



# DIGITAL TALENTS GLOBAL WORK HAPPINESS SURVEY

## About the survey

**The survey** was conducted in collaboration with Dynata, a global leader in first-party data and online market research.

The survey includes 1913 respondents, who were chosen based on their digital skills (see details Exhibit 1) and their residency in one of 10 selected countries (see details Exhibit 2). The respondents include both expats and non-expats.

The analysis is primarily based on the answers to the following questions:

- How happy are you with the following [17] job components of your current job?
- Which of the following [17] job components are most important to you?

The final data set used for analysis has undergone a data cleaning process to ensure data quality and integrity. The differences between the countries in the Digital Talent Global Work Happiness Index are statistically significant on a 99% confidence level except for the two countries with a shared 1st place.

For a comprehensive description of our methodology please contact Jakob Lindmark Frier at [Jakob@DigitalHubDenmark.dk](mailto:Jakob@DigitalHubDenmark.dk).

## About the Authors

This article is written by Boston Consulting Group in partnership with Digital Hub Denmark.

**Digital Hub Denmark** is a non-profit organization connecting tech talent, startups, companies, investors and international delegations with opportunities in Denmark.

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# DIGITAL TALENTS

## Global Work Happiness Survey

The United States, Australia and Denmark rank highest in a new global survey of work happiness

By Boston Consulting Group

Demand for digital talent is substantial and global. Public and private organizations in almost every country actively compete to attract the very best from the global digital talent pool. And this talent pool is truly global because it is made up of skilled professionals who are among the most willing to move to another country to better their careers<sup>1</sup>. But while the hope of a sparkling international career might make digital talents leave their native country, long-term work happiness makes them stay. And where do digital talents experience the greatest level of work happiness? The answer is in the USA, Australia and Denmark. The search for this answer was undertaken as an effort to combine two different fields – happiness studies and digital talent research – each of which has been extensively researched individually.

The survey of the work happiness of digital talents around the world was conducted by Boston

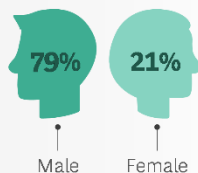
Consulting Group and Digital Hub Denmark. The survey covered 1913 respondents, classified as digital talents residing in one of ten selected countries. The countries selected were based on the ranking of most attractive countries for *digital experts* in BCG's Decoding Digital Talent report (2019). Respondents assessed their level of work happiness in relation to 17 job components (compensation, work-life balance, etc.), reporting it on a scale of 0 (very unhappy) to 100 (very happy). The **2020 Digital Talent Global Work Happiness Index** is constructed from analyzing the survey results, where the components of workplace happiness for digital talents are outlined. This index provides a snapshot of how digital talents perceive their work happiness in the USA, Australia, Denmark, Canada, UK, Germany, France, Spain, Switzerland, and Japan.

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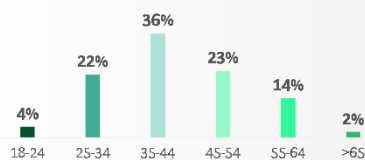
<sup>1</sup> BCG: Decoding Digital Talent (2019)

