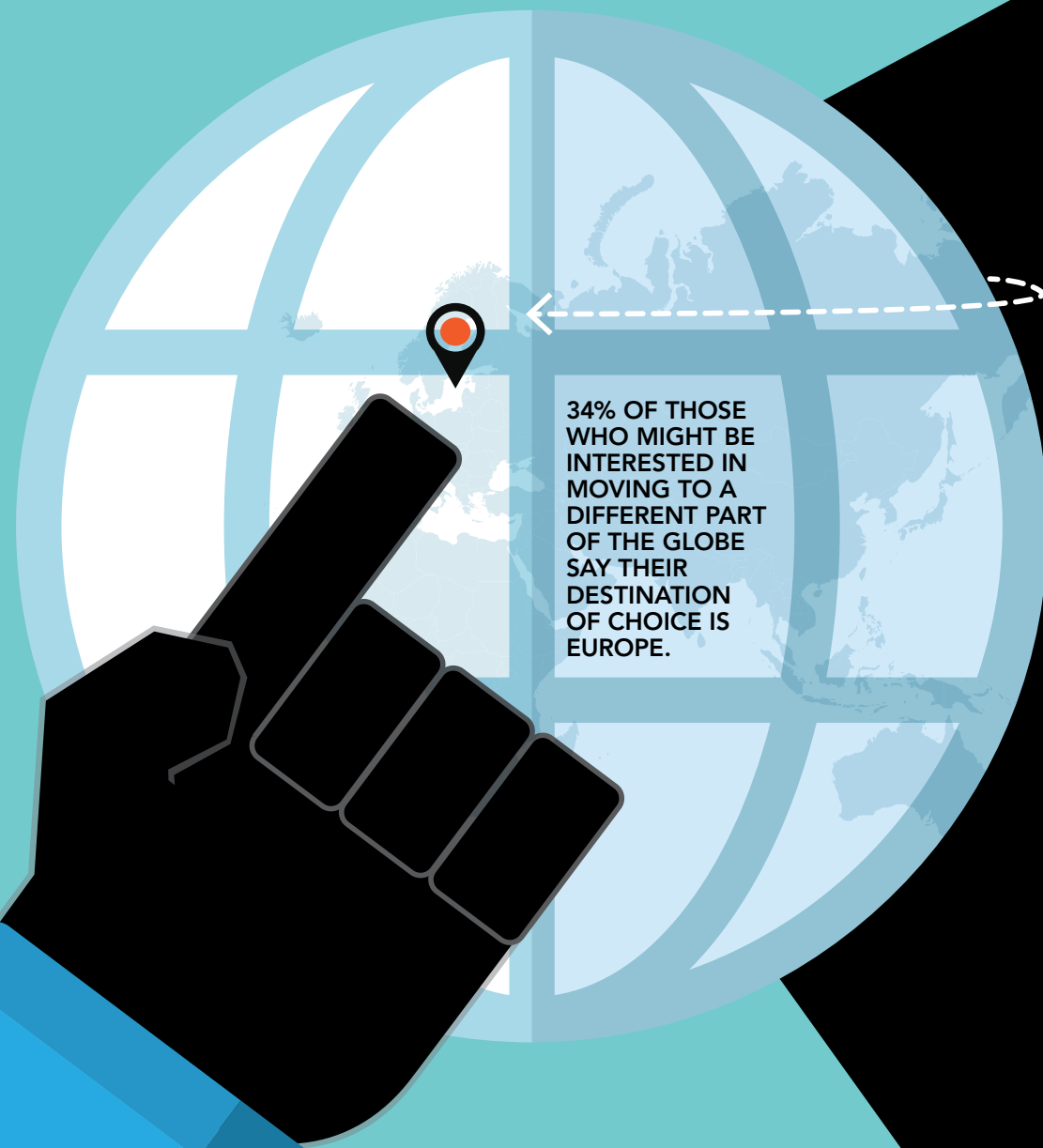


WORKER PREFERENCES AND WORKPLACE AGILITY

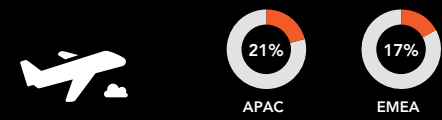




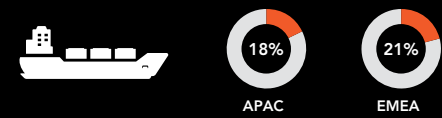
34% OF THOSE WHO MIGHT BE INTERESTED IN MOVING TO A DIFFERENT PART OF THE GLOBE SAY THEIR DESTINATION OF CHOICE IS EUROPE.

71% GLOBALLY SAY THEY ARE WILLING MOVE FOR THE RIGHT JOB

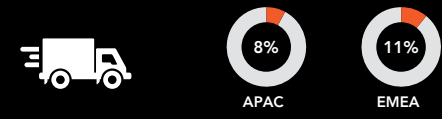
WILLING TO MOVE TO ANOTHER COUNTRY



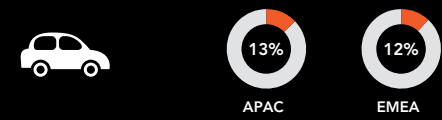
WILLING TO MOVE TO ANOTHER CONTINENT



WILLING TO MOVE TO ANOTHER STATE OR REGION



WILLING TO MOVE TO ANOTHER CITY OR TOWN



WORKERS WILL CONSIDER GIVING UP HIGHER PAY FOR:



IDEAL WORK ENVIRONMENT:

- 1 Collaborative environment
- 2 Flexible work arrangements
- 3 Exposure to the latest technologies and equipment
- 4 Culture of innovation

THE KELLY GLOBAL WORKFORCE INDEX 2014

The Kelly Global Workforce Index® (KGWI) is an annual global survey revealing opinions about work and the workplace. Almost 230,000 people across the Americas; Europe, the Middle East and Africa (EMEA); and Asia Pacific (APAC) regions responded to the 2014 survey.

The topics covered in the 2014 KGWI survey include:

- Engaging active and passive job seekers
- Career development
- The candidate experience from hiring to on-boarding
- Worker preferences and workplace agility.

This fourth instalment, *Worker Preferences and Workplace Agility*, canvasses the value that employees attach to key elements of their work, including skills, flexible work arrangements, and even the idea of socially conscious work.

Employees also give a clue as to why they are drawn to some organizations and not others – shedding light on why an employer’s geographic location, size, and management structure all play a part in talent selection.

CONTENTS

4	Where do employees really like to work?
09	Why employer size, location and track record all matter
13	Making the shift for work
16	Flexibility and agility
19	Looking in the mirror
20	How Kelly can help

Where do employees really like to work?

The main features that make an organization attractive to candidates are seldom voiced in formal recruitment processes, but employees hold firm views about where they want to work, and why.

While there's no mistaking that pay is a key driver of candidate attraction and employee retention, workers also prioritize their professional growth and personal fulfilment.

