



DATA SNAPSHOT

# The Global State of EX Management Programs, 2021

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## EXECUTIVE SUMMARY

This research is based on a global study of 870 HR leaders from organizations that have at least 1,000 employees and are headquartered in Australia, Canada, France, Germany, Japan, Singapore, the United Kingdom, or the United States (see methodology at end of report). The survey covered a variety of employee experience (EX) management topics. Highlights include:

- + **EX management is critical.** Thirty-nine percent of HR leaders described EX as a 'critical' area of focus, while 46% have both 'significant' and 'centralized' EX efforts.
- + **Executive support for EX varies.** There is a 28 percentage-point gap between the top and bottom-performing countries when it comes to both senior leaders' support for EX and how highly they prioritize acting on employee feedback.
- + **Overall, France reports the highest EX capabilities.** France reported the highest ratings for EX technology and culture, while Canada reported the highest for skills and competencies.
- + **Australian and French use insights to make ongoing improvements.** Australian and French HR leaders reported make ongoing improvements to operational processes based on employee experience insights at the highest rates.
- + **'Technology limitations' and 'internal conflict' are the top obstacles to EX success.** More than a third of respondents cited 'Technology limitations' and 'internal conflict' as significant obstacles to their EX management efforts.

## FIGURES IN THE REPORT

1. Organizational Focus on Employee Experience
2. Description of EX Efforts
3. Executive Prioritization of EX
4. EX Management Capabilities Self-Evaluation
5. EX Management Technology Self-Evaluation
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12. Top EX Management Obstacles by Country

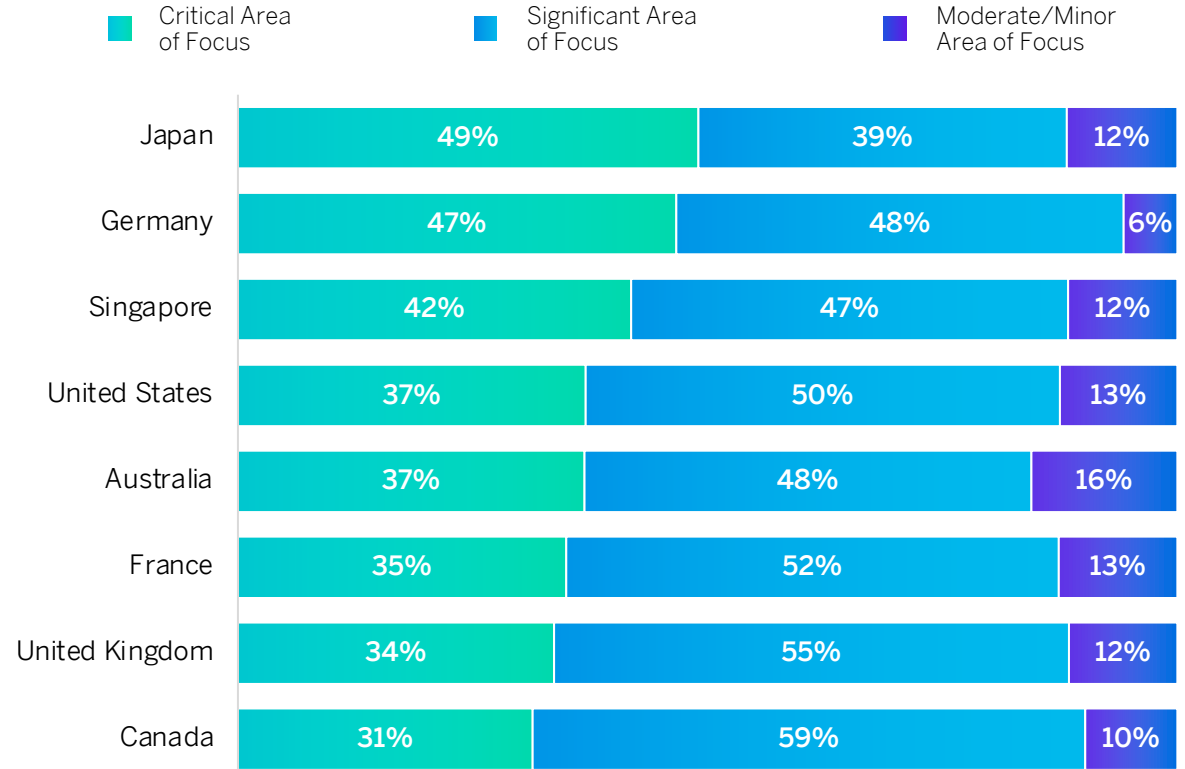
*Methodology*

# Organizational Focus on Employee Experience

## KEY TAKEAWAYS

- + On average, 39% of respondents reported that improving EX was a 'critical' area of focus for their organization.
- + Japanese respondents were most likely to report EX improvement as a 'critical' area of focus, while German respondents were most likely to report EX improvement as either 'critical' or 'significant.'
- + Although Canadian respondents were least likely to say that EX improvement is 'critical' to their organization, they are most likely to designate it as a 'significant' area of focus.

## What level of focus does your organization place on improving its employee experience?



## ABOUT

This chart shows the extent to which respondents from each surveyed country believe their organization is focused on improving its employee experience.

