

KELLY GLOBAL WORKFORCE INDEX® 2014

A WORLD AT

WORK



WORKERS ACROSS THE GLOBE
TALK TRENDS, ATTITUDES AND
WORKPLACE PERFORMANCE

GLOBAL REPORT

KELLY®

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A CHANGING LANDSCAPE

Labor markets across the globe continue to rebound from the economic turmoil of recent years with varying degrees of success.

The International Labour Organization (ILO) estimates that in 2013, there were 62 million fewer jobs worldwide in comparison to pre-crisis trends. This number includes not only the increase in unemployment since 2007, but also the number of discouraged workers who have left the global labor force altogether. This jobs gap is projected to reach 81 million by 2018.

A key driver of the global jobs gap is a significant skills mismatch. Employers continue to struggle to find workers with the right skills, keeping unemployment rates high and job growth muted. Annual job growth in developed countries is expected to average just 0.5% in the coming years – about half the rate seen in the early 2000s.

High unemployment is expected to remain a challenge, particularly in areas where the skills gap is most acute. To compound the challenge, adaptability – the capacity to match talent supply and demand efficiently – varies widely across the world’s labor markets, reflecting cultural and structural factors, as well as the ability of employers and workers to respond to changing circumstances, and opportunities.

As the recovery progresses, companies and workers alike are learning how to adjust to a “new normal.” The changing landscape calls for new workforce capabilities, while the ability to effectively address human capital issues remains a critical business imperative. Strategic workforce planning, talent analytics, and talent supply chain management are emerging as components of a more holistic solution to companies’ workforce challenges.

Yet amid all this planning, we can never forget that “human capital” is – first and foremost – human. The workers who make up the modern labor market continuously reshape it as they shift their professional preferences and priorities, and as generations with different viewpoints enter and exit the workforce.

To create effective workforce strategies, companies need to understand what attracts, engages, and motivates all types of talent around the world—not just the talent they have, but the talent they hope to have. Ultimately, even the best-laid-workforce strategy will fail if it ignores the voice of the workers.

THE KGWI® SURVEY AT A GLANCE

The 2014 Kelly Global Workforce Index® (KGWI) results show that the global labor market remains unsettled, with waning levels of worker loyalty and commitment.

To better understand how workers think—and how employers might respond—Kelly Services® developed the Kelly Global Workforce Index® (KGWI), an annual global survey with nearly 230,000 respondents across 31 countries, generations, and a multitude of industries and occupations.

The results of the survey provide valuable insight into key areas of the talent equation:

- **The Mood of the Global Labor Market** – provides a snapshot of how workers feel toward their work and their employers, as well as their intentions in the year ahead and how they expect to fare in the jobs market.
- **Active and Passive Job Seeker Engagement** – examines the nature of the contemporary job search process from a candidate's perspective, and the way employers identify "hidden" candidates and connect with them.
- **Career Development** – looks at worker perspectives on career aspirations such as the drivers of career goals and career management as well as the role of employers in fostering skills and career progression.
- **Candidate Experience from Hiring to On-boarding** – identifies common pitfalls in the recruitment process that can have lasting impact on candidate attitudes and worker engagement.
- **Worker Preferences and Workplace Agility** – canvases key priorities of workers in terms of their skills and compensation, as well as particular features of organizations that attract high-performing talent.
- **Employer Talent Quotient** – provides a unique analysis that turns the spotlight on employers' performance for insight into potential improvement and factors that may sway worker sentiment.

Survey respondents extend across three global regions:

- **The Americas:** Brazil, Canada, Mexico, Puerto Rico, and United States
- **EMEA (Europe, Middle East, Africa):** Belgium, Denmark, France, Germany, Hungary, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Russia, Sweden, Switzerland, and United Kingdom
- **APAC (Asia Pacific):** Australia, China, Hong Kong, India, Indonesia, Malaysia, New Zealand, Singapore and Thailand

Survey respondents also extend across three generations:

- **Baby Boomers:** 1946 – 1964
- **Generation X:** 1965 – 1980
- **Generation Y:** 1981 – 2000

Given the volume and complexity of the data captured in this research study, Kelly Services also regularly publishes shorter papers that detail findings on specific regions, industries, generations, and skill sets to deliver targeted insights into sectors and markets.

The goal in commissioning and sharing this research is to provide insights that can be used to help shape talent strategies. For these and other reports on the talent landscape, see kellyocg.com.

Notes: Regional differences in results may be attributed in part to the generational composition of the survey samples, 53% in APAC, 40% in Americas and 49% in EMEA.

This report uses the term "workers" rather than employees because workers can be engaged as direct workers as well as through flexible work arrangements such as temporary, contract, independent contractors, project-based workers, etc.

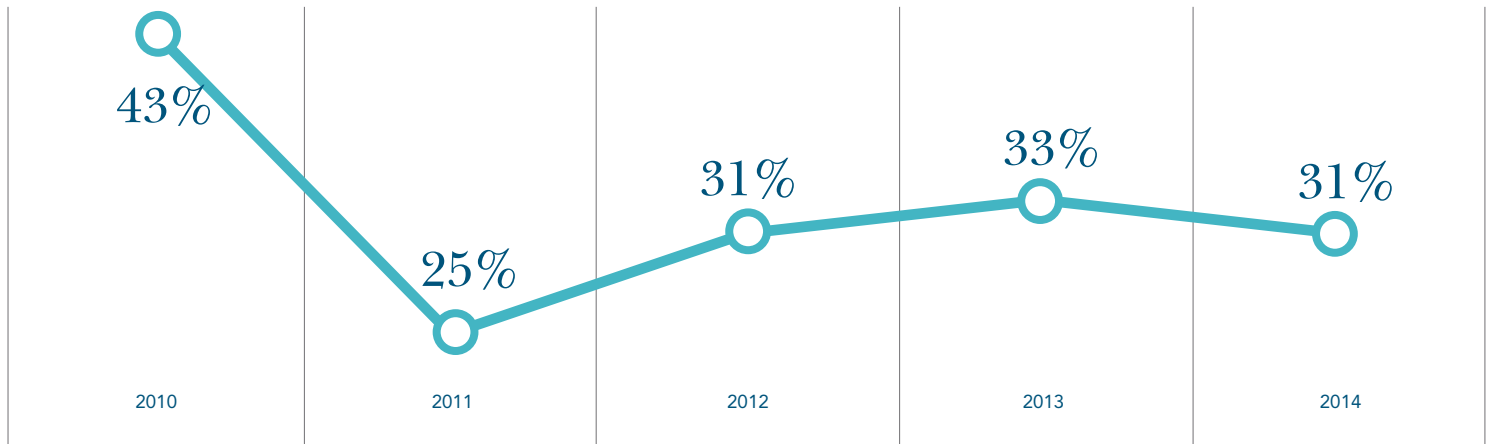


THE MOOD OF THE GLOBAL LABOR MARKET

The 2014 Kelly Global Workforce Index® (KGWI) results show that the global labor market remains unsettled, with waning levels of worker loyalty and commitment.

THE MOOD OF THE GLOBAL LABOR MARKET

Worker Commitment: How committed or “engaged” do you feel with your employer? (% totally committed, globally)



Less than a third (31%) of respondents are “totally committed” to their current employers. While this percentage has remained consistent since 2012, it represents a sharp decline over 2010 when 43% were totally committed.

Workers in the Americas were most likely to report feeling “totally committed” (34%), compared to APAC (29%) and EMEA (26%).

The percentage of workers globally who say they feel “more loyal” to their employers than they did a year ago stands at only 29%, a level largely steady since 2011.

More workers in the Americas and APAC (both 32%) report feeling more loyal as compared to those workers in EMEA (22%).

Aspects contributing to a worker’s “sense of meaning” can have a powerful impact on the way workers engage and contribute in a productive manner.

During the economic turmoil, that sense of meaning took on added value. While workers were more

likely to accept their employers could not afford to increase their financial compensation, that didn’t mean they weren’t looking for more. They simply sought alternative ways to improve their work life, and a “sense of meaning” was on that list.

Yet, in the last two years, results show a sharp drop in the number of workers who say their employers contribute to their sense of meaning. In 2012, almost half (47%) found a sense of meaning in their work. In 2014, that number fell nine percentage points to 38%.

Employers who fail to recognize the value of fostering a “sense of meaning” among their workers could find themselves unable to keep the talent they have and unable to attract the top talent they want. To prevent that from happening, employers can take steps to develop more meaningful employment. Improved sense of meaning could come through their corporate social responsibility efforts. Companies must be careful not to equate random acts of corporate philanthropy

as the entirety of their corporate social responsibility. A comprehensive CSR program is part of the long-term strategy of the organization, addressing multiple facets across company initiatives, including worker retention and recruitment.

Declines in meaningful work happened across all regions, with the Americas dropping the most (12 percentage points), followed by EMEA (9percentage points) and APAC (eight percentage points.)

No longer are workers content to just have a job. In each region, workers are increasingly thinking about quitting their job or leaving their employer (32% Americas; 52% EMEA; 43% APAC; 39% global.)

That rising trend should raise concern for employers. A departing worker can cost the company significantly. Experts estimate that a business spends between 30 and 150% of a worker’s annual compensation package to replace him or her¹. The cost is even greater when factoring the intangible components such as the lost

knowledge and disruption to co-workers and customers.

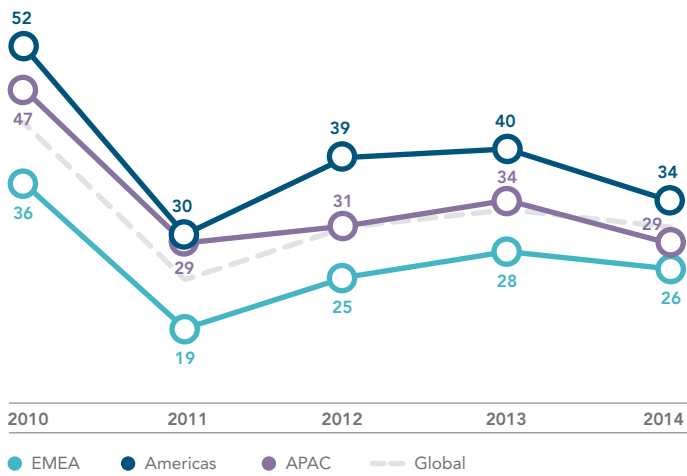
Equally disconcerting to employers is that even contented workers devote time and energy scanning for better job opportunities. Nearly half (47%) of workers say they actively look for better job opportunities or evaluate the external job market even when they are happy in a job. On the bright side, fewer workers say they search today than did last year (55%).

These so-called “unhappy happy” workers are more likely to be in EMEA (54%) and APAC (53%), compared to the Americas at 42%.

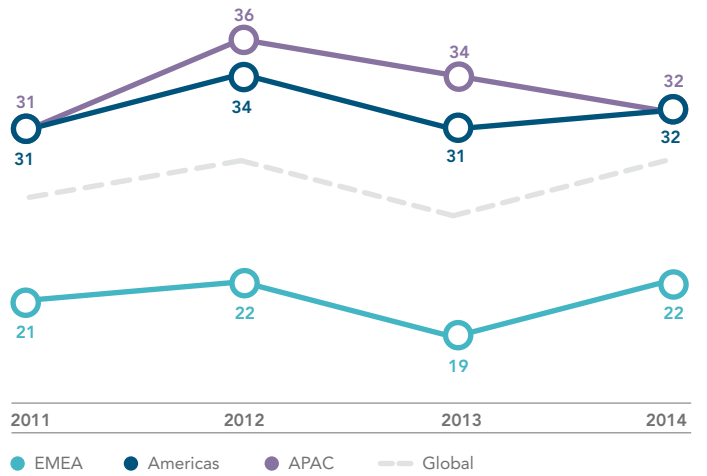
When it comes to changing employers, approximately six out of 10 intend to look for a job with another organization within the next year. While this is a decline from a level of 69% in 2011, the threat is a sobering reality for employers. Not only do they face the strong possibility that more workers will leave, they also are encountering more empowered workers who perceive stronger market demand for their skills

¹ Schlesinger, Leonard A.; James L. Heskett (1991-04-15). “Breaking the Cycle of Failure in Services”. *MIT Sloan Management Review* 33 (3): 17–28. Retrieved 2009-01-21.

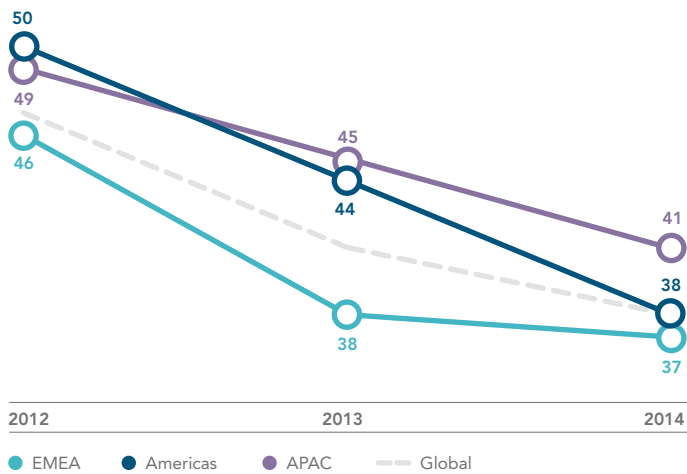
Worker Commitment: How committed or “engaged” do you feel with your employer? (% totally committed by region)



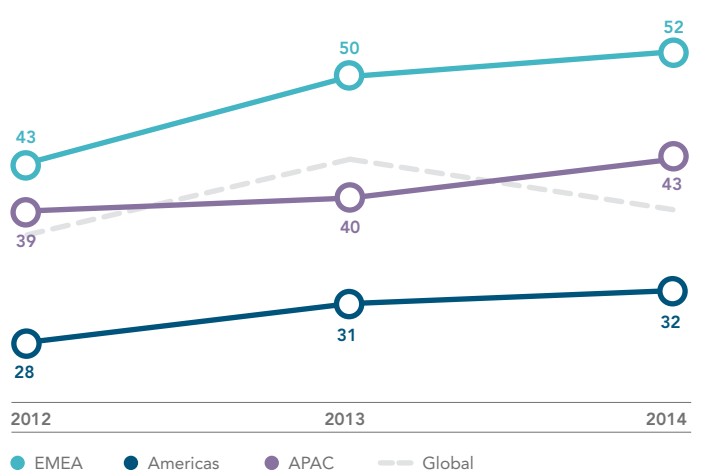
Worker Loyalty: Compared to a year ago, do you feel more to your employer? (% 'more loyal' by region)



Meaningful Work: Do you agree that your current employment provides you with a sense of 'meaning' (% 'strongly agree' and 'agree' by region)



Employment Volatility: Do you frequently think about quitting your current job and leaving your employer? (% 'yes' by region)



THE MOOD OF THE GLOBAL LABOR MARKET

Drivers of Job Dissatisfaction: What factors would be most likely to cause you to leave your organization or change jobs/careers? (% global, top six factors, multiple responses allowed)



and believe their own bargaining power is strengthened. Employers will succeed in attracting and retaining talent when they understand more about what workers want and what matters to them, and respond accordingly.

Geographically, the largest group expecting to switch jobs resides in EMEA (68%), followed by APAC (64%), and the Americas (56%). Employers in the Americas may be getting this message earlier than other geographic regions as its percentage has dropped 17 percentage points since 2011.

Workers identify a number of critical factors behind their intention to leave their jobs and seek new opportunities: salary/benefits (60%); opportunities for advancement (41%); work-life balance (36%); staff morale (33%); management (28%) and stress (26%).

While financial benefits top the list, employers would be mistaken to focus only on remuneration. Advancement, balance and culture all contribute significantly to workers' decision to seek employment elsewhere – but employers who embrace those factors could have a significant effect on workers' decisions to stay.

More than half of all workers (globally and regionally) believe their skills and experience are in high demand in the workplace. That figure is consistent with the past two years as the rebound in global economic activity, together with skills shortages in some areas, appear to have boosted workers' self-confidence about their prospects in the job market. Significantly more in the Americas (57%) and APAC (55%) feel they may be

in high demand compared to those in the EMEA (45%).

Most workers (70% globally) believe they would be in a good bargaining position to secure a similar or better position if they were to consider changing jobs. This is largely consistent with the pattern over the previous two years.

The degree of confidence among workers in their bargaining strength is relatively consistent across the regions (Americas 70%, EMEA 69%, and APAC 71%).

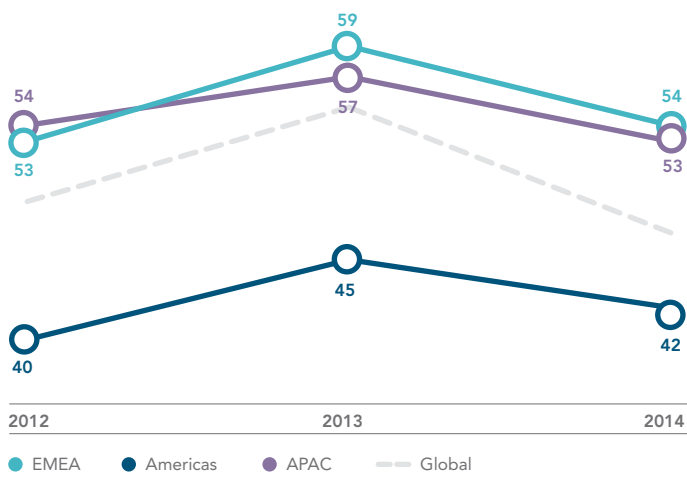
The mood of the labor market remains a difficult one for employers. Job creation is slow and economic recovery is uneven across regions. Yet, the majority of workers are confident that their skills put them in a strong position in terms of securing a new job or being in a better bargaining position.

On the positive side, employers should find more quality workers when they expand their talent pool. On the challenging side, employers must strive to retain their best people in a fragile economic environment, while grappling with a restless workforce and a dynamic marketplace for skills and capabilities.

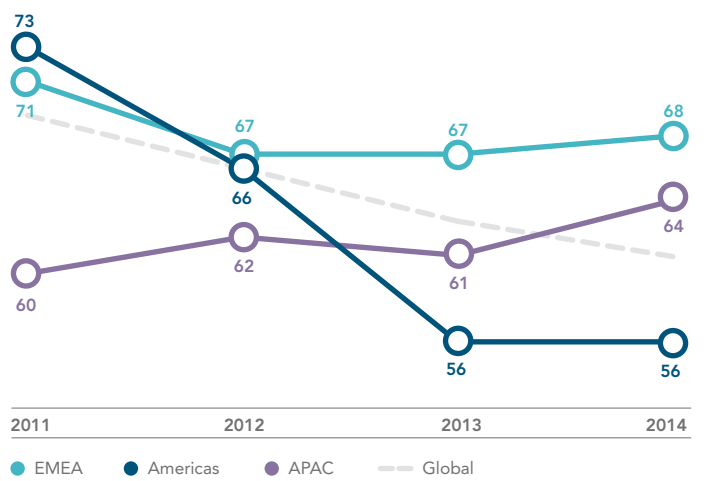
Companies attuned to the voice of talent across geographies, generations, and preferences will be better equipped to make those connections and secure the talent they need to achieve their business goals in 2014 and beyond.

The research findings presented over the following chapters detail many trends shaping this employment landscape, and identify numerous opportunities for top companies and top talent to connect for success.

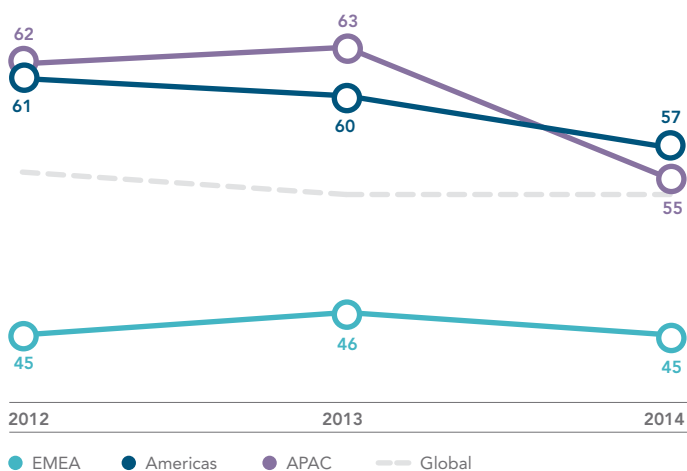
Perpetual Job Hunting: Do you actively look for better job opportunities or evaluate the external job market even when you are happy in a job? (% 'yes' by region)



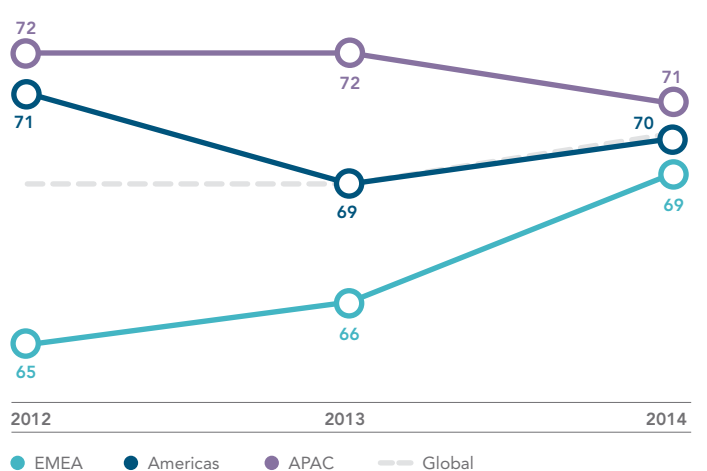
Intention to Switch Jobs: Do you intend to look for a job with another organization within the next year? (% 'yes' by region)



Employment Demand: To what degree do you feel you may be in a position of demand in the marketplace, in terms of your skill set/ experience? (% 'very highly' and 'highly' by region)



Worker Bargaining Strength: If you were to consider changing jobs, do you feel you are in a good bargaining position to secure a similar or better position of employment? (% 'yes' by region)





ACTIVE & PASSIVE JOB SEEKER ENGAGEMENT

Securing top talent for any position often is daunting and can be hampered by the wide range of sources from which to identify the best candidates.

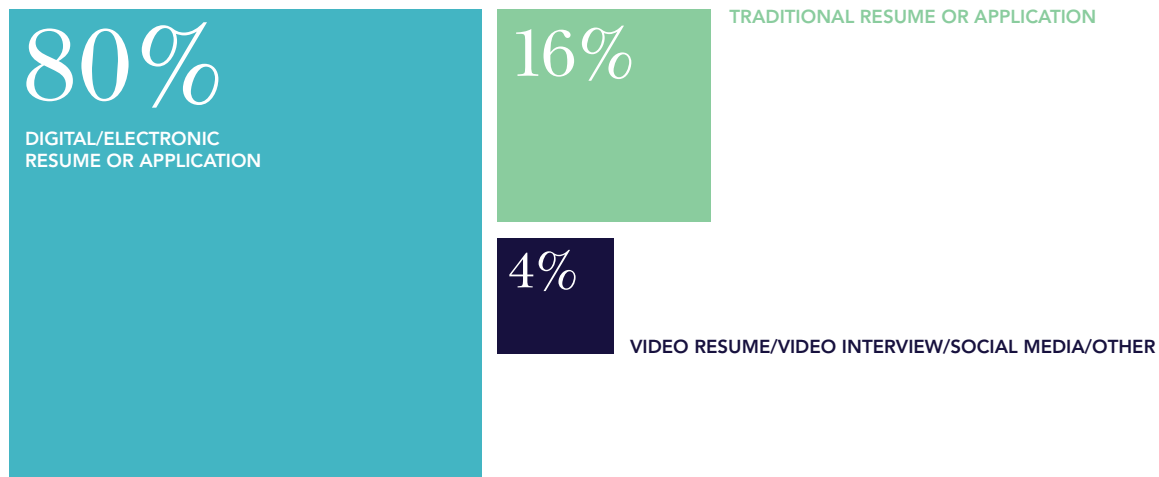
Organizations invest heavily to identify the top talent in their industries. The KGWI® survey results clearly illustrate the best strategy is based on the understanding that employers must meet candidates on their own terms, connecting with prospects in the ways they prefer, not the way the employers prefer. To develop a good strategy for talent acquisition, employers should evaluate all the ways in which top prospects are communicating, thinking or acting related to their

job searches. With that information in hand, employers can craft a strategy focused on how to best connect with candidates on both a macro and micro level.

