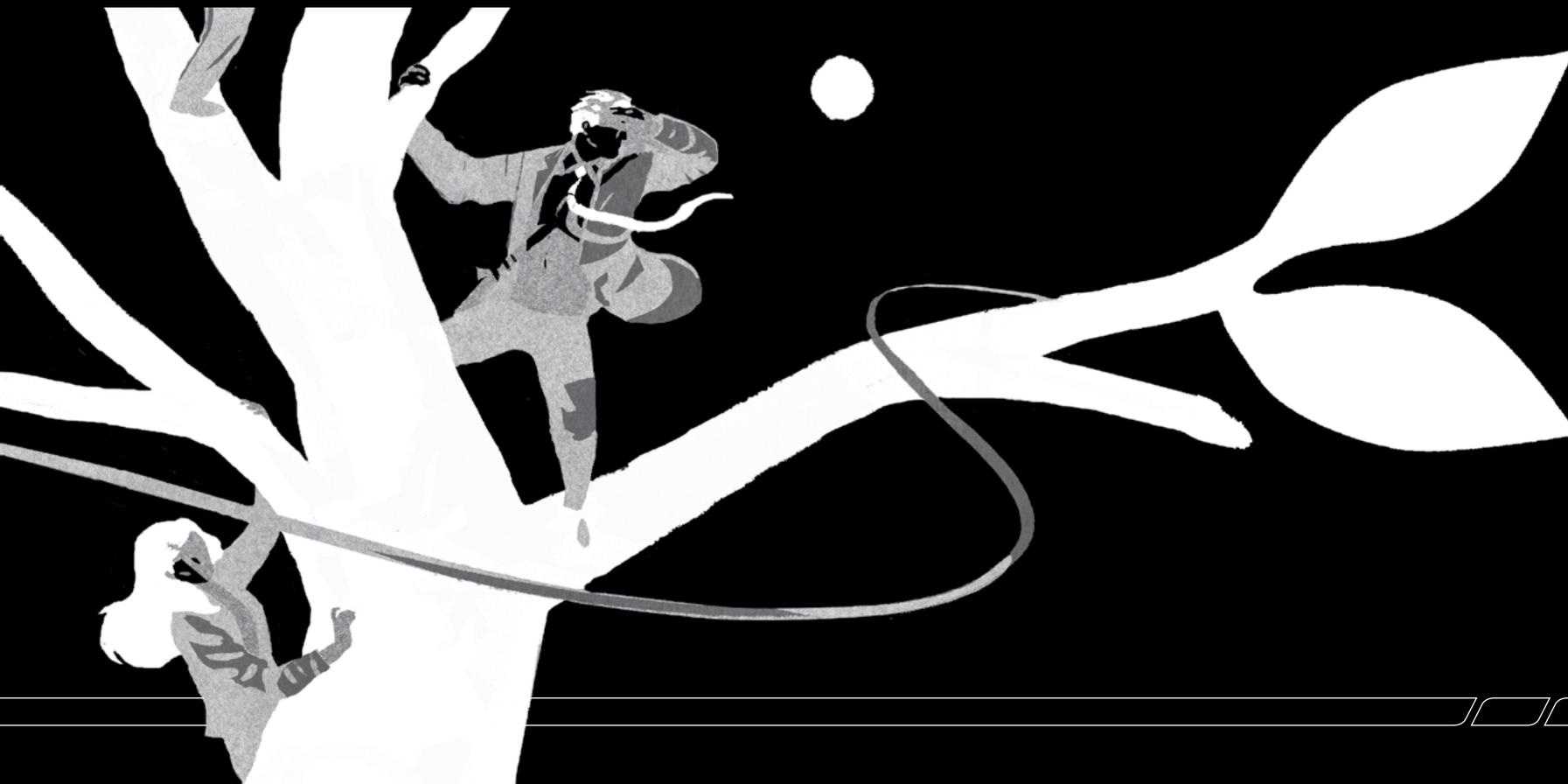


RELEASE: AUGUST 2011
SURVEY POPULATION: 97,000
LOCATIONS: 30 COUNTRIES

Kelly Global Workforce Index™

Drivers of Career Choice and Career Progression

THE EVOLVING WORKFORCE



KELLY®

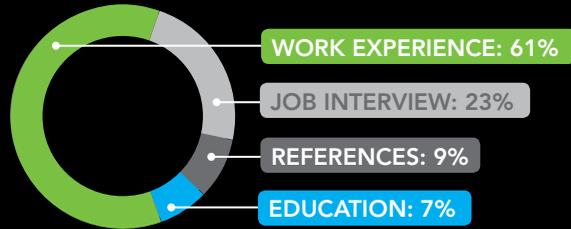
CONTENTS

3	CAREER CHOICE AND CAREER PROGRESSION INFOGRAPHIC
4	INTRODUCTION
5	IMPACT OF JOB EXPERIENCE AND FORMAL EDUCATION ON CAREERS
7	IMPORTANCE OF UPGRADING QUALIFICATIONS AND SKILLS
8	LIKELIHOOD OF CAREER CHANGE
