals that misconduct has begun to increase again following a decline in 2017.

Types of Observed Misconduct

The most frequently observed types of misconduct rose between 2017 and 2020, presenting a not-so-rosy picture for select kinds of behavior, including management lying to employees (21% in 2017 vs. 25% in 2020),¹⁴ conflicts of interest (15% in 2017 vs. 23% in 2020), improper hiring practices (12% in 2017 vs. 22% in 2020), abusive behavior (21% in 2017 vs. 22% in 2020),¹⁵ and health violations (15% in 2017 vs. 22% in 2020).

These five most common types of misconduct largely fall under the category of fraud, waste and abuse. When taken together, nearly one-half (49%) of U.S. employees observed at least one incident of fraud, waste and/or abuse.

¹³ Specific misconduct roll-up – Respondents indicated they observed at least one of 16 specific types of misconduct also measured in 2000, 2003, 2005, 2007, 2009, 2011, 2013 and 2017.

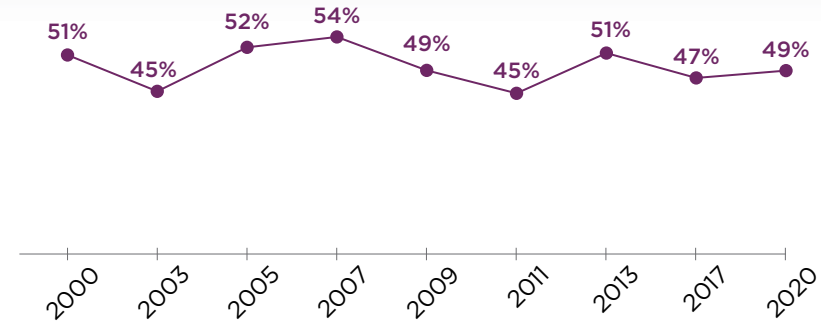
¹⁴ The wording of the item was slightly different on the 2017 and 2020 GBESs (“Lying to employees” and “Management lying to employees,” respectively).

¹⁵ The wording of the item was slightly different on the 2017 and 2020 GBESs (“Behavior that is abusive, intimidating, or creates a hostile work environment” and “Abusive, intimidating or hostile behavior,” respectively).

¹⁶ “Favoritism toward certain employees” was not asked in the 2017 GBES.

Percentage of Employees that Observed Misconduct

(Based on the Specific Observed Misconduct Index)



Note: Due to methodological differences among survey years, it is not possible to compare U.S. and global data related to observed misconduct.

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

	MOST COMMON TYPES OF OBSERVED MISCONDUCT—U.S.		
	2017	2020	PERCENTAGE POINT CHANGE SINCE 2017
Observed favoritism toward certain employees ¹⁶	--	35%	-
Observed management lying to employees	21%	25%	+4
Observed conflicts of interest	15%	23%	+8
Observed improper hiring practices	12%	22%	+10
Observed abusive behavior	21%	22%	+1
Observed health violations	15%	22%	+7

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Management Level and Observed Misconduct—U.S.

Historically, GBES surveys have revealed that non-management and first-line supervisor employees observe approximately the same or more misconduct than middle managers or top managers. In 2020, this relationship reversed; top managers and middle management observed more misconduct than first-line supervisors and non-managers.

What is driving this difference? Between 2017 and 2020, the rates at which non-management employees observed three of the four most common types of misconduct decreased. In contrast, top managers observed all of the most common types of misconduct at much higher rates in 2020. Most notably, over one-third (38%) of top-management employees observed conflicts of interest, while fewer than one in ten (9%) non-management employees observed the same.

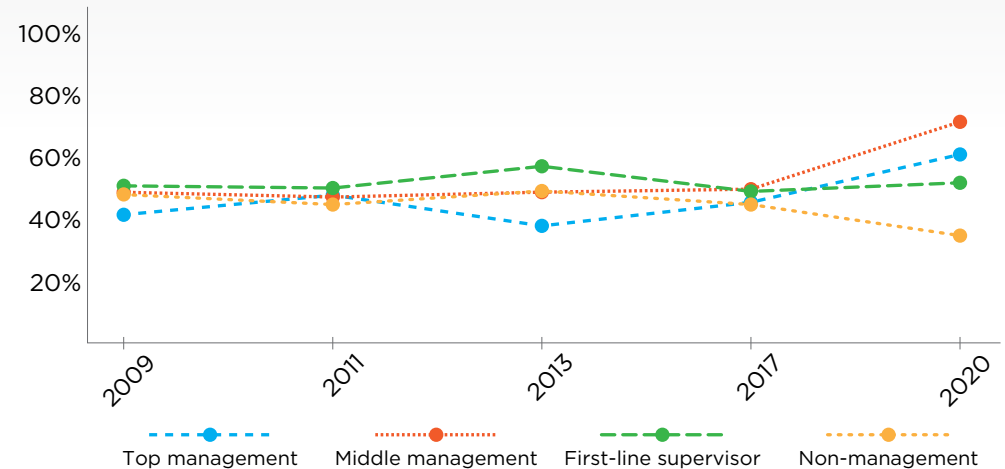
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Historically, GBES surveys have revealed that non-management and first-line supervisor employees observe approximately the same or more misconduct than middle managers or top managers.