# Description of EX Efforts

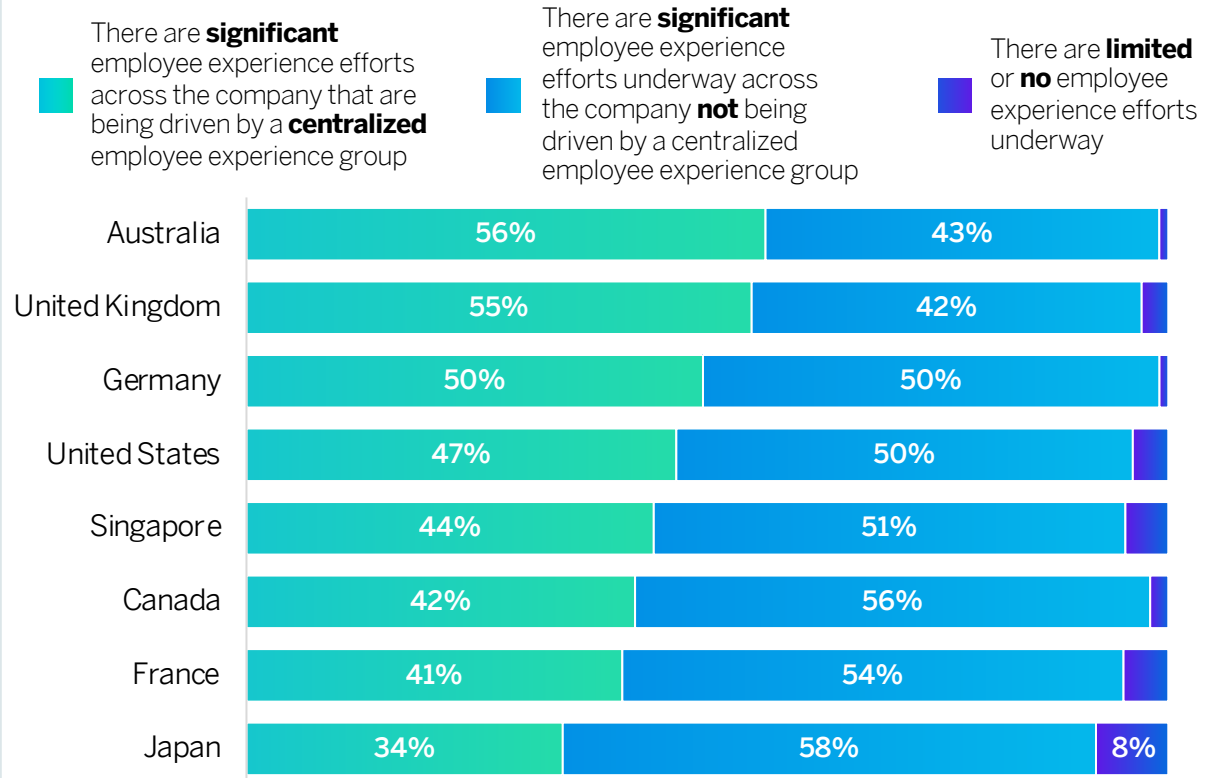
## KEY TAKEAWAYS

- + On average, 46% of respondents reported that EX efforts at their organizations are both 'significant' and 'centralized.'
- + Australian respondents were most likely to describe their EX efforts as both 'significant' and 'centralized' (56%), followed very closely by 55% of participants from the UK.
- + Japanese respondents were most likely to say that while they have significant EX efforts underway, they are not driven by a centralized EX group (58%).

## ABOUT

This chart shows how the sophistication of employee experience management efforts differs across the surveyed countries.