What a company looks like and how it feels to work there, all make a difference to empowered employees.

Also, views and expectations surrounding non-traditional work styles and arrangements are shifting, and these can provide employers with an edge in the competition to attract the best people.

Employers looking to retain talent might consider the trade-offs that could hold appeal for their employees.

It is extremely important to ensure a company's compensation and benefits plans are competitive, but retaining workers also involves giving employees opportunities to improve their work-life balance, offering them flexible work arrangements, and providing clear plans for their further training and development.

WILLINGNESS TO
TRADE OFF PAY
FOR SKILLS

The most attractive companies offer more than competitive pay and benefits. They offer the opportunity to develop skills and a clear pathway for progression.

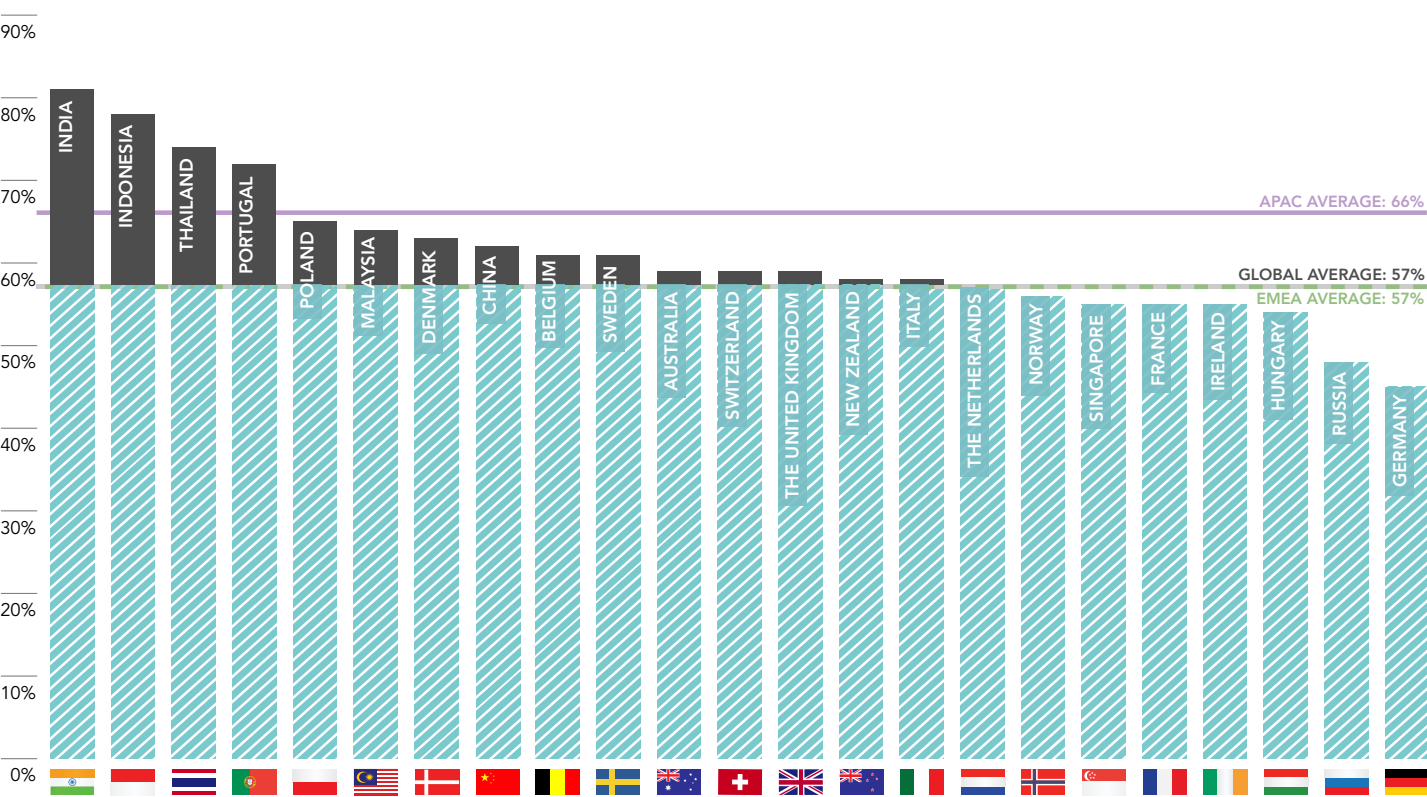
Indeed, learning new skills may be worth more than higher pay and/or career growth or advancement for many employees.

More than half (57%) of employees globally say they may be prepared to give up higher pay and/or career growth or advancement to learn new skills.

The willingness to trade off pay for skills is greater in APAC (66%) than it is in EMEA (57%).

Certain countries stand out for workers' willingness to sacrifice remuneration to gain skills, notably India (81%), Indonesia (78%), Thailand (74%) and Portugal (72%).

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 country)



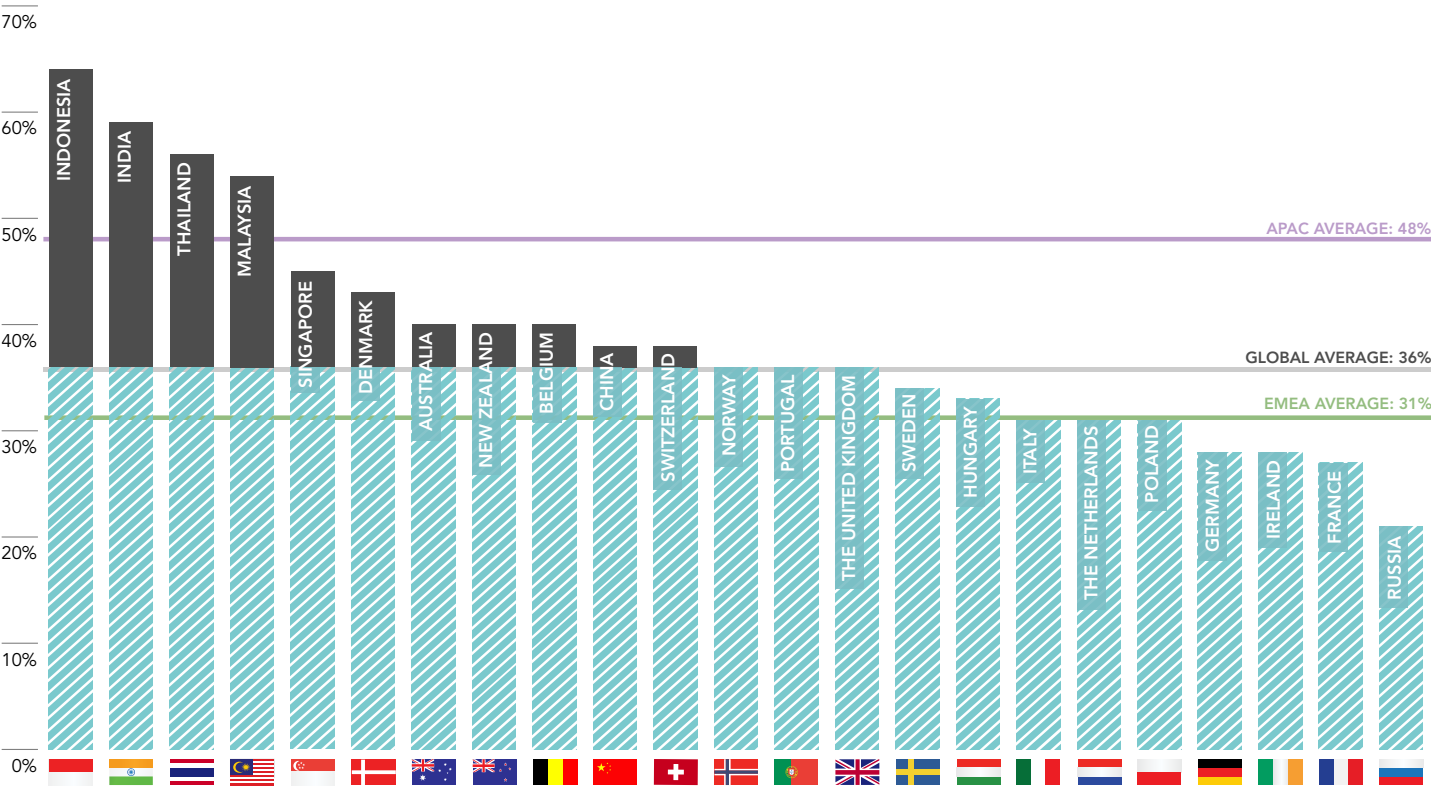
WILLINGNESS TO
TRADE OFF PAY
FOR FLEXIBLE
WORK SCHEDULE