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Percentage of Employees Observing Misconduct—Management Level—U.S.

(Based on the Specific Observed Misconduct Index)



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

OBSERVED MISCONDUCT: 2017 VS. 2020—MANAGEMENT LEVEL—U.S.

	2017 Top Management	2020 Top Management	PERCENTAGE POINT CHANGE SINCE 2017	2017 Non- management	2020 Non- management	PERCENTAGE POINT CHANGE SINCE 2017
Observed improper hiring practices	18%	32%	+14	10%	12%	+2
Observed abusive behavior	23%	32%	+9	20%	16%	-4
Observed conflicts of interest	22%	38%	+16	12%	9%	-3
Observed health violations	21%	34%	+13	13%	13%	0

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*



GLOBAL TRENDS

The 2020 global median (33%) for observed misconduct (based on the general misconduct question) is the same as in 2015, although there was a slight dip in 2019 (25%).

The country-by-country comparison shows that some countries had a decrease in misconduct while others remained about the same or increased slightly. Employees in China observed misconduct at the highest level in 2020 (46%), and comparatively higher than their rates in 2015 (34%) and 2019 (20%).

Overall, the most common types of misconduct were consistent across employees regardless of their location. In the United States, the most common type of misconduct was favoritism toward certain employees, and, the same was true for employees in other countries.



France, Germany, Spain and the United Kingdom tout low rates of observed misconduct in 2020. In China, a different trend emerged. Observed misconduct in China was higher in 2020 than in 2015 and 2019.

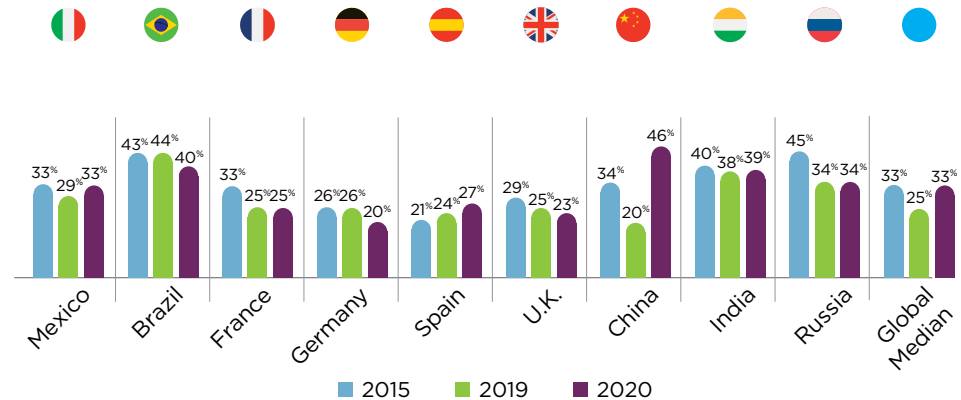


	SPECIFIC TYPES OF MISCONDUCT	
	2020 Global Median	2020 U.S.
Observed favoritism toward certain employees	35%	35%
Observed management lying to employees	26%	25%
Observed conflicts of interest	25%	23%
Observed improper hiring practices	27%	22%
Observed abusive behavior	25%	22%
Observed health violations	24%	22%

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Percentage of Employees Observing Misconduct—Global

(Based on the General Misconduct Question)



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Trend 4 More Employees Are Reporting Misconduct

The only way to improve an ethics culture is to understand the nature of misconduct within an organization. It is imperative that employees feel comfortable reporting misconduct because without said reports, it is impossible for organizations to develop effective E&C programs and to ensure that those who commit wrongdoing are held accountable.



U.S. TRENDS

Over the past 20 years, the reporting of misconduct has been steadily increasing. In 2020, 86% of U.S. employees said they reported “every” or “some of the behavior” they observed in general, an increase of 17 percentage points since 2017.¹⁷

While 86% reported at least one behavior that they “thought violated their organization’s workplace ethics standards,” the rates of reporting for the most common types of misconduct were much lower. In the United States, employees were most likely to report incidents of abusive behavior (60%), while they were least likely to report favoritism toward certain employees (e.g., friends, family, etc.) at the expense of others (40%).

Management Level and Reporting Observed Misconduct—U.S.

Overall, rates of reporting increased across all groups between 2017 and 2020. However, similar to previous survey years, non-management employees continued to report misconduct at lower rates when compared to all other groups.

One possible explanation is that top management, middle management and first-line supervisor employees are now much more likely to indicate that the E&C program in their organization is effective. In 2017, employee level was not strongly associated with program effectiveness. However,

