

Key global workforce insights from Kelly®

# WORK

# LIFE

design  
the new balance

**KELLY**®



# Introduction

Just as businesses are getting comfortable with the concept of work-life balance, they'll need to quickly reconcile with the more complex demands for work-life design—which is a more seamless integration of work and life.

In this era of talent supply chain management, talent has a choice of where and how to work—as evidenced by the 31 percent of global workers who choose flexible work styles over traditional employment arrangements. The best talent is looking for greater control and ownership over work-life design, and seeking out the organizations that will partner with them to achieve this.

For the companies that do, engagement will rise in the form of loyalty, discretionary effort, and commitment. But organizations that don't recalibrate their internal policies risk the high turnover of top, engaged critical workers—which could narrow the range of talent they can attract, and compromise business performance.

As a pioneer in the staffing industry, and in the study of workforce preferences, Kelly takes a high-level look at work-life design as it pertains to the global worker today. In addition to analyzing worker preferences and psychographic insights based on survey data from the 2015 and 2014 Kelly Global Workforce Index™ (KGWI), this report pulls insights from Kelly Free Agent Research (2015) survey data and other research sources. Unless otherwise noted, all statistics come from recent Kelly workforce research data.

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# Work-life design movement

Both employers and workers will drive changes

## Work-life design is the new work-life balance

The essence of **work-life design** is for an organization to develop its capacity to innovate their talent management programs in order to attract and retain top talent who have a broad and ever-evolving set of needs.

At its core, an ideal work environment acknowledges that workers—as individuals—have priorities outside of the workplace.

To better navigate the interdependence of modern work-life design, both employers and workers will need to stay on top of trends. This is the new way.

## The aspects of work-life design:

### 1. There is no single formula

In work-life design, there is no one-size-fits-all programming and no standard set of options. It's not just about flextime—not the number of hours worked, or where work is done.

Organizations need an array of creative options and opportunities, and to relay and encourage those options in order to remain fresh and nimble in a fast-paced business environment.

### 2. Elements vary between individuals

Work-life design requires a stronger ability to respond to the dynamic preferences

of workers, which change over time as individuals move through different life and career phases. Organizations need to sharpen their capabilities and be armed with creative attraction strategies to avoid costly cultural mismatches and turnover.

### 3. There is individual responsibility

Not all change is expected to fall to the employer. A higher level of self-advocacy and self-awareness are paramount for today's worker—to know what he or she needs to succeed in the workforce and how get it, and to drive their own career development.

# 1

## Work-life design movement (continued)

### 4. There is corporate responsibility

Organizations that want to attract and retain a broad range of top talent—key in industries with skills shortages—will need to understand and respond to generational, gender, and geographic differences in order to leverage the expertise and skills of those workers.

### 5. Continual change is a certainty

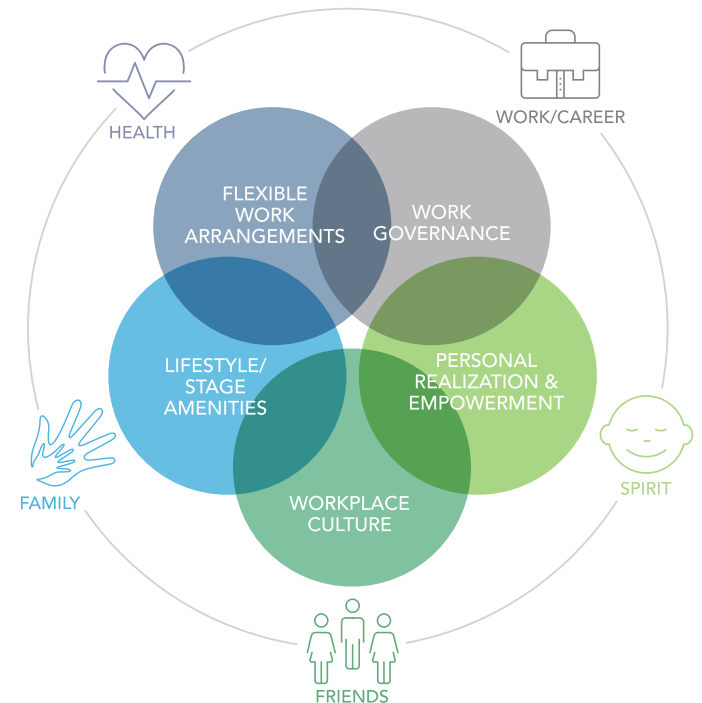
Work-life design considerations will only increase and accelerate, largely driven by technology advances and demographic shifts—such as millennials now having a louder voice in the workplace, baby boomers retiring, and ambitious talent wanting time with their families.

#### EMPLOYEES OWN THE MARKET

Currently, **31 percent of global workers are free agents**, workers who choose flexible work styles over traditional employment arrangements. The majority of free agents seek to improve their personal and professional lives, with freedom/flexibility as the number one factor (cited by 56 percent), followed by empowerment/entrepreneurship (just under 20 percent). With such intense competition to secure and retain top talent, organizations need to embrace work-life design mindsets.

## The work-life design palette

Here are the elements that workers value and draw from for their personal work-life design.



# 2

## Assumptions and outcomes

Successful companies will likely employ a holistic approach to talent

The essence of work-life design is for an organization to develop its capacity to innovate their talent management programs in order to attract and retain top talent who have a broad and ever-evolving set of needs. Ideally, the organization creates a work environment that acknowledges that workers are individuals with priorities outside the workplace.

Clearly, there is no one formula for the perfect work-life design environment or approach. But successful companies will likely be those that employ a holistic approach to their talent

strategies—integrating many different types of labor categories into the work environment and culture as a way to get an edge on talent management efforts. These programs will take individuals into consideration—and their varied life stages and lifestyles.

**The basic principles of the work-life design movement:**

### **Interdependence**

There is recognition on both sides of the interdependence of employers and employees. This recalibration leads to a more flexible organization, and more proactive workers.

### **Integration**

Employers acknowledge that work and life are not separate—and that workers have priorities outside of work.

### **Environment**

Work-life design extends beyond the physical workplace environment and a new culture is created, where work and personal priorities are integrated.

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WORK-LIFE DESIGN IN THE  
ERA OF TALENT SUPPLY CHAIN  
MANAGEMENT

Talent has a choice of where and how to work. The best talent is looking for greater control and ownership over the seamless integration of work and life.