Employees value not only skills development but also flexibility in the way they work.

More than a third globally (36%) say they would be prepared to give up higher pay and/or career growth or advancement for a more flexible work schedule.

Considerably more employees in APAC (48%) are willing to make these pay and advancement sacrifices than in EMEA (31%).

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 country)

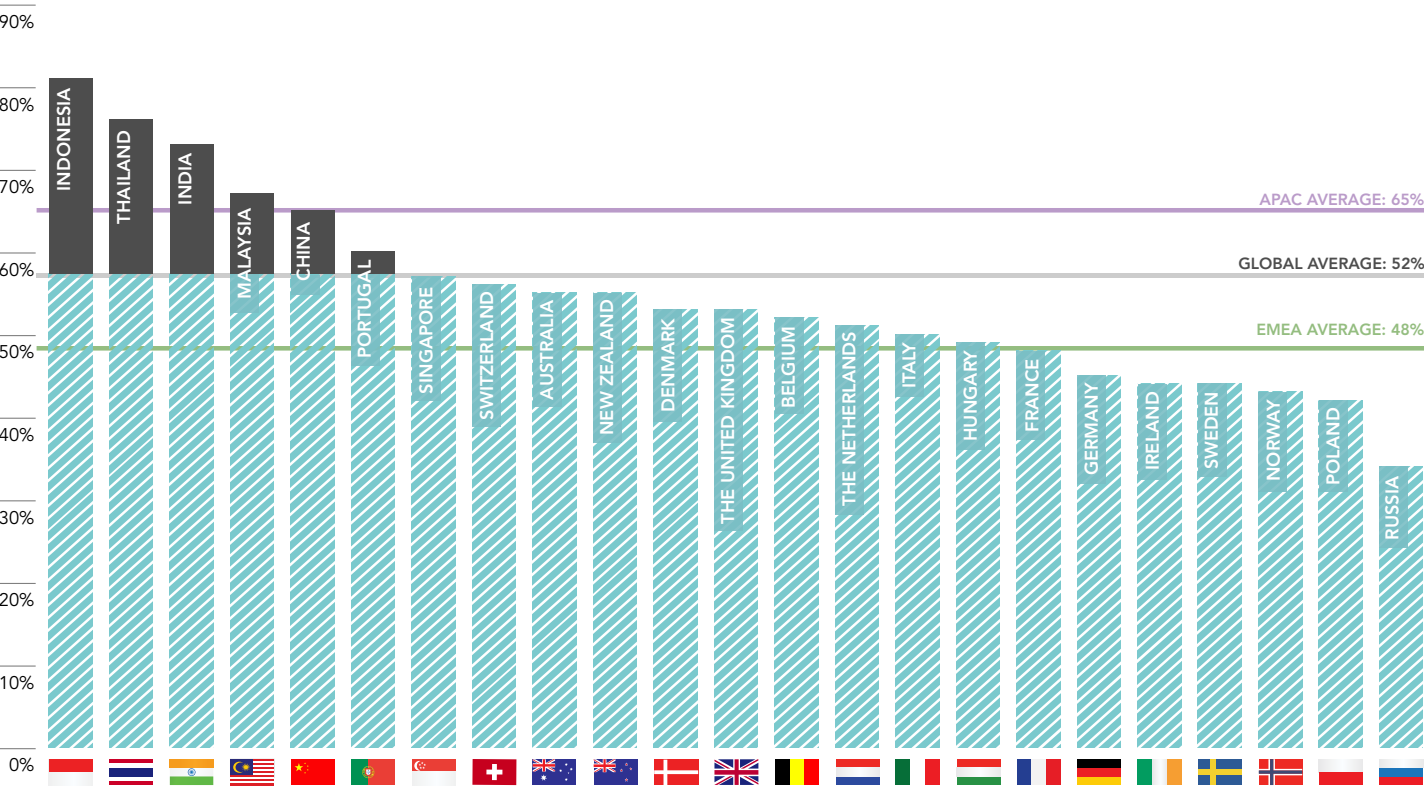


WILLINGNESS TO
TRADE OFF PAY
FOR WORK-LIFE
BALANCE

Improving their work-life balance is also important to employees. A total of 52% globally say they would be prepared to give up higher pay and/or career growth or advancement for a better work-life balance.