9	CAUSES OF CAREER CHANGE
11	RESUMING CAREER AFTER A BREAK
12	ADVANCING TO AN EXECUTIVE POSITION
13	REASONS FOR AVOIDING EXECUTIVE ROLES
15	BEST INDICATOR OF TALENT
17	CONCLUSION
21	ABOUT THIS REPORT



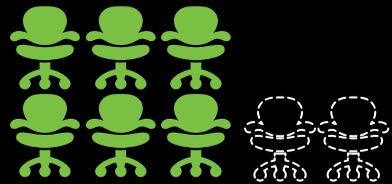
THE EVOLVING WORKFORCE: DRIVERS OF CAREER CHOICE AND CAREER PROGRESSION

BEST INDICATORS OF
TALENT



97%

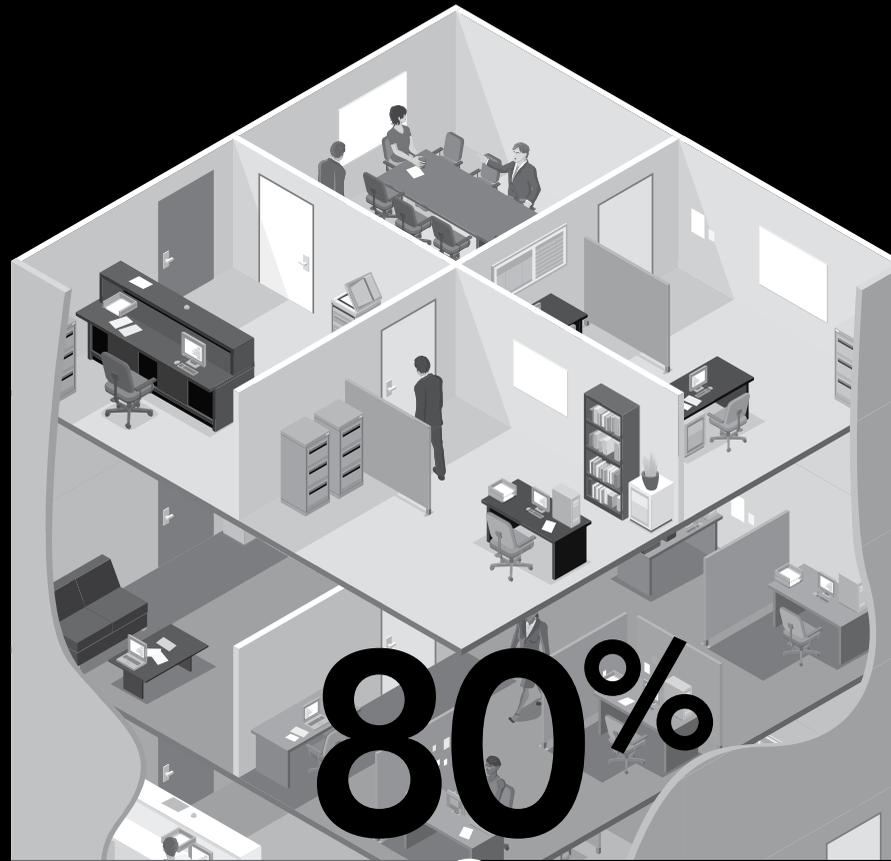
BELIEVE QUALIFICATION AND SKILL UPGRADES ARE OVERWHELMINGLY IMPORTANT WHEN IT COMES TO CAREER PROGRESSION



