




BI
WORLDWIDE

In conjunction with 

FROM THE INSIDE OUT:

Driving Customer Satisfaction Starts With Your Employee Experience

October 2023

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Preface

In today's fiercely competitive business landscape, we all understand that employee engagement stands as a pivotal pillar of long-term success. As companies aim to strengthen the crucial link between their employee experience and customer satisfaction, it becomes essential to pinpoint what truly makes employees satisfied. This prompts the question: What innovative practices, techniques, and strategies can organisations adopt to elevate the employee experience and foster a culture of fulfilment and motivation?

This research, conducted together with ADNA Research across four countries, Singapore, Malaysia, the Philippines, and Vietnam, dives into the nuanced perspectives of employees in this diverse region of the world. It unearths the underlying factors that keep our workforce engaged, beyond financial compensation and other monetary incentives. Moreover, it evaluates the impact of non-monetary rewards and recognition, autonomy, leadership, mastery, and the alignment of business objectives with employees' values, purpose, and meaning that resonate with our employees – all of which converge in driving employee motivation.

What we found

Across the region, a few standout factors emerged as key drivers of employee satisfaction. These include: having tasks aligned with their skills and values (71%), being empowered to make day-to-day decisions (67%), and feeling recognised for their contributions (59%). Yet, the survey also revealed a stark reality. Only 2 out of every 10 employees felt that their employers were meeting these needs, highlighting a significant area for employers to improve on.

Amongst the top three factors, we decided to dive deeper into the impact of recognition, seeking to better understand the effectiveness of rewards and how they impact employee motivation. Interestingly, the data revealed a disconnect between how employees prefer to be rewarded and the rewards that organisations are currently providing.

Most employees favoured rewards that offer a tangible benefit and a freedom of choice. These employee-centric rewards include spot awards (spur-of-the-moment, non-monetary recognition for performance), additional vacation days, and upskilling and development opportunities. Meanwhile, company-led rewards such as team-building activities or retreats, long-term service awards, and company events or dinners were less favourable to employees, despite employers delivering on these rewards more consistently.

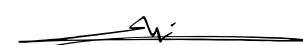
Our report also peered into the perceptions surrounding the importance of customer satisfaction. Naturally, those in customer-facing roles demonstrated a higher affinity for customer-centricity. On the other hand, some employees with low customer interaction were less enthusiastic about customer satisfaction – a factor of concern when we consider the part that all employees play in the entire value chain.

Closing remarks

Understanding that employees, are the face and voice of the brand, it is paramount that we find ways to help our workforce understand the importance of the jobs that they do, while ensuring that we continue to acknowledge and reward the ones who do.

It is abundantly clear that contented and motivated employees lay the foundation for delighted customers. Thus, bridging the aforementioned gaps is critical for organisations genuinely committed to nurturing a culture of satisfaction and commitment. By thoughtfully implementing the findings in this report, organisations can unlock the full potential of an engaged workforce and drive greater customer satisfaction.




Omar Hadoui
Managing Director, APAC
BI WORLDWIDE



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It is abundantly clear that **contented** and **motivated** employees lay the **foundation** for **delighted customers**.

Methodology

This section outlines the overall methodology for this research study. The study, commissioned by BI WORLDWIDE Asia Pacific and conducted by ADNA Research, aimed to gain insights into the drivers of employee satisfaction, with a specific focus on rewards and recognition, and how employers are delivering on them. By understanding the reward mechanisms that motivate employees and assessing employer performance in this area, the study sought to provide valuable insights for businesses to enhance employee engagement and overall organisational performance.

Research Objectives

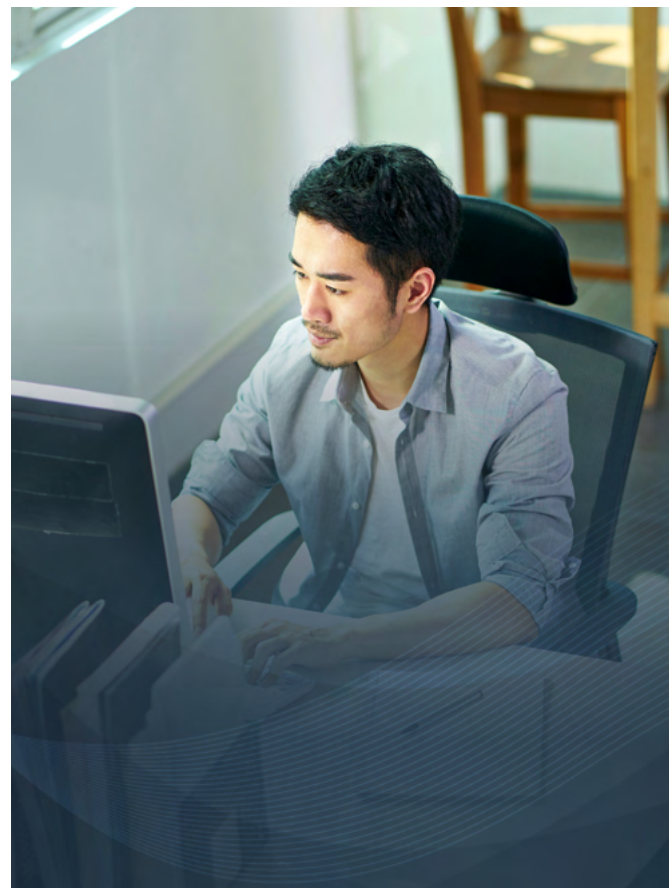
The primary objective of the study was to examine the factors influencing employee satisfaction, particularly those related to rewards and recognition, and to assess the effectiveness of employers in delivering these rewards. The study aimed to achieve the following specific goals:

1. Identify the key drivers of employee satisfaction, with a particular emphasis on rewards and recognition.
2. Understand the perception of employees on the reward mechanisms that motivate them in their work.
3. Evaluate employer performance in delivering rewards to their employees.

Study Design

Targeting employees working in organisations with over 5,000 employees in Singapore, Malaysia, the Philippines and Vietnam, our sample size aimed for at least 2,500 employees in each of the four markets—resulting in a recorded sample size of 10,007 employees. The survey was distributed to the selected sample across the four countries, with careful consideration given to demographic representation and geographical spread.

To facilitate the ease of completing the survey, the overall survey design has been streamlined as much as possible to reduce dropout rates and ensure successful survey submission. To achieve this goal, we have primarily employed 5-point Likert scales for constructing the survey questions. Additionally, we have included certain questions with multiple-choice answers and slider scales to complement the Likert scale format. The decision to utilise Likert scales offers us a structured framework for quantifying respondents' attitudes and opinions. This standardised approach ensures consistency across responses, making comparisons and subsequent analysis straightforward.



There are a total of four key sections for the study:

A. The importance of customer satisfaction

In this section, we asked participants to rate how much they engage with customers in their current roles. Our aim here was to discern variances in opinions among employees with differing degrees of customer interaction. Following this, we asked employees to assess the significance of customer satisfaction to them, to uncover differences in how employees perceive the importance of customer satisfaction based on their roles.

B. Understanding the employee experience

To understand how satisfied employees are at work, we first defined a set of eight factors that contribute to a positive employee experience. These factors include:



Autonomy

Being empowered to make decisions about the day-to-day work scope items



Meaningful Work

Being assigned tasks and responsibilities that aligns with my skills and value



Mastery

Receiving opportunities for continuous learning, skill development and career advancements



Recognition

Acknowledging and appreciating my efforts and recognising and rewarding my achievements



Leadership

Supportive and inclusive leaders, who listen well, communicate effectively and provide guidance and mentorship



Work Environment

Having a healthy work life balance and workplace environment that prioritises my wellbeing



Purpose

A value-driven work culture, that aligns with my beliefs and motivates me with a clear purpose



Engagement

Being engaged and motivated most of the time

Next, the study prompted employees to assess the significance of each of these factors using a 5-point scale. They were also asked to gauge how well their employers were addressing these factors within their current organisation. This would provide us with valuable data into the possible gaps that exist between employee expectations and actual employer performance, which is beneficial for organisations to understand how best to prioritise what to improve.

C. Identifying key motivating rewards

As part of our primary research objectives, the study also aimed to determine which rewards have a greater impact on employees. Moving beyond the one-dimensional allure of cash rewards, we identified six non-cash alternatives that are offered across industries, aiming to gain deeper insights into their appeal and how employers are effectively delivering them. These questions utilised 5-point scales for employees to rate both the importance of each reward and how their employers are performing.

D. Demographics

The survey concluded with demographic questions to aid in data analysis—these include how long the respondents have worked at their current organisation, what their roles were and which industries they worked in. These questions provided essential context and characteristics about survey participants, which helped us better understand and interpret the results of the study, creating additional layers of analysis.

Quantitative Data Analysis

Advanced statistical techniques were employed to examine patterns, correlations, and significant differences in the data. To emphasise meaningful variations in responses, the data was presented at an overall level and at a country level.

Ethical Considerations

Respondent confidentiality was strictly maintained throughout the research process. All data collected was treated with the utmost confidentiality and stored securely. Participants were provided with clear information about the research study and voluntarily provided their consent before taking part in the survey.

Limitations

While every effort was made to ensure the accuracy and reliability of the study, there are inherent limitations that must be acknowledged. The findings are based on self-reported data and may be subject to response bias. Additionally, the study's scope was limited to the selected markets and may not be entirely representative of other regions.