### Which of the following best describes the employee experience efforts within your company?



# Executive Prioritization of EX

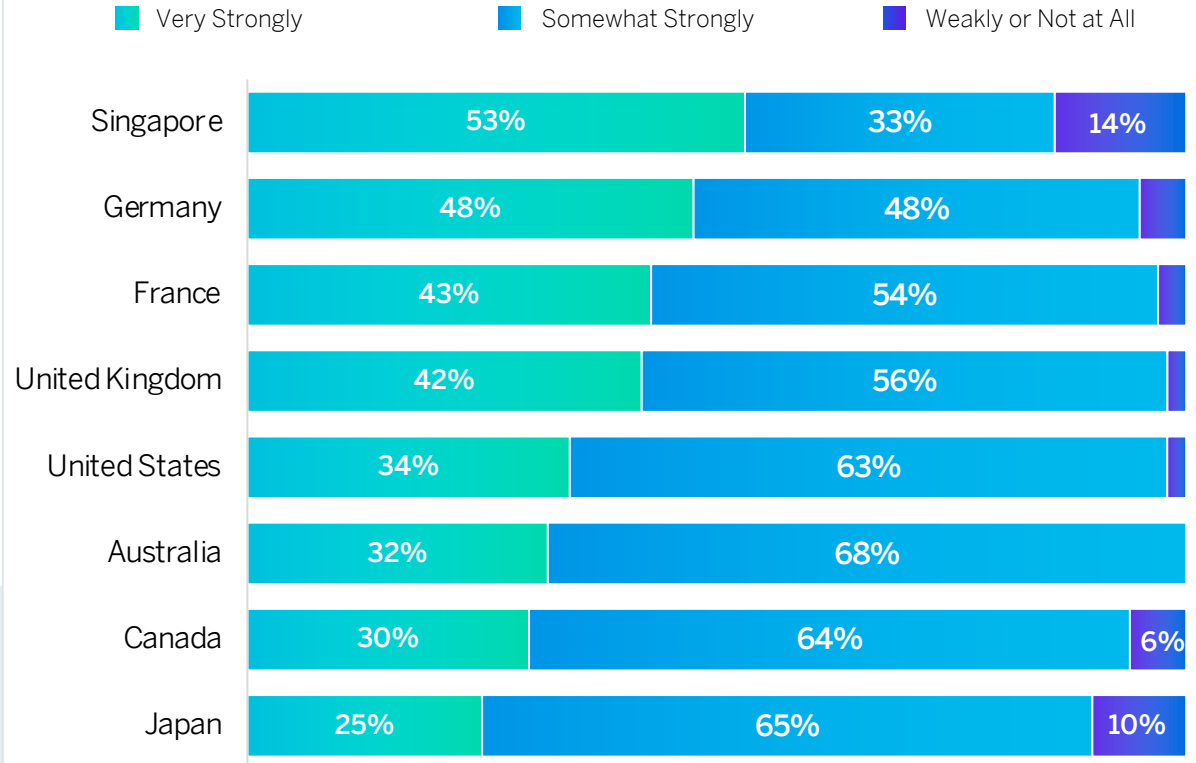
## KEY TAKEAWAYS

- + On average, 39% of respondents reported that their senior leader is a very strong champion of their EX efforts.
- + Singaporean participants feel the highest levels of 'very strong' support for their EX efforts from their CEOs, while Japanese respondents reported the lowest levels.
- + Every Australian respondent said they either have 'very' or 'somewhat' strong support from senior leaders for their EX efforts.

## ABOUT

This chart shows the degree to which respondents from each of the surveyed countries feel that their organization's senior leader acts as an active champion for employee experience.

### To what degree does your CEO (or the leader in charge of your organization) act as an active champion for employee experience?



# EX Management Capabilities Self-Evaluation

## KEY TAKEAWAYS

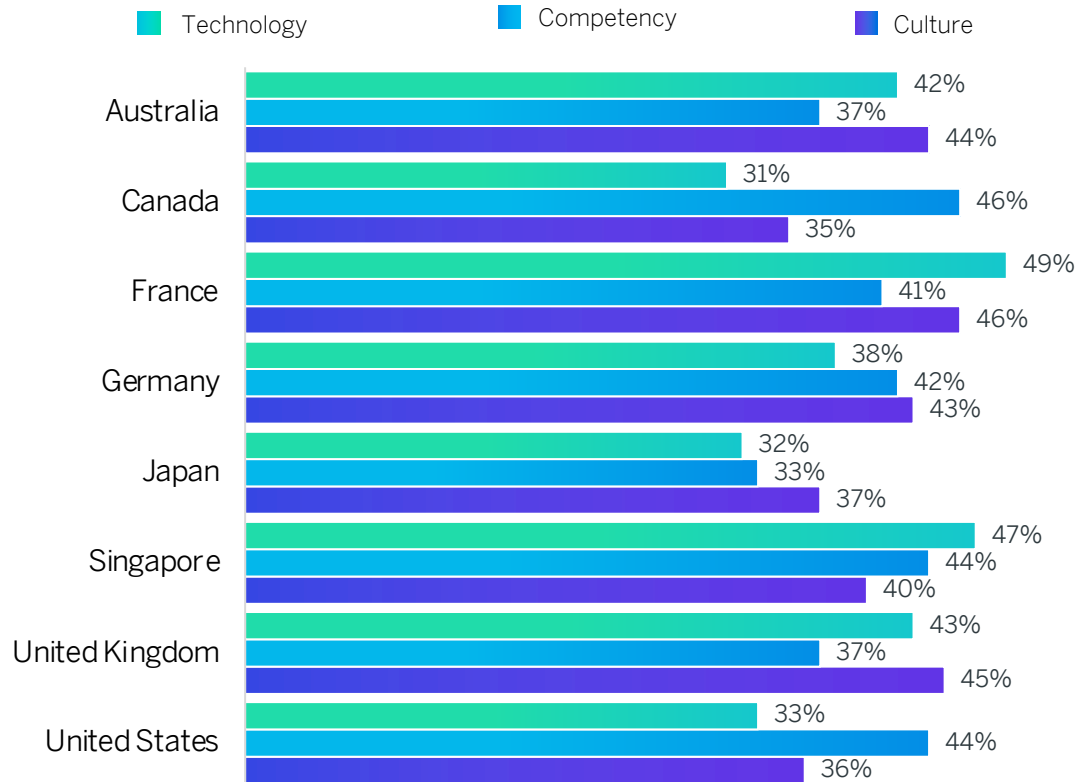
- + French respondents were most likely to describe both their Technology and Culture as “very strong,” with 49% and 46% respectively.
- + Respondents from Canada were most likely to say they have a “very strong” culture with 46%, closely followed by the U.S. and Singapore with 44% each.
- + Japanese respondents reported the lowest percentage of ‘very strong’ EX Management capabilities for each of the three areas.

## ABOUT

This chart shows the percentage of respondents from each of the surveyed countries who said their organization’s employee management capabilities were “very strong” when it comes to technology, competency, and culture.