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

How likely would you be to give up higher pay and/or career growth or advancement for a greater work/life balance? (% "definitely would" and "would," by country)

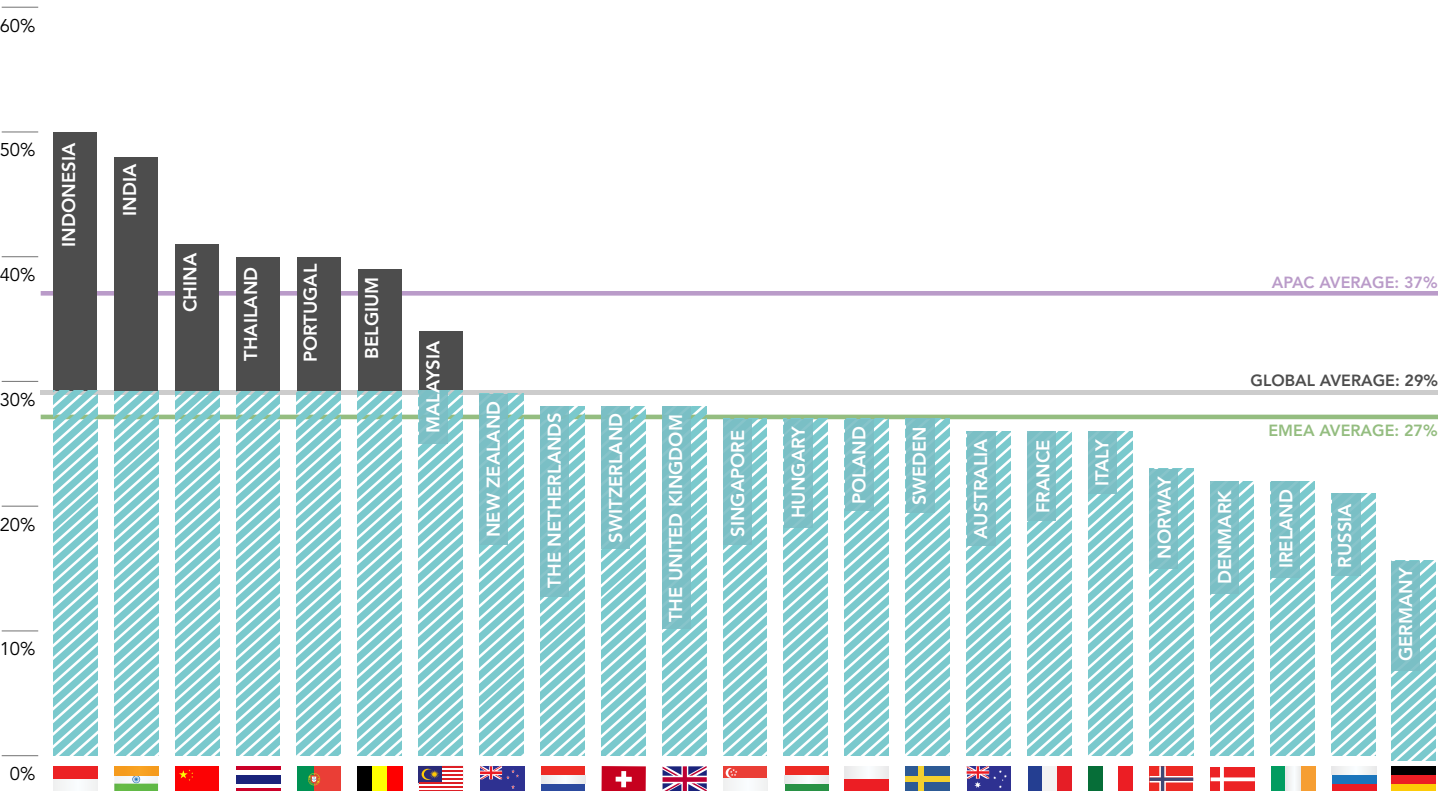


WILLINGNESS TO
TRADE OFF PAY
FOR SOCIALLY
CONSCIOUS WORK

There is also a group of employees who are attracted by work that is socially fulfilling, and who are willing to give up pay and/or promotional opportunities to fill such roles.

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 EMEA (27%).

How likely would you be to give up higher pay and/or career growth or advancement for an opportunity for more socially conscious work? (% "definitely would" and "would," by country)



Why employer size, location and track record all matter

Attracting and retaining employees goes beyond offering competitive pay, a good work–life balance and advancement opportunities.

The characteristics of an organization – its geographic footprint, size, type and record of achievement – also factor into the equation.

companies to work for are large or mid-sized, or established firms with a global presence. However, there are marked variations across the globe.

A significant number of employees globally say the most appealing

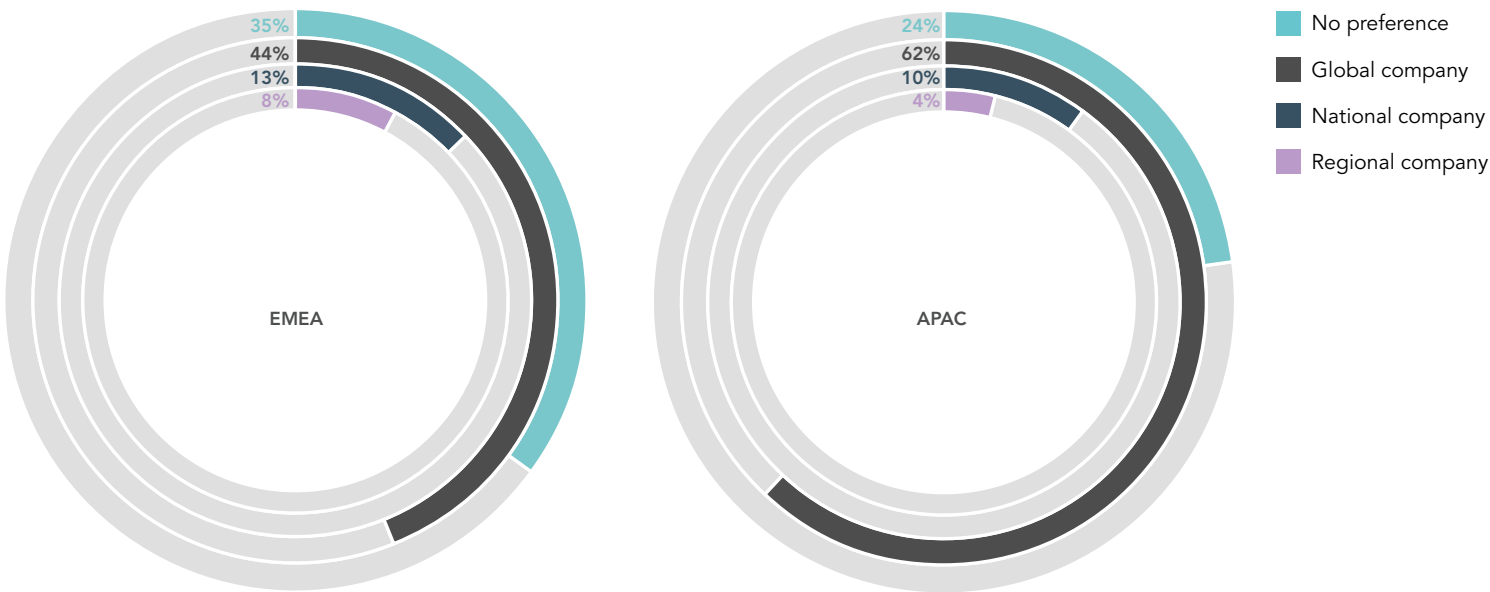
PREFERRED EMPLOYER ORGANIZATION GEOGRAPHIC FOOTPRINT

Globally, a significant portion of employees (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 – approximately three times as many as would prefer to work for a national company (13%) or a regional company (10%).