74%
 BELIEVE IT WILL BE OK

26%
 HAVE THEIR DOUBTS

MORE PEOPLE BELIEVE THEY WILL BE ABLE TO **RESUME THEIR CAREERS** AFTER TAKING A BREAK FOR EVENTS SUCH AS MATERNAL/PATERNAL LEAVE, ILLNESS, OR AN EXTENDED HOLIDAY



EXPERIENCE vs EDUCATION

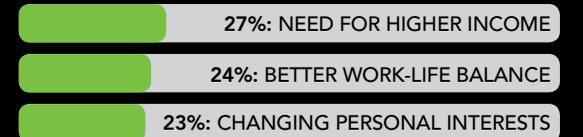
PRACTICAL JOB EXPERIENCE IS MORE IMPORTANT WHEN DECIDING CAREER SUCCESS

18%

THE CAREER FOR LIFE IS VANISHING. MORE THAN HALF OF ALL EMPLOYEES EXPECT TO SWITCH CAREERS IN THE NEXT

5 YEARS

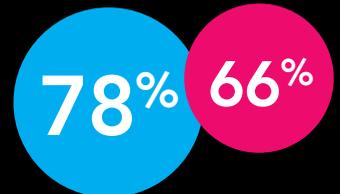
MAIN REASONS:



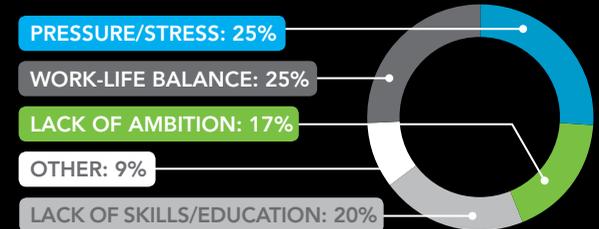
WHO WANTS TO BE AN EXECUTIVE?

72% DO. 20% DON'T.

SIGNIFICANTLY MORE MEN AIM HIGHER THAN WOMEN



REASONS FOR NOT WANTING THE TOP JOB



INTRODUCTION

APPROXIMATELY 97,000 PEOPLE FROM 30 COUNTRIES ACROSS THE AMERICAS, APAC, AND EMEA REGIONS RESPONDED TO A WORKPLACE SURVEY DEVELOPED BY KELLY SERVICES®. THE KELLY GLOBAL WORKFORCE INDEX (KGWI) REVEALED OPINIONS ABOUT WORK AND THE WORKPLACE FROM A GENERATIONAL VIEWPOINT.

Survey respondents ranged in age from 18 to 65 and comprised the following generational groups:

Generation Y (age 18 – 29), Generation X (age 30 – 47), and the Baby Boomer generation (age 48 – 65).

The global survey was open to everyone, with no restrictions. To that end, respondents were either employed within a variety of industries, ranging from information technology to finance, or were unemployed and searching for future work opportunities.

Each respondent revealed their viewpoints on the following four topics:

- Talent Mobility
- Social Media/Networking
- Drivers of Career Choice and Career Progression
- Effective Employers/Employer of Choice

This report highlights responses to questions regarding Career Choice and Career Progression. The questions focused on:

- The relative importance of job experience and formal education in career development
- The importance of skills development
- The likelihood and causes of career change
- The impact of career “breaks”
- The desire to advance to an executive position
- The best indicators of talent among job seekers



IMPACT OF JOB EXPERIENCE AND FORMAL EDUCATION ON CAREERS

IN THE DEVELOPMENT OF YOUR CAREER, WHAT HAS BEEN MOST IMPORTANT—EXPERIENCE OR FORMAL EDUCATION?

(BY GENERATION)

According to the Kelly Global Workforce Index, when it comes to the most important elements in a person's career—experience or formal education—the vast majority (80 percent) nominates experience, while 18 percent cite formal education and 2 percent are undecided.

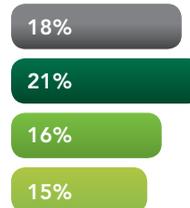
Across all generations, job experience is considered the predominant factor in shaping a person's career. It is most apparent among older age groups, with 83 percent of Baby Boomers and 82 percent of Gen X citing it as the most important factor in career development, higher than Gen Y (76 percent).

01

EXPERIENCE



FORMAL EDUCATION



DON'T KNOW



IMPACT OF JOB EXPERIENCE AND FORMAL EDUCATION ON CAREERS

IN THE DEVELOPMENT OF YOUR CAREER, WHAT HAS BEEN MOST IMPORTANT—EXPERIENCE OR FORMAL EDUCATION?