Employers can benefit by knowing candidates' preferences, from the application submission process and online job board preference to candidate-employer engagement vehicles such as social media and online talent communities, and professional networks.

APPROACHES TO IDENTIFYING TALENT

Preferred way to apply for a job: What is your most preferred way to apply for a job? (globally)



Candidates consistently land new jobs through online job boards, recruitment/staffing companies/headhunters, directly through employers/recruiters, and by word of mouth. None of these is revolutionary, but each requires closer scrutiny by employers. Workers around the globe are consciously preparing for their next move by building solid stepping stones toward the future,

and employers that understand and react to that will be better at attracting and retaining talent.

When workers discover a potential job opening, they don't want to be challenged by the process. They prefer easy and efficient, which most likely is what employers want too. The use of digital/electronic resumes is now the norm, with 80% globally nominating it as their preferred

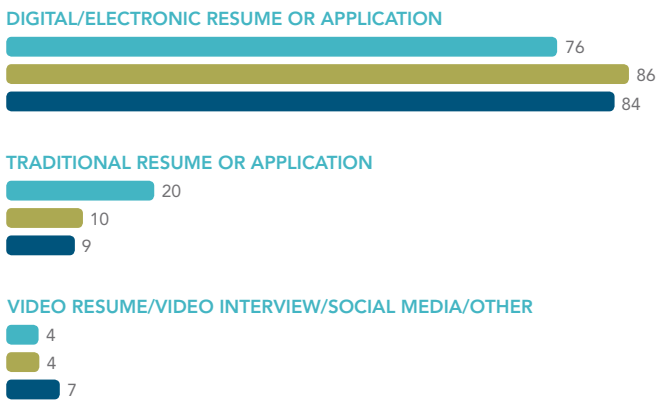
means to apply for a job, well ahead of the traditional hard-copy submission preferred by 16%. Regardless of age, culture (region), skill set, the digital resume is the candidate's choice when they apply for a job.

Offering an easy-to-use application process extends to the delivery vehicle as well. Employers should be responsive to the candidate's digital device

of choice, accommodating submission by laptops, tablets and smartphones.

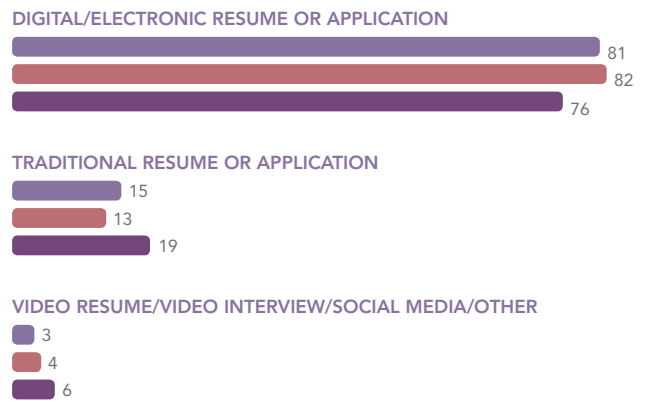
But there is a limit as to how far workers embrace the digital world. Alternative means of applying for work—including social media and video applications—comprise just 4% of the favored methods.

Preferred way to apply for a job: What is your most preferred way to apply for a job? (% by region)



● Americas ● EMEA ● APAC

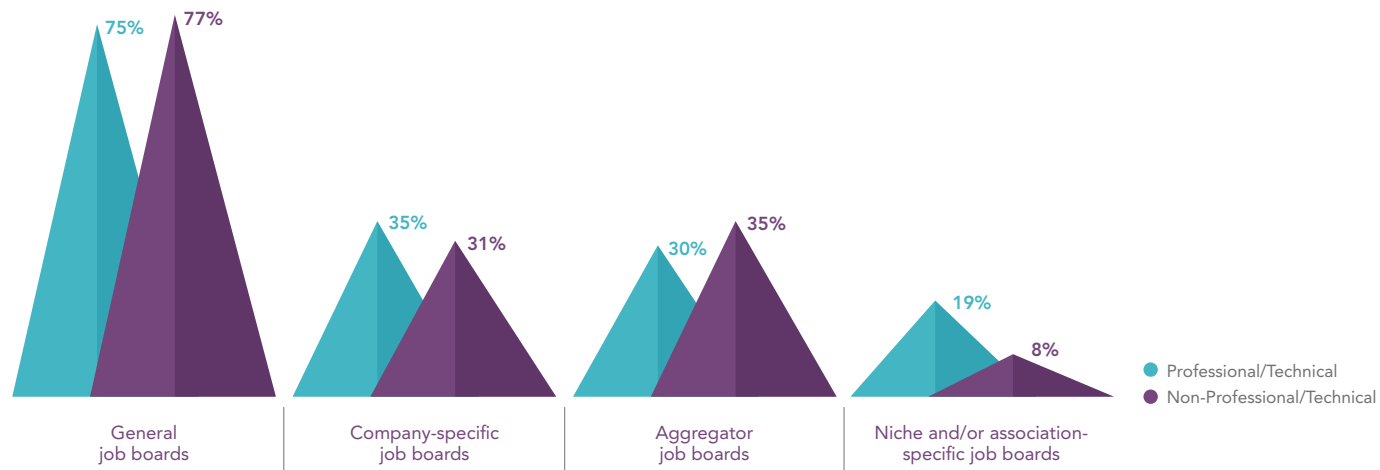
Preferred way to apply for a job : What is your most preferred way to apply for a job? (% by generation)



● Gen Y ● Gen X ● Baby Boomers

THE RISE OF ONLINE JOB BOARDS

Preferred online job boards: Which types of online job boards do you prefer for searching job opportunities and/or evaluating the marketplace? (% by occupation type, multiple responses allowed)



Employers should find that posting job opportunities on general online job boards, such as CareerBuilder[®] and Monster^{®1}, gain the most visibility and yield the highest return on investment. Globally, 76% prefer these general boards, with EMEA (87%) and APAC (85%), well ahead of the Americas (69%).

Aggregator job boards such as Indeed and SimplyHired^{®2} are preferred by one-third globally. Company-specific job boards have a relatively strong following, with one-third globally

preferring to use them to search for job opportunities and/or evaluation of the marketplace.

Niche and/or association-specific job boards are preferred by 14% globally but with a stronger (19%) following in APAC.

The KGWI[®] survey's job category results illustrate why employers in the Professional/Technical category will want to focus more on company-specific job boards as well as niche boards. While this group still cites general job boards

at the top source, they prefer company-specific job boards (35%) more than non-technical workers (31%). Professional/Technical professionals include Education, Engineering, Finance/Accounting, Health Care, IT, Law, Math, Marketing, Sales, Science, and Security Clearance.

Niche job boards are more than twice as popular among Professional/Technical workers (19%) as Non-Professional/Technical (8%). Non-Professional/Technical areas include Administrative/Office

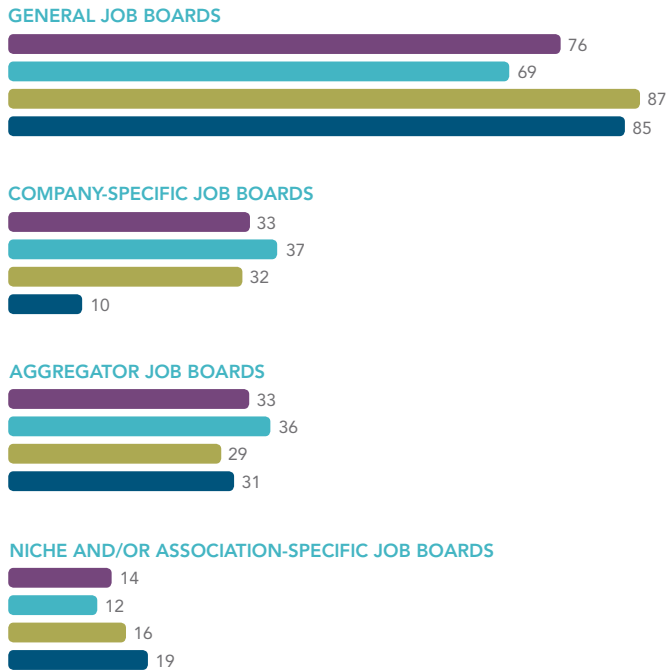
Clerical, Call Center/Customer Service, and Light Industrial.

The choice of general jobs boards is somewhat more pronounced among younger generations. Both Gen Y and Gen X favor general job boards more than Baby Boomers do. Aggregator and company-specific job boards become more of a focus among Baby Boomers, with more than one-third opting for these targeted choices.

¹ CareerBuilder and Monster are job boards commonly used in the US. The names of leading general job boards vary across the EMEA and APAC regions.

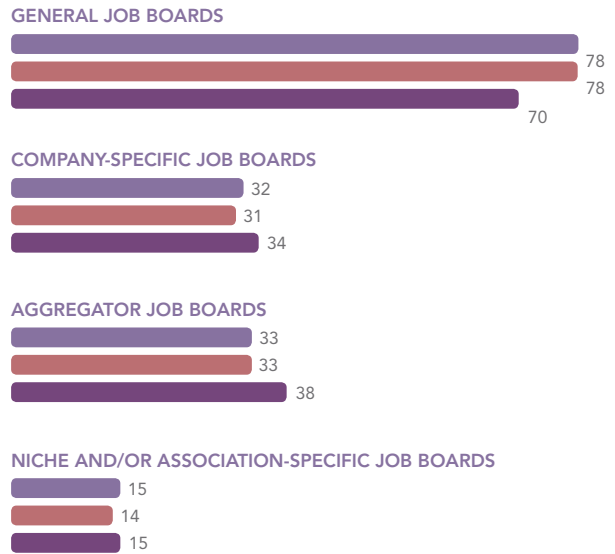
² Indeed and SimplyHired are aggregator job boards commonly used in the US. The names of leading aggregator job boards vary across the EMEA and APAC regions.

Preferred online job boards: Which types of online job boards do you prefer for searching job opportunities and/or evaluating the marketplace? (% by region, multiple responses allowed)



● Global ● Americas ● EMEA ● APAC

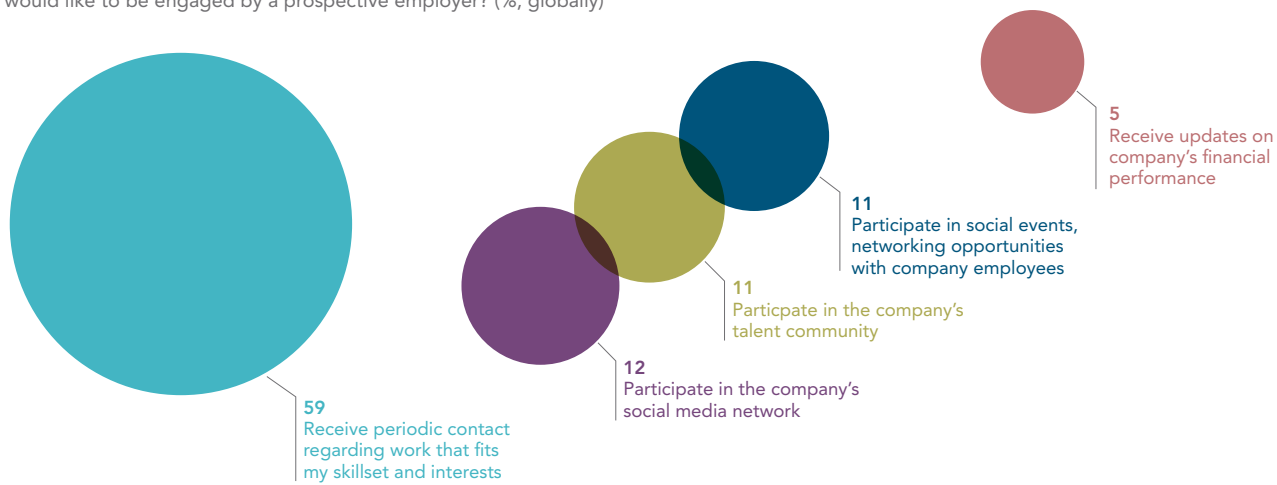
Preferred online job boards: Which types of online job boards do you prefer for searching job opportunities and/or evaluating the marketplace? (% by generation, multiple responses allowed)



● Gen Y ● Gen X ● Baby Boomers

ENGAGEMENT AND CONVERSATION

Preferred method of engagement: Which best describes how you would like to be engaged by a prospective employer? (% , globally)



Despite all the mass digital communication, candidates still preferred to be engaged by more personally. They strongly favor receiving periodic contact from employers or potential employers who share information about relevant work opportunities. This contact takes the form of phone call, e-mail or messages.

This method is well ahead of other alternative engagement vehicles, including participation in a firm's social media network, its talent community, and social-networking events.

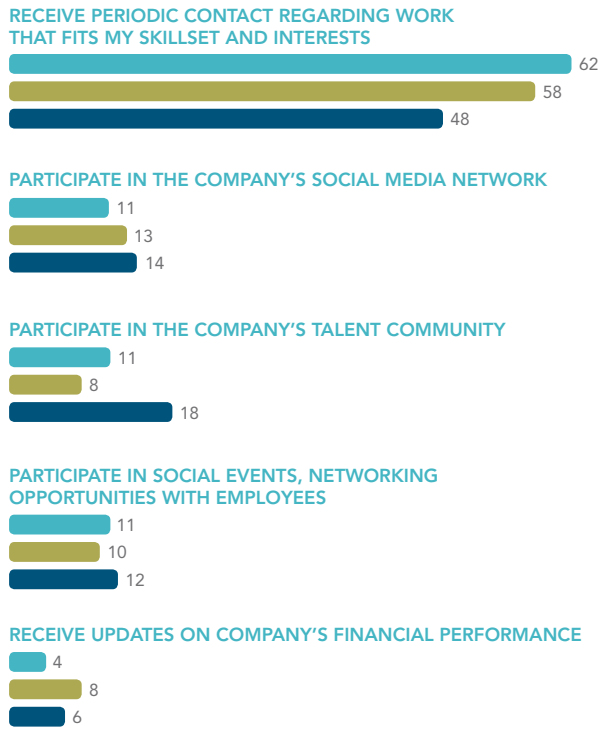
Workers are willing to be engaged and don't mind meaningful contact from

employers about real work opportunities that have relevance to their skill sets and interests.

Firms' use of periodic contact with candidates is cited as a preferred method by the majority of all generational groups, more than 30% of Gen Y and Gen X candidates cite preferences for

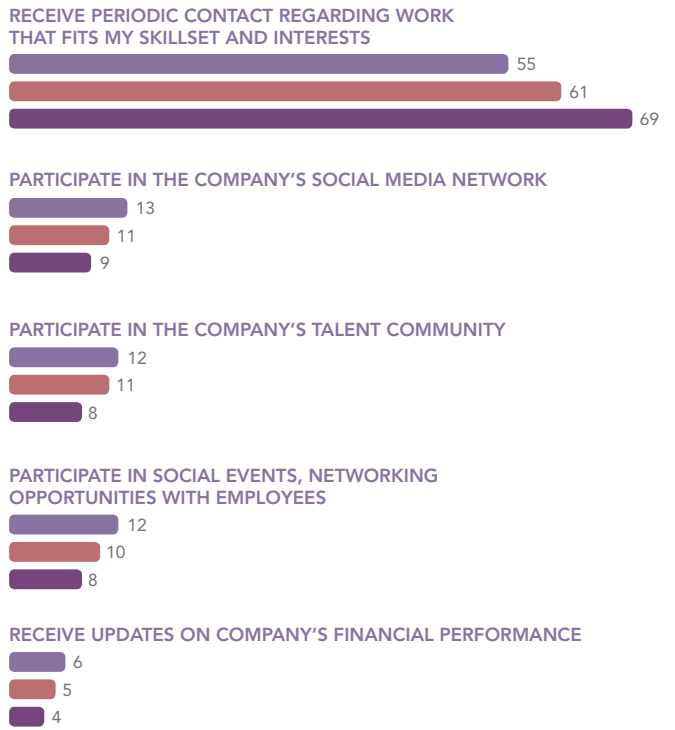
other forms of engagement: company's social network (13% Gen Y; 11% Gen X), company's talent community (12% Gen Y; 11% Gen X) and social events and networking opportunities (12% Gen Y; 10% Gen X). Less than 10% of Baby Boomers cite one of those alternatives.

Preferred method of engagement: Which best describes how you would like to be engaged by a prospective employer? (% by region)



● Americas ● EMEA ● APAC

Preferred method of engagement: Which best describes how you would like to be engaged by a prospective employer? (% by generation)

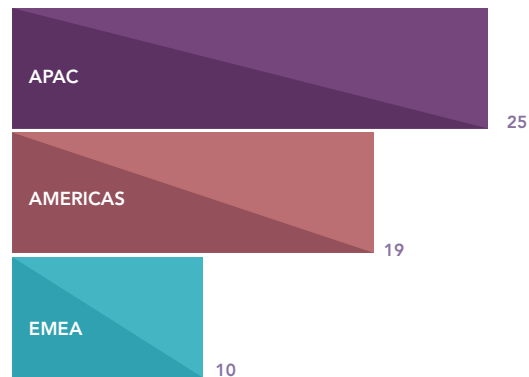


● Gen Y ● Gen X ● Baby Boomers

TALENT COMMUNITIES

Experience in online talent communities: Have you had any experience participating in an employer's online talent community? (% 'yes' by region)

17%
GLOBAL



Online talent communities are still relatively new, but forward-thinking employers recognize talent communities as the next generation of sourcing and recruiting. Earlier incarnations were known as talent pools or talent pipelines. But today's talent communities take those referrals, or social recruiting, to the next level.

A talent community is an interactive forum where individuals connect around particular skill sets or interests. Members could include candidates, employees, alumni and others related to the group's interest. These communities can be online, in person or a combination of both.

The often referral-based interactions lead to a highly effective way to attract a larger pool of qualified job candidates without significant costs. Yet, many employers still have not embraced them yet.

The KGWl® research focused on employer-specific and company-specific talent pools. It found that, globally, only 17% of workers had actually participated in an employer's online talent community. But

APAC and the Americas stand out, with 25% and 19% of respondents respectively involved in online talent communities, higher than in EMEA (10%).

Those results show significant room for improvement in the use of talent communities. Employers should initiate the process of building a talent community – identifying where its potential members would interact the best, inviting those members (including employees, alumni and others connected in one way or another to the company or its mission), developing ways to encourage interactions, and engaging and monitoring the conversation.

But the talent community development process doesn't stop there. Given most workers' unfamiliarity, companies need to introduce the concept and make potential members aware of the benefits. It's a great way for prospective workers to learn about a company's people, culture, work, etc. and it's a good opportunity for current workers to glean insight about the company's and co-workers' activity. When a job vacancy arises, the employer has the ideal outlet to post the opportunity.

Early adopters of talent communities are the more tech-savvy, with approximately a quarter of those in the High Tech: Internet Services/Software Development sector being involved. Business Services and Energy also experience relatively high use of talent communities.

Almost three out of four workers who have participated in an online community cite access to jobs as the biggest advantage.

Online talent communities also engender a closer connection among its members because they share knowledge and expertise of the business, something that is not always easily accessible to outsiders.

Of the workers who have participated in a community, 43% say they like learning more about a given company; 36% like to get that information from current and former workers; and 35% like the access to relevant information on skills development.

While actual involvement has been relatively low, there is a high degree of interest among never-experienced candidates. Globally, among the 83% with no experience, a total of

40% say they are either "very interested" or "interested" in becoming involved in online talent communities.

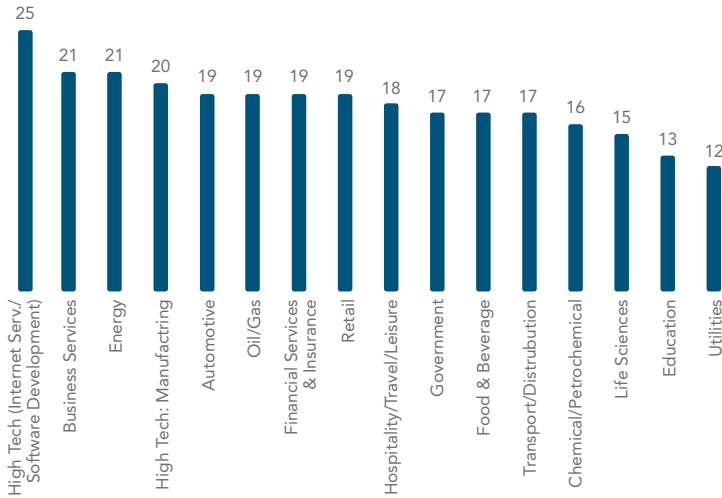
The highest level of interest is in APAC (47%), compared with the Americas (40%) and EMEA (35%).

Interest in online talent communities is highest among Gen Y and Gen X. Of the 83% globally with no experience of talent communities, 44% of Gen Y and 42% of Gen X express a desire to become involved. A third of Baby Boomers want to take part, all of which suggests a fertile area for employers who might be looking at ways to gain exposure to a wider skills base.

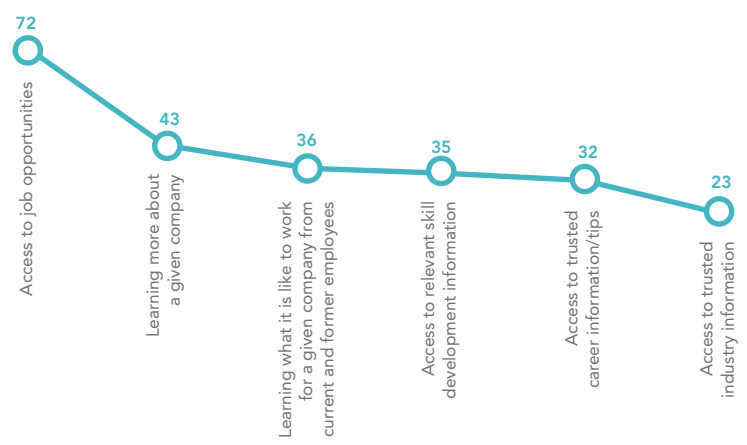
One attraction of online talent communities is the informed nature of the discussions because the network could involve current, past and potential workers, and a wider circle of knowledgeable participants.

In certain industries, this can be especially significant. Among those with no direct experience, there are high rates of interest in Business Services, High Tech: Internet Services/Software Development, Government, Oil/Gas, Energy and Financial Services & Insurance.