The worker preference for global companies is most pronounced in APAC (62%) compared with EMEA (44%).

What type of company do you most prefer to work for? (% by region)



PREFERRED EMPLOYER
ORGANIZATION SIZE

When it comes to the size of the organization an employee works for, the largest percentage globally 41% says it doesn't matter.

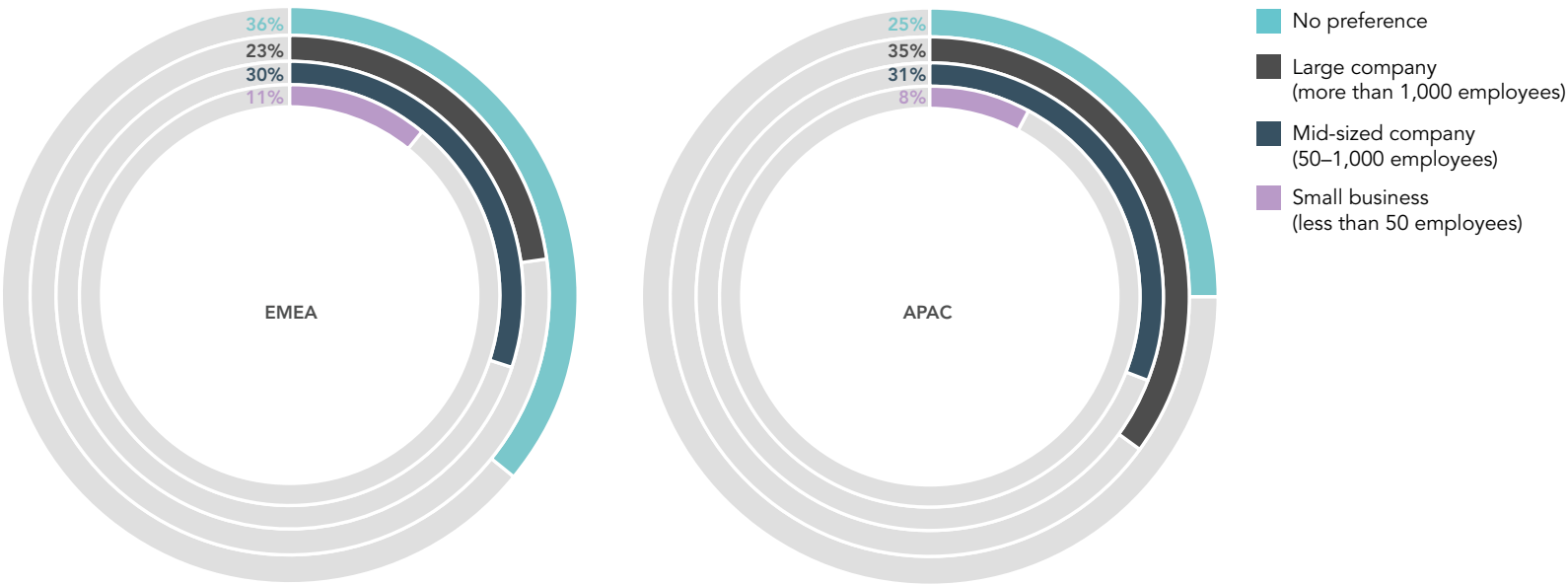
However, more than a quarter (27%) are drawn to mid-sized companies (50–1,000 employees) and almost as many (23%) prefer large companies (more than 1,000 employees). Only 9% prefer small businesses (less than 50 employees).

APAC sees a clear preference for large (35%) and medium-sized companies (31%).

In EMEA, more than a third of workers (36%) don't have a preference, but medium-sized firms (30%) hold sway over large firms (23%).

Small businesses are the preferred choice of just 11% of workers in EMEA and 8% in APAC.

What type of company do you most prefer to work for? (% by region)



PREFERRED EMPLOYER
ORGANIZATION TYPE

When it comes to the types of organizations that employees like to work for, there is a leaning toward firms with an established presence.

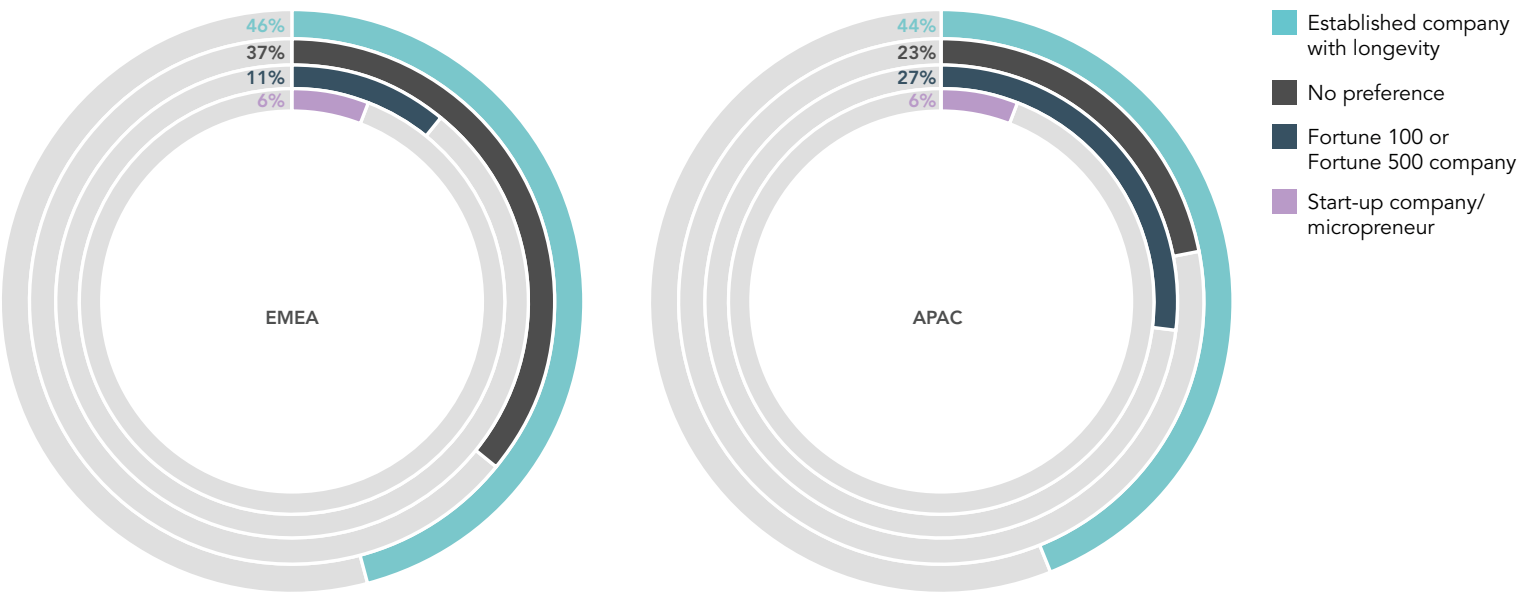
While 38% of workers globally have no preference, 41% say they want to work for a business that is established, with some longevity.