# 2

## Assumptions and outcomes (continued)

### **Elements**

Work-life design is comprised of elements—or features—that vary in significance to workers across industries, geographies, generations, and genders.

### **Engagement**

Workers who are more loyal and committed rate employers higher on work-life design elements. Employers who model and support work-life design are better positioned to tap into workers' desires to extend themselves—to go above and beyond in all areas.

### **Empowerment**

While beneficial to all workers, it's the top talent in industries such as engineering,

technology, and science—where there are shortages—that demand and get work-life design options.

### **Resilience**

As employer/employee balance increases, and complete employer control diminishes, workers become more resilient and in control of their own career development and skill-building opportunities.

### **Innovation**

Today's workers want a work culture that embraces innovation and change, and work-life design inherently creates this—while lowering costs and increasing productivity.

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“Up until now, people were taught that they had to sacrifice in order to have a good job—that it’s the responsibility of the worker to arrange their life around their work. But today, increasing numbers of people are saying, ‘I’ve watched how my parents and my grandparents did that and I don’t want that life. What I want is a life that has work-life balance.’ And for them, work-life balance means that they are capable of arranging work around life.”

— Kelly Services CEO Carl Camden



## THE DYNAMIC FACTORS OF ATTRACTION AND RETENTION

Work-life design programs and approaches must consider the individual's life stage and lifestyle, in concert with the existing corporate culture.



## 3

# Factors in detail

Employers must acknowledge and support workers' priorities

There is no one formula for the perfect work-life design environment or approach. Work-life design elements create a work environment that increasingly acknowledges and supports talent who have priorities outside of the workplace, while at the same time fostering creativity and innovation for the worker and the organization.

## Life stage/ lifestyle amenities

Non-traditional amenities support workers with diverse lifestyles, at various life stages, and evolve with the individual employee over time. They include:

- Wellness programs
- Cafeteria-style amenities
- Childcare support
- Caregiver support
- Convenience/concierge services

## Personal realization/empowerment

Work that employees deem "meaningful" promotes personal passion and innovation via rejuvenation. Introducing meaningful work

into work-life design, however, relies on a combination of self-directed and employer-driven actions.

- Employer-driven actions:
  - Provide opportunities to "give back"
  - Make sabbaticals available for personal realization
- Self-directed actions by the employee:
  - Increase entrepreneurial mindset
  - Innovate on special projects at work
  - DIY career development and self-reliance/advocacy

## Flexible work arrangements

Through trust and technology, work-life design can offer new options for when, where, and how work gets done—or gets delegated. They include:

- Working from home/telecommuting
- Full/part-time work options
- Paid time off
- Purchasing additional vacation time

## Work governance

Employer-driven restrictions, when implemented, protect employees from having work "creep" into personal time:

- Organizations can limit or restrict the employee from working or using technology such as email beyond designated work hours
- The employer can encourage employees to use all allotted vacation time

## Workplace culture

Top, diverse talent is attracted to organizations whose corporate culture and reputation show support for people at all life stages—a company that "walks the talk" has a higher chance of retaining them. A positive reputation includes:

- The promotion of innovation and creativity
- Cross-functional/virtual teams
- A collaborative environment
- Fostering an environment of friendship



# The holistic worker

What work-life design means to the global worker

Work-life design is inherently innovative—but with just half the world’s workers agreeing that their current or most recent employer embraces innovation and change, there’s room for improvement.

It’s not simply a matter of when, where, and how individuals work. Workers aspire to, and achieve, work-life design through a

myriad of elements beyond flexibility—as captured in the most recent Kelly research data. And while workers are increasingly aware of their need for self-reliance, the market is demanding that companies employ a holistic approach to talent—integrating these elements into the work environment and culture as a way to get an edge on recruitment and retention efforts.

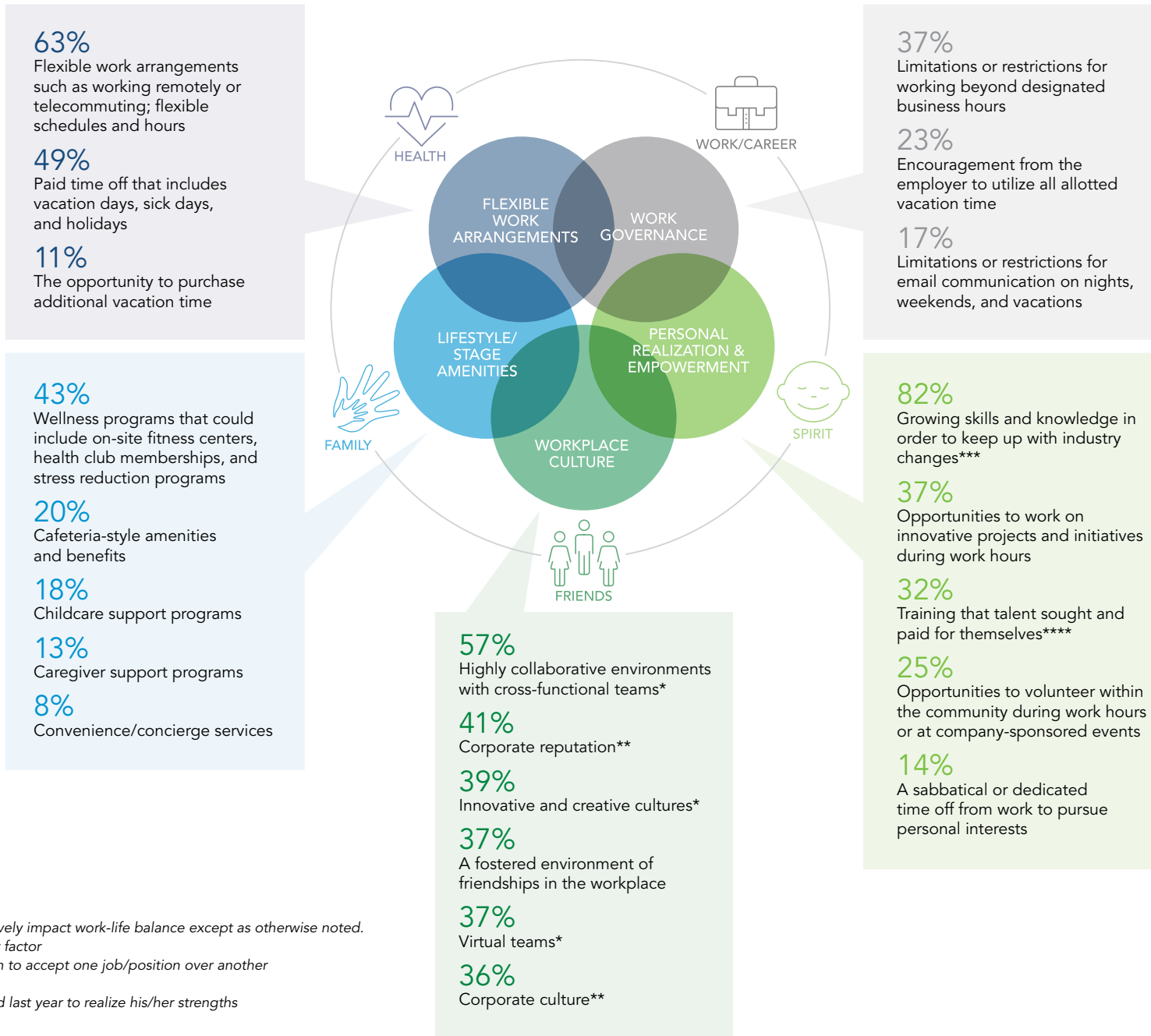
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**To any organization**, a holistic approach to worker wellness and nontraditional offerings are hallmarks of growth and success. Plus, innovating with work-life design demonstrates a work culture that embraces innovation and change—something only half of global workers agree they are getting from employers.