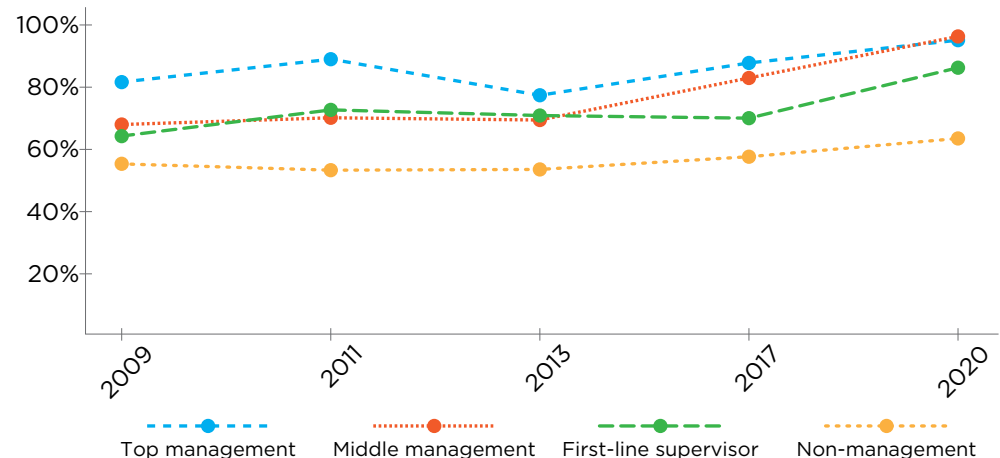
¹⁷ Response options changed from “Yes” and “No” in 2017 to “Yes, every behavior I observed,” “Yes, some of the behavior I observed” and “No, none of the behavior I observed” in 2020. The percentage of employees who indicated “Yes, every behavior I observed” or “Yes, some of the behaviors I observed” are compared with the percentage of employees who indicated “Yes” in 2017. This change may account for the difference in the percentage over time.

Percentage of Employees that Reported Observed Misconduct—U.S.



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Percentage of Employees Reporting Observed Misconduct—Management Level—U.S.



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

in 2020, all groups—except for non-management employees—were substantially more likely to indicate that there was an effective program in their organization.

In addition to the relatively low rates of program effectiveness, non-management employees continue to lack confidence in the reporting processes at their organizations. In 2020, 35% of non-management employees indicated that they did not report an incident of misconduct because they did not believe corrective action would be taken. In addition, 32% of non-management employees said that they did not trust that their report would be kept anonymous, with another 29% indicating the same about their report being kept confidential.

	PROGRAM EFFECTIVENESS: 2017 VS. 2020— MANAGEMENT LEVEL—U.S.		
	2017 E&C program is effective	2020 E&C program is effective	PERCENTAGE POINT CHANGE SINCE 2017
Top management	18%	55%	+37
Middle management	17%	68%	+51
First-line supervisor	15%	42%	+27
Non-management	16%	23%	+7

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*



GLOBAL TRENDS

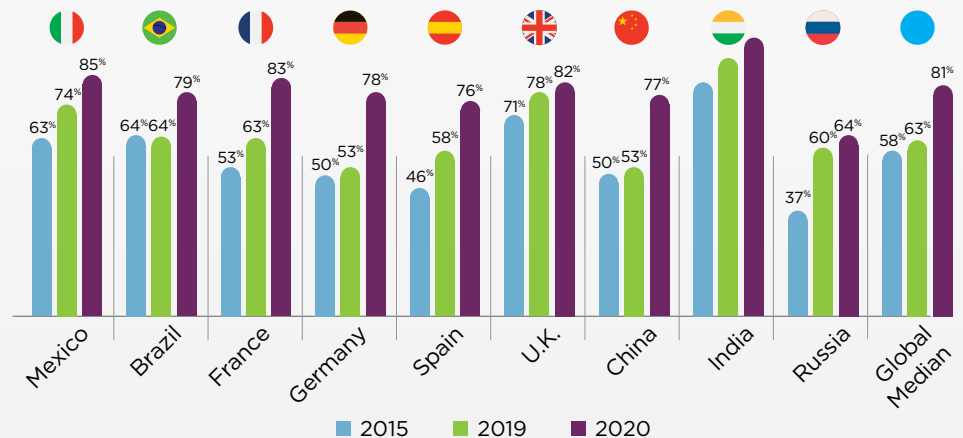
The global median for reporting misconduct was 81% in 2020, compared with 58% in 2015 and 63% in 2019. The reporting of misconduct across all countries was highest in 2020 and in most countries had been increasing since 2015. The reporting of misconduct was highest in India (97%), followed by the United States (86%), Mexico (85%), France (82%) and the United Kingdom (82%). Russia had the lowest level of reporting (64%).

PERCENTAGE OF EMPLOYEES REPORTING MOST COMMONLY OBSERVED MISCONDUCT

	2020 Global Median	2020 U.S.
Reported favoritism toward certain employees	38%	40%
Reported management lying to employees	43%	46%
Reported improper hiring practices	40%	52%
Reported abusive behavior	58%	60%
Reported conflicts of interest	44%	59%
Reported health violations	59%	59%

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Percentage of Employees that Reported Observed Misconduct—Global



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Trend 5 Retaliation Rates Have Skyrocketed

Retaliation against reporters is one of the most intractable issues that organizations must address. Retaliation can take many forms, and it is often difficult to isolate and prevent. However, it is imperative that organizations investigate retaliation and make it clear that there is no tolerance for it within their organization.



U.S. TRENDS

ECI has been tracking employee perceptions of retaliation due to the reporting of misconduct since 2007. Since that time, retaliation has been increasing, with a jump from 22% in 2013 to 44% in 2017. In 2020, the rate of retaliation¹⁸ against employees for reporting wrongdoing in the U.S. was 79% in 2020, an increase of 35 percentage points. If left unaddressed, high rates of retaliation can erode ethical culture and undermine efforts to encourage employees to speak up and raise concerns.