Regional Outlook

Regional Outlook

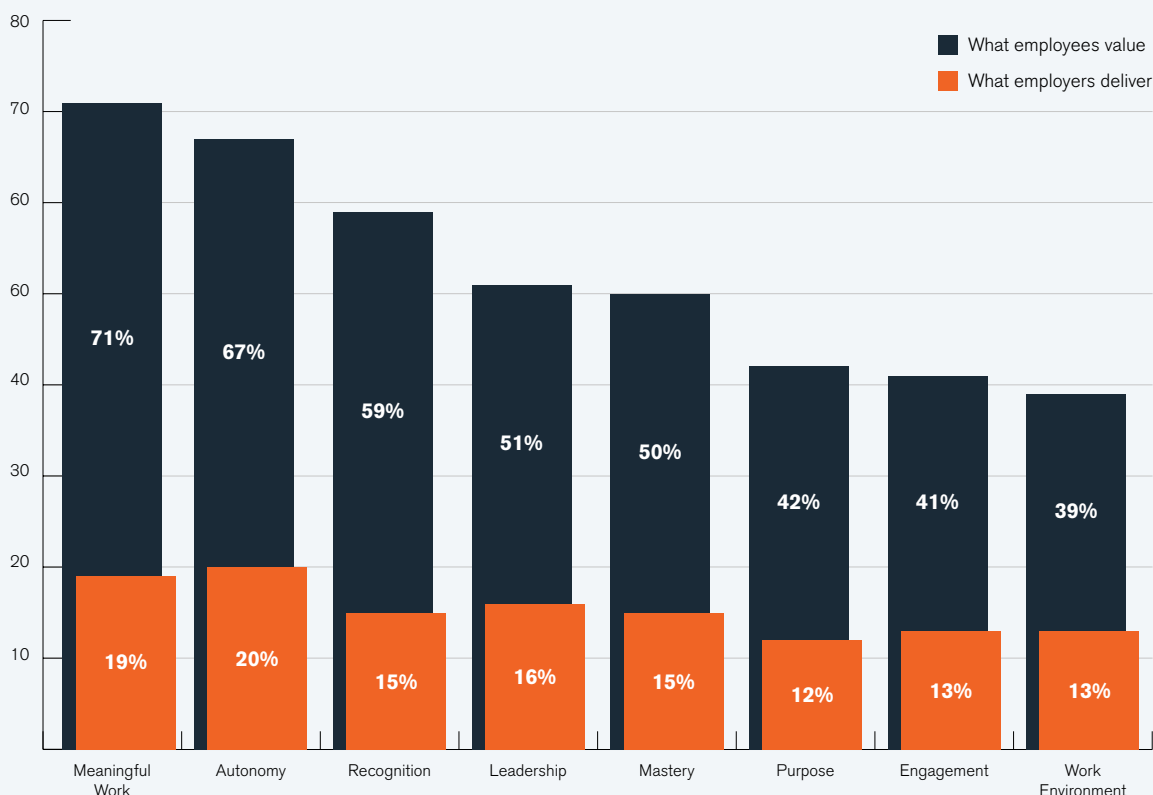
1 Across the four markets surveyed, employees feel that their employers are underperforming when it comes to motivating and inspiring them to give their best at work

Overwhelmingly, employees reported that having tasks aligned with their skills and values (*meaningful work*), being empowered to make day-to-day decisions (*autonomy*), and feeling recognised for their contributions (*recognition*) are the most important factors that affect their motivation and performance at work. When meaningful work and autonomy come together, these two factors create a powerful synergy where employees are able to execute their roles and responsibilities in a manner that resonates with their strengths. And recognition underpins everything by reinforcing employees' positive behaviour and fostering loyalty, paving the way for happier employees and greater productivity.

Beyond these three key factors, employees also want supportive and inclusive leaders who communicate effectively (*leadership*) and sufficient opportunities for upskilling and development (*mastery*). These interdependent factors work in tandem to provide an environment where employees can thrive, through mentorship and guidance which helps them develop themselves further and advance their careers.

However, when subsequently asked to rate the performance of their employers in delivering each of these factors at work, the results told a different story. Across all countries, employees felt that their employers were only marginally delivering in these

What employees truly desire and how their employers are delivering



factors, signifying that a lot more can be done to improve employee motivation. While a gap between expectations and performance will invariably persist, the existing chasm underscores the urgency for employers to address these unmet needs proactively.

With only 2 out of every 10 employees feeling that their key motivating factors are being fulfilled, it is time for employers to reevaluate their employee engagement strategies with the aim of bridging these gaps. Thus, it is critical that we examine the key factors that organisations should prioritise for the best results.

What employers should focus on

Although none of the factors are currently being sufficiently addressed by employers, there are certain factors that hold greater significance for employees. As a result, focusing on these factors would lead to a greater positive impact on overall employee motivation.

In most countries, we observe that *meaningful work* and *autonomy* are factors that are somewhat partially met. Therefore, employers should prioritise the next most important factor: *recognition*. With the current gap that exists between how much employees value *recognition* and how well their employers are delivering on it, organisations can consider inculcating a culture of appreciation for employees and reevaluating their current rewards and recognition efforts. The regular act of recognising your employees' contributions not only validates their hard work, but it also fosters a positive atmosphere where employees feel valued and committed to the organisation's success.



2 out of 10

said their employee experience was satisfactory

Aside from *recognition*, employers can also prioritise *mastery* and *leadership* when it comes to improving employee motivation. Employees here perceive an unmet need when it comes to receiving opportunities for development and having supportive and inclusive leaders. Receiving opportunities for development and career advancement is integral to fostering a sense of growth and progress among employees. When individuals have access to continuous learning and skill enhancement, they feel empowered to expand their capabilities and take on new challenges.

Equally significant is the role of supportive and inclusive leaders who communicate effectively. A leader's ability to provide guidance, encouragement, and a safe space for employees to express their ideas and concerns fosters a culture of trust and collaboration. When employees witness leaders who genuinely care about their well-being and growth, it establishes a strong foundation of loyalty and commitment, resulting in increased motivation and a more cohesive and harmonious work environment.

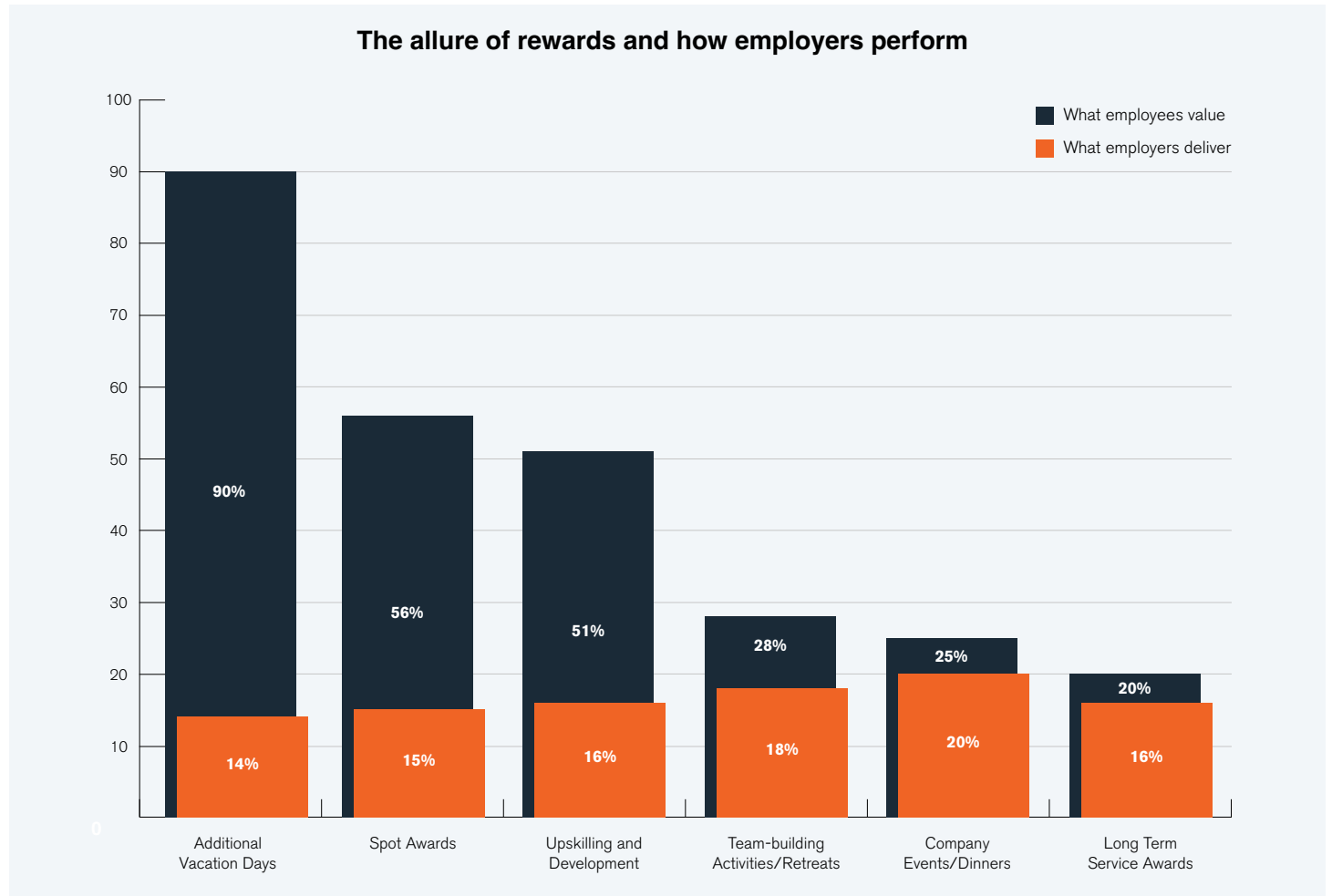
	 SG	 MY	 PH	 VN
Partially met Continue to deliver and improve on these factors.	Autonomy Meaningful Work	Autonomy Meaningful Work		Autonomy Meaningful Work
Leverage Prioritise these factors for the best results.	Recognition Purpose	Recognition Mastery Leadership	Recognition Mastery Leadership Autonomy Meaningful Work	Recognition Mastery Leadership
Secondary Reevaluate these factors and its significance to employees.	Work Environment Leadership Mastery	Work Environment Purpose	Engagement	
Deprioritised Reduce focus on these factors.	Engagement	Engagement	Work Environment Purpose	Engagement Work Environment Purpose

What does this mean?