## How would you rate your organization’s employee experience management...?

(Respondents answering “Very Strong”)



# EX Management Technology Self-Evaluation

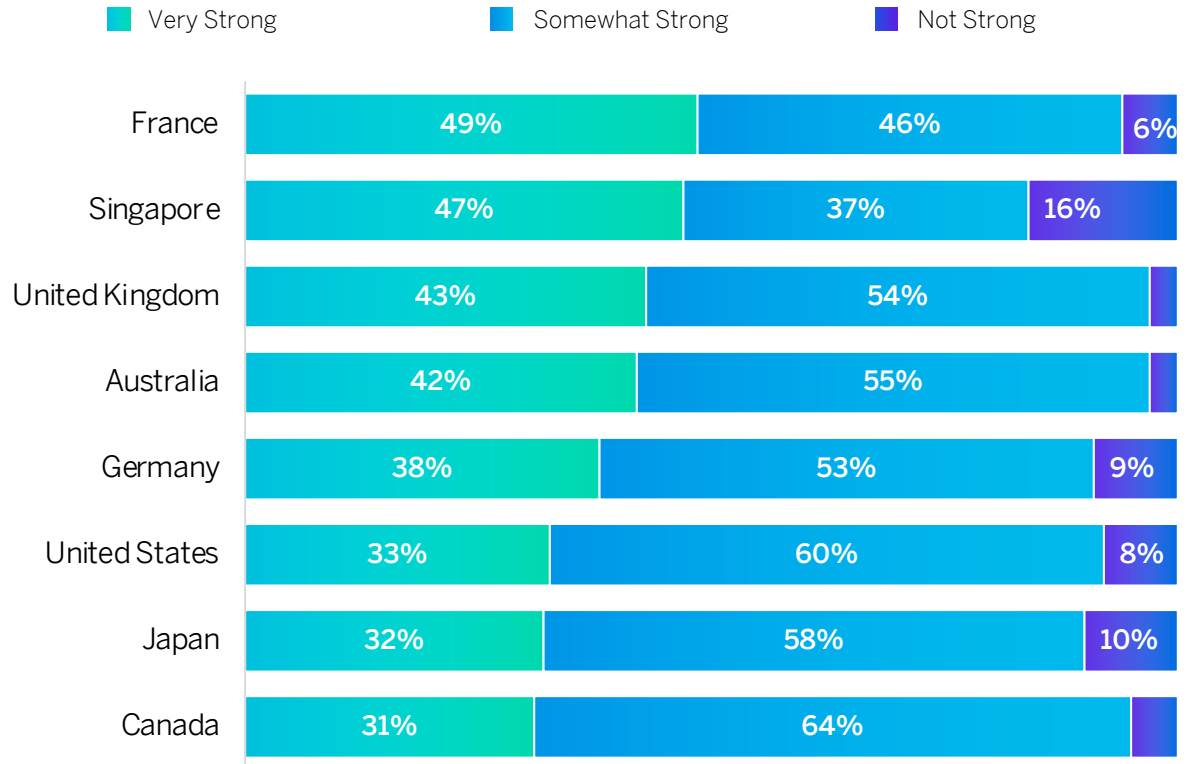
## KEY TAKEAWAYS

- + On average, 39% of participants reported that the technology their organization uses to scale their EX Management efforts is 'very strong.'
- + French respondents reported the highest percentage of 'very strong' EX Management technology capabilities.
- + Although Canadian participants reported the lowest percentage of 'very strong' technology capabilities for EX Management, they also reported the highest amount of 'somewhat strong' capabilities.

## ABOUT

This chart shows how respondents from each surveyed country rate the technology their organization uses to scale employee experience management across their organization.

### How would you rate the technology your organization uses to scale employee experience management across your organization?