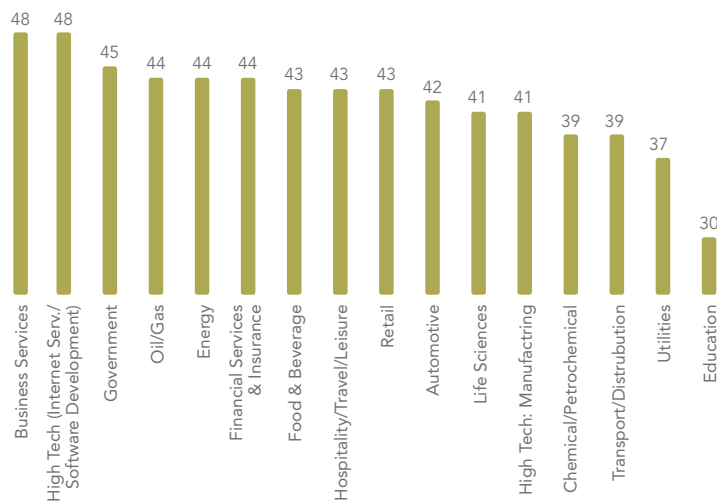
Experience in online talent communities: Have you had any experience participating in an employer's online talent community? (% 'yes' by industry)



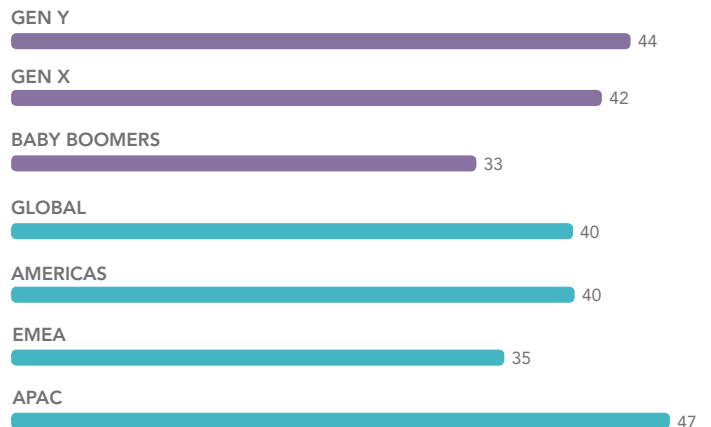
Advantages of online talent communities: If 'yes' to experience participating in an online talent community, what do you like most about it? (% globally, multiple responses allowed)



Level of interest in online talent communities: If no experience with online talent communities, how interested would you be in participating? (% 'very interested' and 'interested' by industry)



Level of interest in online talent communities: If no experience with online talent communities, how interested would you be in participating? (% 'very interested' and 'interested' by generation and by region)

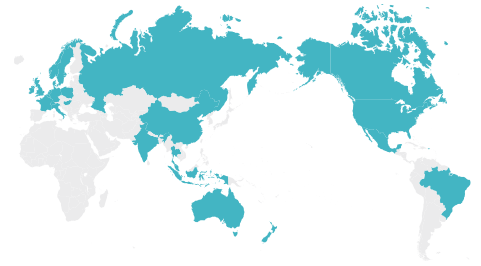


SOCIAL MEDIA AND CAREER NETWORKING

Preference for social media as a job search tool: Would you be more inclined to search for jobs via social media than traditional methods? (% 'yes' by country)

36%

GLOBAL



More than a third (34%) of workers globally uses social media in their job and career decisions. Though that percentage has decreased slightly in the last few years, employers still must evaluate how candidates use social media for career purposes to gain a better understanding of the scene, enabling them to develop a more effective strategy to use social media's assets to their advantage.

Social media offers a platform that combines virtual outreach with word of mouth. Employers should take advantage of its own channels on LinkedIn, Facebook and Twitter. They also must not forget their own workers and enlist their help to spread the word through their personal social media channels as well. Leveraging both company and individuals' social media can only expand the pool of potential candidates.

The APAC region stands out as something of a hot spot, with approximately half (51%) employing their social media network for career and employment decisions, significantly above EMEA (34%) and the Americas (30%). Importantly, the enthusiasm

for social media in career and employment decisions has tapered in the past three years. In APAC, those using their social media networks for employment and career decisions fell from 58% in 2012 to 51% in 2014. In EMEA, the rate fell from 40% to 34% over the same period, while in the Americas it slipped from 33% to 30%.

Across the globe, the use of social media networks in employment and career decisions varies significantly. The APAC region has some of the most intensive use of career-related social media, led by China (70%), India (64%), Thailand (60%) and Indonesia (57%).

Mexico sees the lowest level of social media activity with just 22%, followed by France (25%), the United States and Australia (both 30%) and Russia (31%).

The use of social media networks for employment and career decision-making is not uniform across industries, with almost half in more leading-edge areas using them to less than a third in Non-Professional/Non-Technical areas.

Those most likely to be using social media networks in their employment and career

decisions are High Tech: Internet Services/Software Development; Life Sciences; High Tech: Manufacturing; Business Services; Energy; and Hospitality/Travel/Leisure. Those least likely are in Education, Transport/Distribution, and Utilities. Across the board, those engaged in Professional/Technical occupations are more likely (38%) to use social media in their career engagement than those in Non-Professional/Technical areas (29%).

Globally more than one-third (36%) are now more inclined to search for jobs via social media than through traditional means such as newspaper advertisements, recruitment companies or even online job boards.

That trend is most pronounced in APAC where more than half (53%) prefer social media as a job search tool, compared with lower rates in EMEA (35%) and the Americas (34%).

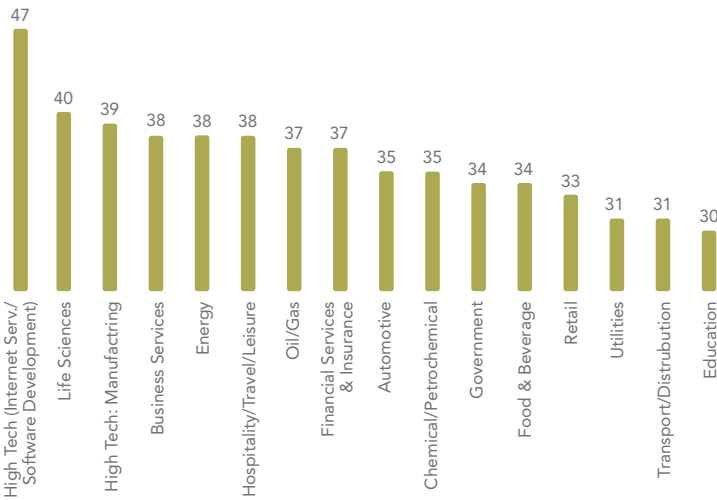
Just as the use of social media in career-related decisions has waned somewhat in recent years, the role of social media as a job-search device also has tapered. In APAC, the number preferring social media networks over

traditional recruitment methods jumped sharply from 47% in 2012 to 56% in 2013, but dipped slightly to 53% in 2014. The Americas follows a similar pattern, rising sharply between 2012 and 2013, and falling marginally in 2014. However, EMEA displays a consistent pattern of increasing social media preference between 2012 and 2014.

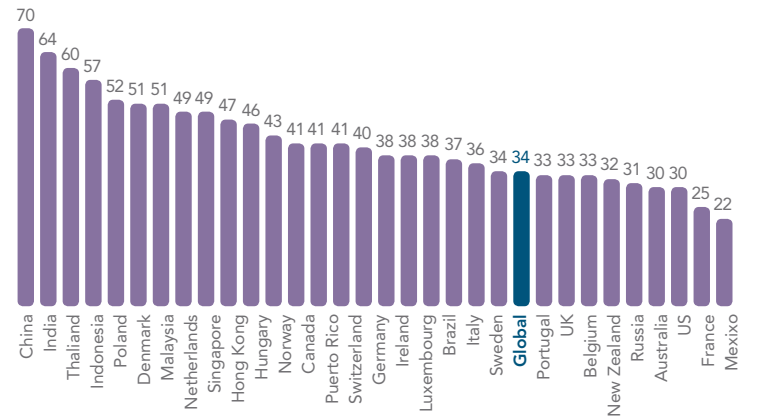
There are local variations in the inclination to use social media as the preferred job search tool over traditional recruitment methods. In the fast growing economies of APAC, social media holds sway over other forms of job search, led by India, Thailand, Indonesia, Malaysia, China, and Singapore – all with more than 50% opting for social media. In EMEA, there is moderate uptick in France, Netherlands, Poland, and Sweden.

What is clear is that workers and candidates have embraced social media in a variety of career- and job-related discussions, notwithstanding a softening in the most recent period. Importantly, the KGWI® research shows that social media remains a viable tool in initially attracting job seekers, but it is not their preferred way of applying for a job.

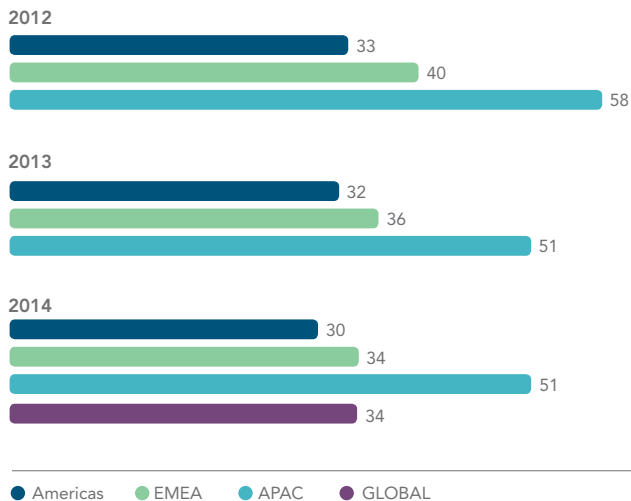
Use of social media networks in employment decisions:
Do you use your social media network when making career/ employment decisions? (% 'yes' by industry)



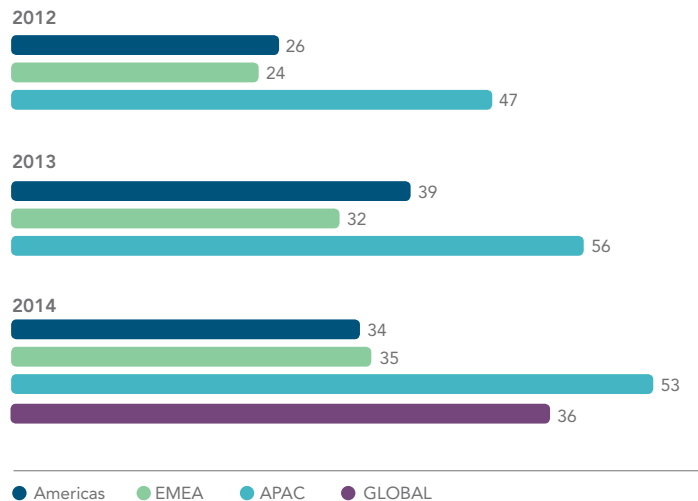
Use of social media networks in employment decisions:
Do you use your social media network when making career/ employment decisions? (% 'yes' by country)



Use of social media networks in employment decisions:
Do you use your social media network when making career/employment decisions? (% 'yes' by region)

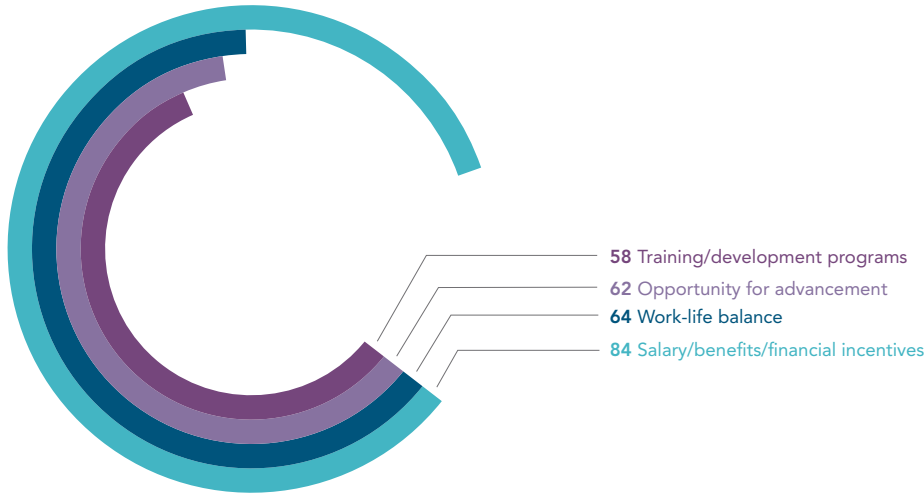


Preference for social media as a job search tool:
Would you be more inclined to search for jobs via social media than traditional methods? (% 'yes' by region)



CRITICAL FACTORS IN THE EMPLOYMENT DECISION

What makes an employer attractive? Which of the following make an organization an attractive employer or would drive your decision to accept one job/position over another? (% , top four factors, global, multiple responses allowed)



The KGWI® sought to identify the factors that stand out in the minds of workers and candidates in choosing one employer over another.

Not surprisingly, financial benefits are the heavyweight consideration, with 84% of workers globally saying that drives their choice. However, a total of 64% indicate that work-life balance can sway their decision.

A total of 62% mention that opportunities for advancement as a differentiator, while 58% say training and/or development programs are key influencers

in their job choice.

Also noteworthy are the factors least likely to sway an employment decision – corporate goodwill, non-traditional perks or benefits, global opportunities, and equal opportunity or diversity considerations.

Looking at the top four factors (salary and benefits; work-life balance; advancement opportunities; training and development) that influence job choice, key comparisons occur across the regions. Those in APAC (86%) and the Americas (85%) rate salary and benefits slightly

higher than those in EMEA (80%). Work-life balance rates higher in APAC (74%) than in the Americas (65%) and EMEA (59%).

Workers in the Americas (65%) and APAC (62%) are more likely to be influenced by advancement opportunities than those in EMEA (57%), while training and development programs rate more highly in APAC (64%) and the Americas (60%) than in EMEA (51%).

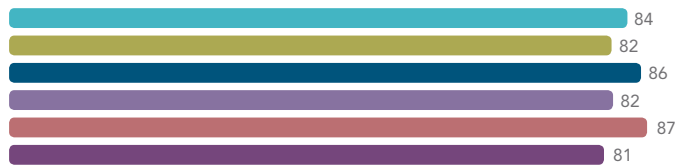
Across a range of Professional/ Technical occupations, key factors in employment selection come into sharper focus. The

issue of salary/benefits/financial incentives is selected most frequently as the top factor by all the selected Professional/ Technical occupations, with IT (87%) highest. In regard to work-life balance, significantly more IT and Science professionals select it than other occupations.

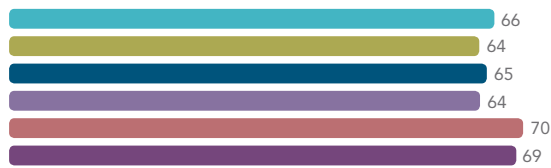
Financial considerations remain paramount, but increasingly, workers are looking to the longer term and taking into account lifestyle and personal development issues. These can become the make-or-break factors in swaying candidates to one job over another.

What makes an employer attractive? Which of the following make an organization an attractive employer or would drive your decision to accept one job/position over another? (% by select professional/technical occupations, multiple responses allowed)

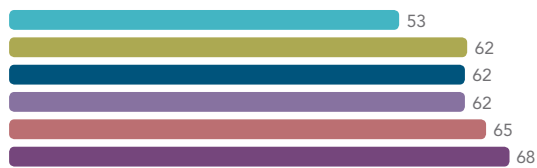
SALARY/BENEFITS/FINANCIAL INCENTIVES



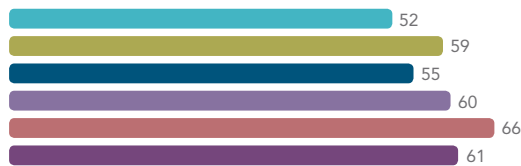
WORK-LIFE BALANCE



OPPORTUNITIES FOR ADVANCEMENT

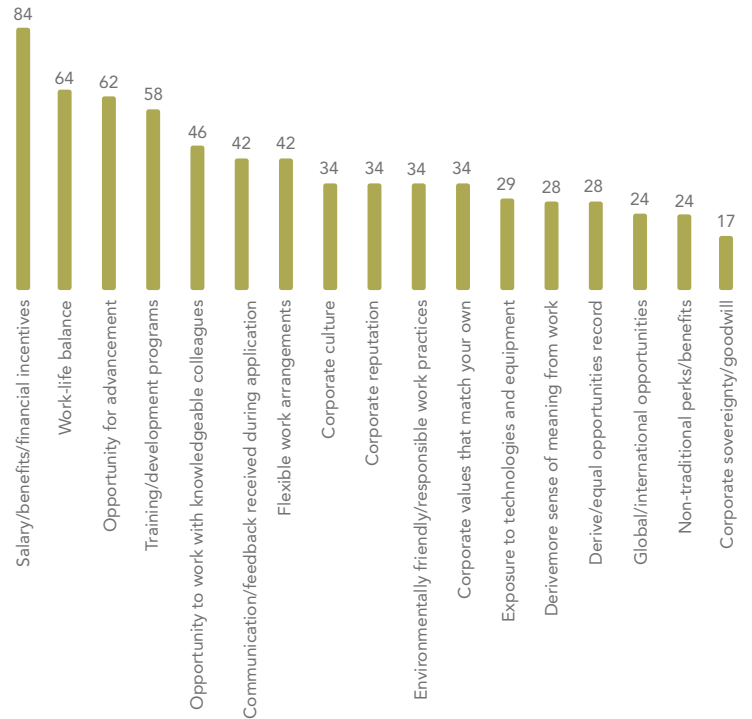


TRAINING/DEVELOPMENT PROGRAMS



- Education
- Engineering
- Finance/Accounting
- Health care
- IT
- Science

What makes an employer attractive? Which of the following make an organization an attractive employer or would drive your decision to accept one job/position over another? (% by select professional/technical occupations, multiple responses allowed)



KEY FINDINGS

REGION

EMEA (87%) and APAC (85%) prevail over the Americas (69%) in worker preference for using general online job boards.

Current participation in talent communities is highest in APAC (25%) and the Americas (19%) and lowest in EMEA (10%). Future interest in talent communities (among those who have not participated) follows the pattern of current participation. Those in APAC (47%) and Americas (40%) are most interested, compared with lower interest in EMEA (35%).

APAC workers are far more likely than workers around the globe to involve their social media network in their employment decisions (51%).

Workers in EMEA and APAC show far greater preference for sending employers digital/electronic resumes or applications, compared to Americas workers (86% and 84% vs. 76%).

GENERATION

General online job boards are most preferred by Gen Y and Gen X job seekers (78% each), and less so by Baby Boomers (70%) who prefer company-specific job boards more than their younger counterparts (38% vs. 33% each).

Younger generations are somewhat more inclined to participate in talent communities (17% each for Gen Y and Gen X), compared to Baby Boomers (15%). In line with those most inclined to currently participate, Gen Y and Gen X workers with no prior experience in talent communities express the greatest interest in partaking (44% and 42%) compared to Baby Boomers (33%).

Thirty-five per cent of Gen Y and Gen X workers involve their social media network when making career decisions, while 32% of Baby Boomers do so.

Gen X and Gen Y job seekers show a greater preference for electronic resumes/applications compared to Baby Boomers (82% and 81% vs. 76%).

INDUSTRY

The highest incidence of talent community participation is among High Tech workers (23% vs. 17% global average).

High Tech workers report the highest involvement of their social media network in their employment decision-making (43%), compared to workers in Life Sciences (40%), Financial Services & Insurance (37%) and Natural Resources (35%).

High Tech and Natural Resources workers show a higher-than-average preference for job searching via social media over traditional methods (42% and 40%), with Life Sciences workers showing less inclination (36%).

SKILL SET

Compared to Non-Professional Technical workers, Professional/Technical job seekers are more likely to prefer company-specific job boards (35% vs. 31%) and far more likely to favor niche and/or association-specific job boards (19% vs. 8%).

High Tech workers with no talent community experience show the most interest in future participation (44% vs. 40% global average).

Professional/Technical workers are far more likely to share their employment decisions with their social media network compared to their non-Professional Technical counterparts (38% vs. 29%, respectively).

Professionals in IT, Science (89% each), Finance/Accounting (88%) and Engineering (87%) are most likely to favor electronic resume/application submission.

CONCLUSION

The advent of disruptive practices and technologies in the recruiting environment has brought both challenges and opportunities for employers.

There is greater opportunity than ever to engage a wide pool of talent across industries, occupations, countries and even continents.

On the one hand, the uptake of social media and the expansion of networked communities exposes employees to the prospect of more attractive offers from employers far and wide.

But it also means that employers seeking talent have a more expansive field in which to canvass for the skills they need.

Employees have become more willing to open up with a wide audience about work and workplace issues, effectively dismantling the privacy barrier that once stood between a firm and the outside world.

This changes the rules of engagement. What takes place at work doesn't necessarily stay at work. A more uninhibited, tech-savvy Gen Y has ensured that workplace conversation and issues are shared and dissected.

So what does this mean for employers in a new, more open, networked business environment?

The best, most sought after employers have the chance to showcase the opportunities

on offer and become magnets for global talent. Employers who don't meet the highest benchmarks can also expect to be the focus of discussion.

In a seamless, transparent and networked world, all of a firm's communications platforms – websites, LinkedIn, facebook, Twitter and blogs – become windows to the world and avenues for others to engage. Talent communities will extend this reach.

A firm's core culture, values, standards and operating behaviors are accessible and on display.

This warrants a re-think about how organizations manage

the narrowing interface between work and employees' personal lives, and indeed, whether it can be managed.

Simply, good employers will stand out. They will have a chance to become exemplars and thought leaders. They will develop and share meaningful content on issues directly relevant to their industry, firm and other stakeholders.

Their online presence will render them drawcards for information, discussion and learning for both current and prospective employees, no matter where in the world they live.

WHAT EMPLOYERS CAN DO

→ Start retention and recruitment strategy from the viewpoint of the targeted workers – where do they communicate, how do they prefer to connect and what do they want from an employer.

→ Don't think of social media as the cure. Develop a hybrid strategy that takes the best elements of social media and alternative methods to attract, engage, and recruit workers.

→ Form online talent communities. Make it easy for talent to interact and engage through the full suite of social media and online platforms, and use these to showcase new and upcoming industry or company events, trends and initiatives.

→ Turn the firm into a knowledge hub that encourages, develops and shares quality content to those both inside and outside the firm – partners, suppliers, researchers, industry analysts, and prospective workers.

→ Establish and manage a two-way communications program through a database of interested outsiders who subscribe to regular updates about the organization and the industry, keeping them abreast of news, developments and career opportunities.

→ Devote time to make personal contact with top quality candidates through phone calls and emails to share job opportunities as well as company news.

→ Consider ways to energize and mobilize the full talent potential of the existing workforce through non-digital activities, including networked events with industry leaders on topics of special interest.

→ Ensure the company's HR strategy addresses work-life balance, opportunities for advancement and training and development for workers, and make sure workers understand how to take advantage of those opportunities.



CAREER DEVELOPMENT

Workers frequently think about and plan for their career growth.

Some workers envision a different position because they want to do something new, while others want to personally shape their careers toward advancement within or outside their employer. However, more workers today look to their managers to help guide their working future. When good direction is provided, workers ultimately are motivated and inspired toward greater productivity and engagement.

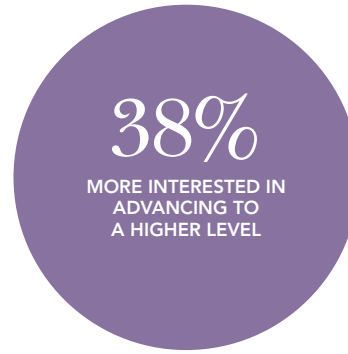
Yet, career guidance is not only about how a worker can obtain the next promotion. As the KGWI® results reflect, workers globally place a higher value on gaining a broader skill set than in gaining a

promotion, at least in the short term. More than any other resource, workers rely on employer-provided training to expand their skills and further develop their strengths. This is good news for employers that focus on career training and development initiatives.

Being aware of workers' career goals and helping guide them go a long way toward strengthening the worker-employer relationship. Offering workers a roadmap for growth through career brainstorming conversations enhances engagement and helps solidify retention.

SKILLS BALANCED WITH ADVANCEMENT

Immediate Career Goals: When considering career advancement opportunities, which statement best describes your immediate career goal? (% , global)



Climbing the corporate ladder is often perceived as workers' immutable career goal. But it is not. Indeed, the KGWI® results strongly suggest that empowered workers prefer a career-growth toolkit over the ladder.