## The work-life design palette

Elements that people value in their pursuit of work-life design, by percent



Factors that would positively impact work-life balance except as otherwise noted.  
 \* Ideal work environment factor  
 \*\*Factors driving decision to accept one job/position over another  
 \*\*\*Agree/strongly agree  
 \*\*\*\*Resources talent used last year to realize his/her strengths

# 5

## Driving and opposing factors

These trends have opposition—and tension

In part, greater work-life design is being driven by:

1. Rapid technological change
2. Globalization
3. Changing relationships between employers and employees

But there's a newer driver as well: the growing desire of many in the labor force—such as millennials, women, and baby boomers nearing retirement—for a **reimagined relationship** between work and the rest of life, and for a different work experience. Not without backlash, these trends have

opposition—and this is creating tension for organizations, and for workers looking for the best fair deal in the marketplace.

### Possible impact on work-life design implementation:

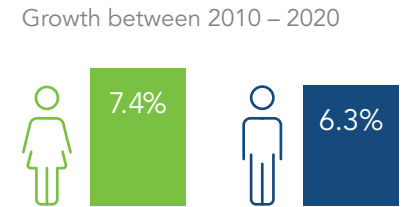
#### Management wants "all hands on deck" to respond to market challenges

Collaboration and communication were the chief reasons high-profile companies Yahoo!®, Best Buy®, and Hewlett-Packard gave for scaling back or ending their telecommuting options—a key work-life design element. Companies that champion telecommuting include Xerox®, Dell®, American Express®, and Apple®.<sup>1</sup>

## Driving factors—projections through 2020



In the U.S., women's presence in the workplace will grow faster than men's



Women will want and need work-life design elements more than men, and with growing numbers, they might get these elements.<sup>3</sup>

# 5

## Driving and opposing factors *(continued)*

### Workers may not want to risk their careers

Yahoo! CEO Marissa Mayer only took a few weeks of her allotted 12-week maternity leave, sending a mixed message from the top about family leave benefits.<sup>4</sup> And research suggests that full-time telecommuters tend not to be promoted as often as on-site workers, at least in some industries, even though working-at-home metrics show improved performance.<sup>5</sup> Companies engaging in work-life design have to walk-the-talk: Accenture automatically enrolls new parents into a “no-travel” program for the first year of their children’s lives.

### Perceptions related to cost

Offering work-life design benefits is sometimes said to be expensive and risky. But the risk may

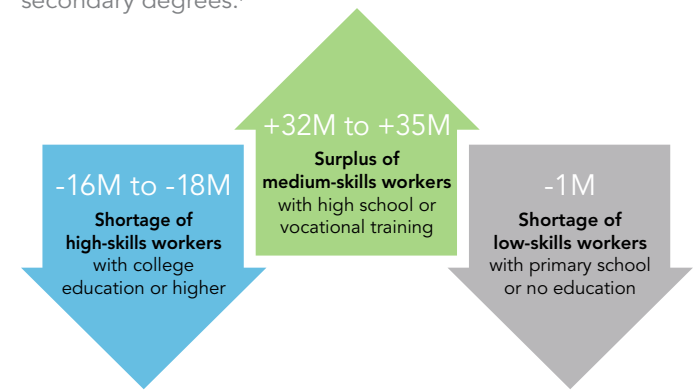
lie in not offering these benefits because, as the workforce trends suggest, the best workers want them. Plus, telecommuting can cut costs: Sun Microsystems® claims to save \$64 million a year on real estate and \$2.5 million on electricity.<sup>6</sup>

While change is hard, not paying attention to talent’s increasing appetite for work-life design will put organizations at risk. The time is ripe to join the ranks of some of the world’s most well known companies who are driving toward an innovative culture in order to lure and retain the best talent with work-life design elements.