Employers need to understand that providing a holistic employee experience goes beyond hygiene factors such as financial compensation, employee benefits and working conditions. Rewarding and recognising your employees, creating opportunities for learning and advancement, and inculcating a strong, inclusive leadership culture are some important factors that employers should prioritise when it comes to enhancing employee satisfaction and driving up overall productivity.

2 | When it comes to rewards and recognition, there is a mismatch between the rewards that employees value, versus what employers actually deliver on

Given that employee recognition is the key factor for employers to leverage across all four markets, this section of the report aims to establish the effectiveness of several rewards and recognition factors — particularly non-cash rewards.



Amongst a set of six non-cash rewards, employees surveyed mostly prefer rewards that offer them a tangible benefit or a freedom of choice pertaining to how they wish to redeem it. These employee-centric rewards include spot awards, upskilling and development opportunities, and additional vacation days. Such rewards, particularly spot awards, speak directly to the need for recognition as discussed above — addressing the innate desire to feel valued and appreciated through instant gratification.

What are spot awards?

Spot awards, sometimes referred to as “on-the-spot” awards, are a type of incentive given to employees typically as an immediate response to exceptional performance or behaviour. These rewards reinforce positive behaviour while showing that employees are valued and appreciated within the organisation. Types of spot awards include gift cards, certificates, or even tangible items such as merchandise and experiences.

Meanwhile, rewards such as *team-building activities or retreats, company events or dinners and long term service awards* are less favourable, likely due to these stemming from a top-down approach which resonates less with employees. Regardless, employers are delivering more consistently on these low-impact rewards and missing out on the ones that matter the most, leading to a mismatch in expectations and performance.

But, that is not to say that such factors are completely irrelevant, they should be instead perceived as basic rewards that employees still come to expect. For organisations seeking to better motivate their employees, it is worthwhile to consider offering *additional vacation days, spot awards and upskilling and development*.

To successfully implement a rewards and recognition programme, employers should also first carefully consider the overall programme goals, the characteristics that they are trying to reinforce and the criteria by which employees are being evaluated. In ensuring an equitable distribution of rewards, employers also need to ensure that the rewards system is clearly structured and transparent.

What does this mean?

Employee-centric rewards such as *additional vacation days, spot awards and upskilling and development*. However, employers across all markets are not delivering on these key rewards and are instead focusing on low-impact rewards such as *company events or dinners and long term service awards*. While this is not to say that employers should start forgoing their current reward methods, they should instead consider how they can weave these higher-impact factors into their employee engagement strategy.

3 | The correlation between employee-customer interaction and the perceived importance of customer satisfaction by employees differ across markets

Almost universally, across markets, those with high customer interaction have reported high levels of customer-centricity just as expected. Specifically, employees in the Philippines and Vietnam reported a higher emphasis placed on customer satisfaction, where even employees with low customer interaction consider customer satisfaction to be important.

Meanwhile, in Singapore, employees with lower degrees of customer interaction are generally more apathetic towards customer-centricity, while a majority of employees in Malaysia remain on the fence. Only 2% of employees in Singapore who have low customer interaction said customer satisfaction is important, whereas 61% of employees in Malaysia said that it was neither important nor unimportant. For employers in Singapore and Malaysia, it is critical to help

employees understand the importance of their roles within the value chain that ultimately contributes to customer satisfaction. For example, a software engineer may not be as involved in customer interaction, yet their role could still influence the customer experience in relation to the products they create.

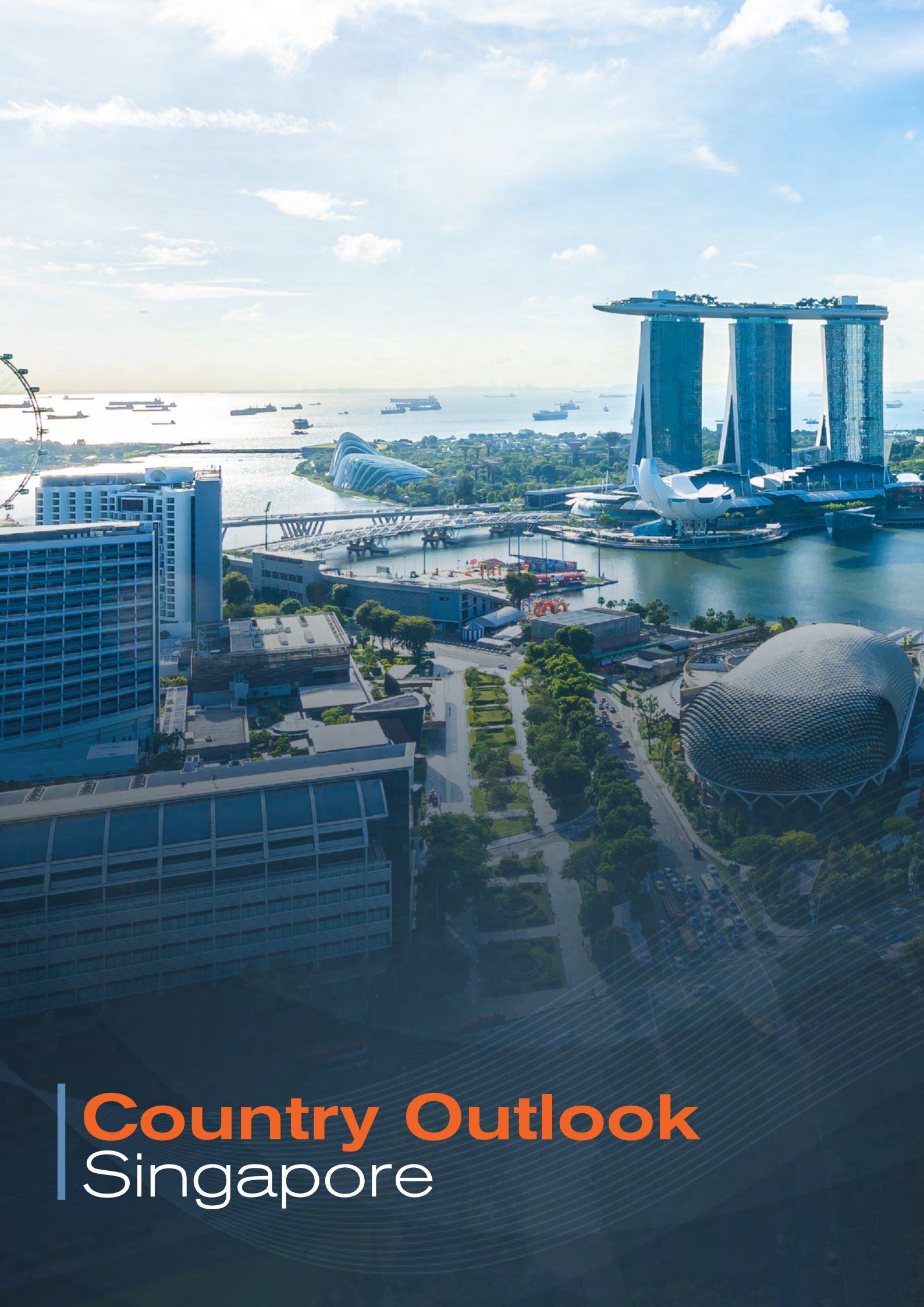
The responsibility of delivering customer satisfaction is not just on customer facing employees, everyone in the organisation has a role to play in creating a positive customer experience. Likewise, employers should strive to ensure that all employees, regardless of their roles and degree of customer interaction, are engaged equally. Employers who skew their attention towards customer-facing employees should reconsider their overall approach and identify gaps in their employee engagement strategies.

The relationship between employee-customer interaction and customer satisfaction

	SG		MY		PH		VN	
Level of Customer Interaction	High	Low	High	Low	High	Low	High	Low
Customer satisfaction is important	100%	2%	92%	7%	100%	79%	100%	86%
Customer satisfaction is neither important nor not important	-	-	8%	61%	-	-	-	-
Customer satisfaction is not important	-	98%	-	32%	-	21%	-	14%
High: Employees who have rated either 4 or 5 on a scale of 1-5 when asked about their level of customer interaction. Low: Employees who have rated either 1 or 2 on a scale of 1-5 when asked about their level of customer interaction.					Legend: Needs attention			

What does this mean?

Organisations should focus on engaging all employees, regardless of their roles or degree of customer interaction—especially so in Singapore and Malaysia. Employees with limited customer interaction might be less inclined towards customer-centric behaviour, but they do still play a role in creating a positive customer experience. Employers should help employees understand the importance of their roles within the value chain and how their work impacts customer satisfaction.



Country Outlook Singapore

Country Outlook

Singapore

1 | Almost all non-customer facing employees in Singapore feel that customer satisfaction is not important to them

Uniquely in Singapore, employees seem to only value customer satisfaction if it is directly relevant to them. While all customer facing employees said that customer satisfaction was important to them, an overwhelming majority (98%) of respondents with low customer interaction indicated that customer satisfaction is unimportant to them, which is an area of concern for employers. In essence, customer satisfaction is a fundamental pillar of business success, and it involves the collective efforts of all employees.