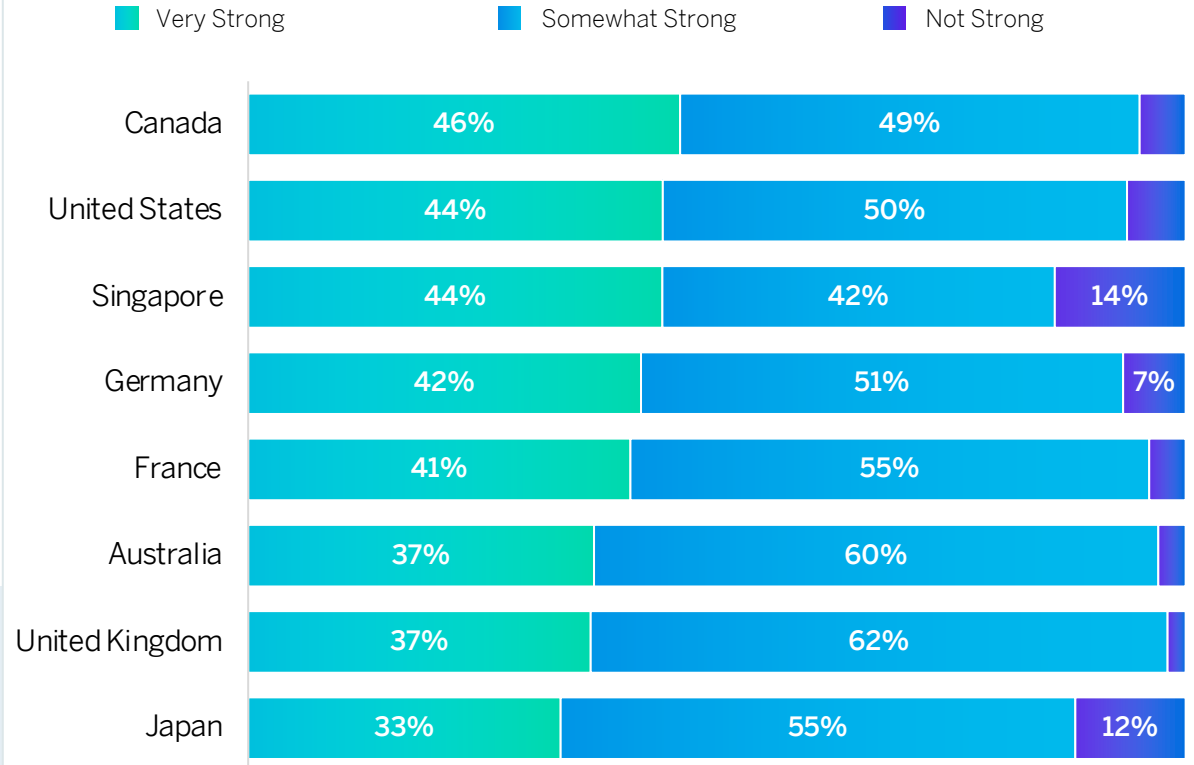


# EX Management Competencies Self-Evaluation

## KEY TAKEAWAYS

- + On average, 40% of HR leaders would describe their EX management skills and competencies as 'very strong.'
- + Canadian respondents reported the highest percentage of 'very strong' EX Management skills and competencies, and Japanese participants reported the lowest.
- + HR leaders from the UK were most likely to describe their EX Management skills and capabilities as either 'very strong' or 'somewhat strong.'

## How would you rate your organization's employee experience management skills and competencies?



## ABOUT

This chart shows how respondents from each surveyed country rate their organization's employee experience management skills and competencies.



# EX Management Culture Self-Evaluation

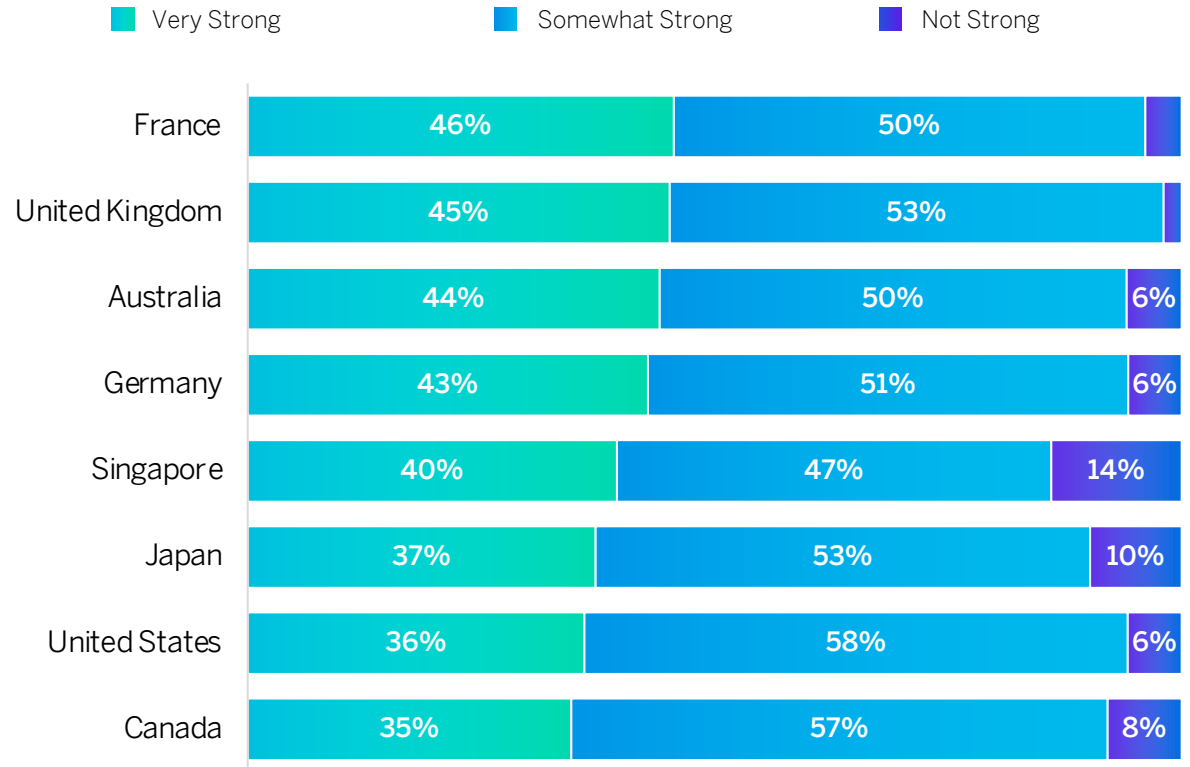
## KEY TAKEAWAYS

- + On average, 41% of participants said that they have a 'very strong' organizational culture that enables good EX Management practices to flourish.
- + HR leaders from France reported the highest percentage of 'very strong' EX Management culture capabilities, while HR leaders from Canada reported the lowest.
- + Respondents from Singapore were most likely to describe their organizational culture's ability to enable good EX management practices as "weak."

## ABOUT

This chart shows how respondents from each surveyed country rate their organizational culture's ability to enable good employee experience management practices to flourish across their organization.

## How would you rate your organizational culture at enabling good employee experience management practices to flourish across your organization?