## EXHIBIT 1 | Demographics of Digital Talents

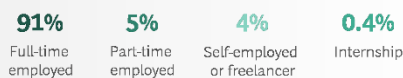
### GENDER



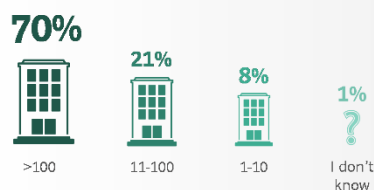
### AGE



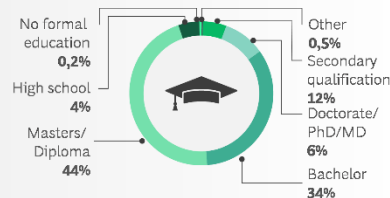
### EMPLOYMENT



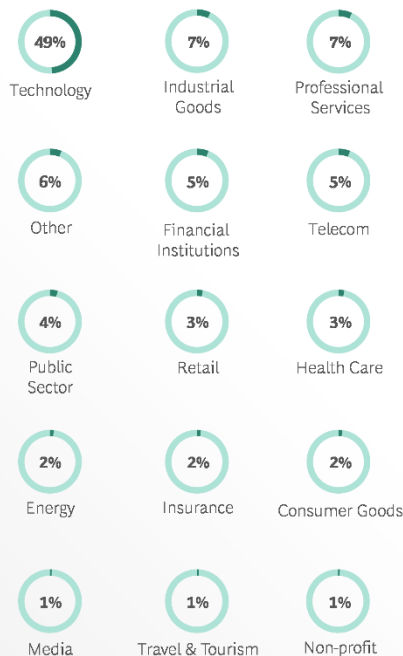
### COMPANY SIZE



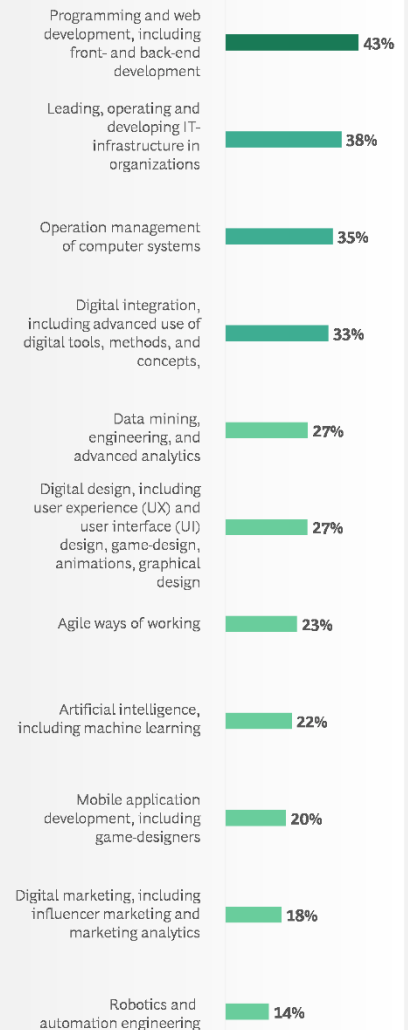
### EDUCATION



### INDUSTRY



### DIGITAL FOCUS AREAS



Source: BCG/Dynata proprietary survey and analysis

### Who Are the Digital Talents?

Digital talents are defined in a broad and inclusive sense in this survey (see Exhibit 1). Hence, the survey is representative of the general digital workforce. The respondents qualify as digital talents as per their digital work areas:

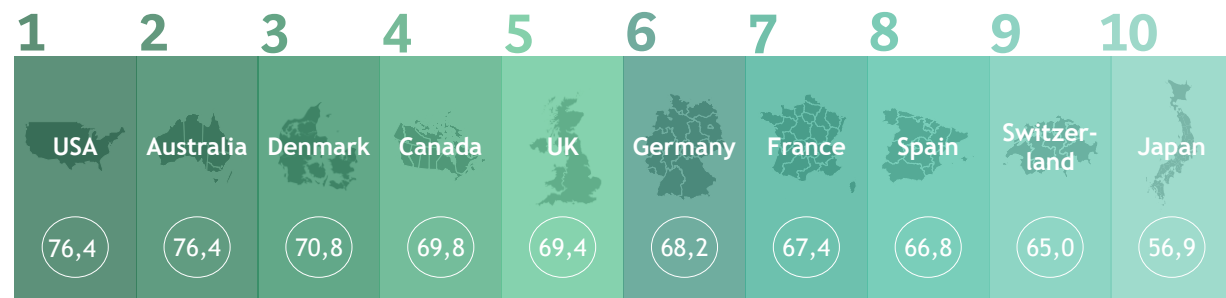
- Programming and web development (43%)