(BY REGION)

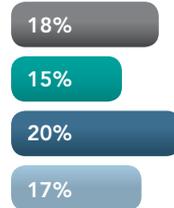
The emphasis on experience as a career decider is more pronounced in APAC, with 84 percent citing it as the predominant influence on their careers, higher than in both the Americas (81 percent) and EMEA (77 percent).

02

EXPERIENCE



FORMAL EDUCATION



DON'T KNOW



IMPORTANCE OF UPGRADING QUALIFICATIONS AND SKILLS

IN ORDER TO PROGRESS YOUR CAREER, HOW IMPORTANT IS IT THAT YOU UPGRADE YOUR QUALIFICATIONS AND/OR SKILLS?

(BY GENERATION AND REGION)

Well over half of all respondents (61 percent) say it is extremely important that their qualifications and skills be upgraded in order to advance their careers.

The need to upgrade skills is most important to Gen Y, with 64 percent saying it is extremely important for their career development. By contrast, 60 percent of Gen X and 55 percent of Baby Boomers describe skills upgrading as extremely important.

Across the globe, there is a considerably higher priority on upgrading skills in APAC and the Americas than in EMEA. In APAC, 68 percent say that doing so is extremely important, compared with 66 percent in the Americas and 54 percent in EMEA.

03

AMERICAS



APAC



EMEA



ALL COUNTRIES



LIKELIHOOD OF CAREER CHANGE

DO YOU ANTICIPATE HAVING TO CHANGE YOUR CAREER OR FIELD OF WORK WITHIN THE NEXT FIVE YEARS?

(BY GENERATION AND REGION)

More than half of all respondents (57 percent) say they expect to have to change their career or field of work within the next five years.

Fifty-eight percent of both Gen Y and Gen X believe they will have to change their careers, which is higher than Baby Boomers (50 percent).

There are some distinct regional differences, with more respondents from APAC (63 percent) anticipating a career change than in EMEA (59 percent) or the Americas (48 percent).

Within APAC, Gen Y is feeling the greatest pressure, with two-thirds anticipating a career change within the next five years, higher than any group across the survey.

In EMEA, Gen X is the group most impacted, with 61 percent anticipating a career change.

In the Americas, less than half of all respondents are looking to change careers, but the most likely group to do so is Gen X.

04

AMERICAS



APAC



EMEA



ALL COUNTRIES



CAUSES OF CAREER CHANGE

WHAT WOULD CAUSE YOU TO CHANGE YOUR CAREER OR FIELD OF WORK?

(BY GENERATION)

The main driver of likely career change is need for higher income (27 percent), followed by better work-life balance (24 percent), changing personal interests (23 percent), concern that the industry is in decline (14 percent), other issues (8 percent), and current management issues (4 percent).

The need for higher income is most pronounced among Gen Y, and to a slightly lesser degree, Gen X. For Baby Boomers, income is much less of a concern, and ranks virtually equally with the state of the industry, changing personal interests, and improved work-life balance.

05

NEED FOR HIGHER INCOME



BETTER WORK-LIFE BALANCE



PERSONAL INTERESTS CHANGING



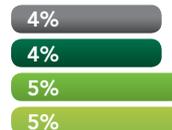
CONCERN THAT INDUSTRY IS IN DECLINE



OTHER ISSUES



CURRENT MANAGEMENT ISSUES



CAUSES OF CAREER CHANGE

WHAT WOULD CAUSE YOU TO CHANGE YOUR CAREER OR FIELD OF WORK?

(BY REGION)

Across the globe, the main reasons for considering a career change differ; in the Americas it's concern about income, in APAC it's to improve work-life balance, and in EMEA it's changing personal interests.

The Americas has a significantly larger share of people concerned that their industries are in decline.

In APAC, concern about income and the need for improved work-life balance account for more than half of all the issues driving career change. APAC also has significantly more individuals worried about organizational management issues than elsewhere around the globe.