Globally, 62% of respondents say they are more interested immediately in acquiring new skills than rising to a higher

level in their organization (38%). Skill acquisition over promotion is most pronounced in EMEA where 67% cite skills acquisition as the priority, compared with 62% in the Americas.

In APAC it is a different story. Respondents split almost evenly between a priority on skills (51%) and a priority on corporate advancement (49%).

All generations seem to recognize that skills development is the best immediate approach in achieving their career goals, with older workers more likely to embrace that path. Among Baby Boomers, 69% favor skills acquisition over corporate advancement, higher than among Gen Y (61%) and Gen X (60%).

The message is that skills formation and development is more important than ever. The economic recession and the slow recovery in labor markets have reminded workers of the need for optimum capabilities and adaptability. Promotion at the expense of development may meet a short-term goal, but workers typically value long-term skills deepening more.

Immediate Career Goals: When considering career advancement opportunities, which statement best describes your immediate career goal? (% by region)



I AM MORE INTERESTED IN ADVANCING TO A HIGHER LEVEL



● Americas ● EMEA ● APAC

Immediate Career Goals: When considering career advancement opportunities, which statement best describes your immediate career goal? (% by generation)



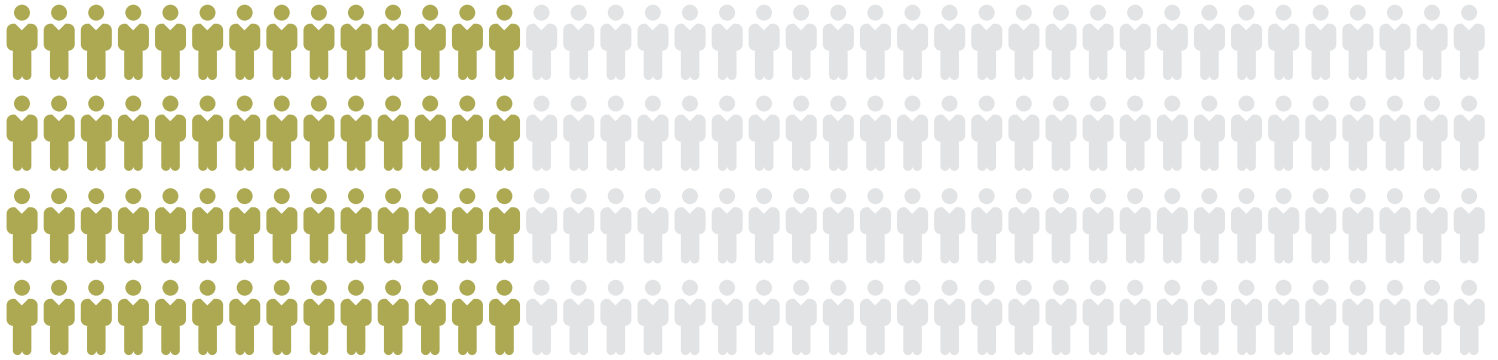
I AM MORE INTERESTED IN ADVANCING TO A HIGHER LEVEL



● Gen Y ● Gen X ● Baby Boomers

CAREER POTHOLES

Opportunities to Advance/ Grow with Current Employer: Do you agree that you have opportunities to grow/advance your career with your current employer? (% , globally 'strongly agree' and 'agree')



35% believe they have opportunities to grow with their current employer

Ultimately, employers also benefit when their workers develop new skills and strategies because it can improve their performance. Employers who offer clear paths for advancement through training and experience have an edge.

However, only about a third of workers (35%) believe that they have the opportunity to advance their careers with their current employers. More workers in APAC (40%) and the Americas (36%) are in agreement about their advancement opportunities than those in EMEA at just 32%.

The prospect of a dead-end career with an existing employer can have a debilitating impact on morale, performance and retention.

The KGWI® shows a pattern of progressive deterioration based on age groups in regards to employee attitudes about their advancement opportunities. While 39% of Gen Y is confident of growing their careers with their current employers, this falls to 36% among Gen X and just 28% among Baby Boomers.

By industry sector, the best prospects for career advancement with existing employers, according to workers, are in Oil & Gas (43%), Business Services (42%), Automotive, and Energy (both 40%). The least favorable sectors are Utilities (29%) and Life Sciences (33%).

A key element in any worker's career advancement is the availability of a defined roadmap along which workers can progress, in keeping with their knowledge, skills and experience.

Globally, just 29% of respondents say that their current employer provides a pathway that would afford career advancement. Significantly more workers in APAC (37%) and the Americas (31%) say their employers provide clear career path options, compared with just 23% in EMEA.

Generationally, almost one-third of Gen Y and 29% of Gen X say they have clear career path options with their current employers. Less than a quarter (23%) of Baby Boomers believes that they do.

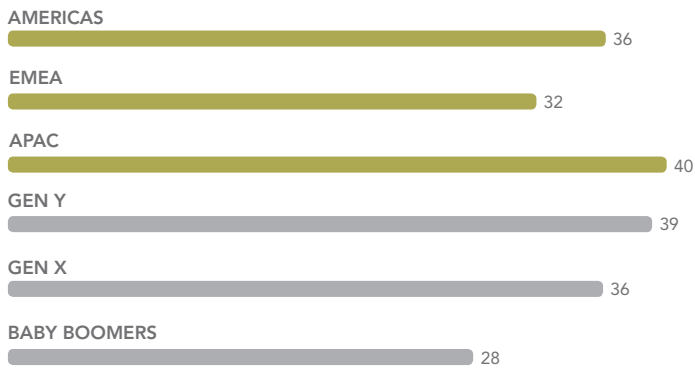
As for industry sectors, among Professional/Technical workers, the most promising career path options within existing employers are Math and Sales (both 33%). At the other end of the scale, workers say they have less clear career pathways in Science (22%) and Law (26%).

Employers who offer clear paths for advancement engender confidence and a sense of loyalty because that gives workers an important edge in a competitive labor market environment.

The KGWI® results suggest that some employers may be missing opportunities to satisfy workers who want growth opportunities, and the chance to catapult their careers within their current organizations. Workers report that career progression weighs heavily in their employment decisions. In fact, in a previous survey, four out of 10 workers said they would switch jobs based on career advancement opportunities. This factor ranked second among the top six contributors leading workers to likely move on from their current organization.

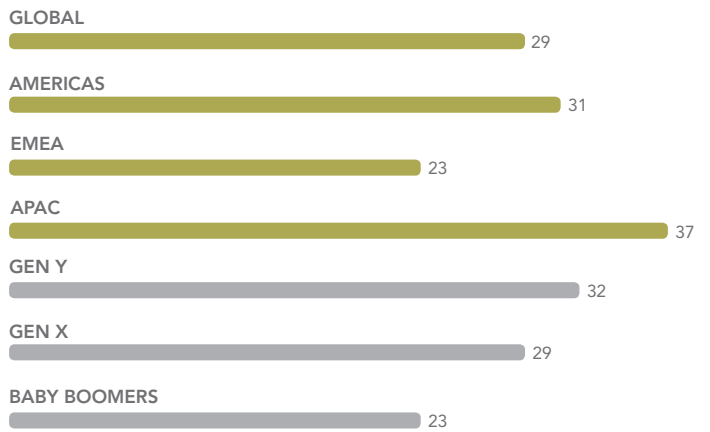
Opportunities to Advance/Grow with Current Employer:

Do you have opportunities to grow/advance your career with your current employer? (% 'strongly agree' and 'agree' by region and generation)

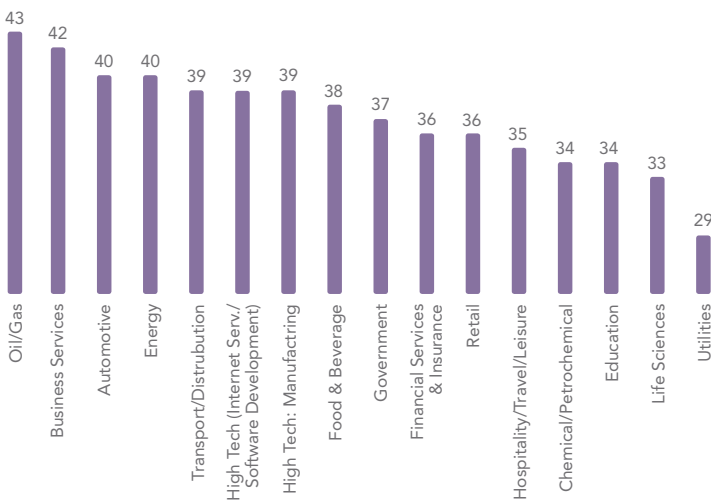


Pathways with Current Employer:

Do you have clear career path options available with your current employer? (% 'very clear' and 'clear' path options by region and generation)



Opportunities to Advance/Grow with Current Employer: Do you agree that you have opportunities to grow/advance your career with your current employer? (% 'strongly agree' and 'agree' by industry)

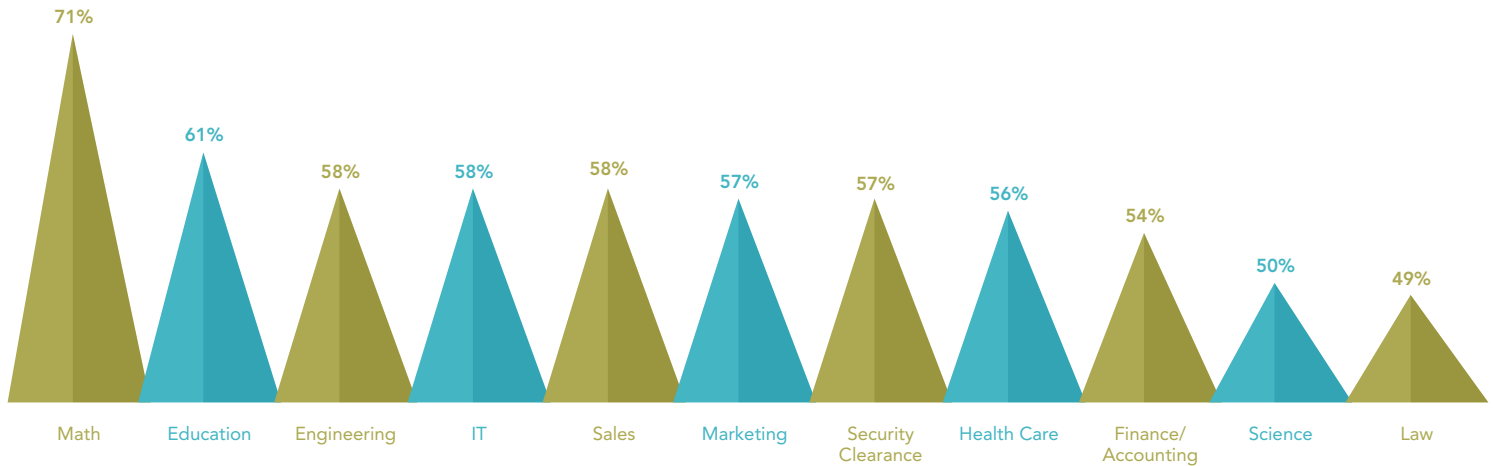


Pathways with Current Employer: Do you have clear career path options available with your current employer? (% 'very clear' and 'clear' path options by occupation)



CAREER BRAINSTORMING

Benefit of Career Development Discussions on New Skills: Among those who had a career development discussion in the last year, to what degree do you agree or disagree that the career development discussion was beneficial to you in terms of potential/future advancement opportunities? (% 'Strongly Agree' and 'Agree' by Professional Occupation)



The KGWI® shows that workers think career discussions meet a real need – demonstrating an employer’s willingness to guide its workers’ career growth. It enables the workers to appreciate the employer’s interest in them and leads to them to become even more engaged in their position and with their employer. Workers see these career conversations as a bridge to opportunity.

Yet, most employers have not heeded that insight. Just 38% of workers globally say they have had a career development discussion in the past year. Significantly more in APAC (50%) and EMEA (41%) have had such discussions in the past year than those in the Americas (34%).

The likelihood of workers and employers engaging in career development conversations appears to diminish with age. Gen Y (42%) and Gen X (40%) discussed career development with their employers as compared to 29% of Baby Boomers. The generational differences are logical as companies might be less likely to see value in

engaging in career talk with the generation eligible to retire. However, employers that reframe their view and expand the conversation from a career-focused one to a worker-growth one may find Baby Boomers more engaged in their work.

There is a significant variation among occupations in regards to workers being afforded career development conversations. More than half of those in Marketing (54%) and Sales (51%) have had such discussions in the past year, but only 21% of those in Education, 34% in Math, and 38% in Health Care.

Of those globally who had career development discussions with their employers, almost half (48%) agreed that it was beneficial to advancement opportunities. Geographically, significantly more workers in APAC (57%) and the Americas (50%) derived benefit from these discussions, compared to 42% in EMEA.

There is a particular leverage afforded by career development discussions that take place with

younger workers. Among the respondents who had career conversations in the past year, 52% of Gen Y agreed that they were beneficial to their future advancement. Less than half of Gen X (46%) reported the same benefits, and only 39% of Baby Boomers felt these discussions had been beneficial in terms of advancement.

For employers, this suggests that younger workers derive considerable benefit from these career discussions, while older workers may need extra effort to help identify opportunities.

The primary intention behind any career development discussion is to assist workers in acquiring the skills and capabilities that will help them in the next stage of their working life.

But not all career development discussions produce these outcomes. In regard to the issue of new skill acquisition, 57% globally felt that their career development discussions helped them.

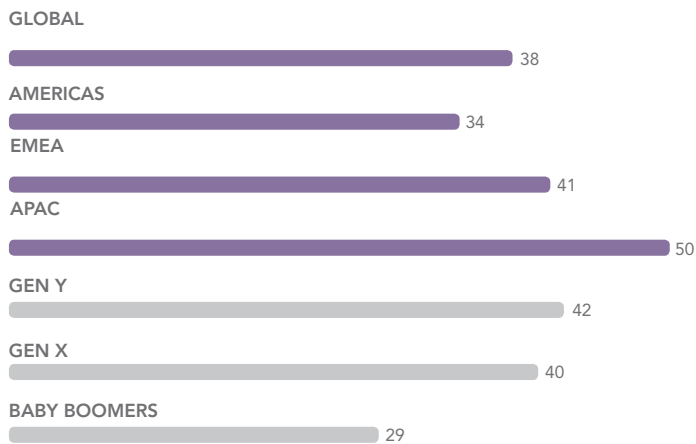
Significantly more workers in APAC (61%) and the Americas (58%) believe these conversations led to the opportunity to acquire new skills, higher than in EMEA (52%).

Career development discussions seem inclined to produce more benefit in terms of skills development for younger workers. Among those who had career development discussions in the past year, 61% of Gen Y workers found them beneficial to acquiring new skills. By contrast, 54% of Gen X and 49% of Baby Boomers reaped skill benefits.

Across professional occupations there is a marked variation in the extent to which career development discussions result in new skills development. Those in Math (71%) and Education (61%) appear to derive the greatest benefit.

More professionals in Engineering, Sales, and IT (58% each) say these discussions were beneficial in acquiring new skills, compared to those in Law (49%), Science (50%), and Finance/Accounting (54%).

Career Development Discussions: Within the last year, have you had a career development discussion with your employer? (% 'yes' by region and generation)

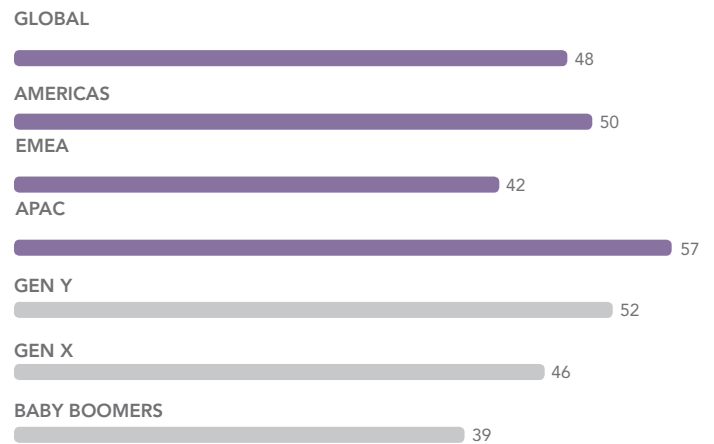


Career Development Discussions: Within the last year, have you had a career development discussion with your employer? (% 'yes' by professional occupation)



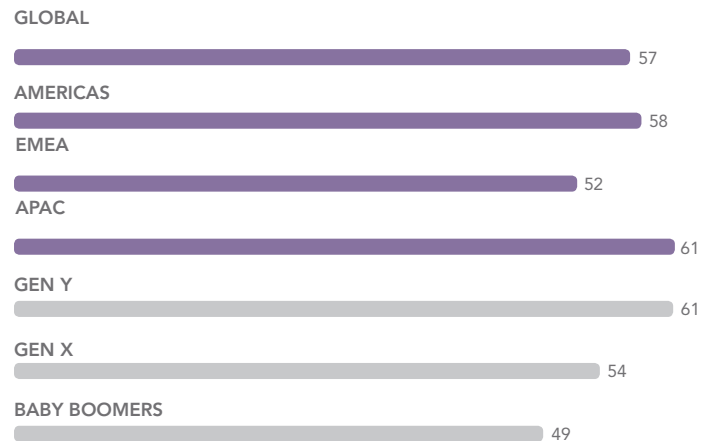
Benefit of Career Development Discussions in Advancement:

Among those who had a career development discussion in the last year, to what degree do you agree or disagree that the career development discussion was beneficial to you in terms of potential/future advancement opportunities? (% 'Strongly Agree' and 'Agree' by region and generation)



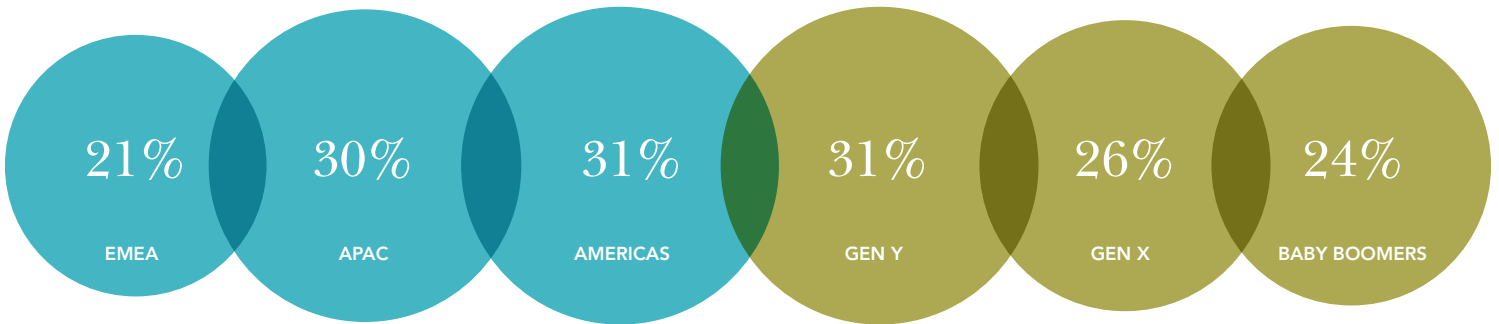
Benefit of Career Development Discussions on New Skills:

Among those who had a career development discussion in the last year, do you agree that the career development discussion was beneficial to you in terms of the opportunity to acquire new skills? (% 'strongly agree' and 'agree' by region and generation)



CAREER RESOURCES

Satisfaction with Career Development Resources: What is your overall level of satisfaction with the career development resources offered by your current employer? (% 'very satisfied' and 'satisfied' by region)



When undertaking career development opportunities, workers choose from a range of resources such as training, mentoring, coaching, and assessments to fulfil their career ambitions. These resources may be provided by the employer, the employee or both.

The most common resource for career development is employer-provided training, utilized by 46% globally, but with higher rates in APAC (49%) and the Americas (48%) than in EMEA (40%).

Almost one-third of workers (32%) globally make a personal investment in their career growth by seeking or paying for training on their own. Self-sought/self-paid training is used by more respondents in EMEA (36%), compared with APAC (32%) and the Americas (29%).

Other resources globally are mentoring (27%), career tests (25%), and professional career coaching (20%).

Generationally, more Gen Y workers (48%) helped themselves to employer-provided training, compared to Gen X (45%) and Baby Boomers (43%). The older generations rely more on themselves with self-sought/self-paid training higher among Gen X (35%) and Baby Boomers (34%) than Gen Y (28%). Mentoring is considerably more sought by Gen Y (31%), ahead of Gen X (26%) and Baby Boomers (23%).

Among professional occupations, there are some important choices being made between employer-provided training and self-sought/self-paid training.

Health Care and Sales have the highest rates of employer-provided training (both 49%). Law

(38%) has the lowest employer-provided training, but one of the largest rates of self-sought/self-paid training (38%). At just 31%, Science has the lowest rate of self-sought/self-paid training.

For employers, this raises the important question of whether their training is meeting the needs of workers and the business. The answer is no. Workers feel only marginally satisfied with the training options made available. Just over a quarter of workers across the globe (29%) are satisfied with their employer-provided career development resources.

More workers in the Americas (31%) and APAC (30%) feel satisfied with their employers' resource offerings, compared to only 21% in EMEA.

There is a marked generational decline in employee perceptions

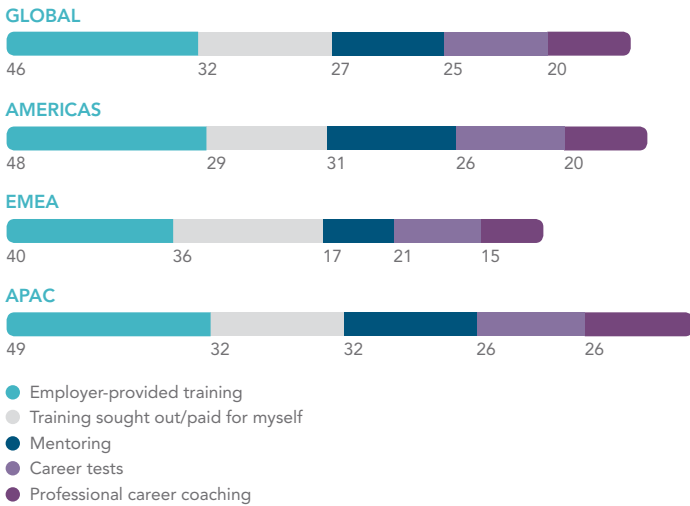
of quality in regard to employer-provided career development services.

Among Gen Y, almost a third (31%) is satisfied with the employer-provided services offered, but this declines to just 26% of Gen X and 24% of Baby Boomers.

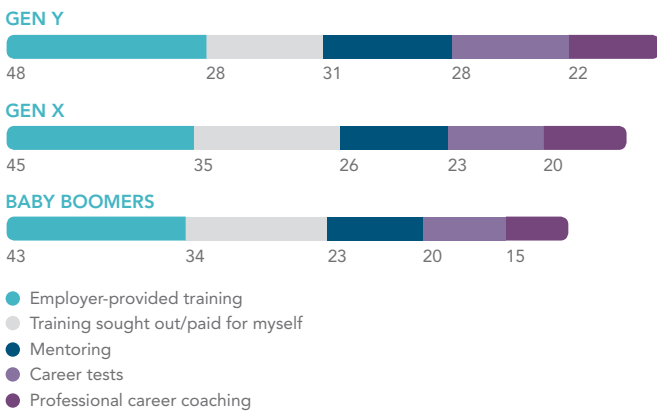
Across industries, the Oil & Gas sector (34%) stands out with the most workers expressing satisfaction with their employer-provided career development resources.