When employees do not see the value of their work and how they contribute towards the customer experience, organisations may start to see negative consequences such as decreased productivity and customer retention.

Employers should foster a culture that emphasises the importance of prioritising customer satisfaction and service excellence, regardless of role or function. Ultimately, every employee in the organisation works together as part of the value chain that delivers a product or service and it is important to always prioritise customer service excellence at every step of the way.

To help employees reinforce the connection between their work and the end goal of delivering exemplary customer service, employers can consider rewarding employees based on metrics that are relevant in their roles towards customer satisfaction, or promote cross-functional collaboration and implement customer feedback loops to increase the visibility of their efforts.

Non-customer facing employees in Singapore

2%



Only 2% said that customer satisfaction is important to them

98%



98% said that customer satisfaction is unimportant to them

2 | Employers should focus on *recognition* and *purpose* to better motivate their employees in Singapore

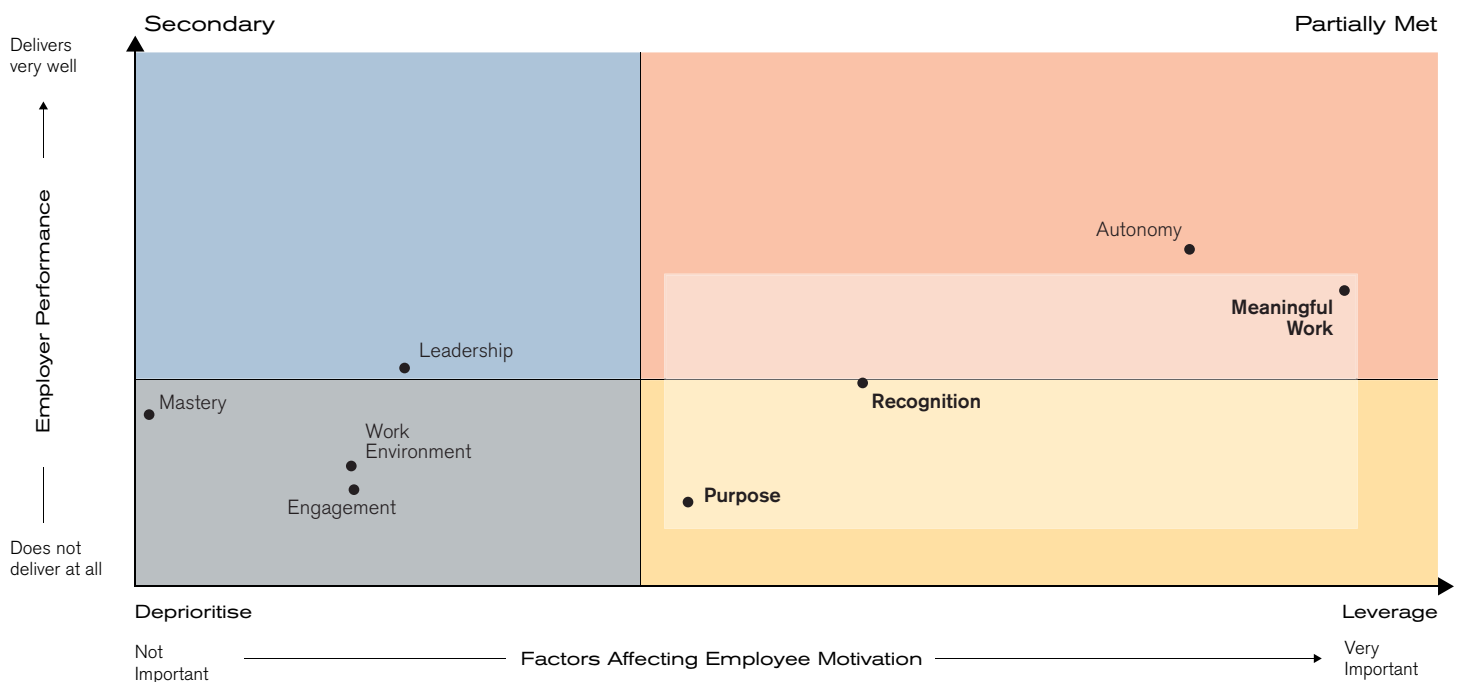
Overall, employer performance in Singapore is among the highest in the region when it comes to the employee experience, but there are still gaps to be bridged. Employers are partially delivering on the first two factors—*meaningful work* and *autonomy* – and should continue to do so to drive employee engagement.

More importantly, employers should focus on closing the existing gap when it comes to acknowledging their employees' efforts and rewarding them for their achievements. In particular, employees with low or zero customer interaction have expressed a stronger desire to feel recognised (61%) compared to those

who interact with customers more often (56%). This suggests a need for employers in Singapore to relook their existing rewards and recognition programmes, especially for employees in non-customer facing roles.

Employees here also rated higher on having value-driven work that aligns with their beliefs (53%), as opposed to other markets (avg. 39%). For employers, this represents another opportunity to bridge the gap by taking a deliberate approach to define and integrate the organisational values into various aspects of the employee experience – for example, by aligning these values with performance management metrics.

Top factors for employers to focus on



	Description
Partially met	Factors that are important for employees, and employees are delivering on it relatively better compared to other factors.
Leverage	Factors that are important for employees, but employers are not currently delivering on it.
Secondary	Factors that are not as important for employees, yet employers are delivering on it relatively better compared to other factors.
Deprioritise	Factors that are not as important for employees, and employers are not currently delivering on it.

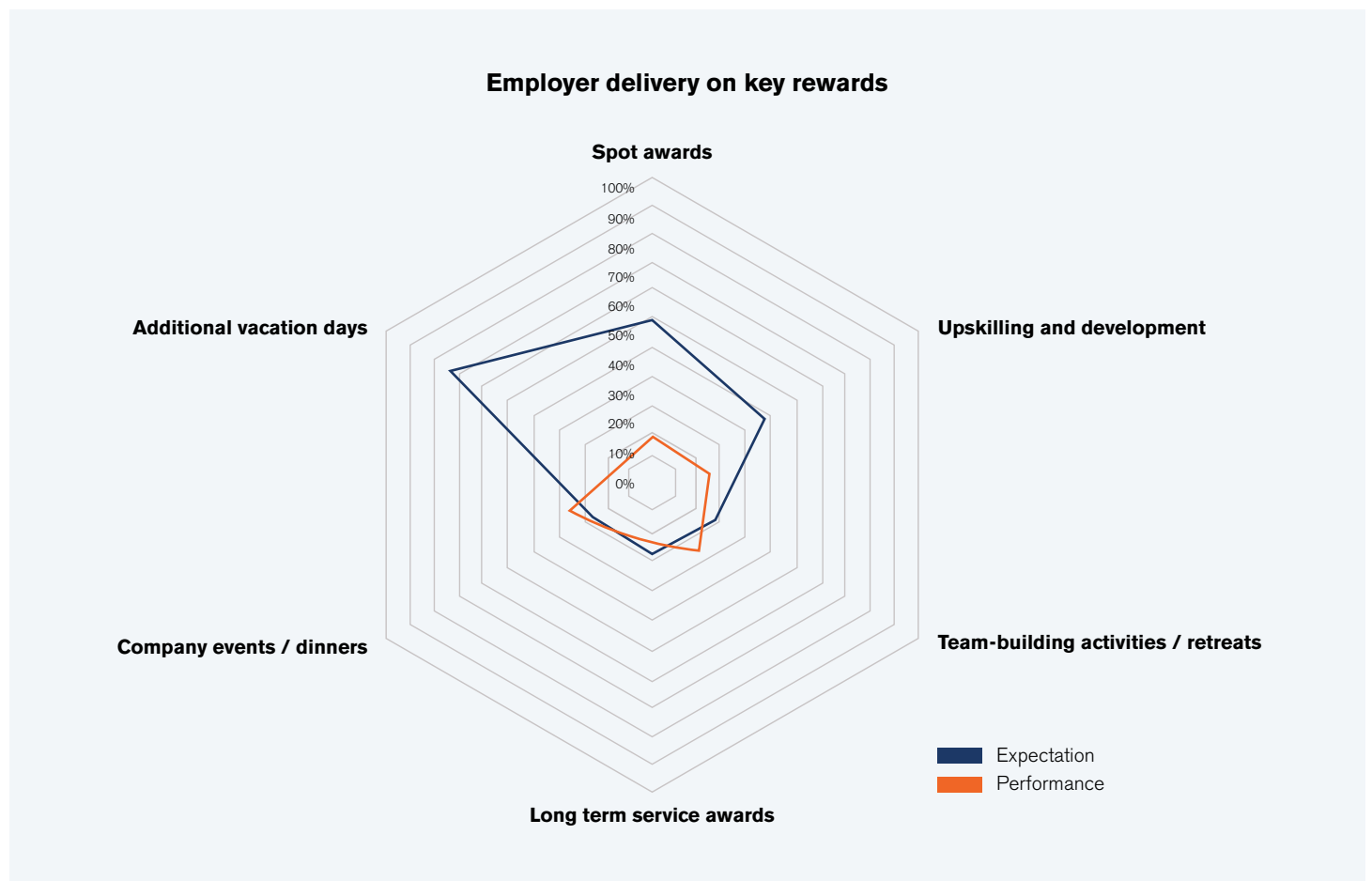
3 | Employers in Singapore are delivering on *upskilling and development* better than their peers in the region

The most impactful rewards and recognition factors for employees here are *additional vacation days* (73%), *spot awards* (49%) and *upskilling and development* (38%), of which employers are only partially delivering on the third factor. Employer performance on *upskilling and development* is the highest overall across the region, which can be attributed to a culture of lifelong learning and numerous initiatives dedicated to upskilling the Singaporean workforce.