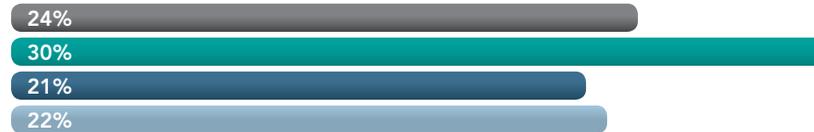


06

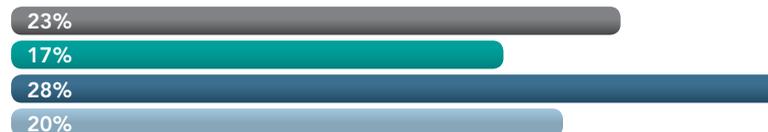
NEED FOR HIGHER INCOME



BETTER WORK-LIFE BALANCE



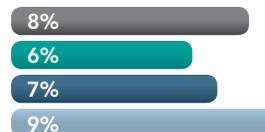
PERSONAL INTERESTS CHANGING



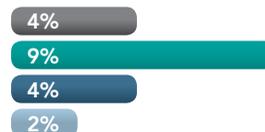
CONCERN THAT INDUSTRY IS IN DECLINE



OTHER ISSUES



CURRENT MANAGEMENT ISSUES



RESUMING CAREER AFTER A BREAK

IF YOU HAD A BREAK IN YOUR EMPLOYMENT (MATERNAL/PATERNAL LEAVE, ILLNESS, EXTENDED HOLIDAY), DO YOU THINK YOU WOULD BE ABLE TO RESUME YOUR CAREER AT THE SAME LEVEL?

(BY GENERATION AND REGION)

The prospect of taking time out from a person’s career can have far-reaching employment consequences. Approximately three-quarters (74 percent) believe they would be able to resume their careers at the same level after taking a break for such reasons as maternal/paternal leave, illness, or an extended holiday.

Younger workers, notably Gen Y (76 percent) and Gen X (74 percent) are most confident about their ability to resume their careers after a break, but only 67 percent of Baby Boomers believe they could do so.

Respondents in the Americas (77 percent) and APAC (76 percent) are somewhat more confident than those in EMEA (71 percent).

07

AMERICAS



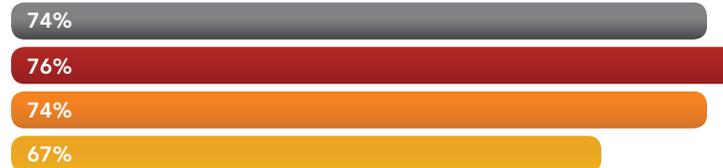
APAC



EMEA



ALL COUNTRIES



ADVANCING TO AN EXECUTIVE POSITION

DO YOU HAVE ASPIRATIONS TO ADVANCE TO AN EXECUTIVE POSITION?

(BY GENERATION AND REGION)

Almost three-quarters of respondents (72 percent) say they aspire to an executive position.

Gen Y is more ambitious than their older colleagues. Some 80 percent of Gen Y aspire to an executive role, significantly higher than Gen X (72 percent) and Baby Boomers (54 percent).

Globally, respondents in APAC (84 percent) are significantly more enthusiastic about an executive position than those in the Americas (71 percent) and EMEA (67 percent).

08

AMERICAS



APAC



EMEA



ALL COUNTRIES



REASONS FOR AVOIDING EXECUTIVE ROLES
IF YOU DO NOT ASPIRE TO AN EXECUTIVE
ROLE, WHY NOT?
 (BY GENERATION)

Lifestyle factors are the main reasons people give as to why they wouldn't want to take on an executive role.

When asked to rank the reasons, 25 percent of respondents say they don't want the pressure or stress; a further 25 percent say it would impact their work-life balance; 20 percent say they don't have the skills or education; 17 percent don't have the ambition; and 9 percent cite other reasons.

The lifestyle factors (pressure/stress and work-life balance) are more pronounced among Baby Boomers, where 54 percent cite them for avoiding an executive role. By contrast they are named by 51 percent of Gen X and 45 percent of Gen Y.

The issues of pressure and stress are most acute among Baby Boomers, while work-life balance is felt most by Gen X.

Concern about inadequate skills or education is most pronounced among Gen Y, as is the view that they lack the ambition for an executive role.