*(See page 16 for companies with noteworthy practices.)*

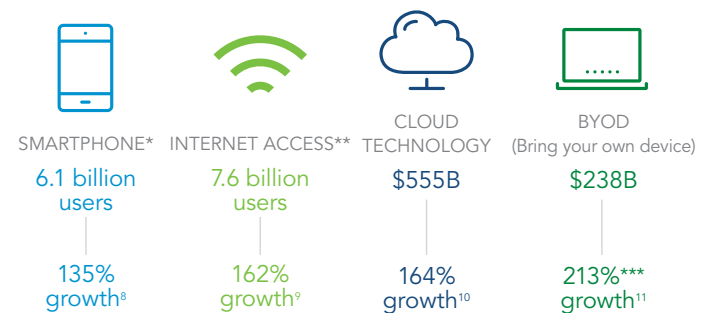
## Driving factors—projections through 2020

By 2020, advanced economies could have too few college-educated workers and too many workers with secondary degrees.<sup>7</sup>



The technology that enables work-life design is on the rise. Globally, growth is predicted from 2014 – 2020 across key technologies—and will be seen in both additional users and dollars represented:

### 2020 predictions



\*Starting point is 2015

\*\*Total Internet users including via mobile devices

\*\*\*From 2013





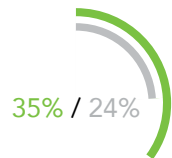
# Get on board

## The impact and benefits of work-life design

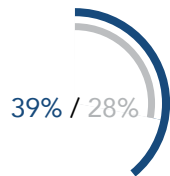
The costs of not changing or adapting to a work-life design environment are high. Work-life design is not just a trend: it's a movement. It requires employers and employees to renegotiate the terms of how they view and rely on each other—to now work within their mutual interdependence. To do this, workers need to invest more in their own development, while employers need to recognize that

workers have priorities outside of the workplace. If they do, worker engagement rises in the form of loyalty, discretionary effort, and commitment—and these become the workers that organizations want to retain. By not adapting, organizations risk the turnover of top, engaged talent; narrow the range of talent they can attract; and compromise performance and innovation.

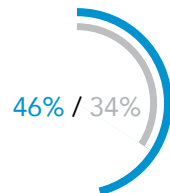
**Not surprisingly, highly committed workers** outscore the average on components of talent agility—they are well aware of their market power and value, so if they are dissatisfied, they know they can find a better opportunity.



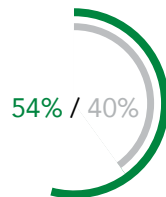
35% strongly agree that whenever they have tried, they have been able to find a new or better position (vs. 24% overall)



39% strongly agree they are in high demand (vs. 28% overall)



46% strongly agree that if they were to consider changing jobs, they are in a good position to secure a similar or better position (vs. 34% overall)



54% strongly agree that their skill set and experience puts them in a position to compete effectively with other job seekers (vs. 40% overall)

## Your best talent is looking for greater ownership over how they integrate work into their personal lives

These numbers show the relationship between work-life design elements and higher levels of commitment from workers—compared to the overall workforce:





# Millennials

## A greater demand for work-life design choices

Recent research reveals that the highest levels of turnover are to be found among millennials. With only 17 percent of organizations aware of the costs incurred with replacing a staff member, engaging millennials becomes a critical component in a talent management strategy.<sup>12</sup>

### Millennials are a force to contend with

The presence of a generation used to getting what it wants is already being felt. More than one out of three American workers are millennials as of Q1 2015, surpassing Gen X as the largest generational group in the workforce,<sup>13</sup> and one in every four managers is a millennial.<sup>14</sup>

Globally, they make up 40 percent of the developed markets' workforce.<sup>15</sup> At the same time that their professional responsibilities are increasing, millennials are becoming parents. They are looking for the benefits that come with improved work-life design—and are sometimes, but not always, willing to take a pay cut to get them. Nearly 90 percent of them feel work-life design elements are an important contributing factor to satisfaction and happiness in the workplace. But 44 percent

of millennials say work-life balance has gotten harder to achieve in the last five years due to responsibilities at home. Not making things any easier, 78 percent of millennials have a spouse or partner who also works full time, compared to 73 percent of Gen X, and just 47 percent of baby boomers.<sup>16</sup>

As the expectations of a generation of workers change, the workplace must change and adapt as well if it wants to attract and retain those workers.

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#### THE MILLENNIAL MINDSET

*“When looking at their career goals, today’s millennials are just as interested in how a business develops its people—and its contribution to society—as they are in its products and profits.”*

— Deloitte Global CEO Barry Salzberg

## Millennial preferences



Beyond salary and healthcare benefits in their compensation packages, millennials want:

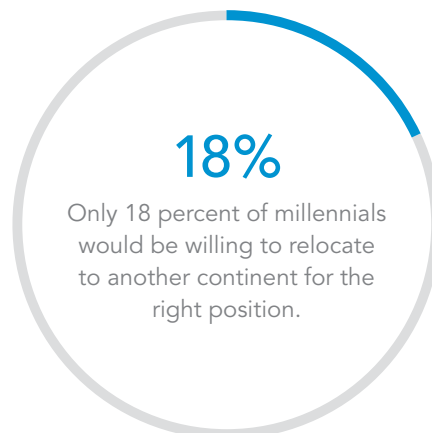
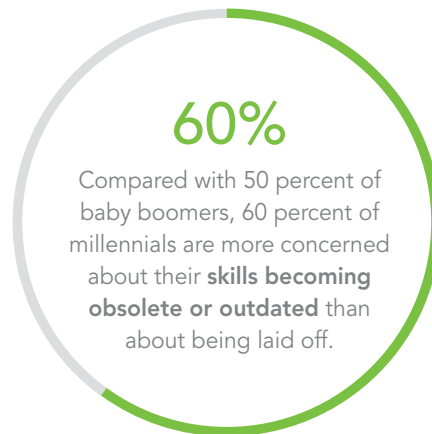
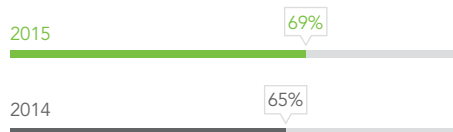
- 65% Vacation and other paid time off
- 60% Flexible work arrangements
- 50% Wellness programs
- 28% Childcare support
- 21% Caregiver support



These numbers show the work-life design elements that millennials would be willing to give up higher pay to receive:

- 35% Flexibility in work schedules/ work arrangements
- 28% Opportunities to work remotely
- 24% Additional vacation time
- 24% Reduced work schedule/hours
- 21% Sabbatical opportunities to pursue personal interests

As an attraction factor, work-life balance is increasing in importance for millennials year-over-year:



## Major corporations add work-life design elements

To retain and attract talent in areas where there are shortages, such as IT, engineering, and high-level management, large global companies are building family-friendly benefits into attraction and retention efforts. Here are a few:<sup>17</sup>

**Accenture** automatically enrolls new parents into a “no-travel” program for the first year of their children’s lives.

**Facebook**® has a culture that strongly encourages all parents—mothers and fathers—to take the offered four months of family leave.