Spot awards and *additional vacation days* are key rewards to be leveraged in Singapore, and organisations should consider acknowledging the

significance of providing more generous vacation days and implementing *spot awards* in a consistent manner to create a more motivated and engaged workforce.

As discussed above, employers may also consider tying these rewards back to customer success metrics to incentivise employees to adopt customer-centric behaviour, especially for non-customer facing employees. Some example metrics could include net promoter scores and customer satisfaction scores, or perhaps even through a peer recognition program where employees can nominate each other for positive behaviours that contribute to customer satisfaction.





Country Outlook Malaysia

Country Outlook

Malaysia

1 | A high percentage of employees in Malaysia (61%) who are not in customer facing roles are apathetic towards the importance of customer satisfaction

Rating customer satisfaction as neither important nor unimportant, this group of employees are on the fence, representing a prime opportunity for employers to shape them into customer-centric employees. Changing the attitudes of these employees will present less of a challenge than compared to in Singapore, and it is critical for employers to leverage this opportunity to educate on the importance of customer satisfaction.

Employers can expect to see improvements in quality and productivity once these non-customer facing employees begin to prioritise customer satisfaction, as the intention to delight customers eventually spills over to their daily tasks. On the other hand, allowing non-customer facing employees to continue to feel apathetic about customer satisfaction may eventually carry a risk of them falling into the mistaken belief that their work has little to no impact on the customer.

As such, organisations should help employees see how their collective efforts effectively contribute to the value chain, by implementing customer feedback loops and encouraging cross-functional collaboration. Employers may also consider linking employee rewards to customer satisfaction metrics to better reinforce customer-centric behaviour.

Non-customer facing employees in Malaysia

7%



Only 7% say customer satisfaction is important

61%



61% are apathetic towards the importance of customer satisfaction

32%



32% say customer satisfaction is not important

2 | When it comes to motivating employees in Malaysia, *meaningful work*, *autonomy*, and *leadership* are the top three factors that were cited as important

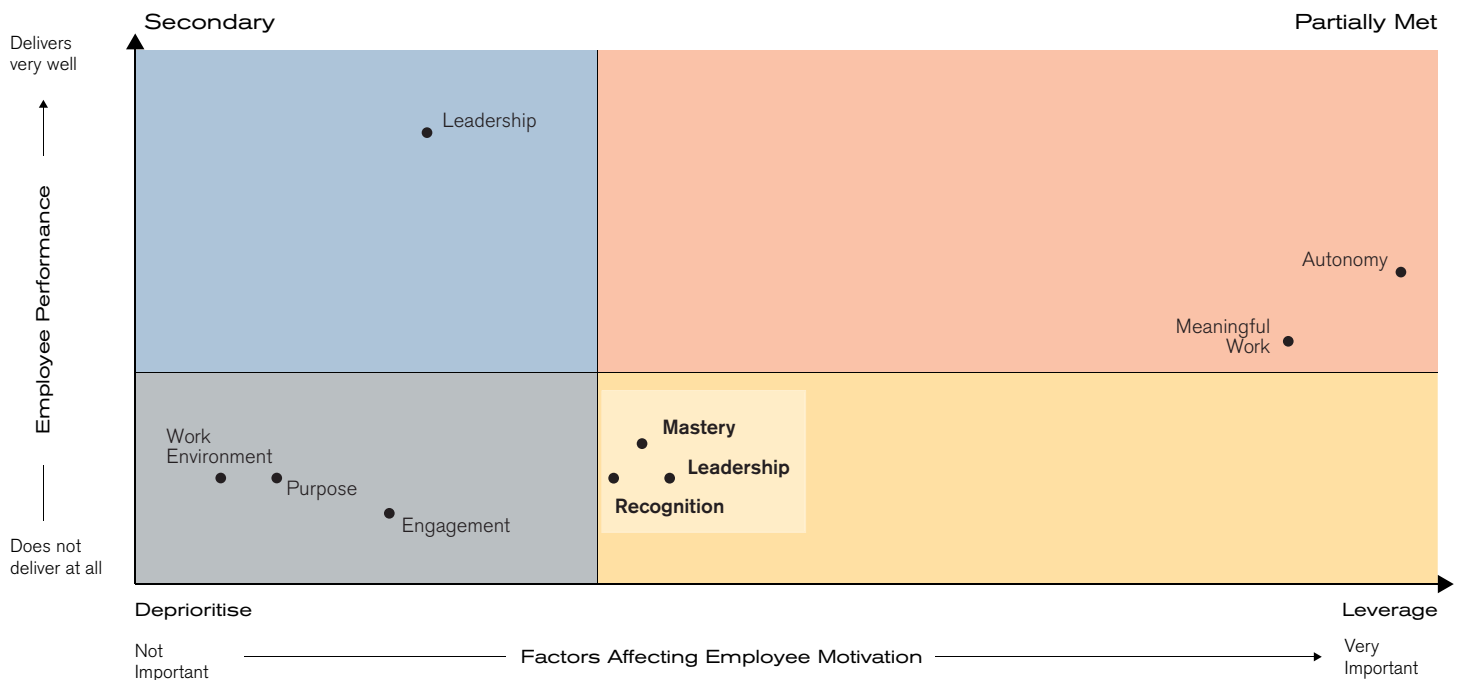
Unlike in the other regions where the top three factors are largely similar, having supportive and inclusive leaders (42%) makes an appearance as the third most important factor here. Another noteworthy point is that employees in Malaysia ranked *autonomy* as their most important factor (68%), above *meaningful work* (64%), which is the top priority for other regions.

Weaving these two points together, we begin to understand that employees here desire an environment where they are given the freedom to exercise their creativity and judgement to contribute to the organisation's success – and this stems from

first having leaders that understand and trust their employees enough to make autonomous decisions.

To that end, employers are perceived to be delivering well in providing *meaningful work* and *autonomy*, but more can be done to develop a supportive leadership culture. Organisations can encourage leaders to actively listen to their team members, promote an open-door policy, and involve employees in decision-making processes when possible. Besides *leadership*, employers in Malaysia should also look into bridging the gap in *recognition* as well as *mastery* to drive up employee satisfaction.

Top factors for employers to focus on



	Description
Partially met	Factors that are important for employees, and employees are delivering on it relatively better compared to other factors.
Leverage	Factors that are important for employees, but employers are not currently delivering on it.
Secondary	Factors that are not as important for employees, yet employers are delivering on it relatively better compared to other factors.
Deprioritise	Factors that are not as important for employees, and employers are not currently delivering on it.

3 | Employer performance when it comes to rewards and recognition factors are the lowest overall in the region

With the lowest overall performance when it comes to delivering motivating rewards in the region, employers in Malaysia ought to relook at their rewards and recognition programmes. Particularly, employees in Malaysia have the highest preference for *additional vacation days* (98%) among the region, but employer delivery on this is very low (13%).

Spot awards and *upskilling and development* are also critical factors (40% for both) for employers to leverage on, where actual performance is sitting at only 9% and 10% respectively. Organisations are likely

to see substantial improvements in employee morale and performance should they place additional resources to bridge the gaps across these top three rewards and recognition factors.

Employers should also take note that employees who have worked longer tend to place greater importance on factors such as *upskilling and development*, as well as *long-term service awards*. For organisations with a higher proportion of long-serving employees, especially 8 years and above, should consider prioritising these rewards.





Country Outlook Philippines

Country Outlook

Philippines

1 | Despite their degree of customer interaction, employees in the Philippines value the importance of customer satisfaction more than any other country

Our research reveals a distinctive trait among employees in the Philippines—regardless of the degree of their customer interaction, they consistently emphasise the importance of customer satisfaction more than their regional counterparts. While 100% of respondents with high customer interaction said that customer satisfaction was important to them, an impressive 79% of employees with low to zero customer interaction also acknowledged its significance. This phenomenon underscores the intrinsic value that Filipino culture places on fostering positive interpersonal relationships and upholding a strong sense of commitment to delivering high-quality service.

The innate predisposition of employees towards valuing customer satisfaction presents an opportunity for organisations to bolster both employee engagement and customer satisfaction levels. Employers should look to understand the specific aspects of job roles, recognition, and intrinsic rewards that fuel this innate attitude towards customer service excellence.

These insights can then be integrated into talent management strategies, fostering a more engaged and motivated workforce that excels at customer satisfaction.

By continuing to nurture this unique mindset and aligning it with organisational objectives, businesses can foster a customer-centric work environment, ultimately contributing to improved performance and success.