- Leading and developing IT-infrastructure (38%)
- Operation management of computer systems (35%)
- Digital integration (33%)
- Data mining, engineering, advanced analytics (27%)
- Digital design, including UX and UI (27%)



## EXHIBIT 2 | Global Digital Talent Work Happiness Index

How happy are you with the following [17] elements of your current job? (100=very happy)



Note: The work happiness score is computed as a simple average of 17 job elements. 0 is very unhappy, 25 is rather unhappy, 50 is neutral, 75 is rather happy, 100 is very happy  
Source: BCG/Dynata proprietary survey and analysis

- Agile ways of working (23%)
- Artificial intelligence, including machine learning (22%)
- Mobile application development (20%)
- Digital marketing (18%)
- Robotics and automation engineering (14%)

Digital work is often very knowledge-intensive, and therefore it is of no surprise that digital talents are highly educated, with more than 80% holding a bachelor's degree or higher. However, only 21% of respondents were women, confirming that the well-known gender divide in the digital sector persists.

### The Global Perspective of Work Happiness

According to the *Digital Talent Global Work Happiness Index*, digital talents experience the highest levels of work happiness in the USA, Australia

and Denmark (see Exhibit 2), while indicative results place Denmark at the top for digital expats. In Japan, digital talents experience the least amount of work happiness by far, while France, Spain, and Switzerland are placed at the lower end of the spectrum. Canada, the United Kingdom and Germany are placed in the middle. The analysis finds that digital talents are on average quite happy at work – 74% of respondents are either *rather happy* or *very happy* in their current working life. This may be related to digital talents on average occupying positions that have high flexibility, above-average wages, high job security and other advantages.











Digital talents' work happiness relating to specific job components and which job components they consider the most important are outlined in this article. This allows for a comprehensive understanding of digital talents' work preferences as well as the main drivers of work happiness.

On a global scale, the analysis of the job components of work happiness (see Exhibit 3) show that digital talents are happiest in relation to *personal safety*, *interesting job content*, and *work-life balance*.

“74% of digital talents are either rather happy or very happy in their current work life.”

## EXHIBIT 3 | Components of Work Happiness

How happy are you with the following components of your current job?