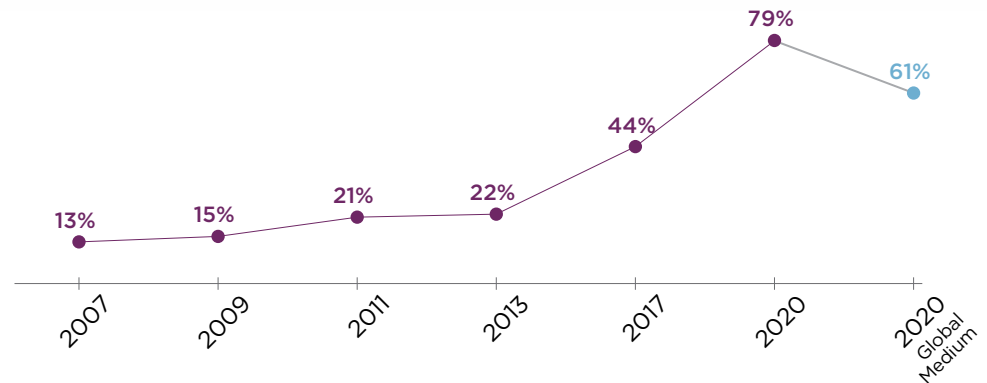
MANAGEMENT LEVEL AND RETALIATION—U.S.

Retaliation is at an all-time high across all management levels, with top managers and middle managers driving much of this increase in recent years. Between 2013 and 2020, rates of retaliation among top managers and middle managers increased by 62 and 67 percentage points respectively. In contrast, retaliation rates among non-management employees increased by 24 percentage points.

“
Instances of retaliation against employees
continue to increase in the U.S.
”

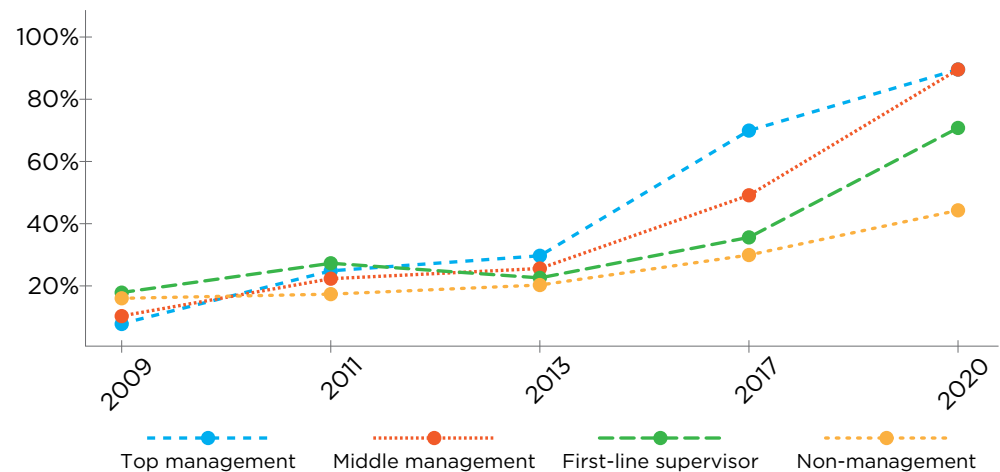
¹⁸ Response options changed from “Yes” and “No” in 2017 to “Yes, after every report,” “Yes, after some of the reports” and “No, I never experienced retaliation” in 2020. The percentage of employees who indicated one of the “Yes” responses in 2020 were combined and compared with the percentage of employees who indicated “Yes” in 2017.

Percentage of Employees Experiencing Retaliation After Reporting—U.S.



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Percentage of Employees Experiencing Retaliation After Reporting—Management Level—U.S.



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*



GLOBAL TRENDS

In 2020, the global median for retaliation was 61%, a large increase from 2015 (40%) and 2019 (33%). Employees from all countries examined reported higher rates of retaliation than before. The largest jumps in retaliation were observed in Brazil, China, France, Germany, Spain and the U.S., although employees from India report retaliation at the highest levels.

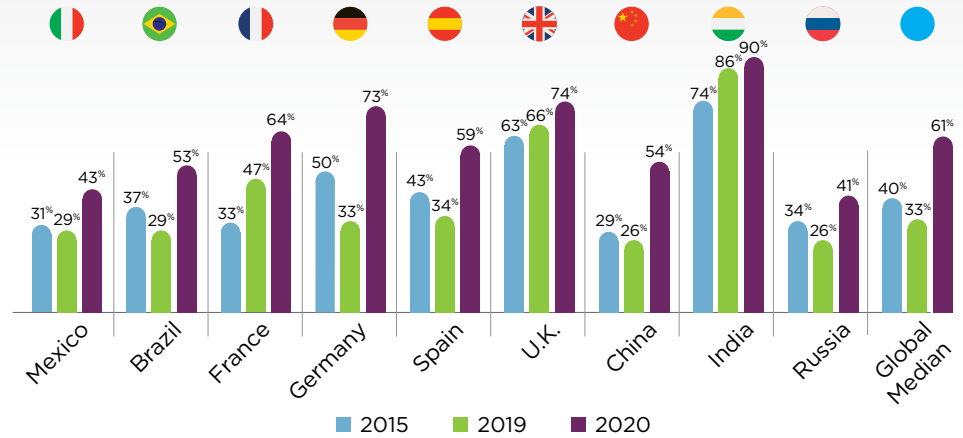


“

Retaliation for reporting was at critically high rates across all countries in 2020.