Automotive, Business Services, Education, Financial Services & Insurance, High Tech: Manufacturing, and High Tech: Internet Services/Software Development are also above the global average. Utilities at 24% are well below the global average and the lowest among those ranked.

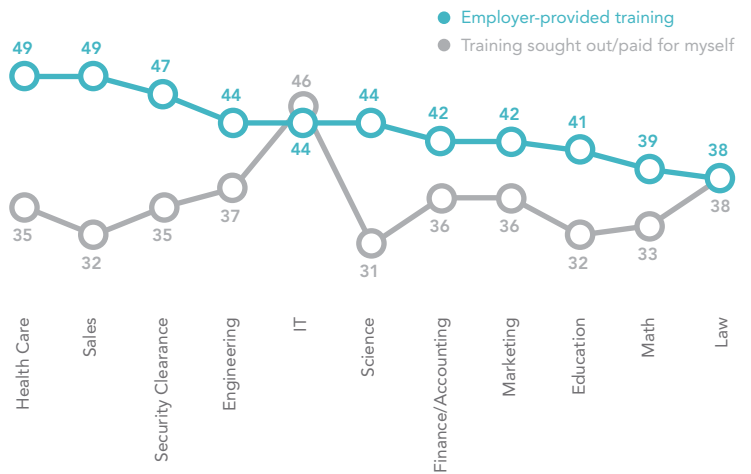
Resources used in Career Advancement: When preparing for career development/advancement opportunities, which of the following resources have you utilized within the last year to realize your strengths? (% by region, multiple responses allowed)



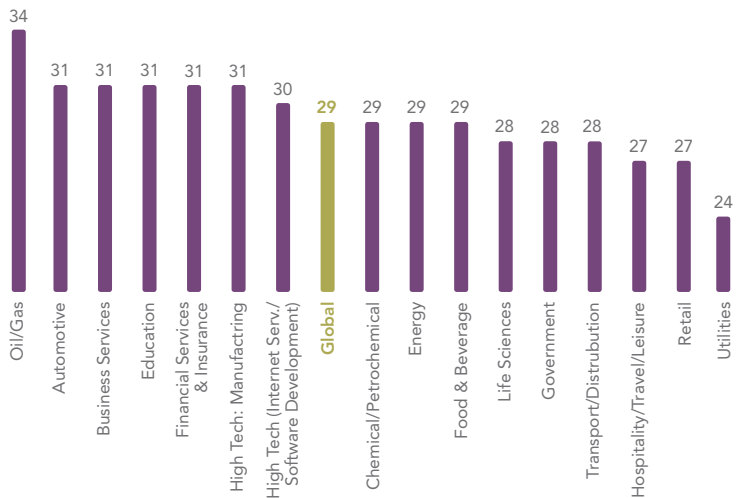
Resources used in Career Advancement: When preparing for career development/advancement opportunities, which of the following resources have you utilized within the last year to realize your strengths? (% by generation, multiple responses allowed)



Resources used in Career Advancement: When preparing for career development/advancement opportunities, which of the following resources have you utilized within the last year to realize your strengths? (% top two resources by professional occupation)



Satisfaction with Career Development Resources: What is your overall level of satisfaction with the career development resources offered by your current employer? (% 'very satisfied' and 'satisfied' by industry)



KEY FINDINGS

REGION

Significantly more EMEA workers (67%) show greater interest in gaining new skills when considering career advancement opportunities versus 62% of workers in the Americas and 51% of workers in APAC.

More workers in the Americas (36%) and APAC (40%) regions say they have growth opportunities with their current employers compared to those in EMEA (32%).

Significantly more workers in the Americas (31%) and APAC (37%) say their employer provides clear career path options, yet only 23% of EMEA workers say the same.

Significantly more APAC (50%) and EMEA workers (41%) held career development discussions with their employers within the last year versus those in the Americas (34%).

GENERATION

More Baby Boomers (69%) are interested in acquiring new skills, compared to Gen Y (61%) and Gen X (60%).

Gen Y (39%) is more likely to say they have growth opportunities with their current employers than others (Gen X 36%, Baby Boomers 28%).

Significantly more Gen Y (32%) and Gen X (29%) say they have clear career path options compared to Baby Boomers (23%).

Many more Gen Y workers (42%) discussed their career development with their employer compared to Gen X (40%) and Baby Boomers (29%).

INDUSTRY

The best prospects for career advancement with existing employers are in Oil & Gas (43%), Business Services (42%), Automotive and Energy (both 40%). The least favorable are in Utilities (29%) and Life Sciences (33%).

More workers in High Tech (32%) and Financial Services & Insurance (31%) state they have very clear career path options as compared to those working in Life Sciences (27%) and Natural Resources (29%).

More than two out of five workers in Financial Services & Insurance (47%); Natural Resources (45%), Life Sciences and High Tech (46% each) had career development discussions within the last year compared to the global average (38%).

SKILL SET

More Science professionals (66%) indicate greater interest in acquiring new skills, compared to Engineering (63%), IT (62%) and Finance/Accounting professionals (61%).

Both Engineering and IT professionals (38%) are more likely to say they have advancement opportunities with their current employers than those in Science or Finance/Accounting (28% and 34% respectively).

Significantly fewer Science professionals (22%) say they have clear career path options available versus professionals in IT, Engineering (31% each) and Finance/Accounting (29%).

Significantly more IT professionals (48%) had career development conversations with their employers compared to other professionals (Finance/Accounting 46%; Engineering 44% and Science 43%).

CONCLUSION

Employers will benefit most when they recognize how the economic upheaval and ensuing recovery have upended workers' lives and changed their views on career development.

As the KGWI® report clearly shows, job titles may have superficial importance, but they can't replace the critical role of skills development. In a world of seeming uncertainty and economic volatility, skills

serve as an insurance policy against a possibly adverse and unknown future.

Skills provide people with the knowledge and capacity to perform not only their current jobs, but the adaptability and flexibility for the jobs of the future – jobs that may be very different or jobs that may be with a different employer.

It's important for employers to recognize the premium that

workers place on individual skills development. Making an investment in a worker's development will result in a worker who is more engaged and productive, and that is good for business.

Workers also desire employers that help in guiding their career advancement both in counsel and training. They appreciate an organized, deliberate and proactive approach.

While intention and formalization are good, more assistance is required for success. Employer-provided training and resources must be seen as beneficial by the worker – something that is not happening today.

Employers making career development a high priority through a comprehensive strategy and thoughtful implementation will have a significant impact on worker commitment, retention and productivity.

WHAT EMPLOYERS CAN DO

→ Understand the value of skill development to benefit the individual AND the business.

→ Fully evaluate existing career development initiatives to test their suitability to workers' needs and their fit with the organization's human capital needs.

→ View career advancement as requiring a toolkit, not a ladder, and start providing the tools to your workers.

→ Incorporate career development in a structured way as part of regular performance reviews as well as encourage more frequent career conversations between formal evaluations.

→ Assist workers in setting personal professional goals as well as job-specific development goals so they understand your interest in their individual growth and their growth within your business.

→ Be open and honest about the advancement opportunities for individual workers and discuss the possibilities, including the limitations and what steps may be needed to improve prospects.

→ Provide skill advancement opportunities and training that addresses workers' needs and exceeds their expectations.

→ Consider a career "future-proofing" exercise to encourage workers to consider how their industry and their jobs will evolve, and the skills/qualifications/training that will be required.

→ Investigate your industry's standards in regards to career development assistance to ensure what you do is on par or better than your potential competitors for good workers.

→ Reframe the discussion with older workers who may be interested in professional development but do not see equate that with career advancement.

→ Be proactive in identifying potential skill development opportunities, particularly for older workers who are less likely to speak up about their interest in training.

→ Develop a knowledge capture program to harness the skills and expertise of gifted, expert and longstanding workers so that this intellectual property and ability can be retained in the firm and passed on to newer and less experienced staff.

→ Reward and acknowledge workers who take the initiative for self-sought/self-paid training.

→ Don't underestimate the power of mentoring, career testing and professional career coaching.



THE CANDIDATE EXPERIENCE

FROM HIRING TO ON-BOARDING

The job application process is often candidates' initial experience with an organization and companies do well when put their best foot forward to make a good first impression.

Communicating with candidates during the job application process is essential to establishing rapport, and has the power to influence their opinions of the company's brand.

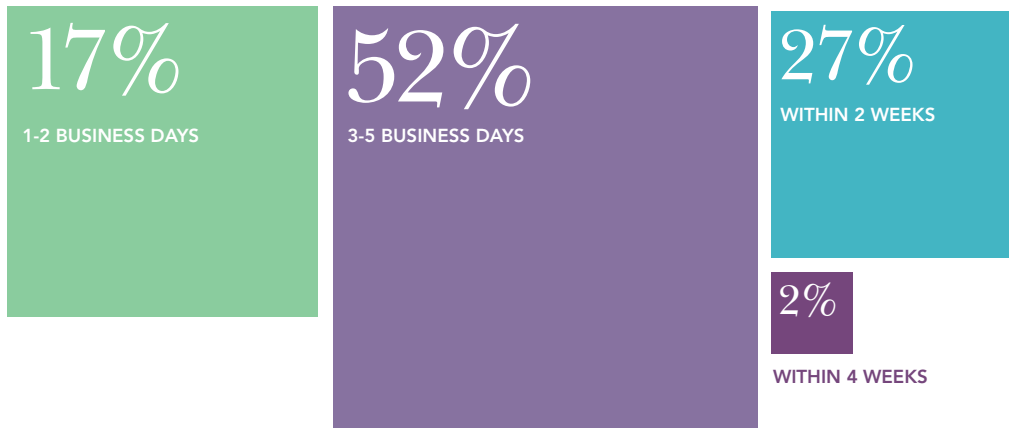
Once workers are hired, organizations, to a large extent, create the destiny of their new workers through the on-boarding experience. Effectively assimilating them into the company is essential for a productive future.

A worker's first few months on the job is not only a time when they are being tested by employers, but a period during which the new hires are testing the employers, making decisions on whether to stay or go.

The process of identifying and integrating new talent sets the stage for success, and sends a message about the organization to a wider audience.

RIGHT FOOT

Job Application Response Time: If clear/regular communication updates regarding status of application was the top factor in satisfaction, what is an acceptable timeframe for receiving communication regarding the status after you have received confirmation your resume/application was accepted? (% globally)



The job application and hiring process is not always viewed as it should be – a glimpse inside the organization; a way of seeing how it functions and how it treats its people.

Unfortunately, only half of global respondents were satisfied with their recent experience of the job application process. In the Americas, 55% were either “very satisfied” or “satisfied” with their job application experience, but this fell to only 42% in EMEA and APAC.

These results suggest that in many instances, the job application process is failing a fundamental test, and worse, may be portraying the firm in a bad light.

Older workers come away less satisfied with this early encounter with a prospective employer than their younger counterparts. While 54% of Gen Y were either “very satisfied” or “satisfied” with the job application process, this fell to 50% among Gen X and 46% among Baby Boomers.

Candidates’ dissatisfaction could have far-reaching effects because they often share their

experience with a wide circle of people. Firms that proactively address this potential problem will improve their reputation as an employer of choice and as a quality organization overall.

Among the 50% of global respondents “very satisfied” or “satisfied” with the job application process, some positive features of the process were cited:

- Easy to apply/submit resume electronically using devices such as laptops, tablets and smartphones (77%);
- Clear job description and requirements (52%);
- Receipt of clear/regular communication or updates on the status of the application (45%);
- Clear/regular communication following an interview (33%);
- Awareness of the pay/salary range (32%).

Among the 17% globally who were “very dissatisfied” or “dissatisfied” with the job application process, the biggest source of discontent was the lack of clear/regular communications or updates regarding the status of their application, cited by 65%.

Next was the lack of communication or updates following the interview, mentioned by 32%.

This mirrors anecdotal evidence from many candidates regarding a lack of information about where they stand in the application process. Too often, this stage is typified by a communications “blackout,” resulting in confusion and resentment.

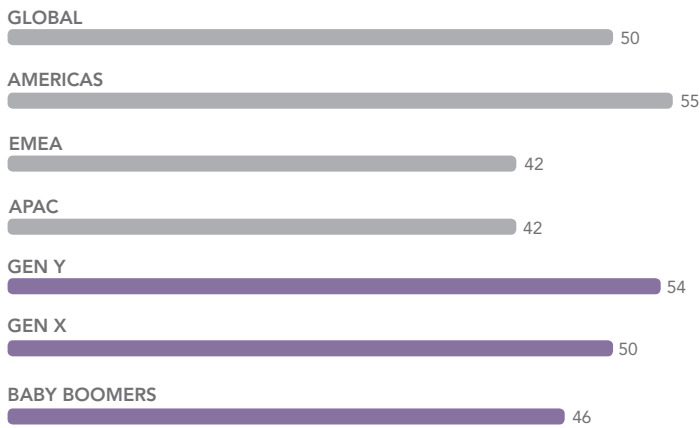
The biggest key to improving the job application process rests in communicating with candidates to let them know where they stand, both after their resume/application submission and after the interview. Firms should consider automating the communication process where possible, such as sending an automated reply email when a resume is received or creating a secured site for individuals to access the status of their application. The effort will pay off as the firm’s becomes better known as an organization that cares about its candidates, and in turn, its workers.

When workers reflect on their overall job search efforts and identify the most influential factors in making application process a positive experience, two issues dominate. More than a third (38%) highlights the ease of applying via electronic devices. Almost 30% identify clear, regular communications or updates regarding the application, so that candidates know if they are being considered for the position. A sizable 17% say the most influential factor to a positive experience is a clear job description and requirements.

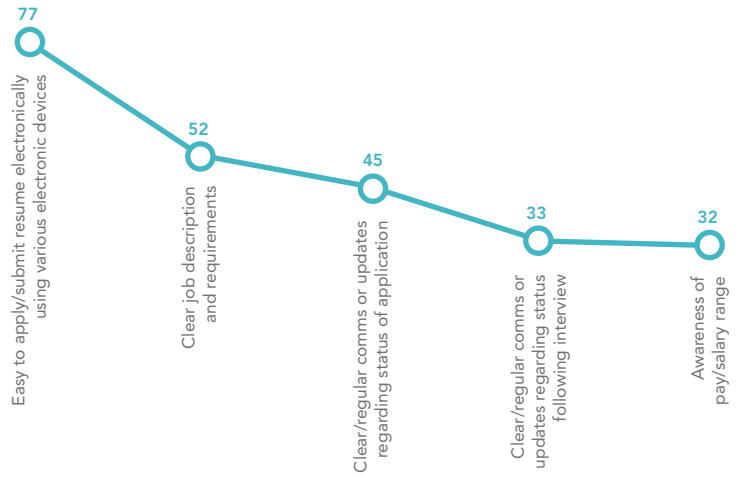
The respondents who cited the need for clear, regular communication or updates regarding the status of their job application were also asked about an acceptable timeframe for hearing back.

More than half (52%) indicated three to five business days for a response following confirmation that their application has been received. Approximately a quarter (27%) said within two weeks, and 17% nominated one to two business days.

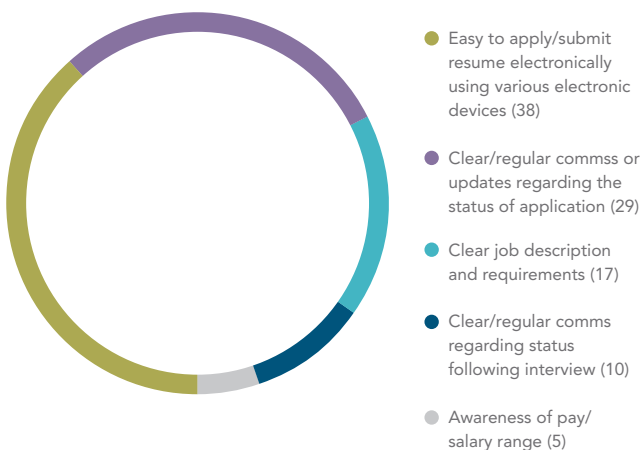
Satisfaction with Job Application Process: Thinking of the most recent job for which you applied, what is your overall level of satisfaction with the application process? (% 'very satisfied' and 'satisfied' by region and generation)



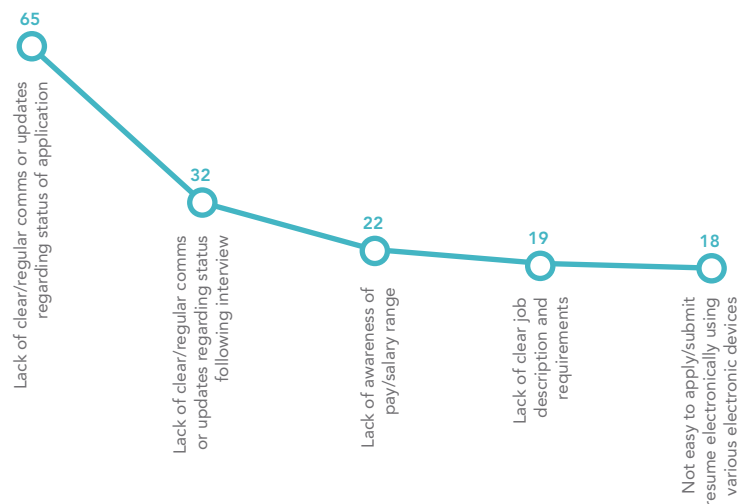
Positive Factors Impacting the Job Application Process: If satisfied/very satisfied with the application process, what factors contributed to your satisfaction? (% , multiple responses allowed, globally)



Key Factor Influencing the Job Application Process: Considering your job search efforts in general, what one factor is most influential in making the job application process a positive experience for you? (% globally)



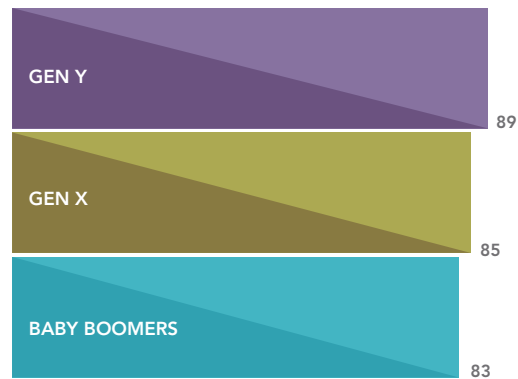
Negative Factors Impacting the Job Application Process: If dissatisfied/very dissatisfied with the application process, what factors contributed to your dissatisfaction? (% , multiple responses allowed, globally)



FIRST IMPRESSIONS

Worker Impressions from the Job Application Process: Following the application process, were you left with a favorable impression of the company (image, culture, management, philosophy, core values)? (% 'Yes')

87%
GLOBAL



The job application process represents an important initial engagement. It is the first opportunity for an employer to make a lasting, positive impression on a candidate who is judging whether to join the company. It's an experience based on which the candidate evaluates the company's image, culture, management, philosophy and/or core values.

In most instances, the application process led candidates generally to have favorable views of the company's traits. Globally,

87% had a positive impression (39% "definitely" and 48% "somewhat"). The Americas had the highest number who definitely had a favorable impression (43%), higher than in APAC (34%) and EMEA (32%).

Younger workers came away with a more positive impression of a firm after the job application process than their older colleagues. A total of 42% of Gen Y workers definitely had a favorable impression, compared with 37% of Gen X and 34% of Baby Boomers.

Among professional occupations, the numbers with a definite favorable impression vary considerably.

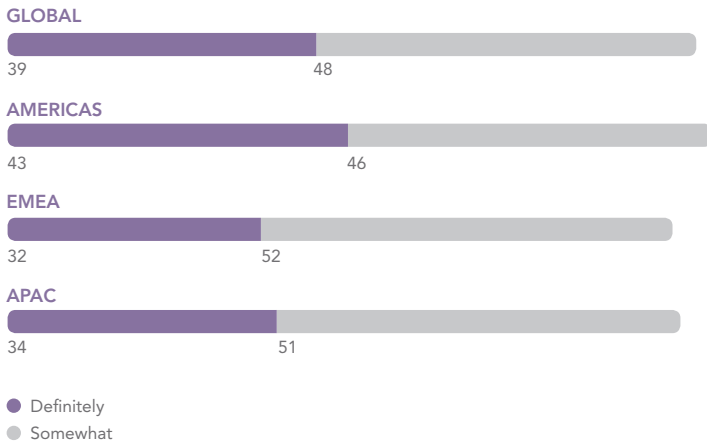
The most favorable impressions from the job application process are in Education (43%) and Health Care (41%), while Science and Engineering (both 34%) were significantly less likely than other professionals to definitely have a favorable impression of the company.

Firms should be careful not to dismiss what the non-

hired candidates think of the experience. Candidates who may not qualify for an immediate job opportunity are likely to remain connected to a recruiter or firm, perhaps becoming part of an organization's talent community where they will pursue other opportunities. Even if they do not stay directly connected, the candidates will share their experience in their personal and professional circles. If treated well, their sharing will still have positive effects for the non-hiring employer.

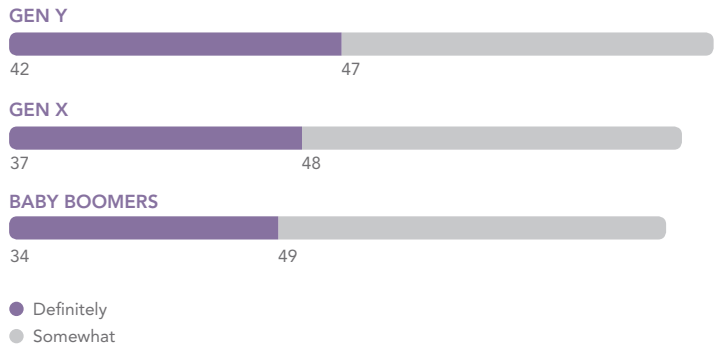
Worker Impressions from the Job Application Process:

Following the application process, were you left with a favorable impression of the company (image, culture, management, philosophy, core values)? (% 'Yes,' by region)

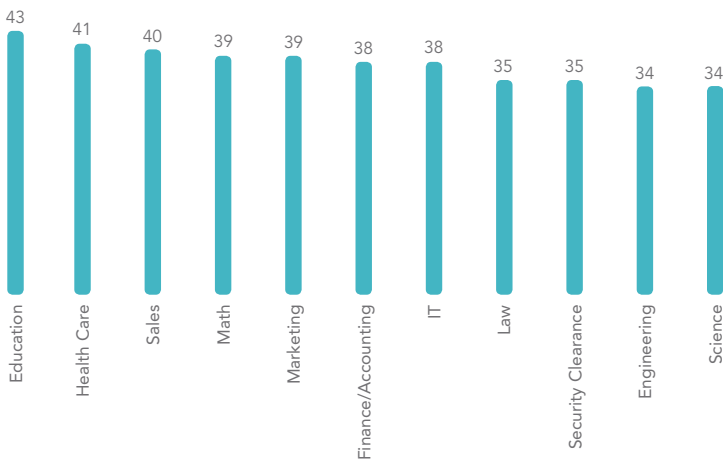


Worker Impressions from the Job Application Process:

Following the application process, were you left with a favorable impression of the company (image, culture, management, philosophy, core values)? (% 'Yes,' by generation)

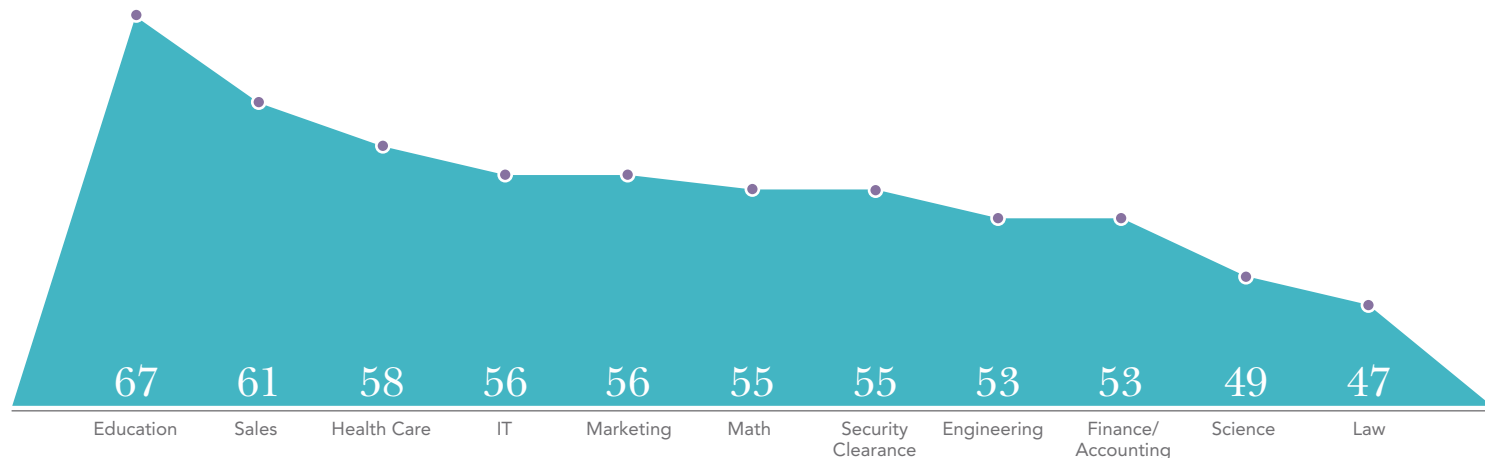


Worker Impressions from the Job Application Process: Following the application process, were you left with a favorable impression of the company (image, culture, management, philosophy, core values)? (% 'yes, definitely' by professional occupation)



“ON-BOARDING” EXPERIENCE

New Worker Assimilation: Did your current employer have a planned approach to assimilate you into the organization once hired and/or placed? (% 'yes' by professional occupation)



Once a firm has successfully attracted and hired a quality candidate, the hard work begins on assimilating the worker into the organization and building a strong foundation for retention, a process often known as “on-boarding.”