|  |  USA |  Australia |  Denmark |  Canada |  UK |  Germany |  France |  Spain |  Switzerland |  Japan | Average |
|--|---|---|---|--|--|---|--|---|---|---|---------|
| Personal safety  | 81.7  | 79.5  | 74.8  | 79.3   | 75.6   | 74.3  | 73.9   | 74.3  | 72.6  | 63.5  | 74.8    |
| Interesting job content                                | 78.2  | 78.4  | 72.7  | 71.2   | 72.1   | 71.5  | 68.5   | 71.6  | 70.6  | 58.2  | 69.6    |
| Work-life balance                                      | 77.8  | 77.0  | 74.0  | 70.9   | 69.3   | 69.7  | 69.2   | 66.7  | 67.4  | 59.7  | 68.9    |
| Relationship with superior                             | 77.8  | 77.3  | 73.3  | 70.8   | 72.4   | 68.0  | 71.0   | 69.0  | 67.1  | 55.5  | 68.9    |
| My organization's purpose                              | 77.5  | 77.8  | 76.5  | 72.8   | 71.3   | 69.4  | 68.8   | 67.9  | 66.2  | 56.3  | 68.6    |
| Family friendly working models                         | 76.3  | 77.6  | 71.7  | 71.2   | 68.0   | 71.9  | 68.5   | 69.4  | 68.2  | 58.4  | 68.1    |
| Commute time   | 78.0  | 74.5  | 70.4  | 70.4   | 71.6   | 65.3  | 64.8   | 63.0  | 60.9  | 61.5  | 67.8    |
| Amount of paid time off (e.g. holiday, parental leave) | 77.5  | 76.2  | 72.5  | 68.7   | 69.5   | 69.3  | 66.1   | 65.6  | 65.3  | 58.5  | 67.6    |
| Social environment                                     | 75.1  | 75.1  | 72.5  | 66.9   | 68.7   | 67.3  | 69.6   | 69.7  | 66.2  | 57.1  | 67.5    |
| Efficient use of my time                               | 75.9  | 76.5  | 70.8  | 68.8   | 70.1   | 66.7  | 68.7   | 66.5  | 63.2  | 57.2  | 67.2    |
| Creative and innovative work environment               | 75.2  | 77.2  | 69.4  | 68.3   | 67.6   | 68.8  | 65.7   | 66.8  | 68.5  | 57.8  | 66.7    |
| Personal impact  | 74.7  | 75.6  | 74.4  | 69.1   | 70.0   | 64.7  | 67.1   | 68.4  | 64.4  | 55.7  | 66.6    |
| Delegation of authority and responsibility             | 75.0  | 75.8  | 68.3  | 71.2   | 69.1   | 65.5  | 67.7   | 67.7  | 61.2  | 52.4  | 66.0    |
| My organization's environmental effort                 | 74.0  | 75.0  | 65.6  | 66.8   | 65.9   | 68.0  | 64.2   | 63.4  | 62.6  | 56.4  | 65.1    |
| My organization's initiatives to stimulate diversity   | 75.6  | 76.9  | 64.6  | 68.3   | 66.2   | 66.8  | 65.8   | 62.1  | 59.7  | 54.1  | 64.9    |
| Financial compensation (e.g. salary, bonuses)          | 76.0  | 73.5  | 65.8  | 66.0   | 67.5   | 65.8  | 63.2   | 60.7  | 59.4  | 51.6  | 63.9    |
| Learning & career development opportunities            | 73.0  | 74.5  | 66.9  | 66.7   | 64.8   | 66.0  | 62.4   | 62.4  | 60.9  | 52.7  | 63.2    |

Source: BCG/Dynata proprietary survey and analysis

This is reflected in the share of respondents scoring these job elements highly, where 76% are *rather happy* or *very happy* with *personal safety*, 71% *rather happy* or *very happy* with *interesting job content*, and 69% *rather happy* or *very happy* with *work-life balance*.

Interviews with digital talents indicate that they interpret *personal safety* as a combination of job security, health insurance and physical security, which helps to explain why this job component is so highly placed as a work happiness component– these kinds of benefits are all very common in digital talents' jobs. Similarly, *job content*

in relation to many jobs in the digital sector, is inherently technical, innovative and often pushes the boundaries of what is possible – which in turn makes it *interesting*. And as for *work-life balance*, interviews with digital talents indicate that they are likely to work at companies that put a great

“ At work, digital talents are happiest with their personal safety, interesting job content, and work-life balance.

deal of emphasis on flexibility and sustainability in terms of working hours.










*Learning and career development* is placed at the bottom of the happiness spectrum by digital talents. In other words, they derive the least amount of work happiness from this. Interviews indicate that this is because the digital sector is rather new and immature, and quite fast-paced. This means it lacks personal development initiatives typical of more mature employment sectors

(e.g. consulting or finance). Digital talents also rank *financial compensation* as one of the job components providing the least amount of work happiness. This is partly to be expected since most people in job surveys are dissatisfied with their compensation<sup>2</sup>.

As mentioned earlier, digital talents also ranked the 17 job components in terms of importance (see Exhibit 4). Unsurprisingly, digital talents attach great importance to *work-life balance* and

## EXHIBIT 4 | Most Important Job Components

Which of the following job components are most important to you?