”

Percentage of Employees Experiencing Retaliation After Reporting—Global



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

	PERCENTAGE OF EMPLOYEES EXPERIENCING SPECIFIC TYPES OF RETALIATION	
	2020 Global Median	2020 U.S.
Other employees intentionally ignored me or began treating me differently	25%	24%
My supervisor intentionally ignored me or began treating me differently	22%	23%
I was verbally abused by my supervisor or someone else in management	18%	22%
My supervisor excluded me from decisions and/or work activity	16%	20%
I was given a poor performance review	21%	19%
A manager or managers other than my supervisor excluded me from decisions and/or work activity	16%	19%
Personal or work items were stolen from me	11%	19%
I was verbally abused by other employees	18%	19%
My property was damaged	12%	19%
I was given an unfavorable work assignment(s)	23%	19%

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Special Section: COVID-19 and the Impact on Employees—Global

Since the start of 2020, the COVID-19 pandemic has led to extraordinary challenges in workplaces across the globe. A new reality exists with fundamental shifts that necessitated a multitude of organizational changes and adaptations at lightning speed. The uncertainty and stress that employees are experiencing amid health and safety concerns have undoubtedly led to changes in how employees experience and interact within the workplace.

To understand the impact of COVID-19, employees were asked a series of questions that measured their stress and pressure since the pandemic began. Global median data (comprised of all 10 countries) are discussed in this section. By-country data will be released in subsequent reports.

COVID-19 and Pressure

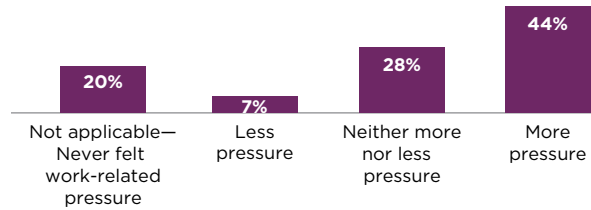
Over two-fifths of employees (44%) indicated that they were experiencing more work-related pressure compared with before the COVID-19 pandemic began.

Employees were also asked how much pressure they have experienced in the past month due to various work-related factors. The top three sources of pressure included pressure to meet performance goals (49%), to always be available (49%) and to show contribution(s)/value (46%).

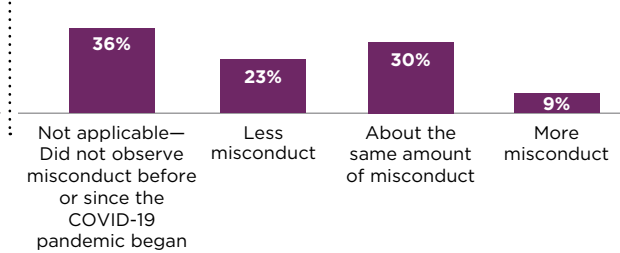
COVID-19 and Misconduct

To assess whether the circumstances of the pandemic were influencing observations of misconduct, the GBES asked employees if there had been changes in this area since the pandemic began. Slightly less than one-third (30%) indicated they had observed about the same amount of misconduct before and after the beginning of the COVID-19 pandemic. In contrast, 9% of respondents indicated they had observed more misconduct since the COVID-19 pandemic began, and 23% indicated they had observed less misconduct.

Changes in Work-related Pressure Since the COVID-19 Pandemic Began



Changes in Observed Misconduct Since the COVID-19 Pandemic Began



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

TOP SOURCES OF PRESSURE AMID COVID-19 PANDEMIC	
IN THE PAST MONTH, HOW MUCH PRESSURE DID YOU FEEL...	"SOME" OR "A GREAT DEAL"
To meet performance goals	49%
To always be available	49%
To show your contribution(s)/value	46%
Related to your job security	42%
To minimize costs and/or generate more revenue	42%
To satisfy expectations of people who support or invest in your organization	39%
To save the jobs of others in your organization	38%
To be in a work environment in which you are in the same physical work space as colleagues, customers, clients, etc.	36%
To work more hours	35%

Note: Sources of pressure are listed in descending order based on the percentage of respondents who indicated they experienced "Some" or "A great deal" of pressure.

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Organizational Changes During the COVID-19 Pandemic and Impact on Ethics Outcomes

The 2020 GBES data were collected while many organizations were undergoing significant change. The GBES typically asks about organizational changes such as mergers, acquisitions and changes in top management, among others. GBES data has shown that organizational changes typically have an adverse effect on ethics outcomes.¹⁹ This was even truer in 2020, and it appears that the pandemic, and the changes organizations were forced to make in response, had a substantial impact on organizations that reported having at least one organizational change.