Non-customer facing employees in the Philippines

79%



79% said that customer satisfaction is important to them



2 Employees in the Philippines value *meaningful work*, *autonomy* and *recognition*, higher than any other country surveyed

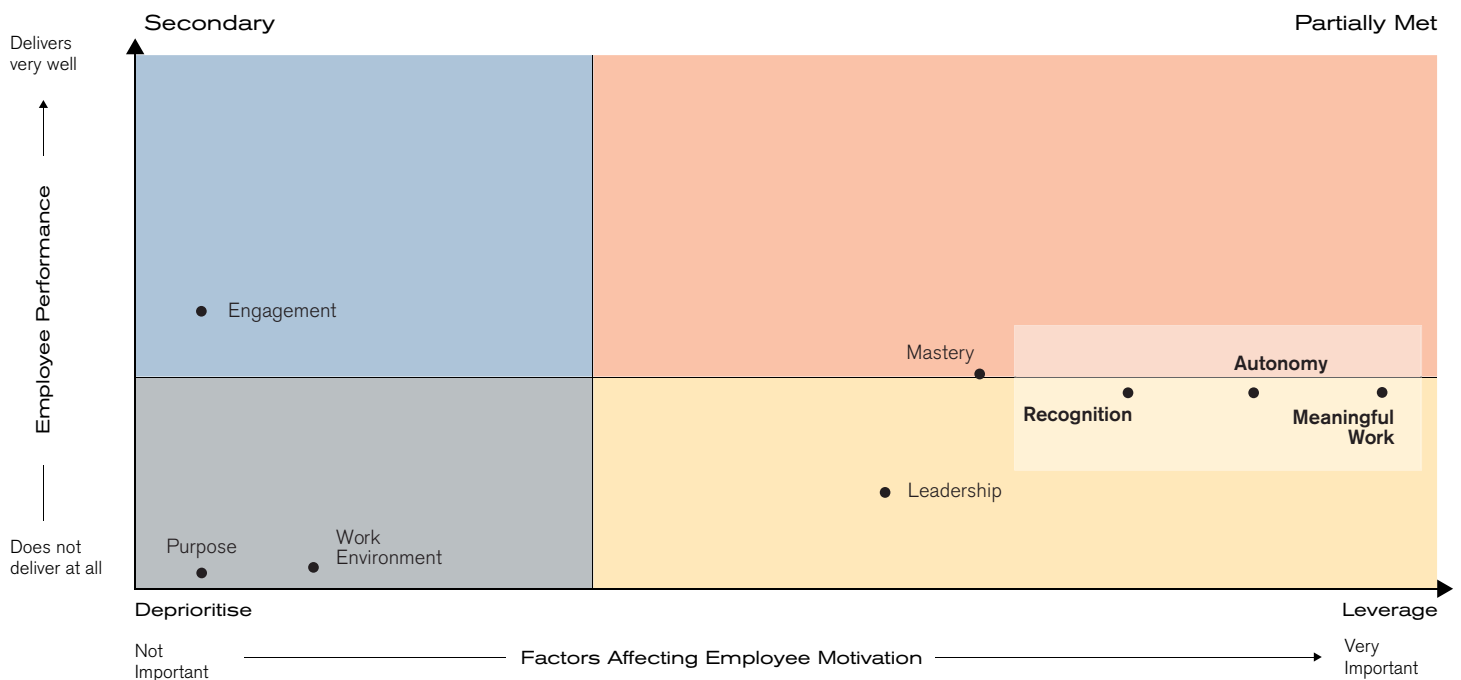
Employees in the Philippines prioritise *meaningful work*, *autonomy* and *recognition* much more than their counterparts in the region, which is a clear signal for employers to pay closer attention to these factors to ensure that they are adequately meeting these demands.

Despite the high value that employees place on these factors, employers in the Philippines are nowhere near meeting these expectations. In fact, the Philippines is the only region considered to not have partially delivered on any factor. A continued misalignment between what employees value and actual employer performance can lead to decreased motivation and job satisfaction, as well as lower employee engagement.

Ranking these employee experience factors in order of importance, they are: *meaningful work* (79%), *recognition* (75%), *autonomy* (72%), *mastery* (67%) and *leadership* (65%). For employers, this means that there are multiple opportunities for them to course correct and provide what their workers truly desire.

This insight presents a significant opportunity for employers to not only improve their internal culture but also impact their bottom line. Motivated employees are more likely to stay with the company, resulting in lower turnover costs. Moreover, their enthusiasm can lead to increased productivity and quality of work, which translates into greater customer satisfaction.

Top factors for employers to focus on



	Description
Partially met	Factors that are important for employees, and employees are delivering on it relatively better compared to other factors.
Leverage	Factors that are important for employees, but employers are not currently delivering on it.
Secondary	Factors that are not as important for employees, yet employers are delivering on it relatively better compared to other factors.
Deprioritise	Factors that are not as important for employees, and employers are not currently delivering on it.

3 Just like the employee experience factors above, the gap between the importance and performance of key motivating rewards in the Philippines remains high

With employees in the Philippines already placing a premium on feeling acknowledged and being recognised for their efforts (72% vs 54% on average for other markets), it is paramount that employers relook their rewards and recognition strategies to continue incentivising customer-centric behaviour. Yet, in our findings, employees reported a wide gap between expectations and performance.

The top three rewards that employees prioritise are *additional vacation days* (97%), *spot awards* and *upskilling and development* (67% for both). However, actual employer performance for these three factors were reported to be only around 17%, highlighting

a mismatch between how employees desire to be rewarded and what employers are delivering on. This is a clear signal for employers in the Philippines to start delivering rewards that matter to employees, given how *recognition* is already a key factor to leverage here.

Particularly, *spot awards* speak directly to the desire for recognition through instant gratification, and organisations should consider prioritising this first. Improvements in employer performance in delivering these motivating rewards will directly translate into tangible benefits such as a more motivated workforce, greater employee satisfaction while also reinforcing customer-centric behaviour.

Employer delivery on key rewards





Country Outlook Vietnam

Country Outlook

Vietnam

1 | Largely similar to the Philippines, employees in Vietnam as a whole also value the importance of customer satisfaction

Drawing parallels with sentiments observed in the Philippines, the commitment to customer satisfaction among employees in Vietnam is also equally noteworthy. The inclination to prioritise customer satisfaction is not restricted to just those in customer facing roles only – 86% of employees who categorise their roles as having low to zero customer interaction said customer satisfaction was important to them.

This figure is unparalleled when benchmarked against the other markets. Regardless of their position in the organisational hierarchy or their direct involvement with customers, Vietnamese employees are well aware of the need to ensure that customers are satisfied. This inherent drive underscores the intrinsic motivation among Vietnamese employees to consistently deliver their best in their respective roles. Even without the immediate feedback loop that frontline staff might experience, these employees recognise that their contributions, no matter how indirect, ultimately cascade to shape the customer experience.

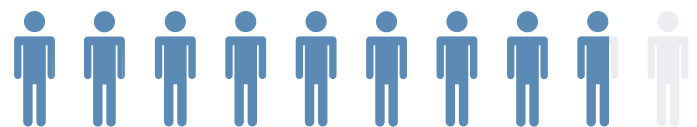
Employers in Vietnam should seize this opportunity to continuously reinforce and nurture this mindset. By acknowledging and incentivising this customer-centric

approach, organisations can further cement a culture where every team member, irrespective of their role, strives towards a unified goal: ensuring unparalleled customer satisfaction.

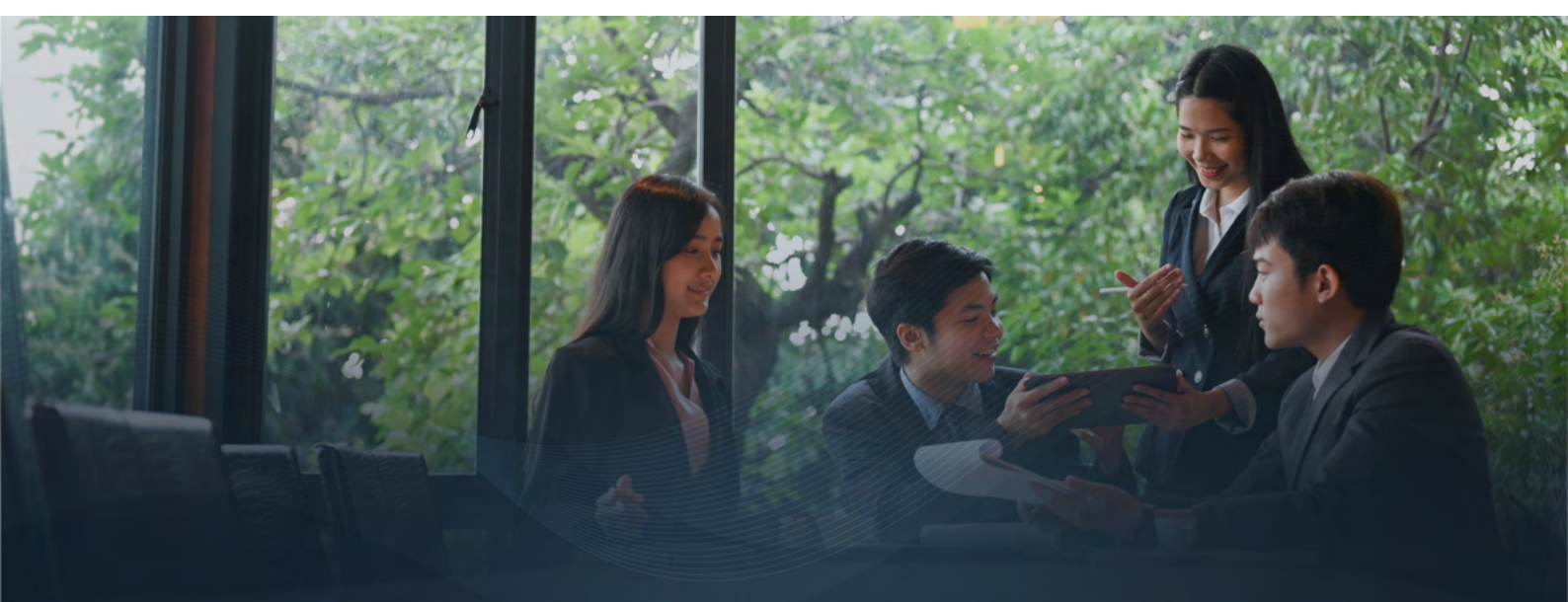
Furthermore, organisations should consider this as an opportunity to delve deeper into understanding the underlying factors that drive such collective customer-centricity in Vietnam and explore ways to replicate this in other markets. By doing so, they can create a more universally aligned workforce, united in their aim to deliver unrivalled customer satisfaction.