On-boarding is essentially the process of equipping new talent with the tools they need to succeed in the organization, including informing the worker about the company’s expectations related to performance and behavior.

Only a slim majority of respondents globally (55%) report that when they arrived at work their employers had a

planned approach to effectively assimilate them into the new organization. This planned approach was more common in APAC (60%) and Americas (58%) than in EMEA (48%). The rest of new workers showed up at employers that left them to muddle through on-boarding.

The new worker assimilation process occurs at varying rates across different occupations.

Some professional occupations clearly make an effort to plan the on-boarding process in a structured way that is noted by new recruits. The highest rates of planned assimilation are in Education (67%) and Sales (61%), and the lowest

in Law (47%), Science (49%), Finance/Accounting, and Engineering (both 53%).

Certain industry sectors use a structured approach to ensure workers have the most relevant introduction to the new organization.

The highest reported rates of structured on-boarding of new workers based on industry were in Education (65%) and Retail (61%). There were relatively lower rates were in Utilities (47%) and Government (53%).

The KGW[®] survey confirms that new hires form opinions of their new employer during their on-boarding experience – and

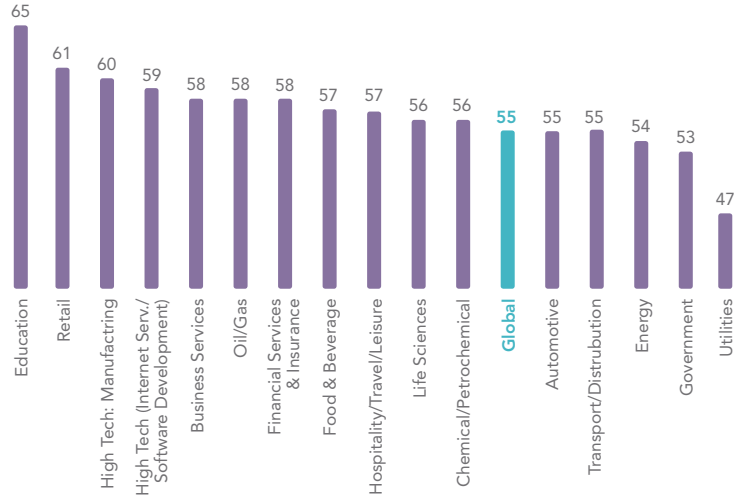
these impressions affect their views on the company, and may perhaps influence engagement and possibly retention.

Employers can create systematic approach to on-boarding or evaluate their existing system. They have great resources easily available – their workers. By asking, recently hired and long-time workers what they liked about their introductory time, what they wished they would have learned, and what they want new workers to know, the firm will go far in developing a quality system and enhancing its reputation among current workers as a place that wants staff to succeed.

New Worker Assimilation: Did your current employer have a planned approach to assimilate you into the organization once hired and/or placed? (% 'yes' by region)

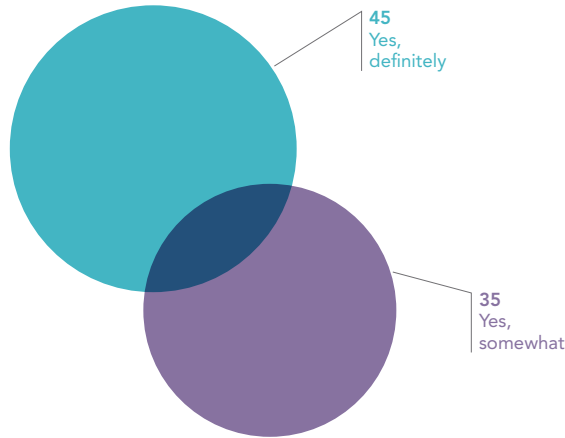


New Worker Assimilation: Did your current employer have a planned approach to assimilate you into the organization once hired and/or placed? (% 'yes' by industry)



LASTING IMPRESSIONS

Worker Impressions Post Recruitment: Did your experience during the first 90 days of employment with your current employer positively impact your impression of the company (image, culture, management, core values, etc.)? (% 'yes')



The first three months of employment is a critical phase for employers and workers alike. Typically, new hires are tested by their employers and early judgments formed about performance, capability and potential. However, workers are also putting their employers to a test. These new recruits form opinions about their employers, and these impressions affect their views of the company, and may influence performance, commitment, and retention.

Similar to their attitudes following the job application process, the majority of new recruits come away with a generally positive impression of the firm after they start work.

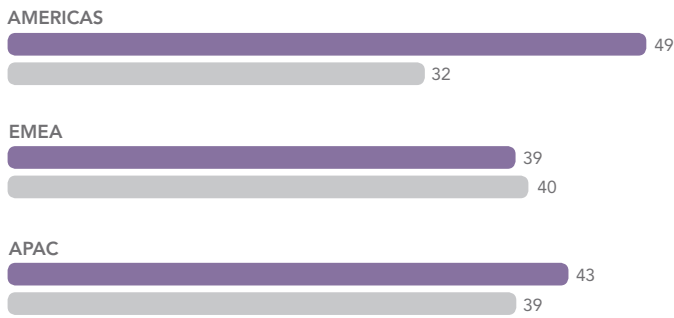
After 90 days of employment, four out of five of respondents globally were "definitely" (45%) or "somewhat" (35%) positive about the organization in regard to such elements as image, culture, management and core values.

More of those in the Americas definitely had a positive impression of their employer (49%) compared to APAC (43%) and EMEA (39%).

Younger workers are a little more positive in their assessments of their new employers. A total of 48% of Gen Y were definitely positive about the impression of their employers after the first 90 days, compared to Gen X (45%) and Baby Boomers (42%).

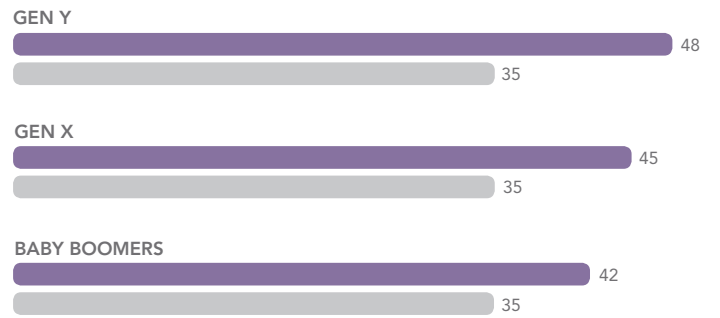
In contrast, one in five workers globally does not have an even "somewhat" favorable impression of their new employer. It's worth remembering that even the most qualified candidates always have a choice to stay or go during the first few months of employment. Employers that invest in their onboarding experience and foster a favorable impression likely will see reduced turnover, thus saving significant dollars and time.

Worker Impressions Post Recruitment: Did your experience during the first 90 days of employment with your current employer positively impact your impression of the company (image, culture, management, core values, etc.)? (% 'yes' by region)



- Yes, definitely
- Yes, somewhat

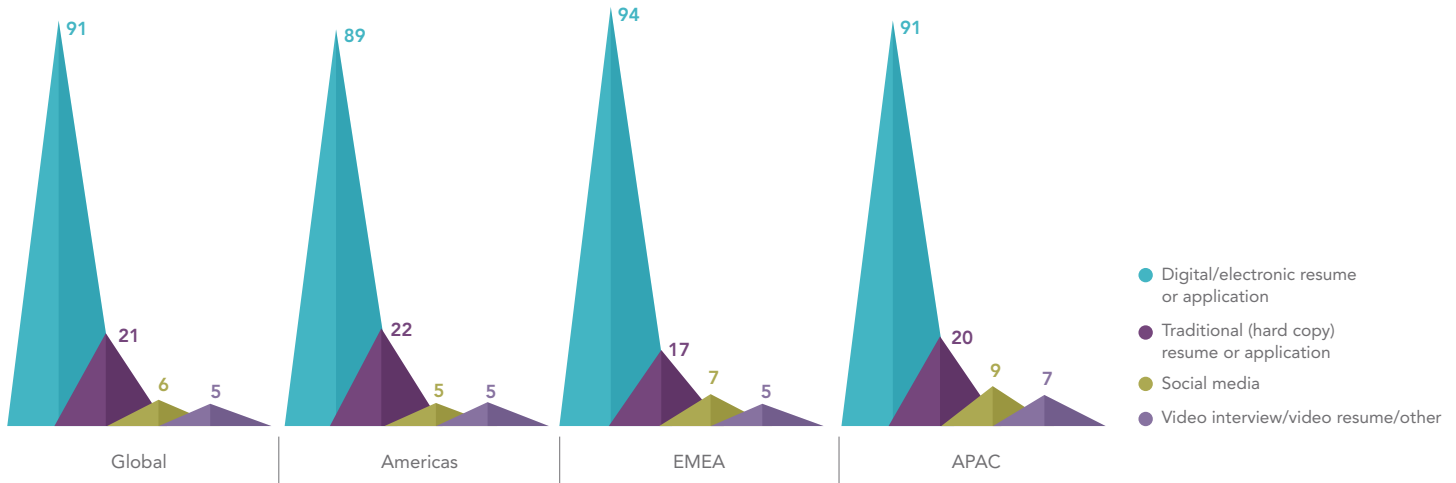
Worker Impressions Post Recruitment: Did your experience during the first 90 days of employment with your current employer positively impact your impression of the company (image, culture, management, core values, etc.)? (% 'yes' by generation)



- Yes, definitely
- Yes, somewhat

ENABLERS

Method Used to Apply for Most Recent Job: Which of the following were used during your most recent job application? (% , multiple responses allowed)



In evaluating how workers secured their most recent job, their responses mirror their use of job-search tools overall. The most frequent way of landing new jobs, globally in 2014, was through online job boards (25%), followed by word-of-mouth (15%), directly through employers/recruiters (15%), and from recruitment/staffing companies/headhunters (14%). Print advertising was responsible for only 3% of work secured.

Despite the rise of social media in the general community, it remains a minor avenue for securing work, identified by only 2% of respondents.

Across the regions, online job boards were cited most frequently, but more rely on them in APAC (27%) and EMEA (26%) than in the Americas (24%). Word-of-mouth is more frequently used in the Americas and EMEA (both 16%) than in APAC (8%).

Direct approaches from employers/recruiters are fairly consistently used across EMEA (16%), APAC (15%) and the Americas (14%). Significantly more APAC respondents (23%) secured their most recent job through recruitment/staffing company/headhunters, than in EMEA (16%) and Americas (12%).

Across eight select professional occupations, online job boards are more commonly used to secure work in IT (28%) and Science (27%).

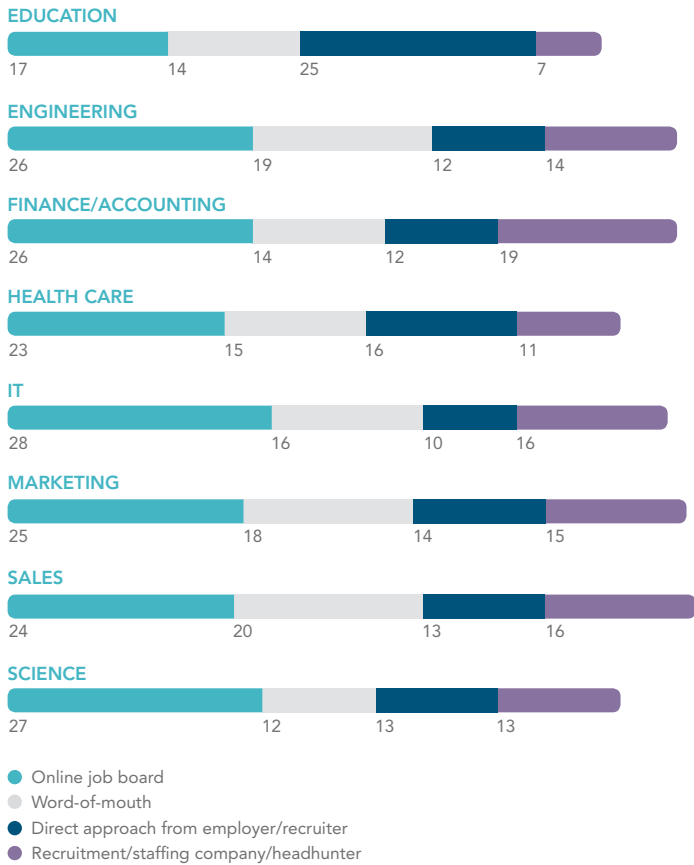
Direct approaches from an employer/recruiter are more frequent in Sales (20%) and Engineering (19%). Word-of-mouth is strongest in Education (25%).

Respondents in Finance/Accounting (19%), IT and Sales (both 16%) are more likely than other professions to find a job through a recruitment/staffing company or a headhunter.

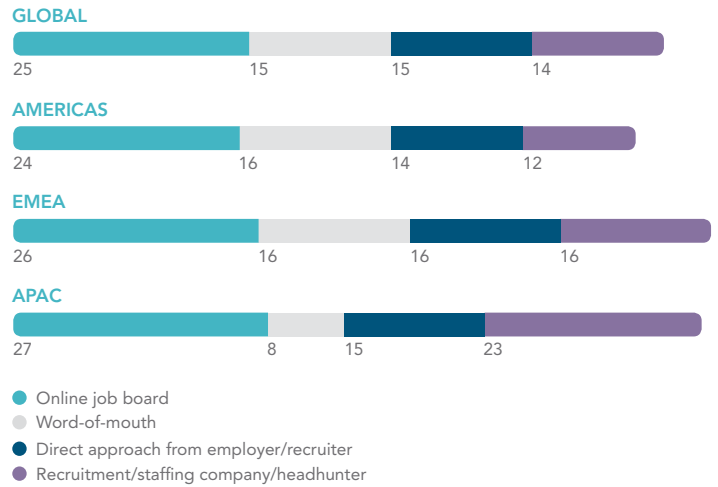
In regard to the actual method used to apply/submit an application that landed a position, the survey shows that electronic submission is now an almost universal practice. An overwhelming 91% globally applied for their most recent job using a digital/electronic resume or application, a trend that is consistent across all regions. Approximately one out of five (21%) globally used traditional hard-copy resumes or applications.

Other methods such as social media and video interview/resumes remain in their infancy as a recruitment tool.

Method of Securing Most Recent Job: How did you secure your most recent job? (% , top four methods, by select professional occupations)



Method of Securing Most Recent Job: How did you secure your most recent job? (% , top four methods, by region)



Method of Securing Most Recent Job: How did you secure your most recent job? (% Globally)



KEY FINDINGS

REGION

Workers in the Americas report higher satisfaction with the job application process than those in APAC and EMEA (55% vs. 42% each).

Significantly more workers in the Americas (43%) had a strongly favorable opinion of the company after completing their job application process, as compared to APAC (34%) and EMEA (32%).

A planned approach to on-boarding is more commonly reported in APAC (60%) and Americas (58%) than in EMEA (48%).

Following their initial months of employment, Americas workers were more likely to have a strongly favorable impression of their employer compared to APAC and EMEA workers (49% vs. 43% and 39%).

Online job boards are somewhat more relied on in APAC and EMEA compared to Americas (27% and 26% vs. 24%).

Far more APAC workers (23%) secured their most recent job through a recruitment/staffing company/headhunter, compared to EMEA (16%) and Americas (12%) workers.

GENERATION

Satisfaction with the job application process was higher than average among Gen Y (54%) and lower than average among Baby Boomers (46%).

Gen Y receives planned on-boarding with their employers more frequently than Gen X and Baby Boomers (61% and 58% vs. 54% and 53%).

Gen Y workers (42%) were more likely to feel positive about companies after their application experience than Baby Boomers (34%).

Gen Y (48%) had more strongly favorable opinions of their employer after the first 90 days, compared to other generations (45% average). Baby Boomers were somewhat lower than the average at 42%.

Use of online job boards increases with each generation. Gen Y are the heaviest users (26%), followed by Gen X (23%), Baby Boomers (21%).

INDUSTRY

Satisfaction with the job application process is similar for Life Sciences, High Tech (52% each), Financial Services/Insurance (50%), and Natural Resources (48%).

Workers in High Tech (59%), Financial Services/Insurance (58%), and Life Sciences (56%) were more likely to receive formal on-boarding than those in Natural Resources (54%).

Significantly more workers in High Tech, Financial Services/Insurance, Natural Resources, and Life Sciences secured their most recent job through a recruitment/staffing company/headhunter (19-20% vs. 14% global average).

SKILL SET

The job application experience resulted in similarly moderate levels of satisfaction for those in IT (49%), Science, and Finance/Accounting (47% each). In comparison, Engineering professionals were less satisfied (43%).

Science (34%) and Engineering (34%) professionals were significantly less likely than other professionals (38%) to have a strongly favorable impression of the company.

Professionals in Engineering, Finance/Accounting (53% each), and Science (49%) were less likely to receive formal on-boarding, compared to other professionals (56% global average).

Professionals in Finance/Accounting (19%) and IT (16%) were more likely to find a job through a recruitment/staffing company/headhunter than other professionals (13%).

CONCLUSION

Regrettably, many firms aren't getting off to a good start with the recruitment process. The goodwill and optimism that characterizes the initial phase of recruitment can quickly evaporate. To some degree this is understandable. Unsuccessful candidates are invariably disappointed.

The challenge for employers is how to treat all candidates with respect, and in a way that leaves

those who missed out with an understanding of why they were unsuccessful, and with a positive impression of the company.

The reality is that some unsuccessful candidates may be reconsidered in the future, while their experience will shape opinions about the organization.

Too many firms treat the recruiting process with an element of indifference, assuming candidates will be satisfied just to have their

resumes/application accepted. These firms do not take proper account of the resources and procedures necessary to make it a success. They will the effects, especially as the job opportunities for candidates grow. These candidates will be drawn more to firms that don't leave them in a vacuum – uncertain and perplexed.

Frustration doesn't stop at recruitment. The satisfaction rates in the latest KGWI® survey

suggests candidates-turned-newly hired workers think improvements are needed in the on-boarding process and given the size of the investment, firm executives must demand greater accountability to ensure a solid structure is in place. Neither the employer nor the new worker wants to squander the experience.

WHAT EMPLOYERS CAN DO

→ Establish performance indicators around the full recruitment process to ensure it is meeting the needs of candidates, new workers, and the business.

→ Interview a random sample of unsuccessful candidates to identify positive and negative features and areas for improvement.

→ Develop a best practice on-boarding program with appropriate personnel and resources, so that new hires have the benefit of a structured assimilation, with appraisal and feedback over the first 90 days.

→ Recognize that on-boarding encompasses a diverse range of information and training, both job specific and personal. Workers need to know how to do their job within the company's framework but they also need to know where the restroom is.

→ Survey (formally or informally) new hires and tenured workers to identify what they found helpful in the on-boarding process, what they wished they would have learned and what they think new workers should know.

→ Share their on-boarding process in the interview stage to communicate to candidates that the firm believes in preparing their workers for success.



WORKERS PREFERENCES & WORKPLACE AGILITY

In the recruitment process, candidates seldom voice what features attract them to work for organizations, but they hold firm views about where they want to work and why.

While there's no mistaking that pay is a key driver of attraction and retention, workers also prioritize their professional growth and personal fulfillment. Elements relating to an organization's size, geographic footprint, and organizational structure also appeal to certain workers. They also have expectations about non-traditional work styles and arrangements.

Employers embracing the evolving workplace have an edge over the competition to attract the best people. What a company looks like and how workers feel about operating in its environment can make all the difference to empowered workers.

MORE THAN MONEY AND PROMOTION

Willingness to trade-off pay: How likely would you be to give up higher pay and/or career growth or advancement for the opportunity to learn new skills, a more flexible work schedule, a greater work-life balance, for more socially-conscious work, or to start your own business? (% 'definitely would' and 'would' by region)



The most attractive companies offer more than competitive pay and benefits. They offer opportunities for skills development and a clear pathway for progression.

More than half (57%) of workers globally say they may be prepared to give up higher pay and/or career growth or advancement for the opportunity to learn new skills. That percent is the same or similar in the Americas (56%) and EMEA (57%), and even greater in APAC (66%).

The likelihood of sacrificing pay and/or promotion for the chance to learn new skills varies markedly across professional occupations. Professionals in Engineering (63%), IT (63%), Security Clearance (62%), Science (61%) and Finance/Accounting (60%) may be the most likely to trade-off pay and/or advancement for new skills.

It's not only skills development that is important to workers, but flexibility in the way they work.

More than a third (36%) globally says they would give up higher pay and/or career growth or advancement for a more flexible work schedule. More workers in APAC (48%) are willing to make these pay and advancement sacrifices than those in the Americas (37%) and EMEA (31%).

Flexibility in work schedules is more important in some professions than others. Those most ready to trade pay and/or career advancement for more flexibility in their work schedule are in IT (40%), while fewer are willing in Sales (30%), Security Clearance (33%), and Law (33%).

By Industry, those most likely to accept a tradeoff to gain a more flexible working schedule are in Education, Hospitality/Travel/Leisure, and High Tech: Internet Services/Software Development (all 39%). The least willing are in Chemical/Petrochemical (33%).

Achieving a greater work-life balance also is important to workers. A total of 52%

globally say they would give up higher pay and/or career growth or advancement for an improved work-life balance.

The premium on work-life balance is considerably greater in APAC where 65% would be likely to make such a sacrifice, higher than in the Americas (51%) and EMEA (48%).

There also is a group of workers who are attracted to work that has a socially conscious element, and who are willing to give up pay and/or promotional opportunities to pursue such work.

More than a quarter globally (29%) say they would be likely to give up higher pay and/or career growth or advancement for an opportunity to perform more socially conscious work. The proportion likely to do so is considerably higher in APAC (37%) than in the Americas (28%) and EMEA (27%).