# Frequency of Employee Engagement Measurement

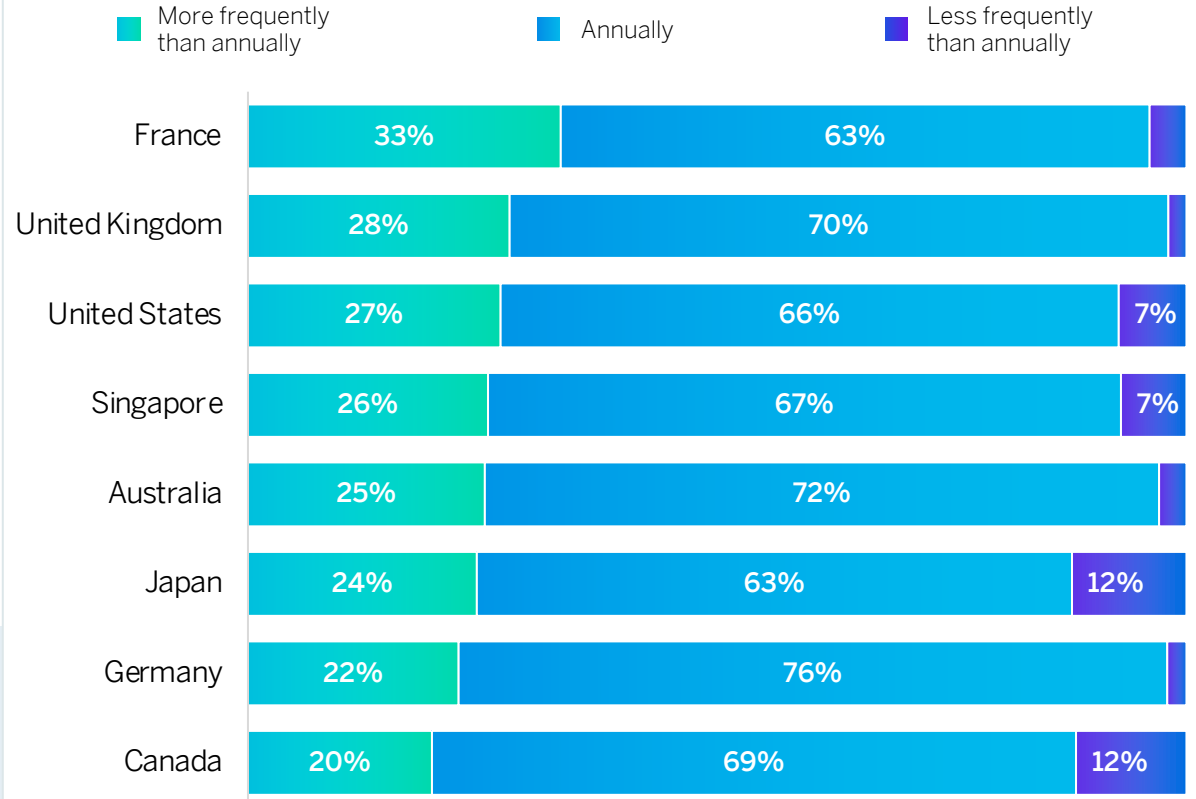
## KEY TAKEAWAYS

- + On average, only 26% of participants indicated that their company measures employee engagement more often than annually.
- + Thirty-three percent of HR leaders from the UK reported that their company measures employee engagement more often than annually, the most of any country. Only 20% of Canadian HR leaders report the same.
- + Of all the countries, respondents from the UK respondents were most likely to say that their company measures employee engagement annually.

## ABOUT

This chart shows how frequently organizations from each surveyed country measure the engagement levels of their employees.