Non-customer facing employees in Vietnam

86%



86% said that customer satisfaction is important to them



2 | As seen across the region, employees in Vietnam also value *meaningful work*, *autonomy*, and *recognition*—with *recognition* ranking higher here

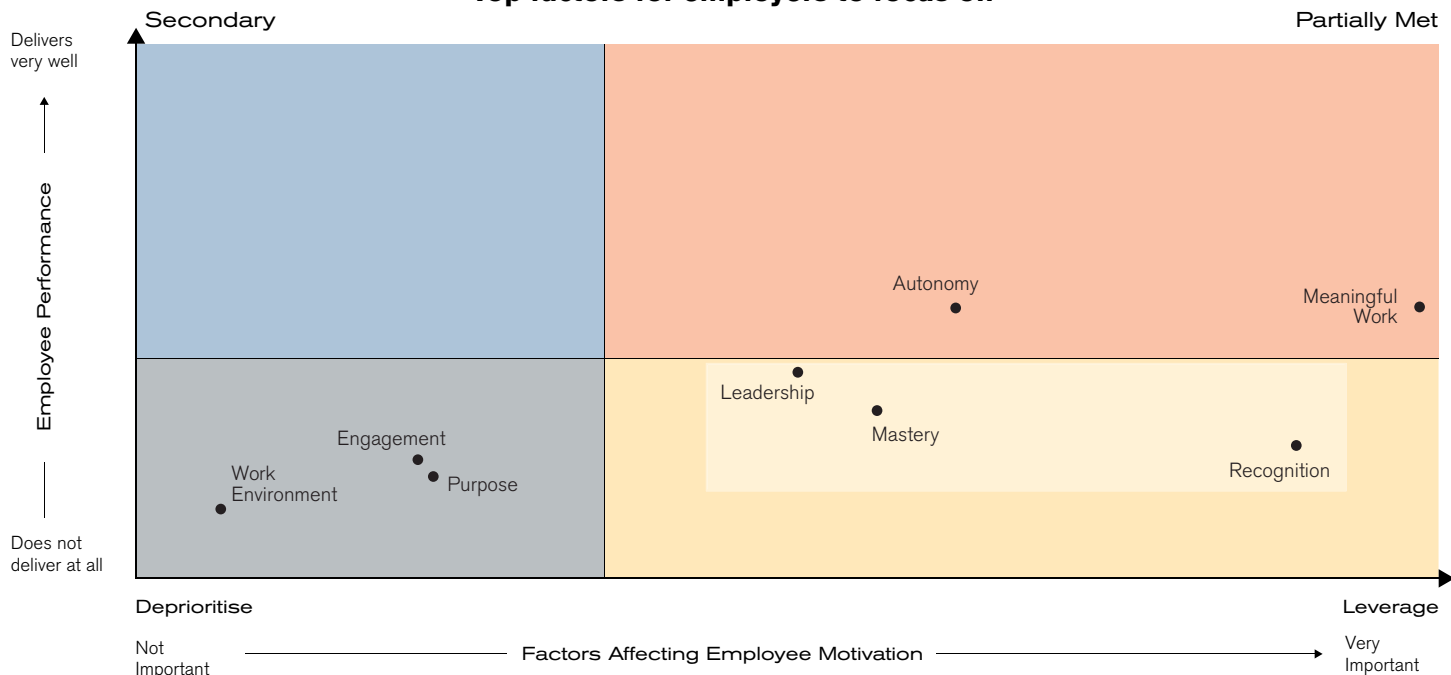
Mirroring the same trend observed across the region, Vietnamese employees are vocal about the value they place on *meaningful work* (68%), *recognition* (65%) and *autonomy* (56%). Among these, *recognition* stands out as it ranks second overall in order of importance, unlike in other regions where it usually ranks third.

However, the pressing issue here is that while 65% of employees in Vietnam value *recognition*, actual employer performance sits at just 12%. This gap simultaneously represents an unfulfilled need that demands immediate attention, and untapped potential for organisations to fully harness. Furthermore, an interesting point to note here is that *recognition* actually surpasses meaningful work as the top priority in the banking sector, where 76% of banking

professionals in Vietnam said it was paramount to the employee experience.

Given the intrinsic drive towards customer satisfaction as observed above, capitalising on this desire for *recognition* can create a powerful synergy. By acknowledging, appreciating, and rewarding their teams for their contributions, employers not only validate their efforts but also reinforce the behaviours that drive customer-centricity. The message for employers in Vietnam is clear: recognising and rewarding your employees is not just a good-to-have — it is a cornerstone for sustainable success. Besides *recognition*, employers should also work on bridging the gap for factors like *mastery* and *leadership* to further bolster employee satisfaction.

Top factors for employers to focus on



	Description
Partially met	Factors that are important for employees, and employees are delivering on it relatively better compared to other factors.
Leverage	Factors that are important for employees, but employers are not currently delivering on it.
Secondary	Factors that are not as important for employees, yet employers are delivering on it relatively better compared to other factors.
Deprioritise	Factors that are not as important for employees, and employers are not currently delivering on it.

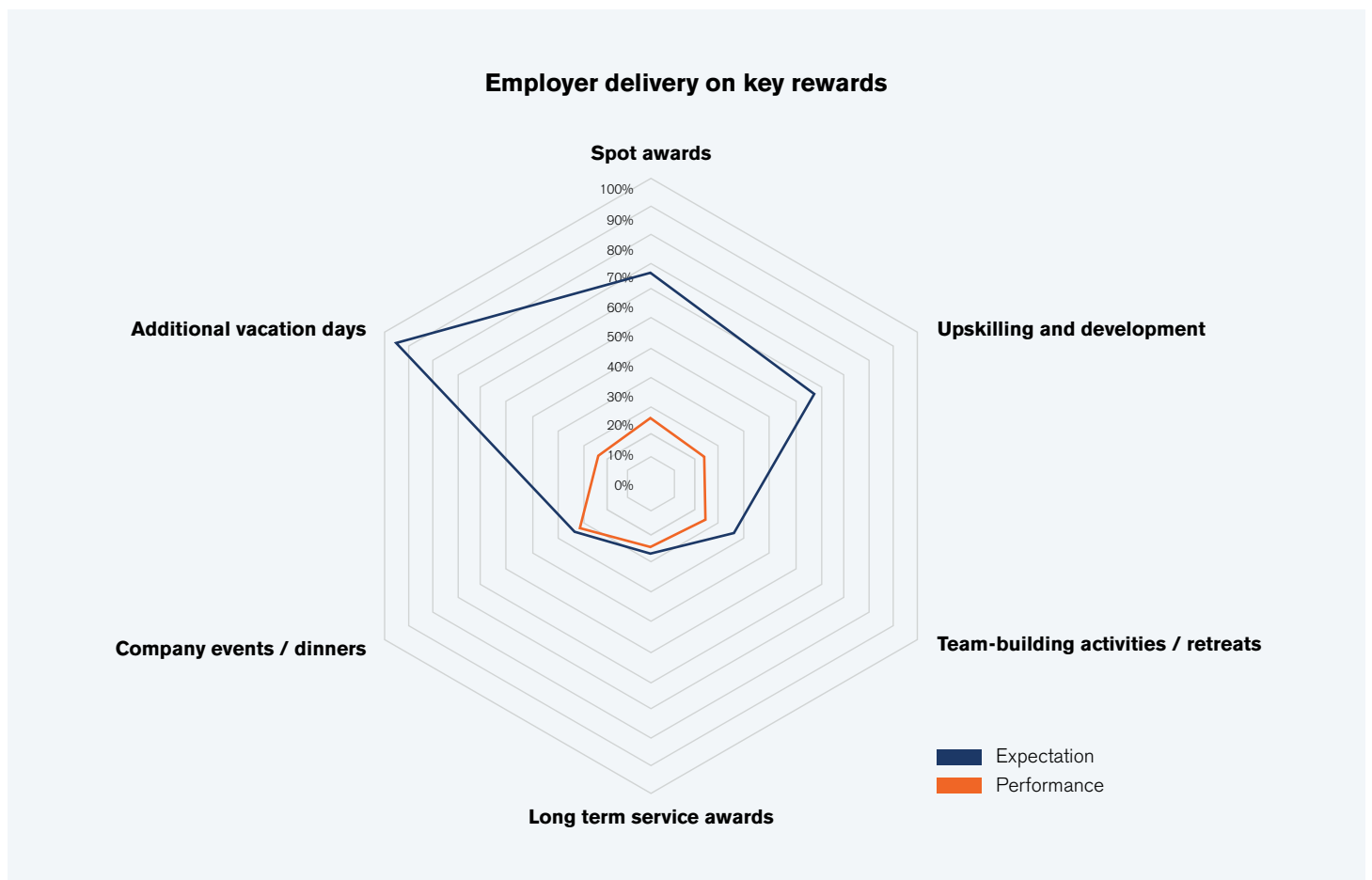
3 | Employers should tap on the desire for *recognition* through rewarding their employees with *spot awards*

As discussed above, it is clear that *recognition* plays a pivotal role in shaping the employee experience for employees in Vietnam. For employers, this means that it is imperative to start identifying ways to better reward and recognise their employees. Similar to findings in the other markets, employees here prefer *additional vacation days* (93%), *spot awards* (67%) and *upskilling and development* (58%).

Considering the importance of recognition here, the impact of *spot awards* becomes even more pronounced. Such prompt gestures of appreciation help employees feel seen and valued in real-time, while providing a tangible demonstration of their contributions to the organisation. This proactive

approach to recognition reinforces a culture of excellence and innovation, where employees are not only content but inspired to continuously improve and contribute to the company's success.