09

DON'T WANT THE PRESSURE/STRESS



WOULD IMPACT WORK-LIFE BALANCE



INADEQUATE SKILLS/EDUCATION



DON'T HAVE THE AMBITION



OTHER



NO RESPONSE



**REASONS FOR AVOIDING EXECUTIVE ROLES
IF YOU DO NOT ASPIRE TO AN EXECUTIVE
ROLE, WHY NOT?
(BY REGION)**

Lifestyle issues are the main reasons for shunning executive roles in both APAC and the Americas, but in EMEA the main reason is lack of ambition.

In both the Americas and APAC, a total of 64 percent cite pressure/stress and the impact on work-life balance as the reasons for avoiding executive positions. By contrast, in EMEA, just 40 percent cite these lifestyle factors.

A total of 27 percent of EMEA respondents say they don't have the ambition for an executive role, compared with just 9 percent in APAC and 5 percent in the Americas.

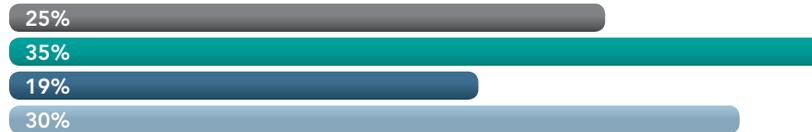
Also in EMEA, almost one-quarter (24 percent) say they don't have the education or skills to perform an executive function—higher than in both the Americas (18 percent) and APAC (17 percent).

10

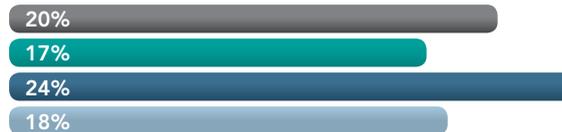
DON'T WANT THE PRESSURE/STRESS



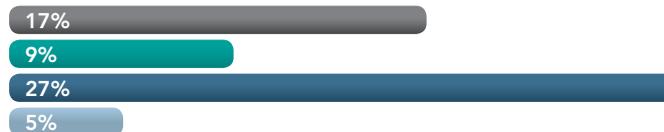
WOULD IMPACT WORK-LIFE BALANCE



INADEQUATE SKILLS/EDUCATION



DON'T HAVE THE AMBITION



OTHER



NO RESPONSE



BEST INDICATOR OF TALENT

**IN YOUR EXPERIENCE, WHEN
LOOKING FOR A JOB, WHAT IS THE
BEST INDICATOR OF YOUR TALENT TO
A PROSPECTIVE EMPLOYER?**

(BY GENERATION)

The majority of respondents (61 percent) say that when looking for a job, the best indicator of a person's talent is their work experience, followed by their performance in a job interview (23 percent), job references (9 percent), and education (7 percent).

The pattern is generally consistent across all generations, but the relevance of work experience as an indicator of talent is greater with older workers. Younger workers place slightly greater emphasis on education.

11

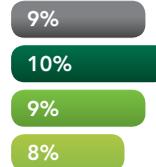
WORK EXPERIENCE



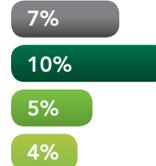
INTERVIEW



REFERENCES



EDUCATION



- ALL GENERATIONS
- GENERATION Y
- GENERATION X
- BABY BOOMERS



**BEST INDICATOR OF TALENT
IN YOUR EXPERIENCE, WHEN LOOKING
FOR A JOB, WHAT IS THE BEST
INDICATOR OF YOUR TALENT TO A
PROSPECTIVE EMPLOYER?
(BY REGION)**

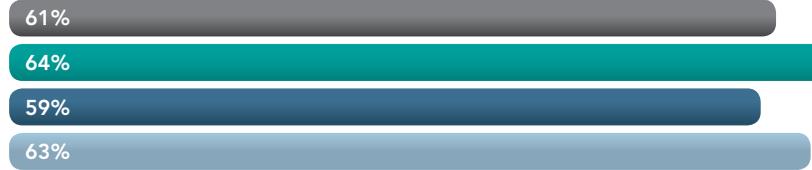
Across all regions, work experience is considered the best indicator of talent in the eyes of those seeking work.

There is greater emphasis on work experience as an indicator of talent in APAC (64 percent) and the Americas (63 percent), than in EMEA (59 percent).

Respondents in EMEA tend to place slightly greater importance on job interviews and references than those in other parts of the world.