Many in the workforce possess a powerful entrepreneurial

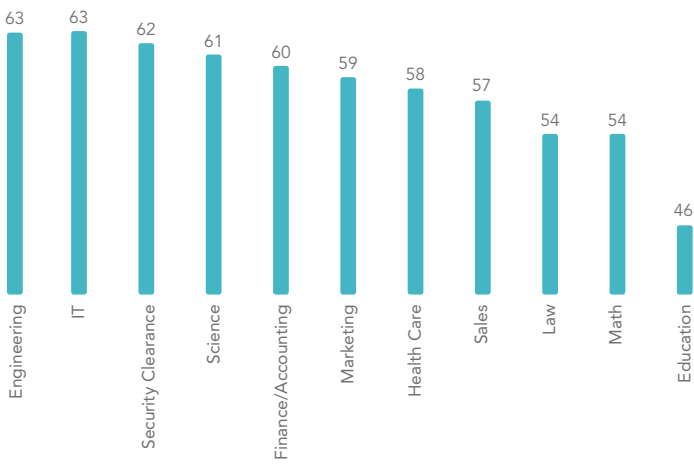
spirit. A total of 40% globally say they would be prepared to give up higher pay and/or career growth or advancement for the opportunity to start their own business.

More workers in APAC are likely to accept this trade-off (47%), higher than in the Americas (41%) and EMEA (36%).

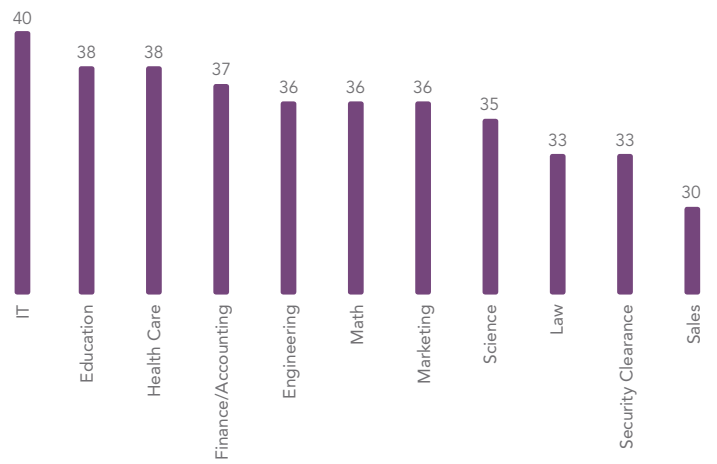
While employers cannot provide workers their own business, employers can nurture these entrepreneurial-minded workers by giving them opportunities to help develop and grow the company.

It is extremely important to ensure a company's compensation and benefits plans are competitive, but an attraction and retention strategy must address other key elements, including work-life balance, flexible work arrangements, clear plans for training and development, and socially conscious work environments.

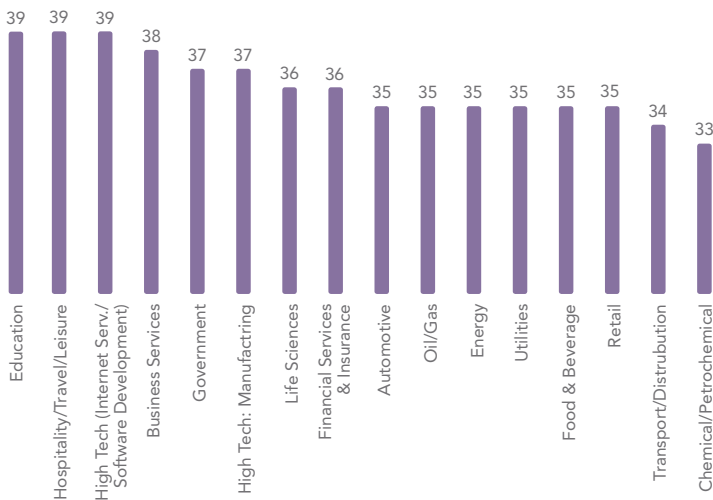
Willingness to trade-off pay for skills: How likely would you be to give up higher pay and/or career growth or advancement for the opportunity to learn new skills? (% 'definitely would' and 'would' by professional occupation)



Willingness to trade-off pay for flexible work schedule: How likely would you be to give up higher pay and/or career growth or advancement for a more flexible work schedule? (% 'definitely would' and 'would' by professional occupation)



Willingness to trade-off pay for flexible work schedule: How likely would you be to give up higher pay and/or career growth or advancement for a more flexible work schedule? (% 'definitely would' and 'would' by industry)



EMPLOYER SIZE, LOCATION AND TRACK RECORD

Preferred employer organization geographic footprint: What type of company do you most prefer to work for? (% selecting Global Company by Industry)



A company's geographic footprint, size, type and record of achievement factor into the attraction-and-retention equation for workers.

A significant number of workers globally say the most appealing companies to work for are large and mid-sized, or established firms with a global presence. However, variations occur across regions of the world, as well as across industries and professions.

Globally, a significant portion (42%) say they have no preference about the type of organization they work for – whether it's a global company, a national company (operating in a single country) or a regional company (operating in a single region within a single country.) However, more than a third (35%) would prefer to work for a global company, which is approximately three times more than the number that would prefer to work for a national company (13%) or a regional company (10%).

The preference for global companies is most pronounced in APAC (62%) compared with EMEA (44%) and the Americas (26%).

The appeal of global companies is greatest among Gen Y (41%)

and Gen X (36%), compared with 22% among Baby Boomers. Baby Boomers (49%) also are more likely than Gen X (42%) and Gen Y (37%) to have no preference about the type of organization they work for.

Professional/Technical workers tend to be drawn to global companies to a greater extent than Non-Professional/Technical workers (40% vs. 30%). Among Professional/Technical workers, the preference for global companies is highest in Marketing (56%), Engineering (54%), Sales (53%), IT (50%), and Finance/Accounting (45%).

The preference for global companies is relatively strong across industry sectors but differences still exist. More than half of workers are drawn to global companies in a handful of industries including Oil/Gas (54%), High Tech: Internet Services/Software Development (52%), and Energy (51%). At the other end, fewer than a third are attracted by a global presence in Education (18%), Utilities (30%) and Government (31%).

More than two out of five (41%) globally says the size of the organization doesn't matter.

However, more than a quarter (27%) is drawn to mid-size companies (50–1,000 workers) and almost as many (23%) prefer large companies (more than 1,000 workers). Regionally, company size matters most to workers in APAC (74%) and EMEA (64%), and least to those in the Americas (54%). Just under half of workers in the Americas (46%) have no preference when it comes to company size, compared to 36% in EMEA and 25% in APAC.

The preference for large companies is more pronounced among Gen Y (26%) and Gen X (23%) than it is among Baby Boomers (16%). Baby Boomers show the greatest preference for mid-sized companies (29%) over large (16%) and small (12%) companies.

When it comes to the "type" of organizations that workers prefer, they lean to firms with an established presence in the marketplace. While 38% globally have no preference, 41% say they want to work for a business that is established with some longevity.

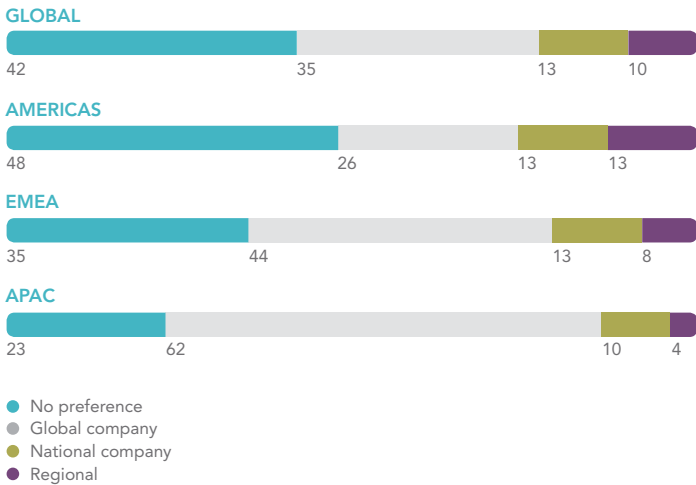
Among the generations, Baby Boomers are more likely to prefer to work for an established company with longevity (47%)

than Gen X (42%) and Gen Y (38%). The preference for Fortune 500 companies is greatest among Gen Y (19%) and Gen X (16%) than it is among Baby Boomers (10%). Start-up companies/micropreneurs are the preferred choice of only 4 to 5% of any generation, and clearly they face an added hurdle in attracting staff to their enterprises.

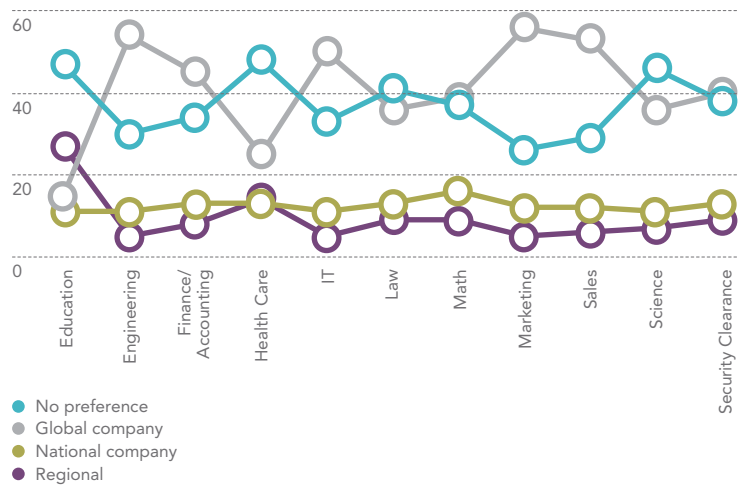
Certain industry sectors gravitate towards organizational types. Professionals in Finance/Accounting, and Sales (both 44%) are the most likely to seek established employers as a place to work. Professionals in Marketing (25%), IT (24%), Sales (23%), Engineering (23%), and Finance/Accounting (21%) are more likely than average to be drawn towards Fortune 500 companies.

Firms that fit the models preferred by workers clearly have an advantage in attracting talent. Firms that don't fit the template – and there are many of those – typically can't change their size, tenure or location. These firms would do well to change what they can, and offering alternative benefits is a great way to attract talent in a competitive marketplace.

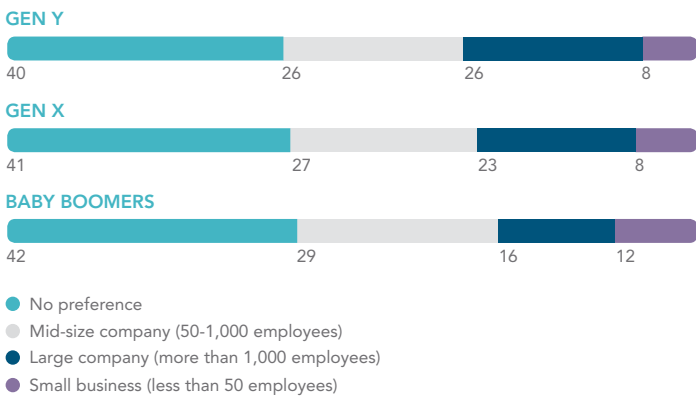
Preferred employer organization geographic footprint: What type of company do you most prefer to work for? (% by region)



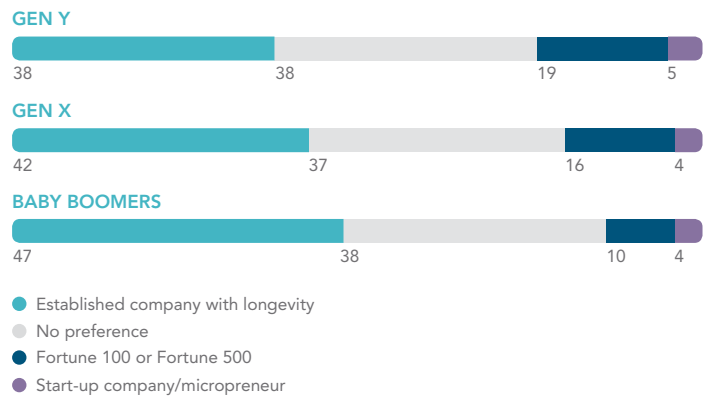
Preferred employer organization geographic footprint: What type of company do you most prefer to work for? (% by professional occupation)



Preferred employer organization size: What type of company do you most prefer to work for? (% by generation)

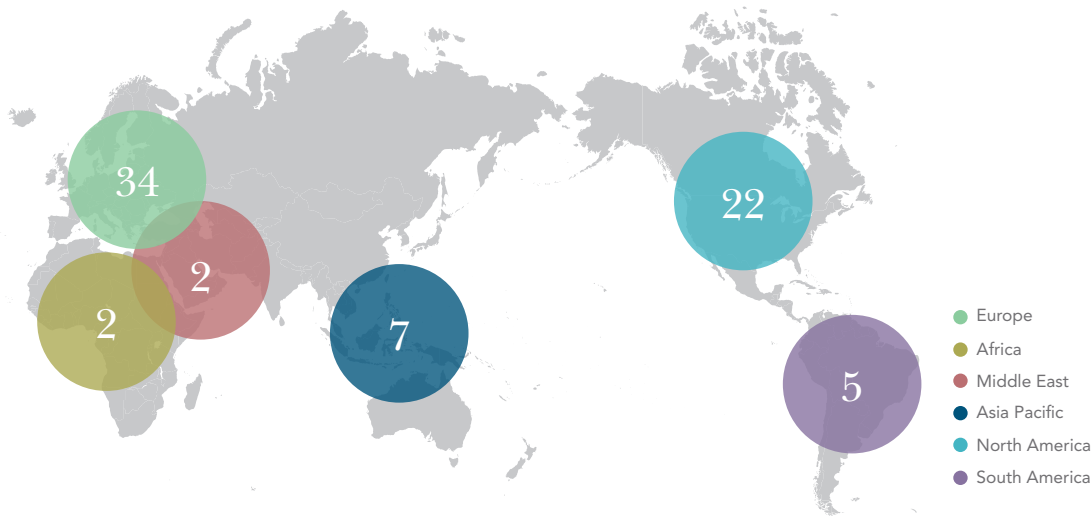


Preferred employer organization type: What type of company do you most prefer to work for? (% by generation)



WORKER LOCATION SHIFT

Preferred region to work: Aside from your own region, which part of the globe would you most want to work in? (% global)



Is it too much to ask workers to move? Not if it's the right opportunity. A surprising number of workers are ready to relocate (often considerable distances) to secure the work that they want. Employers who face skills shortages in their geographic footprint should be pleased to learn about workers' interest in moving.

A high degree of labor mobility is inherent in the workforce, with 70% saying that they would be ready to move for the right job. In that group, 18% would be prepared to move to another city/town; 16% to another state/region/province; 14% to another continent; 12% within the same country, district or province; and 11% to another country.

Workers in APAC and EMEA are the most likely to move from their local area for the right job. Only 22% of those in APAC are not prepared to move, compared with 27% in EMEA and 32% in the Americas.

Workers in the Americas are more inclined to relocate to another city/town or another state or region than workers in APAC and EMEA.

But in APAC, there is a high willingness to travel far for work, with 21% prepared to move to another country, compared with 17% willing to do so from EMEA, and 7% from the Americas.

Younger workers are far more mobile when it comes to

relocating for work. Only 20% of Gen Y are not prepared to move, compared to 31% of Gen X and almost half (46%) of Baby Boomers.

Europe stands out as the choice destination for workers willing to move to a different part of the globe, cited by more than a third (34%) of respondents. More than a quarter (28%) is undecided, while 22% nominate North America.

Asia Pacific attracts only 7%, followed by South America (5%), Africa, and the Middle East (both 2%).

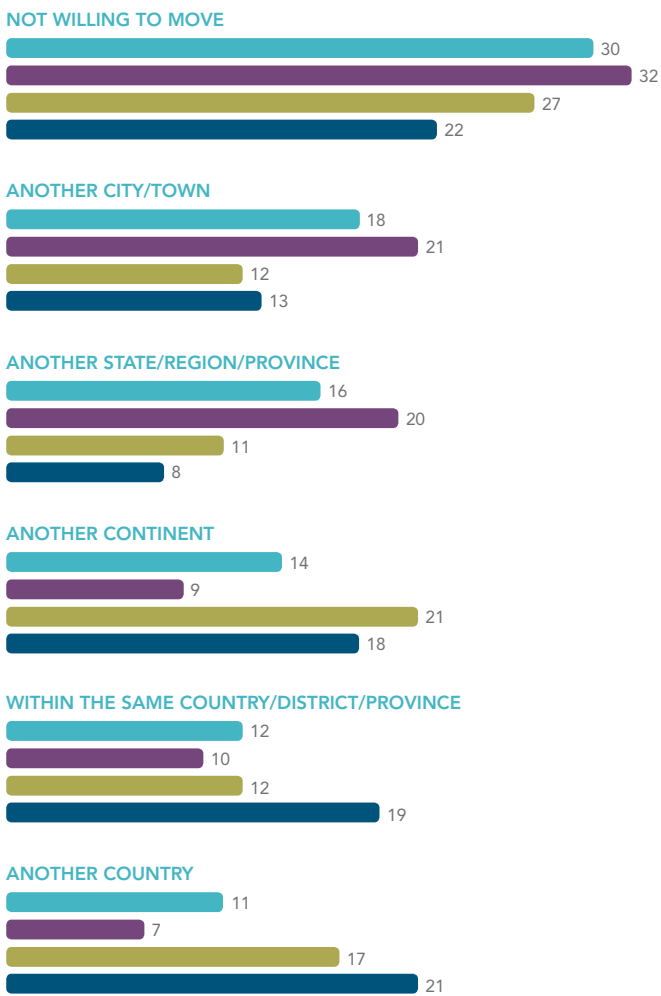
EMEA workers most often gravitate toward their own continent (48%) in terms of the part of the world they would

most prefer for employment. Those in the Americas are split between North America (26%) and Europe (27%).

Respondents in APAC most often choose Europe (33%), followed by Asia Pacific (26%), and North America (17%).

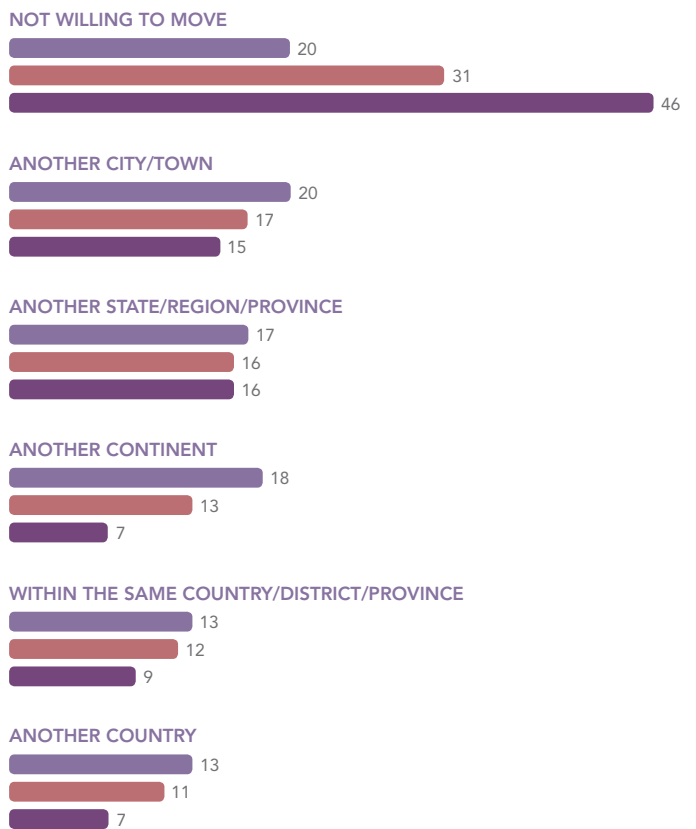
Clearly, employers who may need to source talent from a distance have options. If firms understand their relative attraction as a destination and know the likely demographic, they are in a better position to entice people to relocate for work.

Immediate Career Goals: When considering career advancement opportunities, which statement best describes your immediate career goal? (% by region)



● Global ● Americas ● EMEA ● APAC

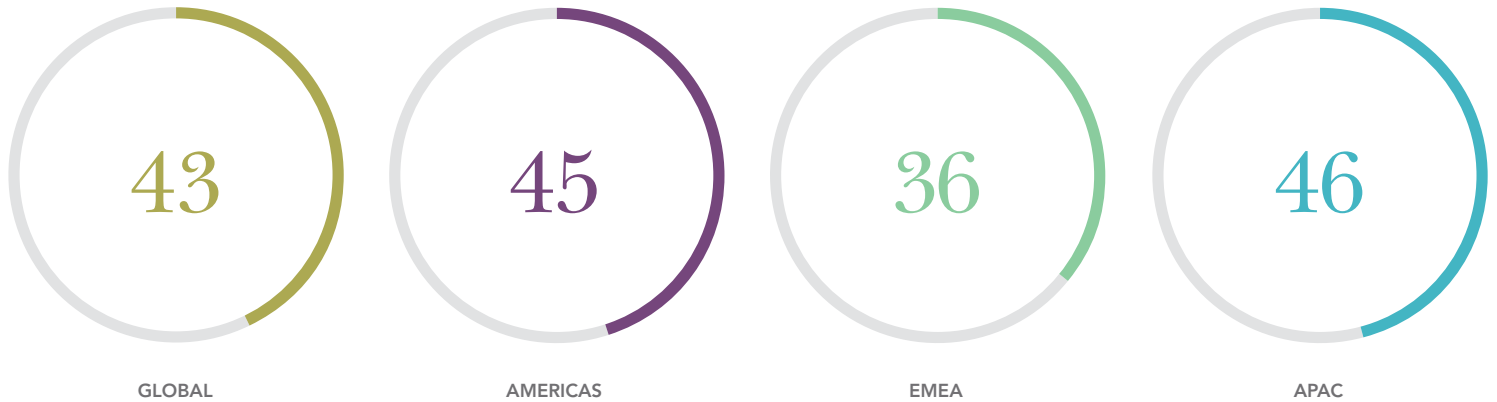
Immediate Career Goals: When considering career advancement opportunities, which statement best describes your immediate career goal? (% by generation)



● Gen Y ● Gen X ● Baby Boomers

NEW AND EMERGING FLEXIBLE MODELS

Appeal of non-traditional employment: To what degree are you interested in non-traditional or flexible employment? (% 'very interested' & 'interested' by region)



The contemporary workplace features the emergence of alternative models to traditional forms of employment.

Globally, organizations continue to move away from hiring all workers directly, and increasingly rely on flexible staffing options. Typical of these arrangements are freelancers, temporary workers, contract workers, independent contractors, project-based statement-of-work

contractors, and entrepreneurs and business owners.

In tandem with this movement, workers show openness toward accepting flexible employment. Globally, more than two out of five workers (43%) express an interest in non-traditional or flexible employment.

Those in APAC (46%) and the Americas (45%) are more likely to be interested in non-traditional

or flexible employment than workers in EMEA (36%).

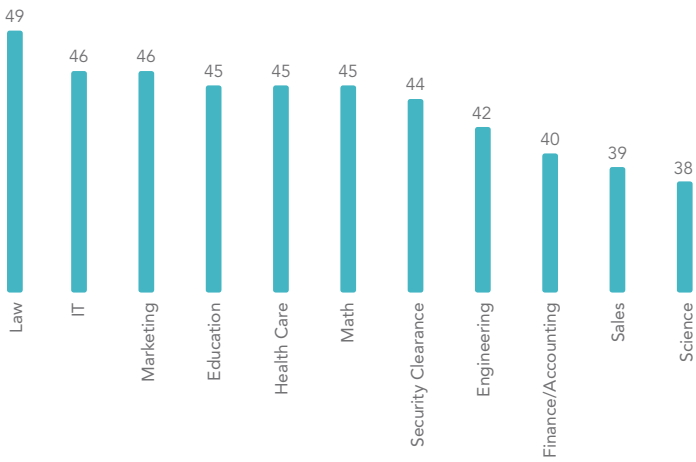
Alternative models of employment also appeal to certain professional categories.