Workers’ preference for established companies is notable in both EMEA (46%) and APAC (44%).

Fortune 100 or Fortune 500 companies are only preferred by 11% of workers in EMEA, but by a much stronger 27% in APAC.

Start-up firms are preferred by only 6% of workers in each region.

What type of company do you most prefer to work for? (% by region)



Making the shift for work

Is it too much to ask employees to travel to find the right work?

Apparently not – a surprising number of workers are ready to relocate, often considerable distances, to secure the work they want.

Firms that understand their relative attraction as a work destination and know their target demographic will be in a better position to entice talent to relocate for work.

WILLINGNESS TO
MOVE FOR WORK

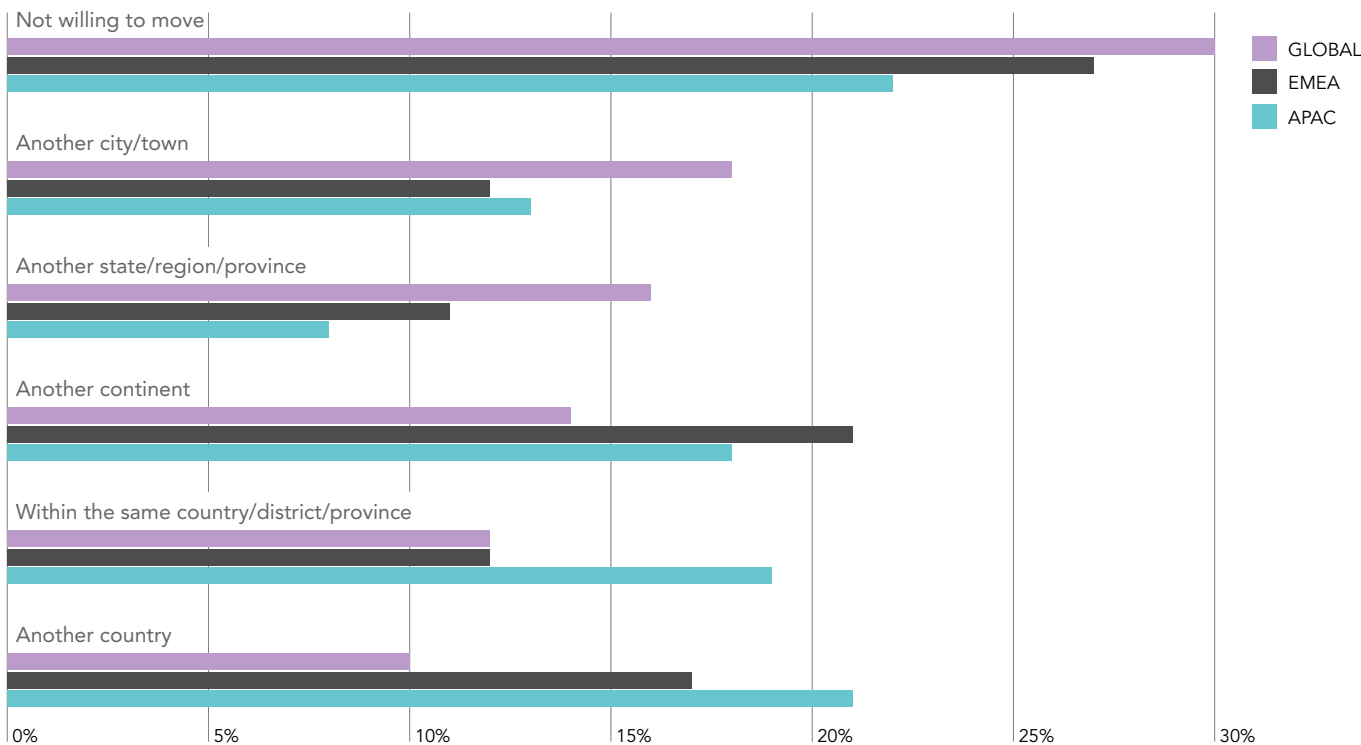
A relatively high degree of labor mobility is inherent in the workforce, with a total of 71% of workers globally saying that they would be ready to move for the right job – 18% to another city/town, 16% to another state/region/province, 14% to another continent, 12% within the same region, and 11% to another country.

Only 22% of workers in APAC and 27% in EMEA are not prepared to move.

In APAC, many workers are very willing to relocate for work, with 21% prepared to move to another country, and 19% within the same country/district/province.

In EMEA, 21% say they would be prepared to move to another continent for the right job.

How far would you be prepared to move for the right job? (% by region)