Ethics culture strength appears to be less impacted in workplaces in which employees reported no organizational changes compared with one or more organizational changes, presumably because the effects of organizational change may take a longer time to influence culture. However, in both the U.S. and global data, pressure, observed misconduct, reporting and retaliation all increased. Particularly noteworthy are the jumps in pressure and observed misconduct.

COVID-19 Changes

In addition to traditional organizational changes such as mergers and acquisitions, 37% of employees globally said that their organizations implemented new policies in reaction to the COVID-19 pandemic. In many cases, these new policies were related to working remotely. Nearly 57% of U.S. employees surveyed indicated they started working remotely at least some of the time since the beginning of the pandemic and therefore, their interactions with colleagues and others were drastically different; the global median was the same (57%). Employees have also been deleteriously impacted in terms of their employment status. More than one-half of U.S. and global employees' employment statuses were impacted due to the pandemic. Of those in the U.S., 54% experienced a reduction in hours. Of those globally, 52% experienced a reduction in hours.

¹⁹ The Impact of Organizational Change on Misconduct Rates - EthicsStat (ECI, 2019).

IMPACT OF ORGANIZATIONAL CHANGE ETHICS OUTCOMES—U.S.					
	STRONG ETHICAL CULTURE	PRESSURE	OBSERVED MISCONDUCT (Based on Specific Observed Misconduct Index)	REPORTING	RETALIATION
At least one organizational change	22%	43%	64%	89%	86%
No organizational changes	21%	17%	34%	78%	54%

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

IMPACT OF ORGANIZATIONAL CHANGE ETHICS OUTCOMES—GLOBAL					
	STRONG ETHICAL CULTURE	PRESSURE	OBSERVED MISCONDUCT (Based on General Misconduct Question)	REPORTING	RETALIATION
At least one organizational change	17%	36%	43%	84%	66%
No organizational changes	14%	17%	17%	69%	49%

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

“Organizational changes adversely affect ethics outcomes. In 2020, this was particularly pronounced with pressure, misconduct and retaliation all sharply increasing in organizations with at least one change compared with no changes.”

What May Be Coming Ahead: Recessionary Tactics and Impact on Culture Strength—U.S.

We may expect to see over time as the pandemic continues to impact organizations in the long term are certain “recessionary tactics”—hiring freezes and production slowdowns—may have an impact on workplace ethics. Looking at historical NBES U.S. data may be useful to understand what may be coming (see footnotes on page 5 for more details about the NBES and GBES distinction). When we look further back to the 2007-2009 recession and compare it with a more “normal” period in 2011, we again see that organizations are more likely to alter their operating practices during stressful economic and social times.

In 2009, organizations implemented “recessionary tactics” to a greater degree than they did in 2011. Compared with 2011, more employees were working in organizations that had undertaken a tactic against the recession, such as hiring freezes or production slowdowns.²⁰

It is important to understand that as the pandemic’s sustained impact continues, there may be longer-term consequences on ethics cultures. In 2009 and 2011, culture strength dropped by half, demonstrating that “recessionary tactics” such hiring freezes and production slowdowns were extremely detrimental to strong ethics cultures.

The data suggest that organizations move cautiously forward if implementing organizational changes at this time or in the upcoming months. If the economy worsens and organizations react by implementing recessionary tactics, it is strongly advised that they take precautionary action to limit increases in pressure, misconduct and retaliation, and support behaviors that epitomize a strong ethics culture.

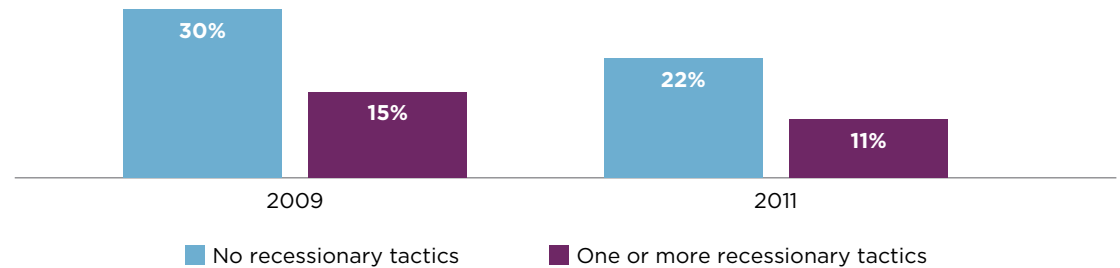
²⁰ For additional information about recessionary tactics, see: Ethics Resource Center (2009). NBES 2009 National Business Ethics Survey: Ethics in the Recession. ERC: Arlington, VA., and ERC (2011). National Business Ethics Survey: Workplace Ethics in Transition. ERC: Arlington, VA.]

²¹ All data shown are based on U.S. data.

	RECESSIONARY TACTICS—U.S. ²¹		
	2009 (Recession Period)	2011 (Normal Period)	PERCENTAGE POINT CHANGE
Undertook at least one recessionary tactic	78%	60%	-18
Hiring freeze	52%	34%	-18
Production slowdown	36%	30%	-6

Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Percentage of Employees Experiencing Strong Ethical Cultures—U.S.