## How often does your company measure employee engagement?

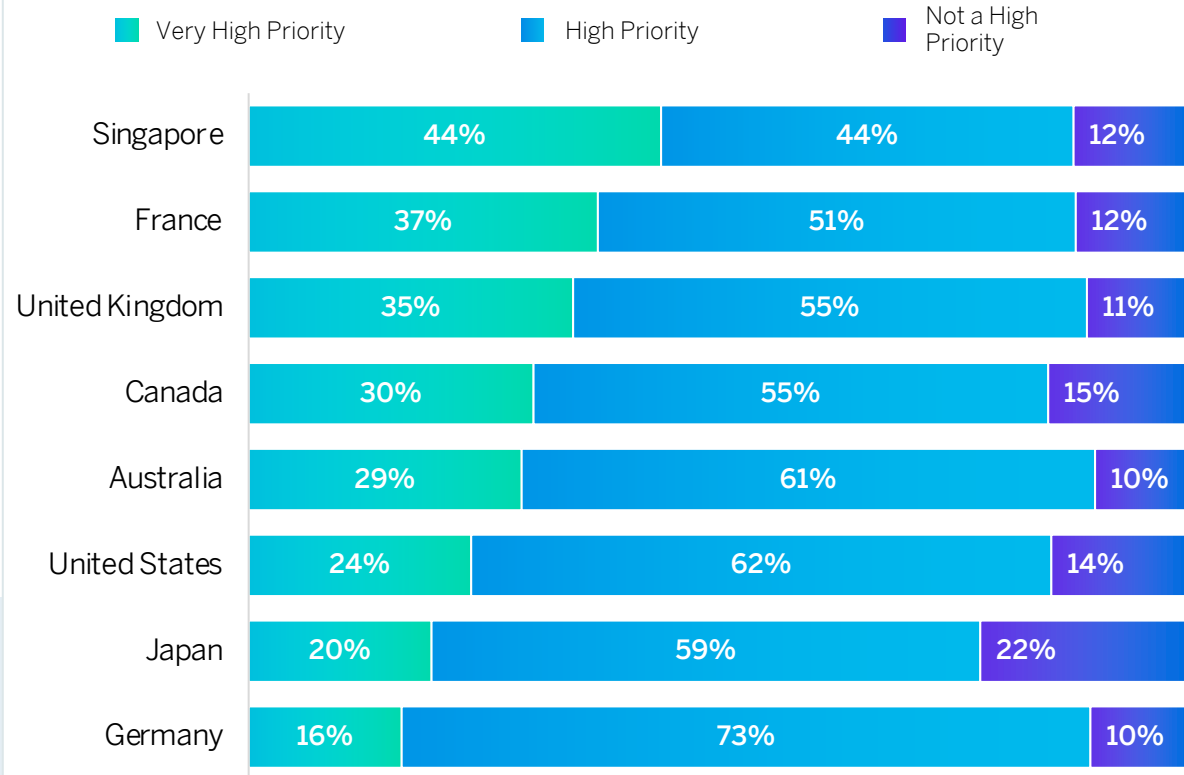


# Prioritization of Acting on Employee Feedback

## KEY TAKEAWAYS

- + On average, 29% of HR leaders feel that their executive team prioritizes taking action based on results from employee feedback.
- + Respondents from Singapore were most likely to describe taking action based on employee feedback as a 'very high' priority for their executive teams.
- + Although only 16% of German participants said their executive team places a 'very high priority' on acting on employee feedback results, 73% said they place a 'high priority' on it – the highest percentage for any country.

## To what degree does your executive team prioritize taking action based on results from employee feedback?



## ABOUT

This chart shows the extent to which executive teams from different countries prioritize taking action based on the results of employee feedback.

# Organizations that Frequently Generate and Act on Insights, by Country

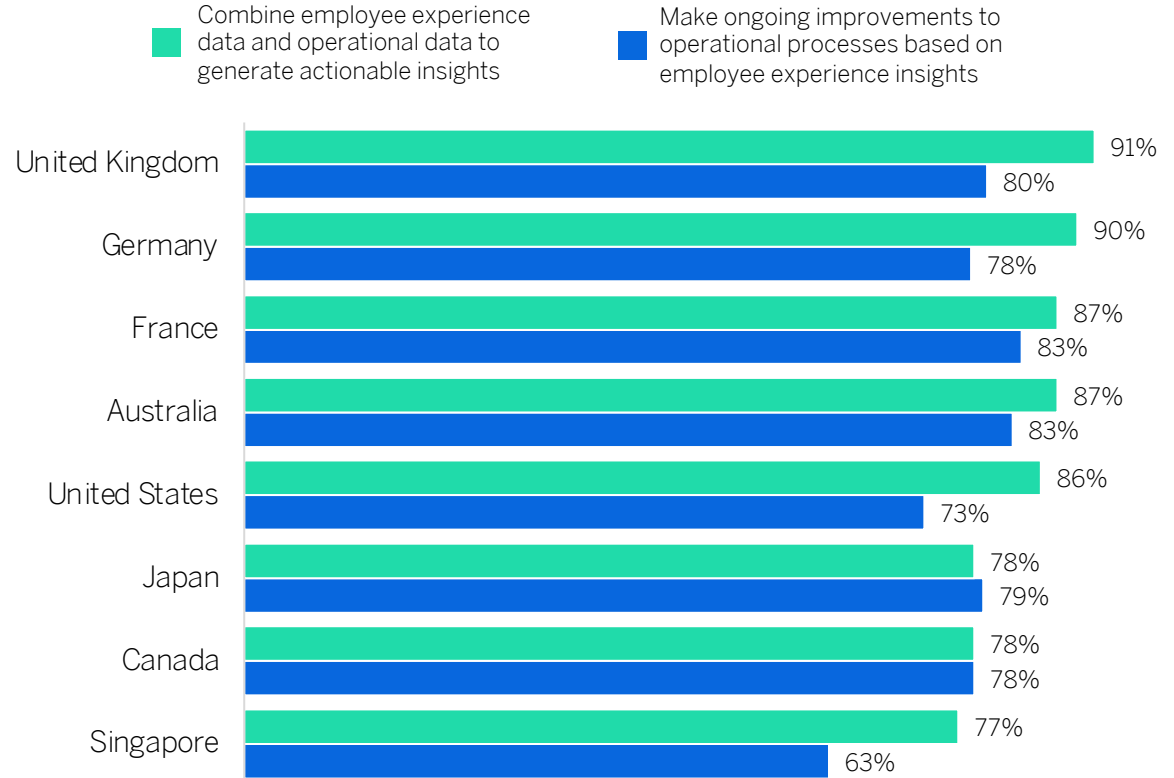
## KEY TAKEAWAYS

- + On average, 84% of HR leaders said their organization 'always' or 'almost always' combines employee experience data (X-data) and operational data (O-data) to generate actionable insights, and 77% say they make ongoing improvements to processes based on those insights.
- + UK respondents report generating insights from X-data and O-data at the highest rates, while those from Australia and France are most likely to say they use EX insights to improve operational processes.
- + Singapore has the largest gap between generating insights from X- and O-data and using them to make ongoing improvements.

## ABOUT

This chart shows the percentage of respondents from each surveyed country who say that their organization "always" or "almost always" exhibits certain employee experience management behaviors.