Beyond spot awards, *additional vacation days* also hold significant weight among employees in Vietnam, echoing preferences noted in other regions. Such a reward symbolises more than just a break; it conveys trust and appreciation from employers for the effort and commitment displayed by their teams. Likewise, offering *upskilling and development* opportunities also signal the employer's commitment to an employee's growth, nurturing their present contributions and future potential alike.



| Conclusion

In conclusion, this research has underscored the pivotal role of employee experience in driving sustainable success for organisations in today's competitive business landscape. Understanding the intricate connection between employee satisfaction and customer delight has become paramount for businesses seeking to thrive and maintain a competitive edge. With the pressing question of how to optimise employee engagement and cultivate a culture of fulfilment and motivation, this study has delved into the nuanced perspectives of employees in Singapore, Malaysia, the Philippines, and Vietnam to reveal essential insights.





As organisations aspire to optimise employee engagement and cultivate a motivated workforce, they can leverage the findings of this research to make informed decisions and implement thoughtful strategies. Creating an environment where employees feel valued, empowered, and aligned with the organisation's purpose can unlock the full potential of an engaged workforce.

Ultimately, organisations that invest in employee experience and fulfilment stand to gain not only a motivated workforce but also loyal customers who are delighted by the company's products and services. The pursuit of employee satisfaction is not just an admirable goal; it is a strategic imperative for organisations aspiring to achieve lasting success. Through the thoughtful implementation of these research findings, organisations can pave the way for a brighter future and tap into the immense potential of an engaged and motivated workforce.

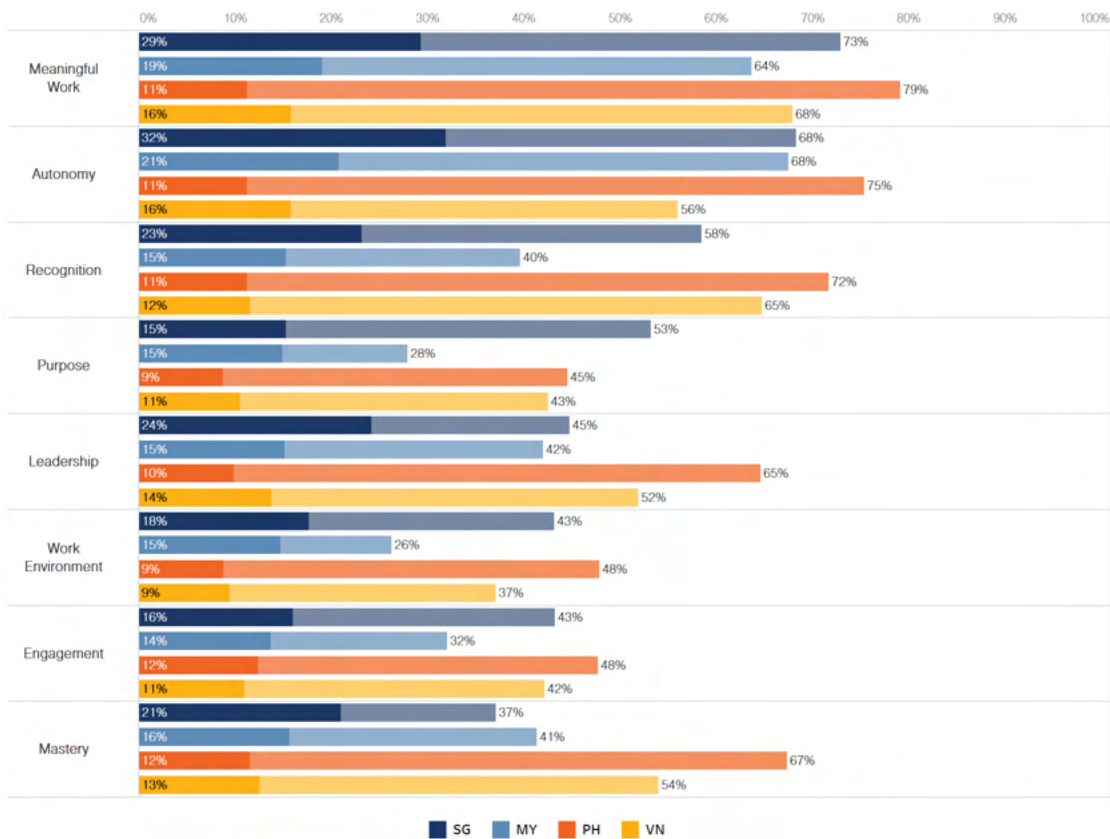
Appendix 1:

Support Information

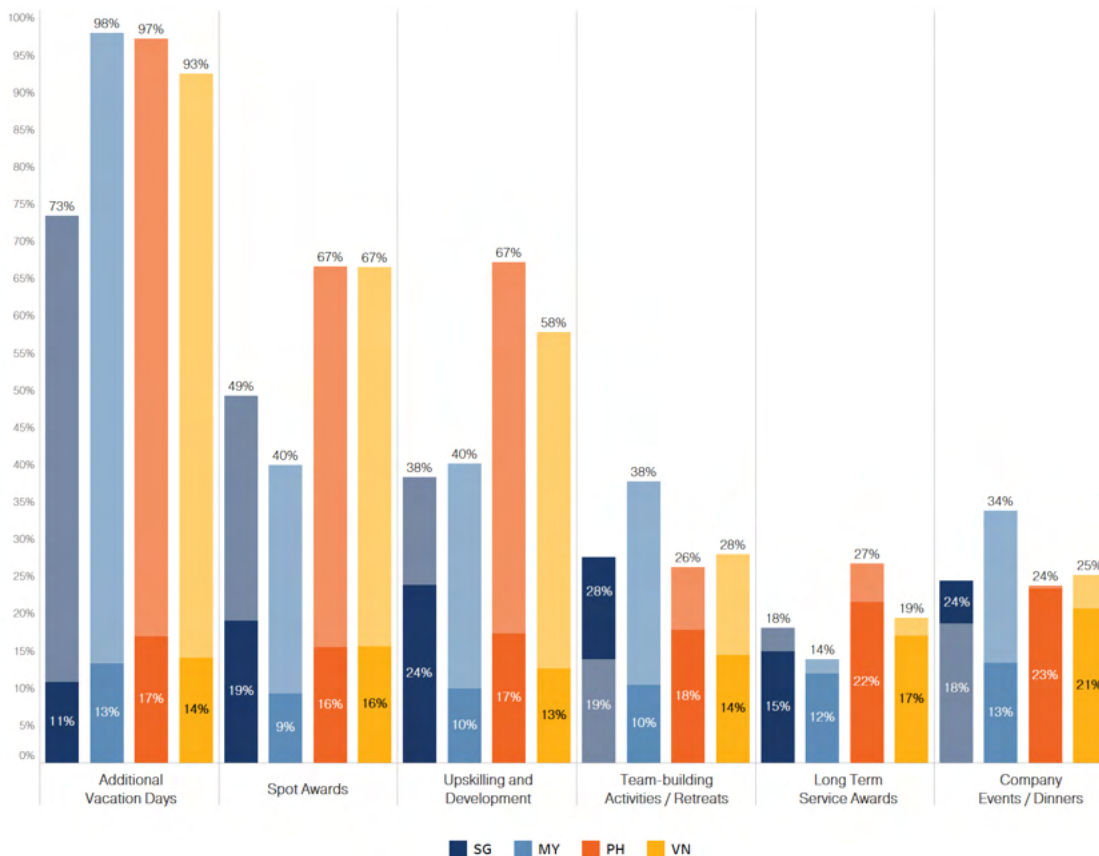
Profiles of sample achieved

	 SG	 MY	 PH	 VN
Total (Sample Achieved)	100% (2505)	100% (2501)	100% (2500)	100% (2501)
Role Type				
Entry-level employee	38% (963)	30% (751)	34% (852)	37% (921)
Middle management	30% (754)	30% (754)	10% (250)	12% (289)
Professional staff	20% (508)	25% (508)	22% (557)	11% (269)
Senior management	2% (74)	3% (74)	3% (38)	1% (25)
Support staff	8% (206)	13% (206)	32% (803)	40% (997)
Years in current organisation				
Less than 2 years	7% (166)	7% (166)	12% (304)	4% (102)
2-4	42% (1045)	42% (1045)	30% (741)	41% (1037)
5-7	25% (623)	25% (623)	30% (748)	25% (636)
8-10	22% (549)	22% (549)	20% (502)	23% (567)
11+	5% (122)	5% (122)	8% (205)	6% (159)
Industry				
Agriculture	0% (6)	2% (52)	5% (133)	8% (201)
Banking/Finance	18% (459)	8% (200)	6% (144)	4% (102)
Construction	1% (18)	4% (102)	4% (100)	11% (268)
Automotive/Energy	-	2% (49)	15% (367)	5% (134)
Food & Beverage/Restaurants	-	12% (296)	18% (444)	8% (201)
Education/Government	-	3% (165)	0% (3)	0% (3)
Healthcare/Medical	4% (89)	10% (251)	10% (253)	7% (169)
Hospitality/Travel/Tourism	13% (314)	12% (310)	20% (501)	20% (509)
Information Technology/Software	14% (356)	8% (210)	3% (66)	8% (203)
Mass Media/Advertising/Marketing/Public Relations	4% (102)	7% (182)	1% (22)	0% (3)
Real Estate/Property Management	3% (71)	10% (252)	1% (17)	3% (78)
Retail/Consumer Goods	11% (287)	7% (176)	8% (202)	15% (377)
Transportation/Storage	-	5% (127)	6% (161)	9% (232)
Others	20% (490)	5% (129)	3% (87)	1% (21)

Employee expectations versus employer performance across eight employee experience factors



Employee expectations versus employer performance across six key motivating rewards



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