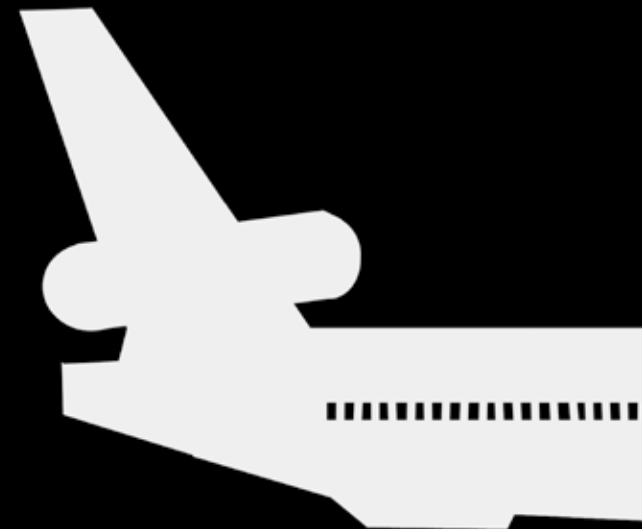
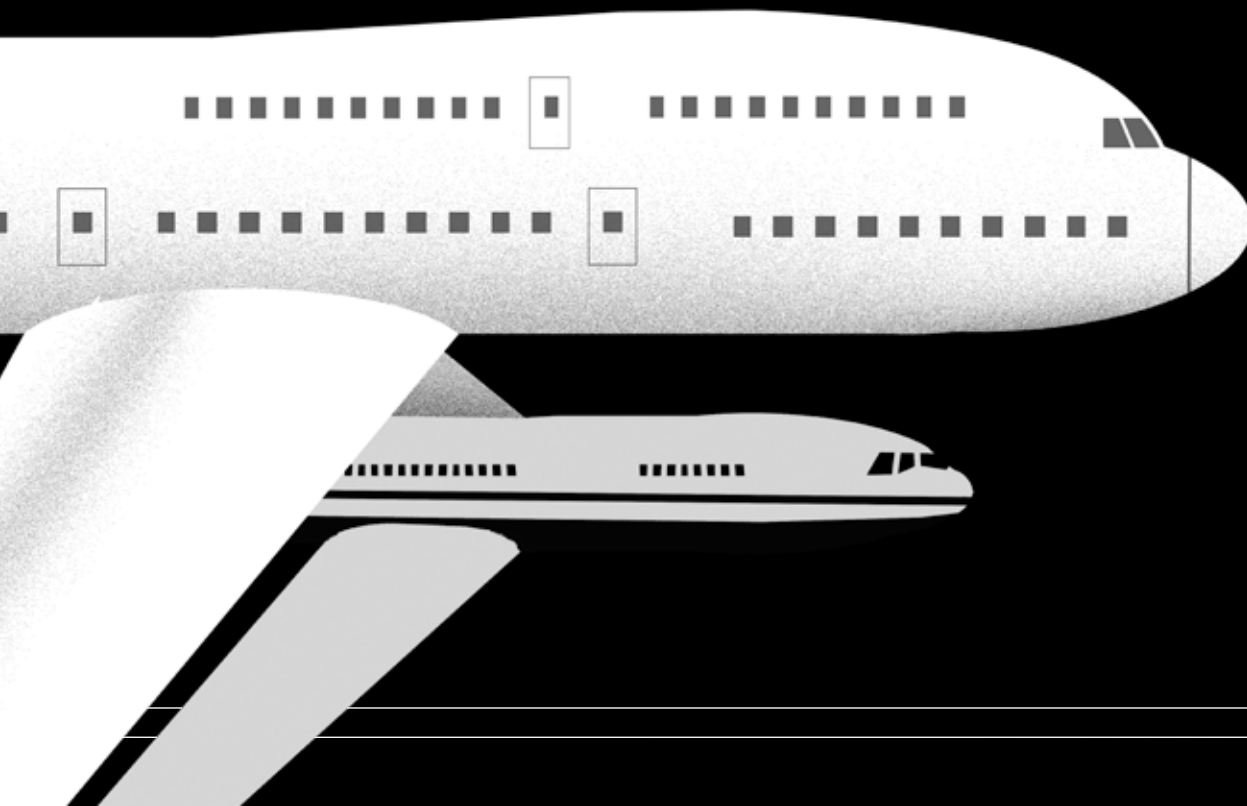


RELEASE: MARCH 2011
SURVEY POPULATION: 97,000
LOCATIONS: 30 COUNTRIES

Kelly Global Workforce Index™

Talent Mobility

THE EVOLVING WORKFORCE

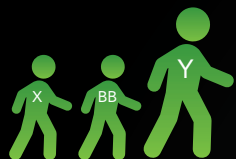


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THE EVOLVING WORKFORCE: TALENT MOBILITY