Source: *The State of Ethics & Compliance in the Workplace: A Look at Global Trends (ECI, 2021)*

Conclusions

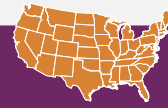
The findings discussed in this report illustrate that employee conduct around the world has been drastically impacted against the backdrop of the COVID-19 pandemic. After more than a

quarter of a century studying employee perspectives of ethics in the workplace, ECI research has illustrated that organizations that take steps to improve and strengthen their workplace cultures create a context in which employee misconduct declines. Yet, in light of the worsening of three key indicators in 2020 (pressure, observed misconduct and retaliation) and the status quo of organizational culture strength since 2017, trouble may be ahead.

Furthermore, a significant percentage of employees are not working in organizations with effective E&C programs. Without an effective E&C program, senior leaders and organizations as a whole will find it very difficult, if not impossible, to improve their workplace cultures.

These four areas will be critical to abate as organizations struggle with the impact of COVID-19 on workplaces and the economy. Rates of misconduct have increased slightly while pressure has skyrocketed. In addition, if retaliation for reporting stays high, it may be a matter of time before reporting levels decrease as well. Reinforcing and protecting employees who report misconduct through anti-retaliation programs and monitoring is paramount.

Lastly, the data also show that there is a clear association between management level and each of the key areas discussed in this report. Overall, higher management levels are associated with increased rates of pressure, observed misconduct and retaliation. Conversely, top managers are more likely to work in strong ethical cultures and to report the misconduct they report.



The Ethics Progress Report—U.S.

STRENGTHS

- A strong workplace culture is a crucial strategy for mitigating wrongdoing, and U.S. organizations are currently experiencing one of the highest culture strength levels in 20 years (topped only by 2009). Among all employees, top managers continue to be most likely to work in strong ethical cultures.
- Continuing a positive trend that began in 2013, reporting of suspected wrongdoing is now at a historic high. Compared with non-managers, top managers and middle managers are much more likely to report misconduct they observe.

OPPORTUNITIES

- Following a decrease in 2017, the rate of observed misconduct is increasing again. Continuing a worrying trend that began in 2013, top managers and middle managers are much more likely to observe misconduct than non-managers. This finding is mirrored by an increase in pressure to compromise standards that is largely driven by higher rates of pressure among top managers and middle managers.
- In addition to higher rates of misconduct and pressure to compromise standards, retaliation rates are at historic highs. A vast majority of top managers and managers who report saying they have experienced retaliation for reporting. While highest among top managers and managers, non-management employees were experiencing very high rates of retaliation as well. Lastly, only slightly over half (55%) of top managers are working in organizations with effective E&C programs, while fewer than one in four (23%) of non-management employees expressed the same.



The Ethics Progress Report—Global

STRENGTHS

- Mirroring the U.S. finding, employees around the world are reporting misconduct at historic highs. Since ECI began collecting global data in 2015, the global median for rates of reporting has increased by 23 percentage points.

OPPORTUNITIES

- The global data shows that fewer than one in seven employees are working in strong ethical cultures. Furthermore, the rate of observed misconduct is increasing again following a decrease in 2019. Lastly, the global median for pressure to compromise standards and the rate of retaliation are both at their highest levels ever.



The workplace is a pressure cooker right now for employees in the U.S. and around the world. While employees seem to be withstanding the pressure and reporting more than ever before, the situation is tenuous with increasing rates of misconduct and very high rates of retaliation.

There may be a breaking point.



Recommendations

The strength of an organization's culture is pertinent in mitigating wrongdoing. This includes holding employees accountable for misconduct, taking the time for management to share information on what is going on in the organization, ensuring employees trust that leadership will keep their promises and commitments, and making sure that all employees set a good example of ethical workplace behavior.

The strength of the E&C program is extremely important in decreasing the likelihood of misconduct in an organization. Below are tools offered by ECI to develop a strong E&C program that tempers wrongdoing.

For Business Leaders in Organizations with No or a Limited E&C Program:

The time is now to make E&C a priority. The following first steps will make a difference for businesses regardless of size and industry.

- Implement an E&C program using a standard such as ECI's resources for an HQP (see below), the U.S. Department of Justice's Guidance of Effective E&C Programs and ISO standards. These resources provide guidance on essential steps to establishing a robust ethical culture.
- Develop or revisit your organization's core values and ensure that they are woven into your E&C activities and/or program. Define the standards and behaviors that should guide employees' actions. Regularly promote values and expectations about employee behaviors in organizational communication.
- Set performance goals for senior leaders and managers to visibly support the organization's values and reinforce the importance of speaking up and listening.

ECI offers a free "tool kit" at www.ethics.org to help you begin to formalize your E&C program.

For Business Leaders in Organizations with an E&C Program in Place:

Do not take your established efforts for granted. When organizations undergo transition or circumstances around the organization changes, culture may erode, leading to a rise in misconduct and retaliation for reporting of misconduct.

E&C programs are often slow to adjust to new realities.

- Regularly ask your employees about the pressure they feel and reinforce to them that performance without integrity is unacceptable.
- Raise the bar for your E&C program. Truly successful programs integrate E&C across all aspects of the business. Evaluate the effectiveness and quality of your E&C program relative to the HQP standard and industry peers.
- Reinforce the importance of culture among managers. Assess your culture and provide additional support to your business areas where employees perceive it to be weak.