|  |  USA |  Australia |  Denmark |  Canada |  UK |  Germany |  France |  Spain |  Switzerland |  Japan | Average |
|--|---|---|---|--|--|--|--|---|---|---|---------|
| Work-life balance                                      | 59%   | 53%   | 58%   | 62%  | 64%  | 53%  | 46%  | 55%   | 61%   | 56%   | 57%     |
| Financial compensation (e.g. salary, bonuses)          | 54%   | 40%   | 34%   | 63%  | 55%  | 37%  | 39%  | 52%   | 46%   | 37%   | 47%     |
| Interesting job content                                | 33%   | 38%   | 42%   | 37%  | 51%  | 43%  | 40%  | 48%   | 58%   | 29%   | 41%     |
| Amount of paid time off (e.g. holiday, parental leave) | 30%   | 25%   | 25%   | 33%  | 31%  | 27%  | 20%  | 33%   | 15%   | 19%   | 27%     |
| Learning & career development opportunities            | 24%   | 25%   | 31%   | 36%  | 29%  | 24%  | 24%  | 29%   | 13%   | 25%   | 27%     |
| Efficient use of my time                               | 24%   | 30%   | 30%   | 22%  | 24%  | 25%  | 20%  | 28%   | 18%   | 19%   | 24%     |
| Creative and innovative work environment               | 27%   | 26%   | 26%   | 20%  | 21%  | 19%  | 24%  | 26%   | 24%   | 19%   | 23%     |
| Personal safety  | 27%   | 26%   | 18%   | 23%  | 15%  | 25%  | 23%  | 27%   | 21%   | 21%   | 23%     |
| Relationship with superior                             | 24%   | 18%   | 22%   | 25%  | 24%  | 21%  | 26%  | 23%   | 21%   | 11%   | 22%     |
| Family friendly working models                         | 19%   | 20%   | 24%   | 17%  | 19%  | 30%  | 14%  | 22%   | 26%   | 16%   | 20%     |
| Commute time   | 26%   | 23%   | 17%   | 24%  | 24%  | 17%  | 16%  | 16%   | 16%   | 13%   | 20%     |
| Personal impact  | 17%   | 22%   | 25%   | 18%  | 19%  | 20%  | 24%  | 22%   | 27%   | 8%  | 20%     |
| Social environment                                     | 12%   | 18%   | 31%   | 9%   | 14%  | 20%  | 22%  | 22%   | 20%   | 9%  | 17%     |
| My organization's purpose                              | 24%   | 18%   | 13%   | 13%  | 16%  | 16%  | 19%  | 14%   | 8%  | 10%   | 16%     |
| Delegation of authority and responsibility             | 13%   | 17%   | 12%   | 9%   | 11%  | 12%  | 15%  | 11%   | 6%  | 4%  | 11%     |
| My organization's environmental effort                 | 12%   | 19%   | 11%   | 8%   | 8%   | 10%  | 15%  | 11%   | 6%  | 6%  | 11%     |
| My organization's initiatives to stimulate diversity   | 14%   | 14%   | 7%  | 10%  | 8%   | 13%  | 10%  | 8%  | 5%  | 6%  | 10%     |

Source: BCG/Dynata proprietary survey and analysis

<sup>2</sup> SHRM: “Better Pay and Benefits Loom Large in Job Satisfaction” (2016), CNBC: “Microsoft Employees Feel Underpaid” (2018)



Diversity and environmental effort is nice-to-have, not need-to-have.

57% of the respondents believe *work-life balance* is the most important job component. They also believe that *financial compensation* (47%) and *interesting job content* (41%) are among the most important job components. Not surprisingly, digital talents feel that *financial compensation* is very important (ranked second in importance), while at the same time it is ranked second lowest in relation to work happiness.

Digital talents feel that *my organization's environmental effort* (11%) and *my organization's initiatives to stimulate diversity* (10%) are the second-least and least important, respectively. Interviews suggest that this is because digital talents do not encounter these matters on a daily basis. These components are not crucial for digital talents to do their job. In one interview, a digital talent phrased it this way: they are nice-to-have, not need-to-have.

This is a surprising response, considering the big global push for much greater diversity and companies everywhere setting ambitious environmental goals. It may also pose a problem in the near future, since these job components are among the hottest debated topics in society, and research<sup>3</sup> indicates greater diversity at the workplace delivers efficiency gains.