**Microsoft**® nearly doubled to 20 weeks its paid leave for women who have just given birth, tripled paid leave for all other new parents (12 weeks for fathers), and began offering them the chance to ease back in by working half time.

**Adobe**® significantly increased paid leave to 26 weeks of paid maternity and 16 weeks of paid paternity leave for birth and adoptive parents.

**Goldman Sachs Group, Inc.** doubled its paid paternity leave to four weeks.

**Google**® gives mothers 18 weeks of leave, primary caregivers 12 weeks of leave, and other caregivers seven weeks—all fully paid with stock vesting and benefits.

**Bank of America**® offers up to 12 weeks of paid parental leave and allows another 14 unpaid weeks for new parents.

**NetFlix**® offers fully paid leave to both parents for an entire year after a baby’s birth.

**IBM**® and **Accenture** will ship breast milk home for nursing mothers traveling for work.

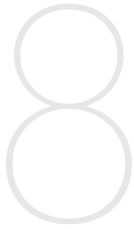
**Nestlé**® expanded its paid maternity leave to 14 weeks from six.

**REDDIT**® offers 16 weeks of paid leave during the first year after the birth or adoption of a child; it must be taken in a minimum of two-week intervals.



# WORK

When women are able to develop their full labor market potential, there can be significant macroeconomic gains; for example, raising the female labor force participation rate to country-specific male levels would raise Gross Domestic Product (GDP) in the U.S. by five percent.<sup>19</sup>



# No longer a gender issue

Work-life design responds to cultural shifts

## A cultural shift is beginning to take place: Men are initiating the dialogue around work-family balance

As women increase their participation in the global workforce to more than six out of 10 (62.8 percent, up from 59.1 percent in 2000) as men slightly decrease their participation (from 80.9 percent in 2000 to 79.7 percent in 2014),<sup>18</sup> the care of children and other family members becomes a topic fathers can no longer take for granted. This is driving new attention from men who are beginning to bust some long-held gender myths. However, recent Kelly research reveals that as far as attraction factors go, women still value work-life balance and flexible work arrangements more than men, and are more likely to give up career advancement for flexibility and opportunities to work remotely.

### Driving factors

As far as the workforce is concerned, **gender roles are converging**—the roles of mother and father are becoming increasingly similar.

In the U.S., women comprise nearly half of the labor force, and **all adults are working** in more than 60 percent of households with children.

Almost two-thirds of people **providing unpaid eldercare** have jobs; half of these caregivers work full time in addition to their caregiver duties (U.S.).<sup>19</sup>

Work-life design elements can be implemented at a **national policy level**. Sweden has a high female labor participation rate, with a gender gap of only six percent—mostly attributed to a generous and flexible parental leave policy with a high coverage rate for childcare, job guarantees, and eligibility for reduced working hours.<sup>20</sup>

But even with large companies adding family leave policies to their benefits, many parents feel a stigma attached to taking advantage of these programs—they fear losing visibility and career momentum. What talent needs are leaders who model the use of the benefits being offered—such as Facebook CEO Mark Zuckerberg, who took two of the possible four months of the company’s paid paternity leave.<sup>21</sup>

Women and men weighed in on work-life design preferences—here’s where we see the greatest differences:

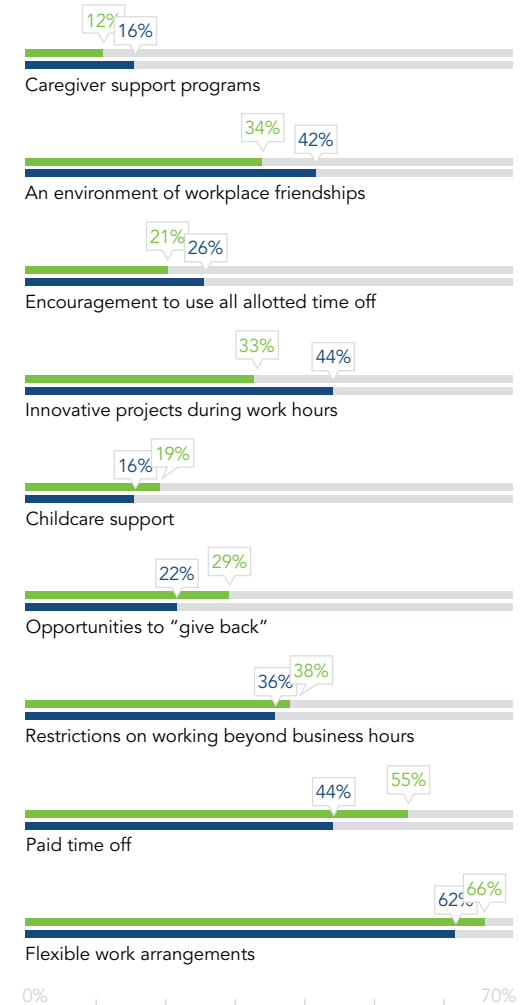


### Gender role myth busters:

More men than women are seeking friendship at work, and caregiver support programs.

### Freedom and choices are still driving forces for men

### Family and community are still driving forces for women







## FACEBOOK PIONEERS FAMILY LEAVE FOR BOTH MOTHERS AND FATHERS

“The more that the men can take leave, the more of a social norm it is.”

— Facebook VP of Human Resources Lori Goler



# Skill sector comparisons

Professional/technical talent expects work-life design benefits

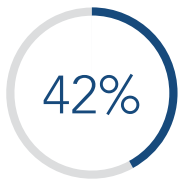
Professional/technical (PT) workers, overall, value work-life design more than other workers—and they expect it. As high tech companies and others depending on STEM talent increasingly compete for a small pool of highly skilled professionals, they may feel as

though they've entered an employee benefits "arms race." From on-site meals to lengthy parental leave to other concierge-type perks, it seems that—in addition to high salaries—more and more may be required to attract and retain the industry's best talent.