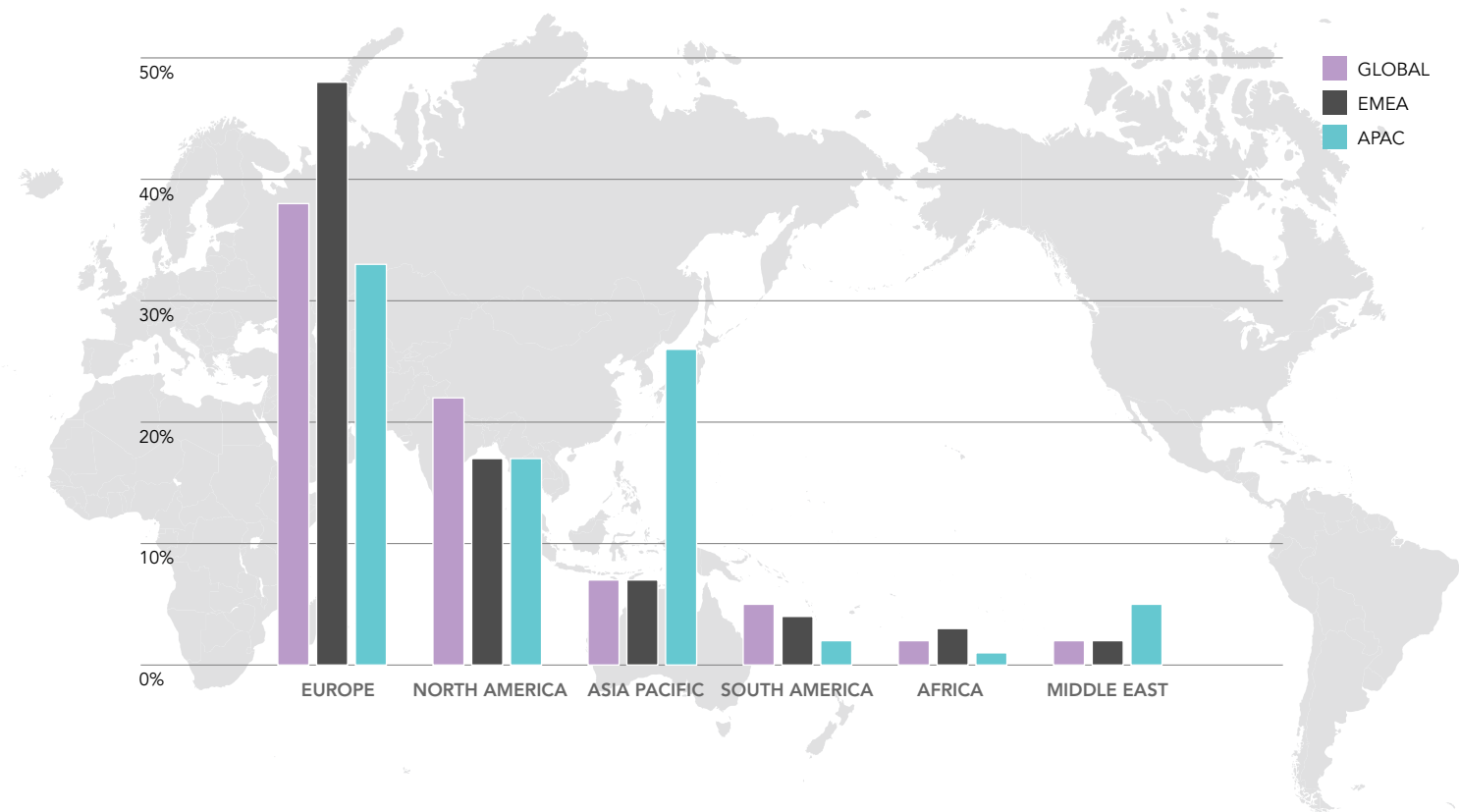
PREFERRED REGION
TO WORK

Europe stands out as the destination of choice for employees who would consider moving to a different part of the globe for work, chosen by more than a third (34%) of respondents globally, 22% nominate North America.

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

EMEA workers most often gravitate toward their own continent (48%), while those in APAC most often choose Europe (33%), followed by Asia Pacific (26%) and North America (17%).

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



Flexibility and agility

In choosing the best place to work, employees are focusing on the way that work is structured, and the type of management that will oversee their activities.

The once-standard 'nine-to-five' work arrangement has given way to variations of contract and flexible work, and there are many employees who willingly embrace these choices.

Also the type of management in place in an organization may well be out of employees' control, but workers do understand the distinctions in management style, and gravitate to firms that offer the most stimulating workplace environment.

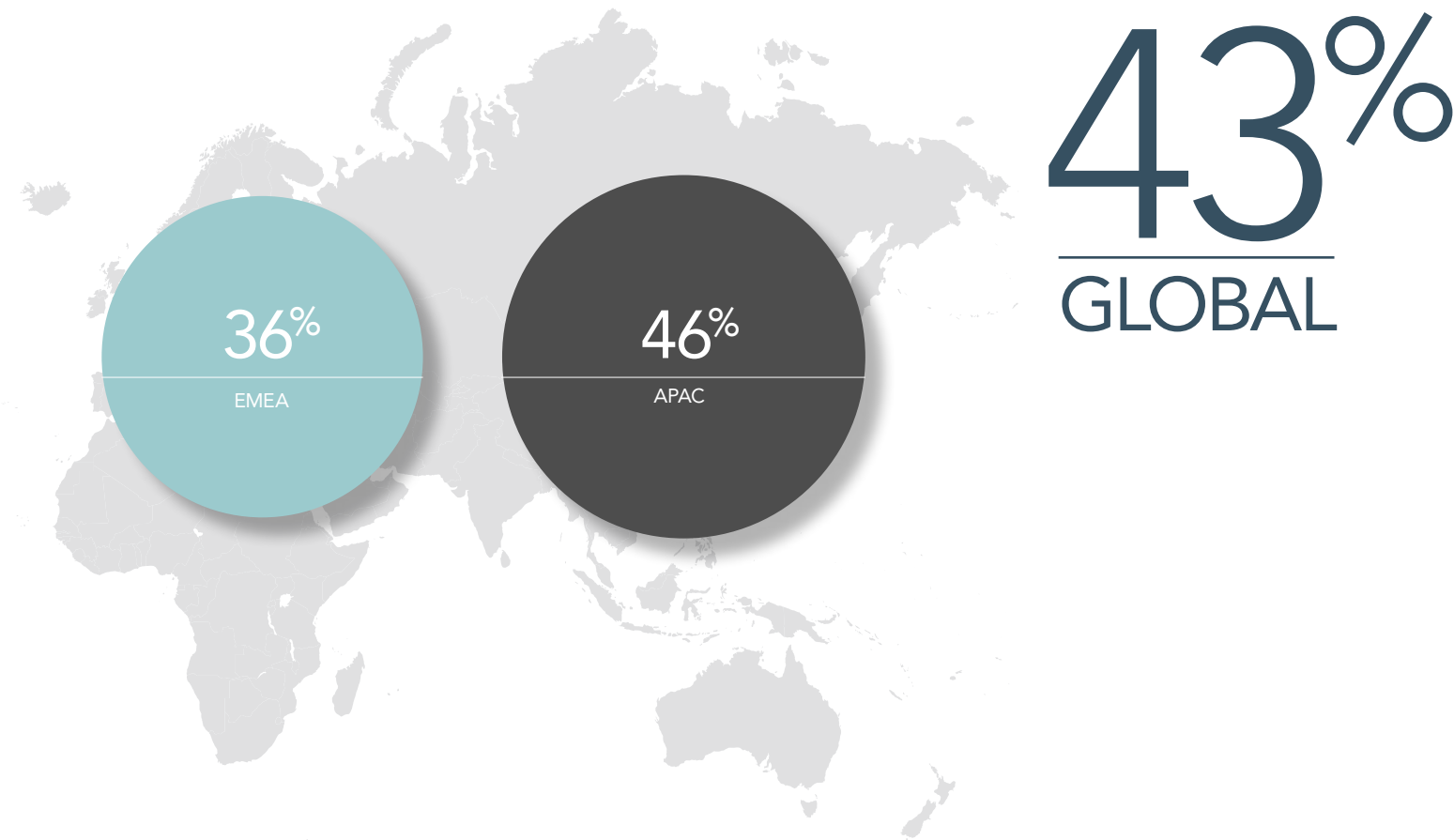
A recent phenomenon of the contemporary workplace is the emergence of various alternatives to the traditional form of employment.

Typical of these are freelancers, temporary employees, contract employees, independent contractors, project-based Statement of Work contractors, and entrepreneurs and business owners.

Globally, more than two-in-five employees (43%) express an interest in non-traditional or flexible employment.

Those in APAC (46%) are more likely to be interested in non-traditional or flexible employment than workers in EMEA (36%).