Organizations that **"always"** or **"almost always"** exhibit these behaviors:



# Top EX Management Obstacles Overall

## KEY TAKEAWAYS

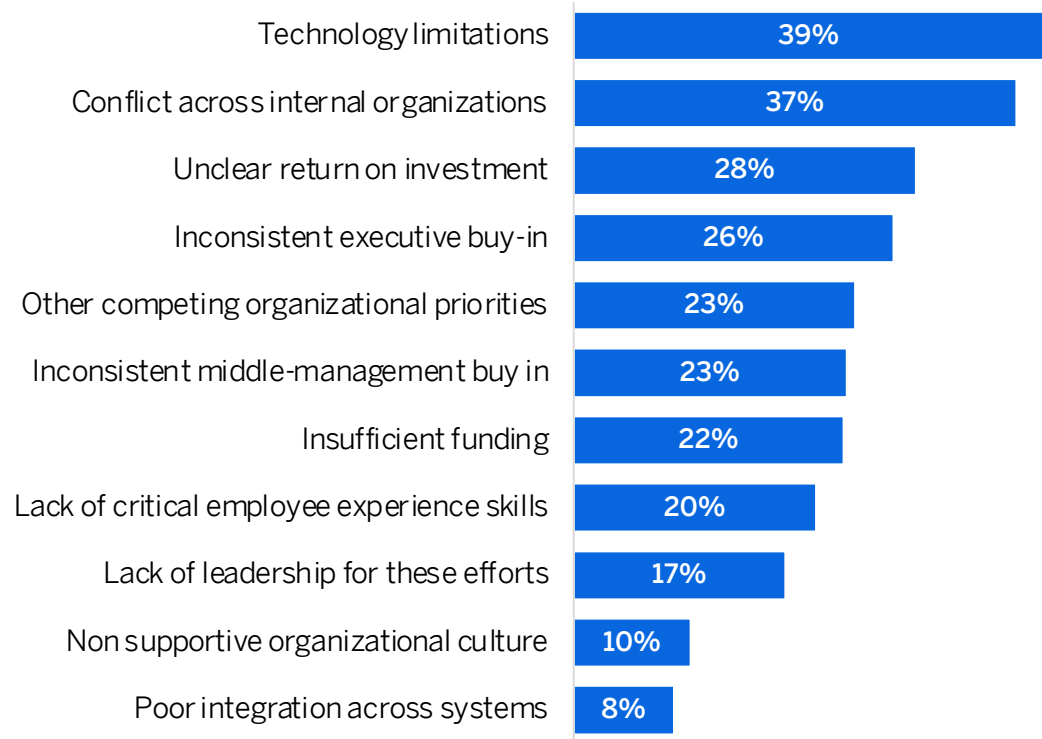
- + Across all respondents, 'technology limitations' rose to the top of HR leaders' list of obstacles, with 'conflict across internal organizations' coming in a close second.
- + 'Unclear ROI' and 'inconsistent executive buy-in' were third and fourth on the list of obstacles, with 28% and 26% of HR leaders reporting them as top barriers to EX Management.
- + 'Poor integration across systems' was the least common obstacle, with only 8% of HR leaders citing it as a problem.

## ABOUT

This chart shows the common obstacles HR leaders say are impeding their organization's employee experience management efforts.

### Which of the following do you consider to be significant obstacles to your organization's employee experience management efforts?

(Select all that apply)



# Top EX Management Obstacles by Country

## KEY TAKEAWAYS

- + HR leaders in five of the eight countries were most likely to select 'technology limitations' as an obstacle. 'Conflict across internal organizations' was the second most reported barrier.
- + 'Unclear ROI,' 'inconsistent executive buy in,' and 'other competing organizational priorities' were each one of the top two most cited obstacles for two countries.
- + More than half of HR leaders from Australia selected 'technology limitations' as a major hurdle, the most of any obstacle or country we looked at.

**Which of the following do you consider to be significant obstacles to your organization's employee experience management efforts?** (Select all that apply)

■ Most common country obstacle      ■ 2<sup>nd</sup> most common country obstacle

	Australia	Canada	France	Germany	Japan	Singapore	United Kingdom	United States
<b>Technology limitations</b>	51%	26%	47%	46%	28%	49%	48%	30%
<b>Conflict across internal organizations</b>	41%	31%	35%	30%	36%	30%	42%	40%
<b>Unclear return on investment</b>	29%	25%	29%	30%	22%	49%	27%	27%
<b>Inconsistent executive buy-in</b>	27%	23%	14%	30%	31%	12%	32%	31%
<b>Other competing organizational priorities</b>	17%	29%	20%	20%	40%	28%	11%	24%
<b>Insufficient funding</b>	22%	17%	27%	23%	21%	26%	31%	18%
<b>Inconsistent middle-management buy-in</b>	17%	27%	18%	16%	16%	14%	23%	33%
<b>Lack of critical employee experience skills</b>	13%	20%	15%	16%	21%	26%	15%	29%
<b>Lack of leadership for these efforts</b>	15%	19%	12%	29%	12%	16%	13%	21%
<b>Non-supportive organizational culture</b>	5%	10%	16%	7%	7%	19%	4%	13%
<b>Poor integration across systems</b>	3%	7%	6%	8%	9%	19%	5%	13%

## ABOUT

This chart shows the percentage of HR leaders from each surveyed country who report experiencing each significant obstacle to their EX management efforts. It also highlights the two most commonly reported obstacles by the respondents from each country.

## DATA SOURCE

The data in this report come from the Qualtrics XM Institute Q4 2020 EX Management study, which surveyed 870 HR leaders from organizations that have 1,000 or more employees and are headquartered in Australia, Canada, France, Germany, Japan, Singapore, UK, or U.S.

For each country, we collected 100 responses, with the exception of the U.S., where we collected 200, and Singapore, where we gathered 40. We screened out respondents who were not involved in any employee experience (EX) efforts.

We used a third-party panel for respondents and translated the online survey from English for French, German, and Japanese respondents. The data went through an automated quality control process to remove any questionable responses.

## DATA CALCULATIONS

Wherever we describe “averages,” we took the average of the individual country scores.

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