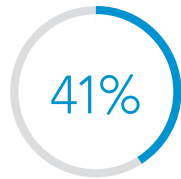
Work-life design elements that PT workers value more than on average



**Flexible work arrangements**  
Especially in IT (73%) and finance (66%)



**Opportunity to engage in innovative projects during work hours**  
Especially in engineering (50%), science (49%), and IT (47%)



**Fostered environment of friendship in the workplace**  
Especially true across all key skill sectors: engineering (44%), finance (42%), and IT and science (both 41%)

I feel I am in a position of high demand in the workforce



IT / 71%  
Finance / 65%  
Engineering / 63%  
Global average / 58%

Globally, across key PT skill sets, different work-life design elements are valued more than on average

● IT ● SCIENCE ● FINANCE ● ENGINEERING

	What work-life design elements would you give up higher pay for?	What work-life design elements would you give up career advancement for?	Beyond salary, what work-life design elements are most important to you in a package?
Opportunity to work remotely	● IT — 41% ● FINANCE — 33%	● IT — 30% ● SCIENCE — 21%	
Reduced schedule	● IT — 27% ● FINANCE — 27%	● IT — 28%	
Flexible work arrangements	● IT — 41% ● SCIENCE — 40%	● SCIENCE — 27%	● IT — 69% ● SCIENCE — 65%
Additional vacation time	● SCIENCE — 28%		● SCIENCE — 69%
Sabbaticals	● IT — 22%		
Wellness program			● IT — 50% ● FINANCE — 52% ● ENGINEERING — 49%
Caregiver support			● IT — 25% ● FINANCE — 25% ● ENGINEERING — 23%





ECONOMICS WILL BE ONE OF THE KEY FACTORS IN SHAPING THE WAY THINGS PLAY OUT

Facebook VP of corporate development Vaughn Smith puts the value of a good engineer at \$500,000 to \$1 million. Dr. John Sullivan, an HR thought leader and professor of management at San Francisco State University adds, "Nothing spurs executives to focus on talent management like quantifying in dollars the added economic value of having top-performing workers versus average ones."<sup>22</sup>

# 10

## The role of technology

Both work-life culprit—and solution

### The give and take of technology

Experts continue to haggle over how high the price is for the advanced technology that individuals and organizations rely on at an ever-increasing rate. On the one hand, technology enhances the means by which workers can flex their time and space. On the other, mobile devices and 24/7 access are known to allow work to “creep” into personal time—leading to worker frustration and burnout.

According to a 2015 survey by WorkforceTrends.com and CareerArc:<sup>23</sup>

- **67%** of employers say their workers have good work-life balance
- **45%** percent of employees claim they don't have enough time in the week for personal activities
- **One in five** spends 20+ hours each week outside the office working on work—during their personal time

Among information technology executives, their top-three short-term objectives are focused on ways to make remote working more viable. And advancements are making it possible for more jobs to be executed remotely—at least some of the time.

By 2018, more than 60 percent of enterprises will have at least half of their infrastructure on cloud-based platforms.<sup>24</sup> And smartphone and Internet users are projected to jump 135 percent and 162 percent, respectively, between 2014 and 2020.

### But technology is also the top culprit for poor work-life balance

Many managers expect employees to be reachable outside of office hours by email or phone. About the same number of employees said their managers expect them to respond to work communications during their personal time.





# WORK

THE INTERNET IS REVOLUTIONIZING HOW PEOPLE FIND AND ACCESS WORK

Today's workers are joining online social communities to make connections. They are taking advantage of video conferencing, instant messaging, and cloud computing applications that allow them to store work on the Internet and retrieve it anywhere. Physical location and other tangible ties to employers are becoming less important. No matter where they are in the world, workers can use technology to access the work they want, when they want.



# 10

## The role of technology (continued)

Nearly four out of 10 workers (37 percent) say an employer limiting work beyond designated business hours would positively impact the balance between their personal and professional lives. Another 17 percent say restrictions for email communications during nights, weekends, and vacations are a desired element.

### The right technology—in the hands of smart managers

One important way organizations can ensure a work-life design environment that works is by providing the best virtual tools for collaboration—and then discouraging work outside of designated business hours. A robust telecommuting program requires the right technology and tech training to ensure

that remote workers stay connected, as well as strong managers who set clear, precise, measurable work goals. Remote work programs prove that performance, retention, and business metrics improve side-by-side with cost savings from reduced brick and mortar expenses.

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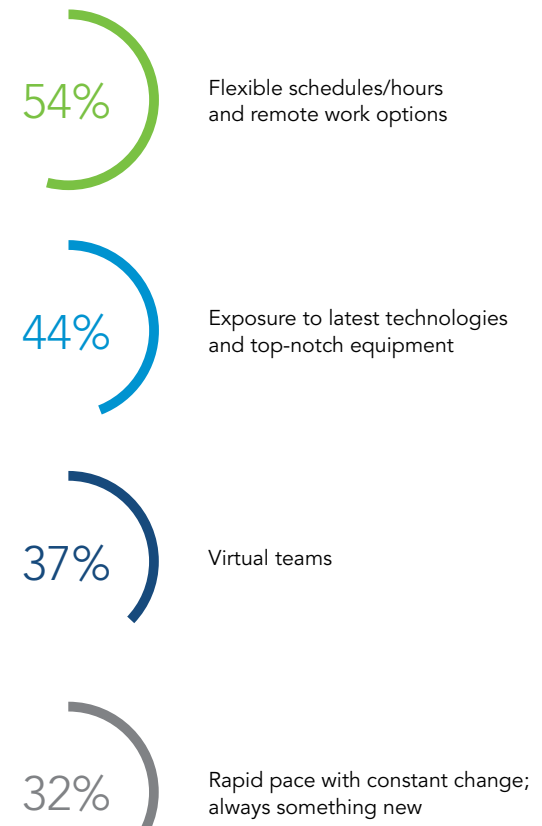
INFORMED USE OF TECHNOLOGY CAN HELP TO SUPPORT EMPLOYEE ENGAGEMENT

*“You need collaboration software—ways for people to communicate outside of email—ways to give workers access to people in the company who have the information that can help them do their jobs.”*

*—Axero Solutions CEO Tim Eisenhauer*

## An ideal environment

According to workers, their ideal work culture supports a work-life design environment with these elements:





# Regional cultures play a strong role

Worldwide, what matters most to workers and organizations

## Globally, regions tell their own stories regarding work-life design

Given their significantly higher willingness to give up higher pay or career advancement for different elements of work-life design, workers in the Asia-Pacific (APAC) regions are much more interested in work-life design than workers in Europe, the Middle East, and Africa (EMEA).

Workers in the Americas are on par with the global average in this respect; however, they are significantly less likely to opt out of higher pay (46 percent) or career advancement (51 percent) for work-life design.