ECI Resources

Details regarding ECI's High-Quality Program (HQP) principles, the HQP Measurement Framework and our blue-ribbon panel report, *Principles & Practices of High-Quality Ethics & Compliance Programs*, are available to the public at www.ethics.org/HQP.

These resources help ethics and compliance professionals identify strengths and weaknesses in their E&C programs and track program improvement over time. Over 100 leading practices categorized into 27 supporting objectives are grouped into principles that drive a high-quality E&C program.

- 1. Strategy:** E&C is central to business strategy.
- 2. Risk Management:** E&C risks are identified, owned, managed and mitigated.
- 3. Culture:** Leaders at all levels across the organization build and sustain a culture of integrity.
- 4. Speaking Up:** The organization encourages, protects and values the reporting of concerns and suspected wrongdoing.
- 5. Accountability:** The organization takes action and holds itself accountable when wrongdoing occurs.

Visit www.ethics.org/HQP to learn more.

Methodology

Since 1994, ECI has conducted a longitudinal, cross-sectional study of workplace conduct from the employee's perspective. Survey participants are asked to provide insight into the strength of the ethics culture in their workplace, the instances of misconduct they have observed, and what—if any—efforts are underway in their organizations to promote integrity. The data from the Global Business Ethics Survey® provide the international benchmark on the state of E&C in business. Historically, ECI reported findings from the research under two titles: The National Business Ethics Survey® (NBES®), which provided measures of U.S. workplaces; and the Global Business Ethics Survey® (GBES®), which expanded the dataset to include input from employees around the world. In 2017, ECI updated both the U.S. and global studies and combined the research under the GBES name.

The 2020 GBES data collection took place between August and September 2020. Employees in 10 countries were included in the data collection. The 2020 GBES collected data from 14,000 employees.

Participants in the 2020 GBES were 18 years of age or older, currently employed at least 20 hours per week for a single employer and working for a company that employs at least two people.

COUNTRY	EMPLOYEE SAMPLE SIZE
Brazil	1,000
China	1,000
France	1,000
Germany	1,000
India	1,000
Mexico	1,000
Russia	1,000
Spain	1,000
United Kingdom	1,000
United States	5,000*

*Note: In order to compare to historical data, all U.S. data presented in this report is based on responses from employees working at for-profit organizations. The total sample size of the for-profit U.S. data is 3,320.

ECI established survey questions and sampling methodology; Ipsos America, Inc. managed data collection.

Data collection mode and weighting: Over the years, the data collection method has been modified as various third-party vendors have been secured by ECI to collect the data.

In 2009, information about education was not available; therefore, GBES data were only weighted by age and gender. From 2000 to 2017, data were weighted by age, gender and education. In 2020, data were weighted by age, gender, race/ethnicity and geographical region. In 2011, data were collected by telephone and online, and data were weighted to equalize the proportion of telephone respondents to online respondents. In 2013, ECI collected responses from both telephone and online respondents. Starting in 2017, ECI exclusively collected responses via an online survey utilizing vendors with online panels.

Respondent Demographics

Global demographics include 14,000 employees from the 10 countries surveyed in the 2020 GBES data collection. U.S. demographics include 3,320 employees surveyed in the U.S who worked at for-profit organizations.

ORGANIZATION SIZE	GLOBAL DEMOGRAPHICS	U.S. DEMOGRAPHICS
2 to 5	5%	5%
6 to under 20	9%	9%
20 to under 50	8%	7%
50 to under 100	9%	8%
100 to under 250	10%	9%
250 to under 500	10%	9%
500 to under 1,000	14%	15%
1,000 to under 2,500	9%	8%
2,500 to under 5,000	7%	7%
5,000 to under 10,000	7%	6%
10,000 to under 20,000	3%	4%
20,000 to under 50,000	3%	4%
50,000 to under 90,000	2%	3%
90,000 or more	5%	8%

Methodology

Respondent Demographics Continued

JOB POSITION	GLOBAL DEMOGRAPHICS	U.S. DEMOGRAPHICS
Top management (e.g., CEO/president, C-suite)	13%	12%
Middle management (e.g., director, persons managing multiple reports)	23%	24%
First-line direct supervisor with direct reports	28%	20%
Individual contributor/Not a member of management	37%	44%

INDUSTRY	GLOBAL DEMOGRAPHICS	U.S. DEMOGRAPHICS
Technology	15%	20%
Education	9%	5%
Manufacturing	8%	8%
Retail trade	7%	9%
Government	6%	<1%
Construction	6%	5%
Medical	6%	8%
Finance and banking	6%	6%
Professional, scientific and technical services	4%	5%
Transportation and warehousing, waste management	3%	3%
Other services: personal services, repairs, civic/professional/social/religious/etc. organizations	3%	3%

INDUSTRY	GLOBAL DEMOGRAPHICS	U.S. DEMOGRAPHICS
Accommodation and food services	2%	2%
Automotive	2%	2%
Insurance	2%	3%
Arts, entertainment and recreation	2%	2%
Wholesaling	2%	1%
Real estate (commercial and/or residential), rentals and leasing	1%	2%
Nonprofit (other type not listed)	1%	<1%
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