GEN Y ARE MORE PREPARED TO MOVE THAN OLDER GENERATIONS



77% **34%**

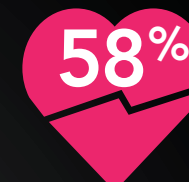
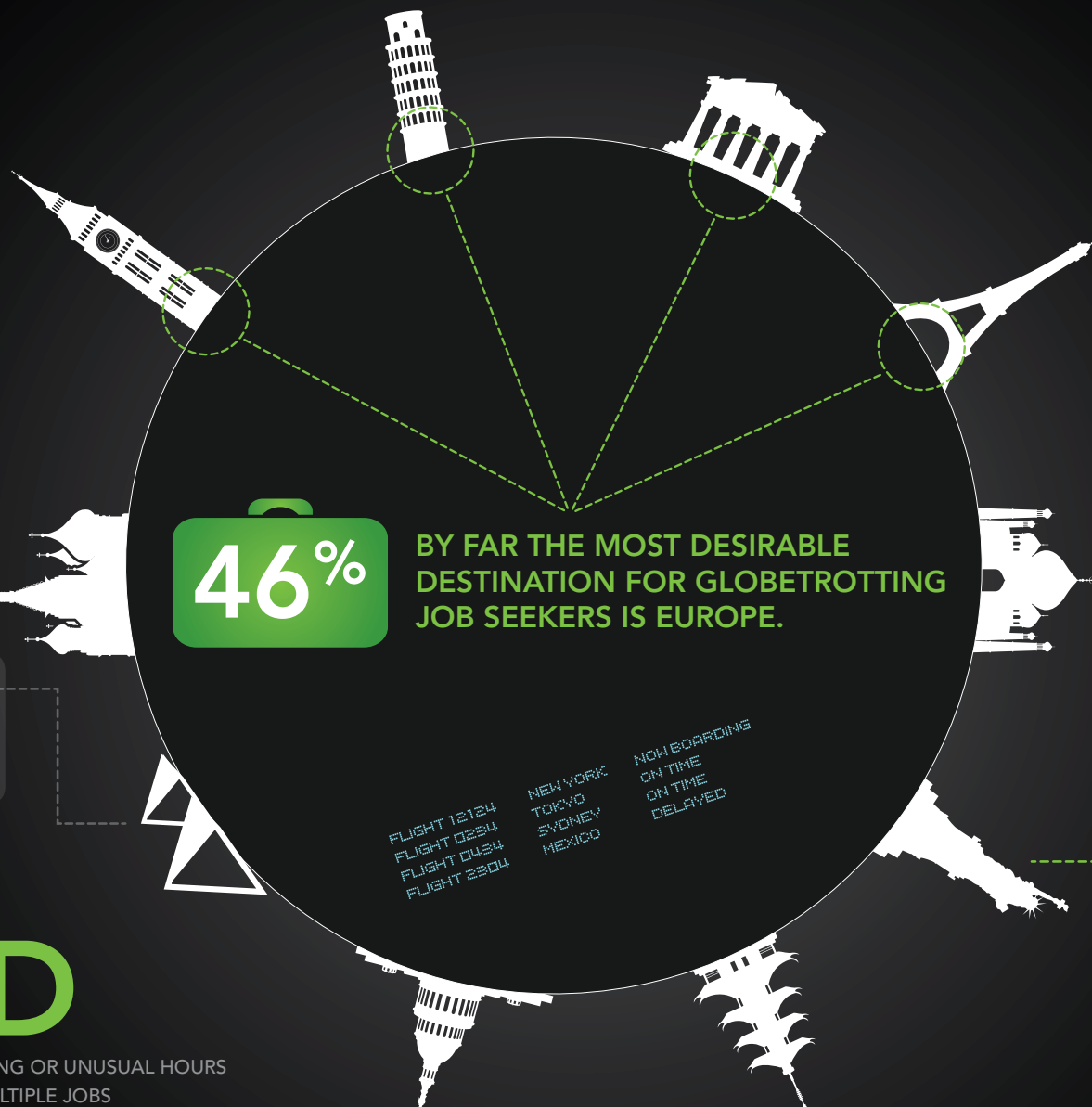
THREE-QUARTERS OF JOB SEEKERS ARE PREPARED TO SHIFT FOR THE RIGHT JOB, 34% TO ANOTHER COUNTRY OR CONTINENT

2% THE LEAST DESIRABLE DESTINATION FOR JOB SEEKERS IS THE MIDDLE EAST

ACROSS THE



- 49% WORK LONG OR UNUSUAL HOURS
- 17% WORK MULTIPLE JOBS
- 13% LIVE AWAY FROM HOME
- 13% ENDURE EXCESSIVE TRAVEL
- 8% OTHER



58% FAMILY AND FRIENDS ARE THE MAIN REASON FOR NOT WANTING TO MOVE TO ANOTHER CONTINENT FOR A JOB

OTHER CONCERNS:

- 18% COST OF MOVING
- 13% LANGUAGE BARRIER
- 5% CULTURAL DIFFERENCES



FAMILY AND FRIENDS ARE MORE IMPORTANT TO WOMEN THAN MEN

5 YEARS

THE TIME ONE-QUARTER OF MOBILE WORKERS WILL STAY ABROAD

58% ARE PREPARED TO STAY FOR THREE YEARS OR LESS

20%

NORTH AMERICA IS ANOTHER FAVORITE DESTINATION FOR WORKERS ON THE MOVE

INTRODUCTION

APPROXIMATELY 97,000 PEOPLE FROM 30 COUNTRIES IN 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 Talent Mobility. The questions focused on:

- Readiness to move for the right job
- Area of the world in which participants would want to work
- Obstacles to moving to another continent for a job
- Maximum time prepared to work in another continent
- Unconventional work arrangements, such as long/unusual hours, multiple jobs, living away from home, excessive travel, etc.
- Length of time those working in unconventional arrangements can continue to do so.