## Attraction factors

Nevertheless, when it comes to attracting talent in the Americas, seven out of 10 workers want work-life balance, which ranked third as an attraction factor. Nearly six in 10 want flexible work arrangements, which ranked fifth. When it comes to attraction factors, regional cultures play a strong role in determining what matters most to workers.

## APAC

**Workers here feel the most confident about the opportunities to cultivate skills and talent portfolio.**

## Culture of freedom/choice seeking

When it comes to total compensation, convenience/concierge services and flexible work arrangements matter much more to workers in APAC than the global average or in other regions.

**74%** value flexible work arrangements

**21%** value convenience/concierge services

## Attracting top talent with flexible work arrangements

Much higher than the global average or other regions, workers in APAC value flexibility.

**65%** of workers in APAC value flexible work arrangements

**44%** of workers in EMEA value flexible work arrangements

# 11

## Regional cultures play a strong role (continued)

### EMEA

**Workers here are less likely to make concessions for a more balanced work style, which may reflect holding employers to a higher standard.**

#### Culture of social support

When it comes to total compensation factors, support programs matter much more to workers in EMEA than the global average or in other regions.

**34%** want caregiver support programs

**28%** want childcare support programs

#### Organizations at risk in EMEA for low engagement

Workers in EMEA rate employers below the global average and other regions when it comes to encouraging a culture of engagement—an important factor when it comes to employee satisfaction and retention.

**53%** are satisfied with employer culture of engagement in the Americas

**43%** are satisfied with employer culture of engagement in EMEA

While APAC and EMEA workers are polarized regarding their willingness to engage in work-life design elements, including free agency, workers in the Americas see free agency as a way to have control over their career paths—all the while delivering a balanced lifestyle. Workers in the Americas stand out from workers in other regions—and the global average—for wanting these work-life design elements:

**55%** Paid time off

**45%** Wellness programs

**33%** Opportunities to “give back”

**24%** Encouragement to take time off

## Willingness to give up career advancement or higher pay

These numbers show what work-life design elements workers in APAC and EMEA are willing to sacrifice career advancements or higher pay to receive:





“Work-life balance means that workers can work around life. Free agency offers the best possibility to do that while exercising a particular skill set or craft. And the best opportunity to choose with whom you are going to work and where you are going to work.”

—Kelly Services CEO Carl Camden

# 12

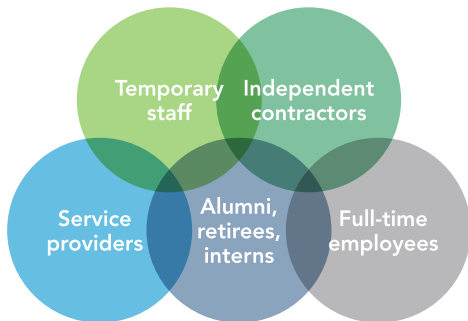
## Talent supply chain management—expanded

In the era of work-life design, this is a critical component

Traditional talent acquisition models are being challenged, fueled by competitive pressures and technological advances. And unlike the supply chains of the manufacturing world (i.e., widgets), talent has a choice of where and how to work.

Companies looking to only recruit direct, full-time staff could be missing out on some of the best talent in the market. By contrast, those with agile talent supply chain management strategies—that recruit across all labor types—are gaining a competitive advantage, and can scale their operations on demand.

Workforce solutions providers such as Kelly can manage all the different categories of talent—both inside and outside the walls of organizations.



### Free agency: one clear path to work-life design

Free agents report satisfaction rates as high or higher than the traditionally employed and report more optimism about their advancement opportunities.

**56%** choose free agency for the freedom and flexibility it allows

**20%** choose free agency for a sense of empowerment and entrepreneurship

### Free agents have a blended approach to work

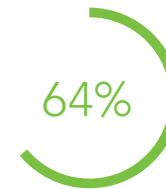
**17%** of free agents identify as “hybrid” workers—people who actively mix traditional employment with free agency or freelance work. Of those:

**53%** say free agency allows workers to support their personal interests and hobbies

**48%** feel free agency gives workers the opportunity to pursue their true passions

It’s unclear whether the hybrid work style will increase, but it’s clear that these workers are versatile, driven, and resourceful—attributes that are highly sought after in today’s marketplace.

## Free agent satisfaction rates

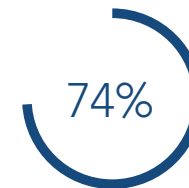


Allows work to be organized around life rather than life around work

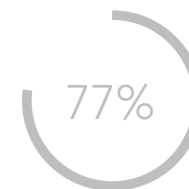


Affords a greater sense of control to manage career development

While satisfaction with job security is on par with free agents, traditional workers cite job security as a top reason for not considering working as a free agent, but they are curious:



Free agency would open up more opportunities and choices of work



Increased opportunities to use the skill sets that are most enjoyed





# FREE

With nearly one in three global workers choosing a free agent work arrangement, driven largely by a desire for freedom and flexibility, top talent is seeking greater control and ownership over how they integrate work with their personal lives and passions.

# 13

## Tips for attracting and retaining

Create the culture you want the world to see

Differentiate yourself as an employer of choice by helping your talent thrive, both personally and professionally. Yes, your clients expect 24/7 service and availability, but this is an issue to be managed by company leaders, not a burden to be absorbed by your workforce—your entire team should not feel the pressure to work non-stop.

Communicate to your workers that you respect and encourage their rights to lead happy, healthy, balanced lives—and provide them with the tools and evolving corporate environment that support these intentions. And remember, in today's highly networked world of work, there are no secrets. Potential talent can quickly determine whether yours is a place they want to work, or not.

### Make flexibility your new normal

Begin by assessing the flexibility options you already have in place, and expand from there. Your company's willingness to recalibrate long-established practices and business policies may seem daunting, but could quickly lead to greater accountability and

loyalty from valued workers—and stronger working relationships between your talent and your management. Take the time to create custom programs for your company based on your talents' desired work-design elements. Be sure to promote a healthy balance, and model it from the top down.

### Provide support for various life stages

How long ago were your company's work-life policies established? Your millennial workforce may perceive these policies to be from a different era—serving a different generation—and they may struggle to relate from their current life situation. At the same time, while your critical baby boomer talent may not require flexibility for childcare, they may wish to retain their job while taking a sabbatical to pursue a deep interest. The appeal of benefits and amenities varies with age, life stage, and gender.