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<sup>3</sup> Harvard Business Review: "Finally, Evidence That Diversity Improves Financial Performance" (2018)

### Age, Gender and Industry Aspects

As expected, in terms of digital talents' age and its relation to work happiness and the importance of job components, several hypotheses can be confirmed. The younger generation of digital talents (under 40), feel that *social environment*, *learning and career development opportunities*, and *my organization's environmental effort* are considerably more important compared to their older counterparts and they also derive greater work happiness from these three job components. In other words, this indicates these three job components are unique generators of work happiness for the young digital talents. At the same time, older digital talents (over 40), feel that *work-life balance* and *interesting job content* are significantly more important compared to their younger counterparts. But both age groups rank these job components equally high in relation to work happiness.

When looking at gender and work happiness, it is apparent that female digital talents are generally less happy at work. Specifically, female digital talents are 3% less happy at work compared to male digital talents. While this difference at first glance may appear insignificant, it is quite a lot, and could for example, move Canada from 4<sup>th</sup> to



Female digital talents are 3% less happy at work compared to male digital talents.



8<sup>th</sup> place in the *Digital Talent Global Work Happiness Index*. This is possibly related to female digital talents' small share of the total population of digital talents (21%), and/or that diversity – as mentioned earlier – is a low priority and possibly overlooked on a day-to-day basis.

In terms of industry, digital talents do not experience greater work happiness in *tech*, which is somewhat surprising. The results show that digital talents in industries such as insurance, telecoms and health care are just as happy with their working life – or even happier – than digital talents working in technology. In general, there is little variance between work happiness across different industries.

### The USA, Australia and Denmark Have the Highest Level of Work Happiness

This section examines the drivers of work happiness for the USA, Australia and Denmark, the top-3 countries in the survey. Japan is also examined due to its remarkably low work happiness ranking. For each country, the job components that digital talents derive the most and least work happiness from are examined – but only if they differ from the job components highlighted in the global perspective. In other words, only job components unique to each country in terms of high/low work happiness are inspected. The most important job components in terms of specific countries are also highlighted.

### USA

The USA is home to the digital talents who are happiest at work, where 84% are *rather happy* or *very happy*. Digital talents in the USA are most happy with *personal safety*, *interesting job content*, and *commute time*. Interestingly, *commute time* is not what is typically associated with the USA in the context of work happiness: In fact, *commute time* in the USA is significantly longer than other countries<sup>4</sup>. This suggests that work happiness is a relative concept and can be a result of comparison with close peers, e.g. colleagues in the same country who work in industries with less flexibility.

Inexplicably, digital talents in the USA are somewhat unconcerned when it comes to *interesting job content*. In fact, only 33% of respondents in the USA feel that it is one of the most important job components compared to a global average of 41%. In several countries, it is considered markedly more important, e.g. in Switzerland and UK where more than 50% consider *interesting job content* among their highest priorities. Interviews indicate that this is because digital talents in the USA have other priorities – specifically, they feel that *financial compensation* and *work-life balance* are by far the most important aspects in terms of attractive employment in the USA. The lowest ranking job components in terms of work happiness in the USA are *learning & career development opportunities* and *my organization's environmental effort* – of these, only the latter is unique to the USA. Interviews indicate that the comparatively

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<sup>4</sup> Washington Post: "Average commute time reached a new record last year." (2019)

low scores of work happiness for *my organization's environmental effort* is due to the same reasons that it is considered unimportant in a global perspective – it is not associated with day-to-day work happiness, which causes digital talents to score it somewhat lower in this context.

### Australia

Digital talents also find that Australia is a happy workplace. In fact, 82% are either *rather happy* or *very happy* all things considered. Digital talents in Australia feel that the job components *personal safety*, *interesting job content* and *my organization's purpose* (in this order) generate the most work happiness. It is of little surprise that *personal safety* and *interesting job content* are key to work happiness in Australia, since these job components are ranked highest by digital talents in all countries in the survey (see Exhibit 3).