Those most likely to have a disposition to non-traditional or flexible employment are in Law (49%), IT (46%), Marketing (45%), and Education (45%). There is less appeal in Science (38%), Sales (39%), and Finance/Accounting (40%).

In some markets, the availability of employer-provided health-care benefits makes a real difference to a worker's attraction to flexible employment.

When health-care benefits are excluded, more than two-thirds (39%) are willing to consider flexible, non-traditional employment. The highest population is in the Americas (43%) and APAC (42%), well ahead of EMEA (33%).

Appeal of non-traditional employment: To what degree are you interested in non-traditional or flexible employment? (% 'very interested' & 'interested' by professional occupation)

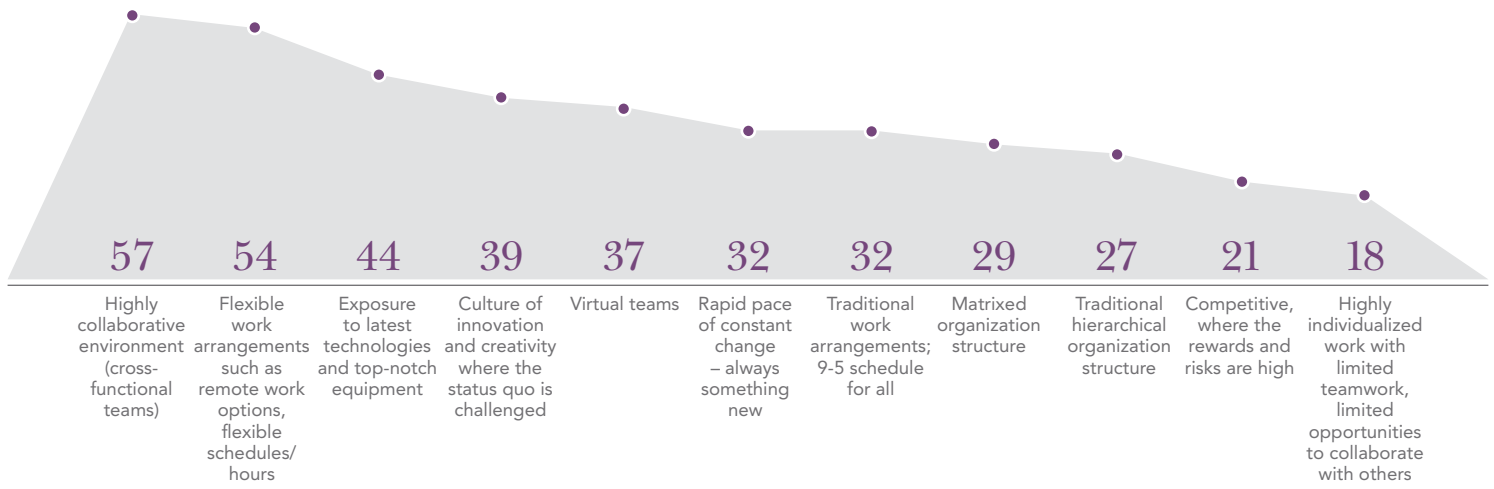


Appeal of non-traditional employment: If you were to exclude employer-paid or universal health-care benefits as a factor when considering employment options, how likely would you be to consider non-traditional or flexible employment? (% by region)



ORGANIZATIONAL STRUCTURE

Ideal worker work environment: Your ideal work environment would include which of the following features? (% multiple responses allowed, globally)



Workplace change today is driven by concepts such as virtual teams, collaborative environments with cross-functional teams, flexible work arrangements, fast-paced environments with rapidly changing demands, and the use of the latest technology and equipment.

Not only have these approaches gained in popularity, they have raised workers' expectations that these concepts should be incorporated into their work life.

Workers say the ideal work environment is one that offers collaboration (57%) and flexible work arrangements (54%).

Workers are also interested in being exposed to the latest technologies and cutting-edge equipment (44%), being part of a culture of innovation (39%), and being on virtual teams (37%).

Fewer workers are attracted to highly individualized structures with little teamwork (18%), competitive setups with both high rewards and risks (21%), and even traditional hierarchical structures (27%).

By region, more APAC (62%) and EMEA workers (60%) are attracted to collaborative workplaces than their Americas counterparts (54%).

Flexible work arrangements are also attractive to more of those

in APAC (60%) and the Americas (58%) than those in EMEA (43%).

Virtual teams are favored by more APAC workers (47%) than by workers in the Americas (38%) and EMEA (32%). When the best workers may not be ready or willing to relocate, virtual teams can be an effective retention strategy.

By occupation, a collaborative work environment is most sought among professionals in Science (71%) and Engineering (67%).

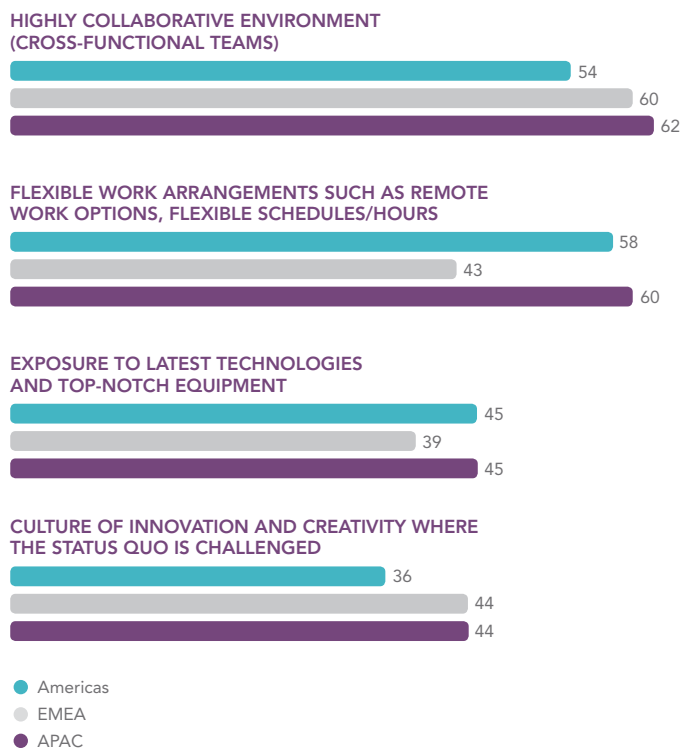
Flexible arrangements have most appeal to those in IT (64%), while these professionals are also most interested in exposure to latest technologies and equipment (63%).

A culture of innovation and creativity rates highest in Marketing (56%), Science (51%), and Engineering and IT (both 48%).

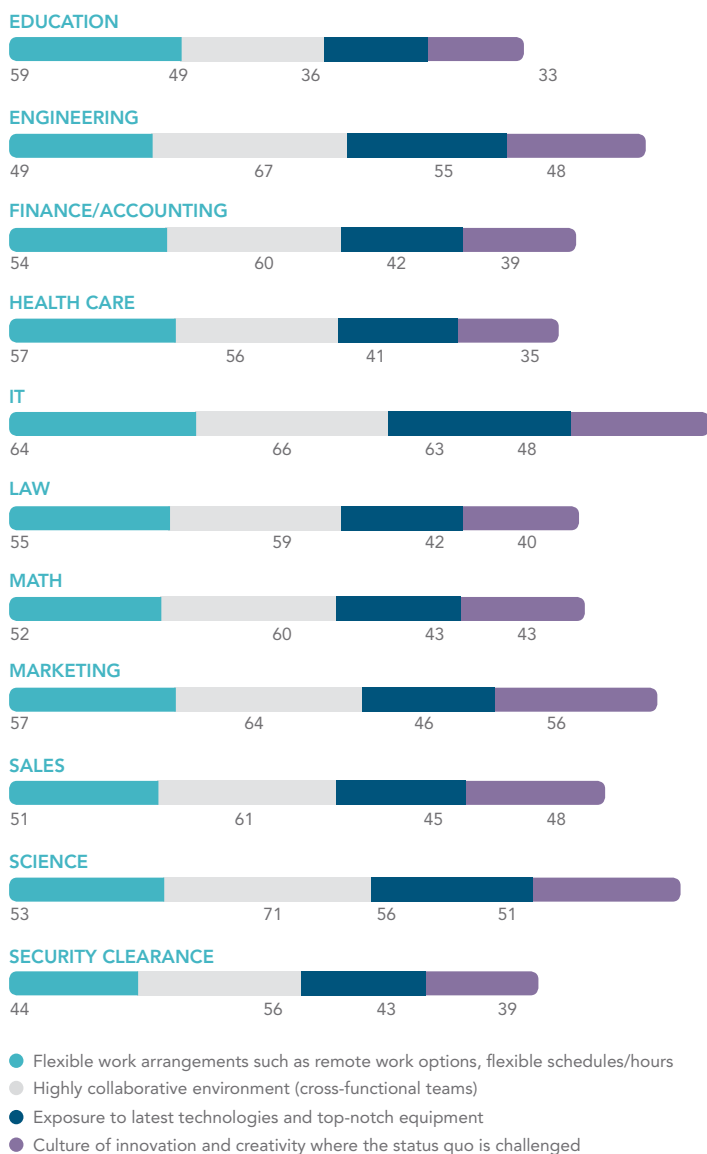
In general, structures that offer collaboration and flexibility have strong appeal, as does the availability of cutting-edge technologies and equipment.

Employers who integrate these approaches into the workplace may have the most success in attracting and retaining the best talent. They also create an enriching employment experience that may ultimately be rewarded through creativity, innovation, and higher productivity.

Ideal worker work environment: Your ideal work environment would include which of the following features? (% by region, top four features, multiple responses allowed)



Ideal worker work environment: Your ideal work environment would include which of the following features? (% by professional occupation, top four features, multiple responses allowed)



KEY FINDINGS

REGION

APAC workers are far more willing than the global average to give up higher pay and/or career growth or advancement to learn new skills (66% versus 57% globally) and for a greater work-life balance (65% versus 52% globally).

Workers in APAC are also more willing to make these pay and advancement trade-offs for a more flexible work schedule (48%) and for the opportunity to start their own business (47%), compared to the global average.

APAC workers (78%) are most willing to move away from their local area for the right job, followed by EMEA (73%) and Americas (68%).

More APAC (62%) and EMEA (60%) workers value collaborative workplaces than their Americas counterparts (54%). APAC (60%) and Americas (58%) workers place greater importance on flexible work arrangements than EMEA workers (43%).

GENERATION

Gen X workers place a somewhat higher priority on work-life balance (55%), than Gen Y (52%) and Baby Boomers (49%). Having the opportunity to start their own business appears to be a much higher priority to Gen Y (45%) and Gen X (41%) workers, compared to Baby Boomers (30%).

Younger workers are far more willing to move for the right job compared to their older counterparts. The vast majority of Gen Y workers (80%) would consider moving, followed by Gen X workers (69%). Only about half of Baby Boomers would be willing to relocate (54%).

Gen Y and Gen X workers (58% each) are more interested in a collaborative workplace than Baby Boomers (53%). Flexible work arrangements are somewhat more important to Baby Boomers (58%), and Gen X (56%), than to Gen Y (51%).

INDUSTRY

High Tech workers are more likely than the global average to forego higher pay and/or career growth for the opportunity to learn new skills (61% vs. 57% average).

SKILL SET

Professionals in Engineering, IT (63% each), Science (61%) and Finance/Accounting (60%) all show higher-than-average willingness to trade-off pay and/or advancement to learn new skills (58% average for other professionals).

Collaborative work environments are most sought after among professionals in Science (71%), Engineering (67%), and IT (66%) as compared to the global average for Professional/Technical workers (61%). Virtual teams represent the ideal work environment for IT workers (56%) more so than for any other professional occupation (40% global average for other Professional/Technical workers).

More professionals in Science (51%), Engineering (48%) and IT (48%) expressed preference for a culture of innovation and creativity than the average for other Professional/Technical workers (44%), as well as exposure to the latest technologies and equipment (63% IT, 56% Science and 55% Engineering, compared to 46% average).

CONCLUSION

What the KGWI® survey shows is that organization type, size, location and managerial structure all carry weight with workers in deciding where to work and have a direct bearing on the level of remuneration and other benefits that are on offer.

Large, global enterprises with recognized brands find it easier to attract workers than smaller businesses with no track record. Employers, though, who don't find themselves with most-attractive status should not think that because they can't change their size or experience, they cannot compete.

These employers will find it's even more important for them to evaluate what they can do differently to attract prospective workers. They need to assess their relative appeal as an employer, improve where they can and ensure their outreach communicates those advantages to candidates as well as their current workers.

All firms need to understand where they stand in this equation and what it means for salaries and benefits. They also need to know the areas where workers indicate a readiness to trade-off salary and benefits, and react accordingly.

For example, if work-life balance is important, workers may be more attracted to a workplace with proximity to health and fitness facilities, child care, and arts and cultural institutions. For workers who value professional growth, firms providing education and professional development opportunities may be more appealing.

The managerial style, culture and structure can also be important to prospective workers. It's something that most candidates might not appreciate from the outside, and something that many organizations don't use

as a selling point. To emphasize this value, employers should engage candidates to learn more about what they prefer in a working environment, and encourage finalists to interact with current employees and ask questions of them to get a taste of what they might experience on a day-to-day basis.

A culture that is collaborative, creative, team oriented with access to leading edge technologies may well be a strong point of differentiation, and should be highlighted as part of the employment offering.

WHAT EMPLOYERS CAN DO

→ Conduct a worker "attraction" evaluation to identify the relative appeal of the organization in terms of its type, size, location, track record and organizational structure.

→ Undertake an audit of all the "non-work" features of the organization that could be attractive to a worker or candidate and consider how they could be embedded in the employment offering.

→ Offer non-traditional work formats that offer flexibility, collaboration and growth.

→ Encourage workers to identify particular interests, such as lifestyle, family, recreation or other pursuits that may provide an opportunity to inject flexibility into the work schedule.

→ Harness the positive features of the organization to extend the recruiting footprint to cities, regions or even countries where skills in demand by the firm may be readily available.

→ Promote the organization's advantages through diverse channels from its website and social media to online talent communities, as well as word of mouth and well-written job postings.



THE EMPLOYER
TALENT
QUOTIENT

WORKERS VIEW OF THEIR EMPLOYERS

While employers regularly monitor their workers' performance, they often lack information on how their workers view them.

The Employer Talent Quotient turns the spotlight toward employers' performance, providing insight into areas for improvement and factors that may influence decisions to switch companies.

It shows that workers rated their employer highly in the following areas:

- Work-life balance (67%);
- Diversity/equal opportunities record (62%);
- Environmentally friendly/responsible work practices (61%);
- Opportunities to be involved in interesting, meaningful work (60%).

EMPLOYER TALENT QUOTIENT: CURRENT EMPLOYER'S PERFORMANCE ON 15 WORKPLACE FACTORS	
	RATING OF "HIGH"
Work-Life Balance	67%
Diversity/equal opportunities record	62%
Environmentally friendly/responsible work practices	61%
Opportunities to be involved in interesting, meaningful work	60%
Clear, cohesive direction and corporate strategy	56%
Competitive compensation/benefits/other financial incentives	54%
Management	54%
Reputation as employer of the best, brightest people	53%
Flexible work opportunities, including work from home, design your own work schedule, etc.	50%
Employment education opportunities/emphasis on continual learning (stretch assignments/conferences)	50%
Exposure to the latest technologies and top-notch equipment	48%
Opportunity to move to different roles/continuous opportunities for change to direct/advance career	45%
Opportunities for community service/to meet your desire for social consciousness	43%
Recognition/reward programs	42%
Non-traditional perks (athletic facility on site, cafeteria-style amenities) and innovative benefits aimed at increasing workers' ease of life outside working hours	32%

REGIONAL VARIATION

Americas (69%) and APAC (68%) workers were more likely to rate their employers highly on promoting work-life balance, compared to EMEA workers (63%).

Americas (67%) workers rated their companies higher on diversity/equal opportunities record, compared to APAC (56%) and EMEA (49%).

Americas (66%) and APAC (63%) employers were rated more highly than EMEA (48%) employers on having environmentally friendly/responsible work practices.

Americas (62%) workers rated their employers higher on offering opportunities to be involved in interesting and meaningful work, compared to APAC and EMEA (55% each).

CURRENT EMPLOYER'S PERFORMANCE BY REGION: HIGH RATINGS			
	AMERICAS	APAC	EMEA
Work-life balance	69%	68%	63%
Diversity/equal opportunities record	67%	56%	49%
Environmentally friendly/responsible work practices	66%	63%	48%
Opportunities to be involved in interesting, meaningful work	62%	55%	55%

KEY ATTRACTION FACTORS

Competitive salaries/benefits, work-life balance, and opportunities for career growth are the top three drivers in the employer-selection process, according to the KGWI®.

Employers underperform in offering competitive compensation and benefits: 84% of workers cite salary as an employment driver, while just 54% rate employers highly in this area.

A shortcoming is also seen in employer's offering opportunities for career advancement: 62% of workers say these opportunities drive their employment decisions, while only 45% rate their employers as performing highly.

No gap exists in work-life balance, with 64% citing it as an attraction factor and 67% rating their employers as performing highly.

In each case, Gen Y and Gen X workers are more likely to emphasize salary/benefits and opportunities for advancement than Baby Boomers are.

EMPLOYER TALENT QUOTIENT GAP ANALYSIS: ATTRACTION FACTORS		
	EMPLOYER PERFORMANCE: HIGH RATING	ATTRACTION FACTOR*
Work-Life Balance	67%	64%
Competitive compensation/benefits/other financial incentives	54%	84%
Opportunity to move to different roles/continuous opportunities for change to direct/advance career	45%	62%

* Factors that "drive decision to accept one job over another" (% selecting response).

KEY RETENTION FACTORS

The top three factors in worker attraction are the same top factors in worker retention. The KGWI® research shows competitive salaries/benefits, work-life balance, and opportunities for career growth drive workers' decisions to leave a company.

When comparing employer-performance ratings with the areas that most impact retention, it appears that salary/benefits is the only area with a gap or shortcoming. With 60% of workers indicating that they would leave their company based on competitive salaries and 54% of workers rating their employers highly in compensation.

Gen Y and Gen X workers are more likely to say that salary/benefits is a top influencer to leave an organization compared to Baby Boomers.

GAPS

Given the myriad factors that draw workers toward an organization, employers may do best to focus their efforts on the ones with the greatest impact: work-life balance, compensation/benefits, and advancement opportunities.

Maintaining flexibility, revisiting compensation packages and reviewing growth opportunities offered to workers would be time well spent.

EMPLOYER TALENT QUOTIENT GAP ANALYSIS: RETENTION FACTORS		
	EMPLOYER PERFORMANCE: HIGH RATING	RETENTION FACTOR*
Work-Life Balance	67%	36%
Competitive compensation/benefits/other financial incentives	54%	60%
Opportunity to move to different roles/continuous opportunities for change to direct/advance career	45%	41%

*Factors that would "most likely to cause you to leave your organization or change jobs/careers" (% selecting response).

The collective voice of workers across the globe provides some compelling reflections on the state of work and careers.

With measured levels of worker loyalty and commitment still at fragile levels, initiatives that help build confidence and trust among workers who have been buffeted by global economic instability are essential.

As the KGWI® shows, many workers place a premium on steps that employers can implement or supplement to develop their workers' skills and advance their careers. Employer-provided training and professional development foster engagement and productivity and future capabilities, and build a level of resilience to withstand fluctuations in economic cycles.

In many countries, workers are uncertain about their future in an unsettled labor market. Opportunities to canvas career pathways and direction help flesh out personal and professional difficulties and can contribute to a more positive engagement.

Clearly there is some disconnect between the somber mood of the workforce in general, and the upbeat outlook among some workers in regard to their job prospects and their bargaining power. Most employers, having endured the cyclical downturn, will be resistant to be salary pressures as they rebuild staff levels.

As detailed in this study, employers will do well when they recognize the need to provide benefits, even

non-monetary ones, such as professional development, flexible work arrangements, and non-monetary benefits.

A new generation of empowered workers continue to show strong confidence in their worth, and are actively expanding their employment networks in pursuit of new opportunities. This can be good news for employers facing skill shortages; not so good for employers seeking to retain staff.

Employers need to keep an eye out for points of friction in the employment relationship, because even happily employed workers are actively pursuing new opportunities on a regular basis.

As workers grow their networks and expand their personal brands on professional

social media websites, they open multiple avenues for conversation and engagement.

"Win-win" initiatives are possible through training and development, career advice and guidance, social networking and talent communities, exposure to peers and industry leaders, and even steps that expose individuals to more challenging and engaging work, perhaps with new teams or in new locations.

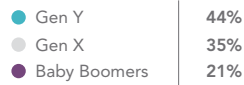
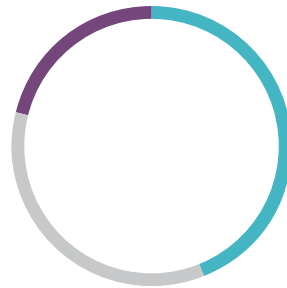
These are all issues that workers themselves identify as being central to their career plans, and which employers can adopt to deliver lasting benefits for firms and individuals.

GLOBAL SURVEY DEMOGRAPHICS

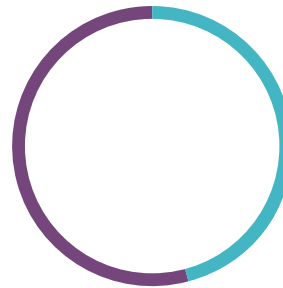
Region



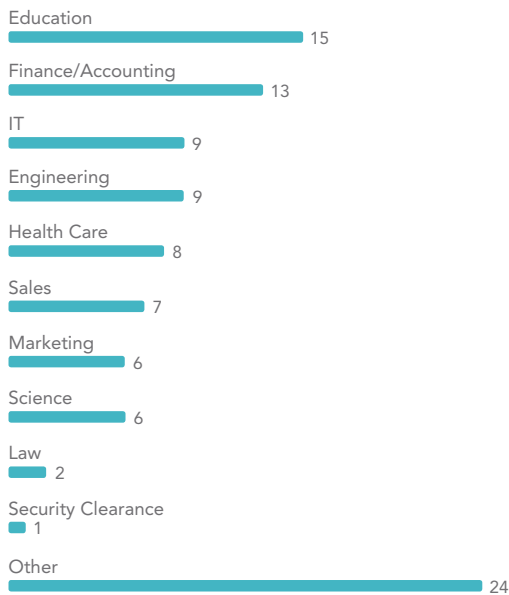
Generation



Gender



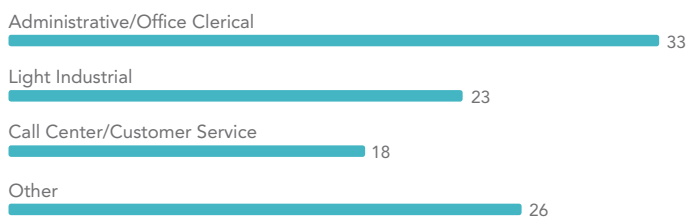
Professional/Technical Skill Set



Industries



Non-Professional/Technical Skill Set



ABOUT THE KELLY GLOBAL WORKFORCE INDEX

The *Kelly Global Workforce Index (KGWI)* is an annual global survey revealing opinions about work and the workplace. Approximately 230,000 people across the Americas, EMEA and APAC regions responded to the survey. The survey was conducted online by RDA Group on behalf of Kelly Services.

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