To what degree are you interested in non-traditional or flexible employment? (% "very interested" and "interested," by region)



IDEAL EMPLOYEE WORK ENVIRONMENT

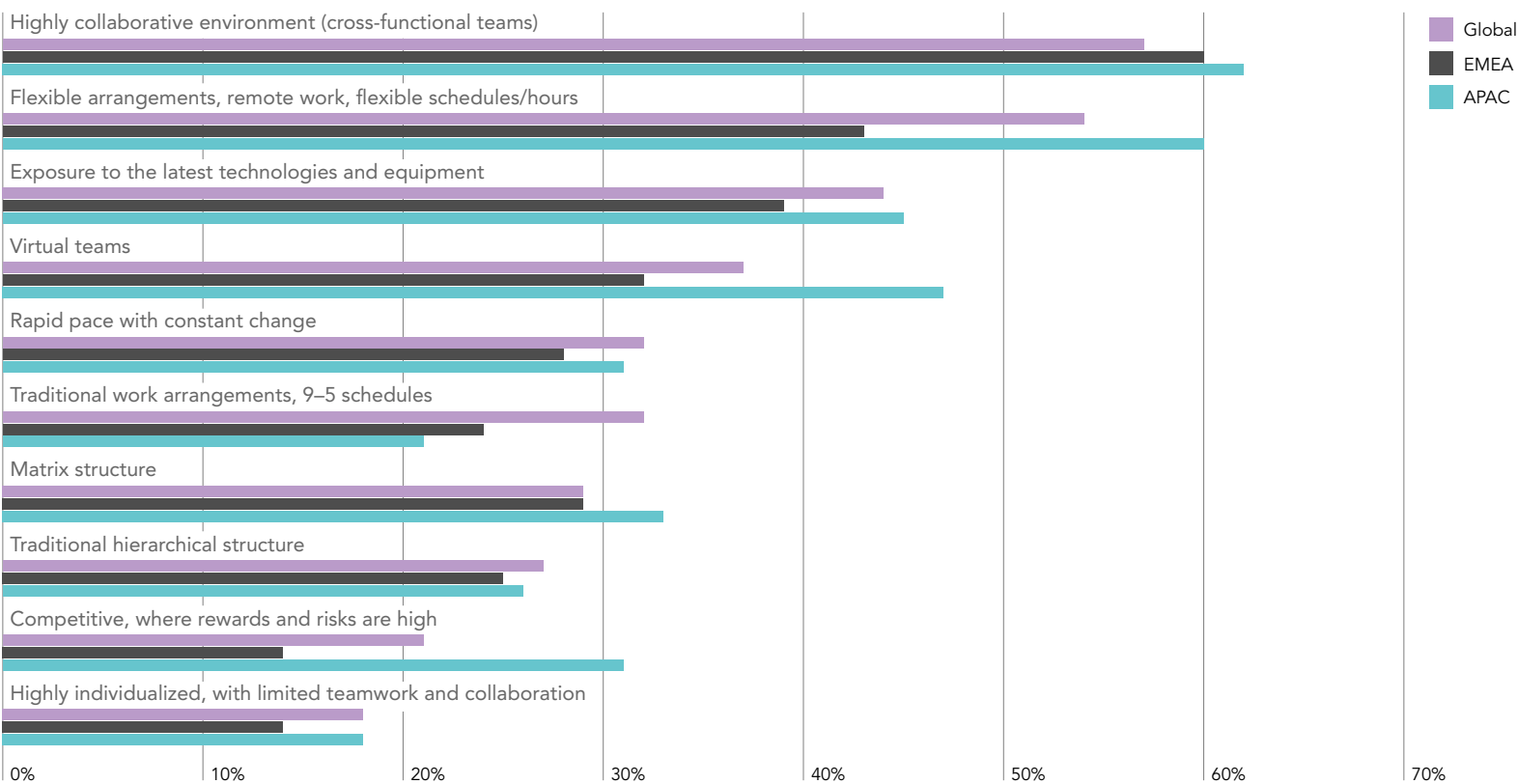
The workplace has many variations – virtual teams, collaborative environments with cross-functional teams, flexible arrangements, risk–reward based environments, and those characterized by the latest technology and equipment.

The ideal work environment for employees is one that offers collaboration (57%) and flexible work arrangements (54%).

Workers also want exposure to the latest technologies and equipment (44%), to be part of a culture of innovation (39%) and to be in virtual teams (37%).

By region, collaborative workplaces are highly attractive to those in both APAC (62%) and EMEA (60%). Flexible work arrangements are more attractive to those in APAC (60%) than in EMEA (43%).

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



Looking in the mirror

It is important for organizations to understand the attributes that are attractive to prospective employees.

Firms need to be able to assess their relative appeal as an employer to set their recruitment and retention strategies.

The KGWI shows that organization type, size, location, and managerial structure all carry weight with employees in deciding where to work, and these have a direct bearing on the level of remuneration and other benefits on offer.

Firms with less appeal to employees may need to offer a premium, while the most sought-after companies can probably afford to be less generous than the market as a whole.

A firm's managerial style, culture and structure can also be important to prospective employees. It's something that most candidates might not appreciate from the outside, and something that many organizations don't use as a selling point.

A culture that is collaborative, creative and team-oriented, and has access to leading edge technologies, may well be a strong point of differentiation.

There are certain things that employers can do to better understand and leverage their position in the market:

- Conduct an employee 'attraction' test that will identify the relative appeal of the organization in terms of its type, size, location, track record, and organizational structure.

- Undertake an audit of the 'non-work' features of the organization that could be attractive to an employee or candidate and consider how they could be embedded in the employment offering.
- Encourage employees 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 may be more plentiful.

How Kelly can help

Kelly Services aims to understand the factors that drive the recruitment process and bring insights that help to find the best talent for every employer.

Understanding the motivations of employees and the needs of employers is a critical element in this. We know that just as employers have different requirements, employees bring their own values, styles, and needs.

One of the important aspects highlighted by the KGWI survey is the diversity

of views among talent regarding the most desirable places to work, as well as distinct preferences for particular organizational styles and types.

Kelly's global presence, knowledge, and experience helps us to better appreciate these traits, and to help organizations and employees achieve the optimum

fit. Knowledge of local markets, industry sectors, and skills availability is crucial.

In a world where talent is increasingly mobile, it is more important than ever to reach into markets and regions where skills can be harnessed to maximize productivity and profitability.

ABOUT THE KELLY GLOBAL WORKFORCE INDEX

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ABOUT KELLY SERVICES®

Kelly Services, Inc. (NASDAQ: KELYA, KELYB) is a leader in providing workforce solutions. Kelly® offers a comprehensive array of outsourcing and consulting services as well as world-class staffing on a temporary, temporary-to-hire and direct-hire basis. Serving clients around the globe, Kelly provided employment to approximately 540,000 employees in 2013. Revenue in 2013 was \$5.4 billion. Visit kellyservices.com and connect with us on [Facebook](#), [LinkedIn](#) and [Twitter](#). Download [The Talent Project](#), a free iPad® app by Kelly Services.

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