But digital talents in Australia stand out because they assessed *my organization's purpose* so highly. Interviews with Australian digital talents indicate that this is because in recent years there has been greater managerial focus on companies communicating their purpose<sup>5</sup>. According to these interviews, this extensive focus on company purpose has helped to further stimulate a working culture where digital talents are asked and encouraged to present their ideas and innovative input to management and their ideas and input are implemented.

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<sup>5</sup> The Australian Financial Review: "Purpose is the business buzzword of 2018. Here's why." (2018)

### Denmark

Moving on to the third-place ranking, 83% of digital talents in Denmark state that their work happiness is either *rather happy* or *very happy*. The job components *my organization's purpose*, *personal safety*, and *personal impact* are ranked highest in terms of work happiness. Among these top three components, *my organization's purpose* and *personal impact* are unique to Denmark.

Interviews suggest that digital talents in Denmark score *my organization's purpose* so highly because their solutions are often highly valued when implemented in public and private organizations. The outcome is the same regardless of whether solutions are for internal use or if it is a digital product to be launched on the market – digital talents simply love seeing their work being put to good use.

In terms of *personal impact*, interviews with digital talents indicate that they associate this job component with their individual contribution to the final product. In Denmark, digital talents partly attribute an informal work hierarchy in the workplace to their happiness with *personal impact*. With a flat hierarchy, digital talents take more responsibility and better understand the task at hand and thus experience more happiness when it comes to their *personal impact*. In their Global Competitiveness Report in 2018 and 2019, the World Economic Forum found that 'Denmark has the flattest work hierarchy in the world'.

As opposed to *learning and career development* and *financial compensation*, which globally receives the lowest average scores of work happiness, digital talents in Denmark are the least happy about *my organization's initiatives to stimulate diversity* and *my organization's environmental effort*: This is in stark contrast to the nation's association with wind turbines, green energy and the world's most ambitious climate act recently passed by the Danish parliament. Interviews indicate that digital talents are not unhappy with these job components per se. But they simply do not consider them important, and therefore these two job components are scored *neutral* in terms of work happiness.

One last thing that sets digital talents in Denmark apart, is that they prioritize *financial compensation* significantly less. Only 34% of digital talents prioritize *financial compensation* among the most important job components in Denmark compared to 54% in the USA and 47% globally. This finding might be explained by Denmark's well-known welfare state with its pro-active labor market policy—*flexicurity*—which provides security for workers. The high marginal tax rate and the importance of work-life balance in Danish culture may also be contributing factors.

## Japan

Compared to every other country in the survey, digital talents in Japan are least happy with their work life.

In fact, not once did the Japanese digital talents assess their level of job happiness as *rather happy* or *very happy*. On average, every Japanese respondent assessed their level of happiness as no

higher than *neutral happiness* for all 17 job components.

Interviews suggest that Japanese digital talents tend to take their work very seriously and they have high self-imposed expectations, which can induce work-related stress. The interviews also suggest that work environments in Japan are often characterized by indirect, ambiguous, and vague communication, which fails to foster personal working relationships or a feeling of belonging.

Interestingly, digital talents in Japan find far fewer job components important compared to their counterparts in countries. Of the 17 job components included in the survey, only *work-life balance* is considered very important by more than 25% of Japanese respondents. One can only speculate whether apathy has taken hold among Japanese digital talents, or whether false modesty is affecting their responses.

## Conclusion

Digital talents' work happiness is a new field of study, and the *Digital Talent Global Work Happiness Index* provides a sensible snapshot of digital talents' work happiness across the world. Currently, the USA, Australia and Denmark generate the highest level of work happiness for digital talents. But it is clear that work happiness is perceived differently across the world, and cultural differences undoubtedly affect the results discussed in this article.