12

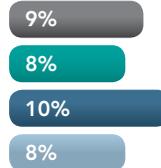
WORK EXPERIENCE



INTERVIEW



REFERENCES



EDUCATION



CONCLUSION
GENERATION Y

The evolution of the modern workforce into a more dynamic and flexible entity is being embodied in the attitudes of Gen Y workers who are uniquely adapting to the changing world of work and careers.

No less than 58 percent of Gen Y plan to switch careers within the next five years. The reasons are both to boost their income and to align their work with changing personal interests.

There is a high degree of confidence in their ability to change careers or take a break from work and return at a similar level of pay and seniority.

When looking to the future, Gen Y is notably ambitious about moving into executive roles. Some 80 percent aspire to senior management positions—a higher rate than for both Gen X and Baby Boomers. For those who

do not foresee an executive role, there are a range of factors cited: lack of education or skills, impact on work-life balance, concerns about pressure and stress, and lack of ambition.

When it comes to career progression, all generations indicate that experience has been more important than education. However, it is interesting to note that for Gen Y, education is both more recent and somewhat more important.

Like older generations, they share the view that experience is the best indicator of talent in a prospective employee.

Of all the generations, Gen Y places the highest priority on developing and enhancing skills, with 64 percent saying it is extremely important for their career progression.



CONCLUSION GENERATION X

As they settle into the mid-term of their careers, Gen X is experiencing something of an awakening. In line with their younger counterparts, 58 percent of Gen X anticipates being required to change their career or field of work within five years. For Gen X, it's not just the need for more income, but also a broader range of lifestyle issues that will drive this career shift.

They also predominantly hold a belief that they can change their careers and take a break for maternal/paternal leave, or even for an extended holiday, and return to their jobs without significant setback.

Some 72 percent are aiming for executive roles—slightly less than Gen Y, but greater than Baby Boomers. For those Gen X members who don't want an executive position, the main reason cited is the adverse impact on work-life balance.

For Gen X, experience has been a more dominating factor over career progression than education, and Gen X believes more strongly than Gen Y that job experience is the best indicator of talent in a prospective employee.



CONCLUSION
BABY BOOMERS

Although they are in the twilight of their careers, a significant share of Baby Boomers (50 percent) anticipate having to change careers within the next five years.

The difference with Baby Boomers is the reasons given—concerns about income are relatively lower, lifestyle factors weigh heavily, and there are also concerns that their industries are in decline.

Far fewer Baby Boomers aspire to executive positions, and the reasons predominantly relate to how such roles would impinge on lifestyle.

Baby Boomers overwhelmingly believe that their experience—rather than education—has shaped their careers, and they have no doubt that job experience remains the best guide to talent in prospective employees.

And even with retirement looming for many Baby Boomers, more than half say that ongoing skills development is essential to their careers.



CONCLUSION

DRIVERS OF CAREER CHOICE AND CAREER PROGRESSION WRAP UP

The latest Kelly Global Workforce Index demonstrates a degree of instability that characterizes many sectors of the global workforce.

Significant numbers of individuals are actively preparing for the likelihood that they will be forced—by economic circumstances or personal life choices—to change their entire career focus within a relatively short time frame.

Such a wholesale career shift represents a dramatic response to changing demographic, cultural, and structural changes in the global economy.

The forces that are driving these shifts are having the greatest impact on younger Gen Y and Gen X workers, and presumably on the emergent Gen Z, which is only now entering the workforce.

It's clear that there are fundamental generational differences toward issues such as work, career, and the way individual talent is measured and assessed by organizations.

The findings underline the degree of volatility that prevails in the global workplace, where structural shifts in the world economy and changing generational dynamics are combining to reshape the way that individuals view their work and careers.



ABOUT THE KELLY GLOBAL WORKFORCE INDEX™

The Kelly Global Workforce Index is an annual survey revealing opinions about work and the workplace from a generational viewpoint. Approximately 97,000 people from the Americas, APAC and EMEA responded to the 2011 survey with results published on a quarterly basis. Kelly Services was the recipient of a MarCom Platinum Award in 2010 and a Gold Award in 2009 for the Kelly Global Workforce Index in the Research/Study category.

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 provides employment to more than 530,000 employees annually. Revenue in 2010 was \$5 billion. Visit www.kellyservices.com and connect with us on Facebook®, LinkedIn®, and Twitter®.

A KELLY SERVICES REPORT

All trademarks are property of their respective owners. An Equal Opportunity Employer © 2011 Kelly Services, Inc. W1110