### Bring a sense of meaning to daily work

When your company takes the time to help workers understand the role their job plays in the greater company mission, employees have a sense of purpose and importance—

and workers that have a sense of meaning are happier and more committed to their employer. Are your employees contributing to the innovative initiatives they want to be part of? Make sure they know how critical their contribution to the company is. Of course, every worker will have their own perspective on meaningful work, but if they seek it at your organization, make sure they find it.

### Help employees keep their skills current

A growing priority in a fast-paced world, continuing education and skills development is a work-design element that organizations can't ignore. While some companies have the resources to develop training materials in-house, offering tuition reimbursement is a great alternative. Tuition reimbursement is easy to implement, and attractive to both current employees and prospective candidates. Either direction is a win—and workers that are given growth opportunities feel valued, contribute what they've learned within the organization, and are more likely to stay.



14

# Trend watch: discretionary vacation time

Navigating the minefield of paid time off

To retain and attract talent in areas where there are shortages, such as in engineering, large global companies are instituting family-friendly benefits, unprecedented in the U.S. where only 12 percent of workers in the private sector have access to paid family leave.<sup>26</sup> As for paid time off for vacations, workers in the U.S. seem to be reluctant to take it all: On average, American employees only take about half of the vacation they are entitled to.<sup>27</sup>

## Trend watch: discretionary time off

Major companies are beginning to offer Discretionary Time Off (DTO), or “unlimited” vacation benefits. But social pressure or the confusion of not knowing how much time to take can lead to workers not taking advantage of this benefit. Here are the positive aspects:

- There’s a competitive advantage when attracting and retaining the best talent: only 2% of companies offer this vacation model<sup>28</sup>

- Companies do not have to pay for unused vacation time
- Employees often return recharged, if they take advantage of this benefit

“We are not alone in making this shift to DTO. It’s part of a growing movement to place more focus on results and empowerment, not hours worked. And it’s an important step to help employees recharge and keep engaged.”

—LinkedIn CHRO Pat Wadors

“Look, this is guaranteed not to affect your career—not just by law, but by the way Facebook operates.”

—Manager of 600 workers at Facebook

## The risks of DTO

If DTO is not backed by supportive language in the corporate policy, and a culture that encourages employees to take advantage of the offer, talent may take less time off, and therefore not receive the benefits of restoration. They can become overworked and resentful.

“It is left to the employee alone to decide if and when he or she feels like taking [time] off, the assumption being that they are only going to do it when they feel a hundred percent comfortable that they and their team are up to date on every project and that their absence will not in any way damage the business—or, for that matter, their careers!”

—Virgin Group CEO Richard Branson, in a company memo

## 15

# Overview and methodology

A high-level look at workforce trends from Kelly

## Background

To better understand the motivations behind the empowered workforce, and how employers can best act and react to worker expectations, Kelly Services® developed the Kelly Global Workforce Index (KGWI), an annual global survey that is the largest study of its kind. In 2015, Kelly collected feedback from 164,000 workers across 28 countries and a multitude of industries and occupations. In 2014, nearly 230,000 were polled in 31 countries.

The majority of this report is based on research from the KGWI. It takes a high-level look at work-life design as it pertains to the global worker today. In addition to analyzing worker

preferences and psychographic insights based on 2015 and 2014 KGWI survey data, this study pulls insights from Kelly Free Agent Research (2015) survey data and develops macro employer/employee trends using standard secondary research sources.

Skilled candidates are in short supply across the globe. Employers in most any industry in search of workers to support growth and innovation have to contend with an employee-driven market, in which organizations face intense competition to secure and retain the best talent. Offering work-life design options can unlock much needed advantage for companies and workers alike.

## KGWI response detail

By category	Number of responses	
	2015	2014
<b>Global Workforce Total</b>	164,021	229,794
<b>Employment status</b>		
Employed full time	57,908	66,216
Employed part time	11,814	16,482
Temporary/casual/contract work	16,299	23,680
Unemployed	12,754	21,451
Looking for work	22,425	22,161
Retired	1,060	1,262
<b>Industry breakout</b>		
Engineering	11,942	10,792
Finance and accounting	10,287	16,150
Information technology	9,847	10,501
Science	5,694	6,920
<b>Geographic breakout</b>		
The Americas	102,321	135,049
EMEA	50,107	71,134
APAC	11,593	21,080
<b>Generational breakout</b>		
Millennials (1980-1995)	56,998	64,475
Gen X (1965-1979)	37,428	51,073
Baby Boomers (1946-1964)	20,382	28,789

## Footnotes

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- <sup>20</sup>IMF report, Women, Work and the Economy, 2013
- <sup>21</sup>"How Mark Zuckerberg's paternity leave affects the rest of us," By Jena McGregor, DEC. 6, 2015
- <sup>22</sup>Ere Media, "A Case Study Of Facebook's Simply Amazing Talent Management Practices, Part 1 Of 2," By Dr. John Sullivan, September 9, 2013
- <sup>23</sup>WorkforceTrends.com and CareerArc 2015 survey as reported in Business News Daily, "Got Work-Life Balance? Workers and Bosses Disagree," By Nicole Fallon, FEB. 4, 2015
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## About the Kelly Global Workforce Index

Kelly Services created the Kelly Global Workforce Index (KGWI) several years ago to measure employee attitudes and opinions on current workplace issues. Kelly sampled nearly 164,000 workers across 28 countries, and in a multitude of industries and occupations for the 2015-16 KGWI survey. The survey was conducted online by RDA Group on behalf of Kelly Services.

## About Kelly Services

As a global leader in providing workforce solutions, Kelly Services, Inc. (Nasdaq®: KELYA, KELYB) and its subsidiaries, offer a comprehensive array of outsourcing and consulting services as well as world-class staffing on a temporary, temporary-to-hire, and direct-hire basis. Kelly has a role in managing employment opportunities for more than one million workers around the globe by employing 550,000 of these individuals directly with the remaining workers engaged through its talent supply chain network of supplier partners. Revenue in 2014 was \$5.6 billion. Visit [kellyservices.com](http://kellyservices.com) and connect with us on Facebook, LinkedIn®, and Twitter®.



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