MOVING FOR THE RIGHT JOB
HOW FAR WOULD YOU BE PREPARED
TO MOVE FOR THE RIGHT JOB?
(BY GENERATION)

Most survey participants are willing to move for the right job.

According to the Kelly Global Workforce Index, more than three in four participants (77 percent) would be willing to move for the right job, with more than one-third (34 percent) even willing to move to another country or continent.

Across all regions, Generation Y participants are more willing to move for the right job (85 percent), followed by more than three in four Generation X (76 percent), and more than three in five Baby Boomers (63 percent).

01

ANOTHER COUNTRY/CONTINENT



ANOTHER CITY/TOWN



ANOTHER STATE/REGION/PROVINCE



WITHIN THE SAME COUNTRY/DISTRICT/PROVINCE



NOT WILLING TO MOVE



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

MOVING FOR THE RIGHT JOB
HOW FAR WOULD YOU BE PREPARED
TO MOVE FOR THE RIGHT JOB?
(BY REGION)

About four in five APAC and EMEA survey participants are willing to move for the right job (81 and 79 percent, respectively). Many of these participants would go as far as another country or continent (35 and 40 percent, respectively).

02

ANOTHER COUNTRY/CONTINENT



ANOTHER CITY/TOWN



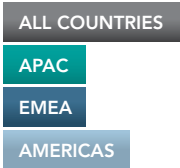
ANOTHER STATE/REGION/PROVINCE



WITHIN THE SAME COUNTRY/DISTRICT/PROVINCE



NOT WILLING TO MOVE



MOVING FOR THE RIGHT JOB
ASIDE FROM YOUR OWN REGION,
WHICH PART OF THE GLOBE WOULD
YOU MOST LIKE TO WORK IN?
(BY GENERATION)

By more than a two-to-one margin, Europe is the part of the world where most people would want to work, followed by North America (46 percent and 20 percent, respectively).

03

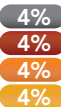
EUROPE



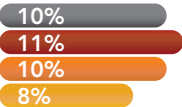
NORTH AMERICA



SOUTH AMERICA



ASIA PACIFIC



AFRICA



MIDDLE EAST



DON'T KNOW



ALL GENERATIONS

GENERATION Y

GENERATION X

BABY BOOMERS



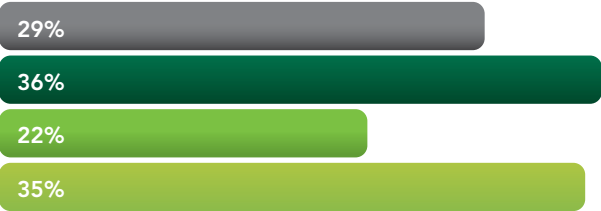
WORKING IN ANOTHER CONTINENT
WHAT IS THE MAXIMUM TIME YOU'D BE
PREPARED TO WORK IN ANOTHER CONTINENT?
(BY REGION)

The desire to move to another continent for a job seems to be more driven by the experience than setting up permanent residence.

Participants from APAC and Americas (67 and 62 percent, respectively) are more inclined to make this experience a short stay of up to three years than those from EMEA (51 percent).

04

LESS THAN A YEAR



1 – 3 YEARS



3 YEARS OR MORE



ALL COUNTRIES
APAC
EMEA
AMERICAS

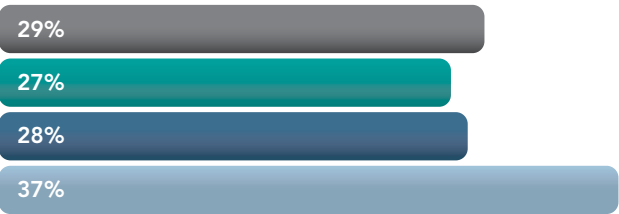


WORKING IN ANOTHER CONTINENT
WHAT IS THE MAXIMUM TIME YOU'D BE
PREPARED TO WORK IN ANOTHER CONTINENT?
(BY GENERATION)

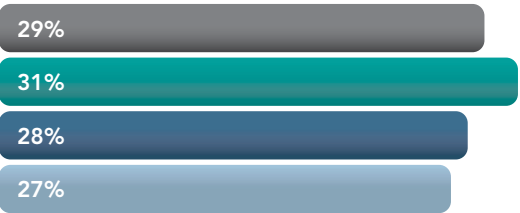
Nearly three in five survey participants (58 percent) are prepared to stay in another continent for up to three years. More than one-half of Generation X participants (56 percent) say they could stay a maximum of up to three years in another continent, and even more Baby Boomers are prepared to stay up to three years (64 percent).

05

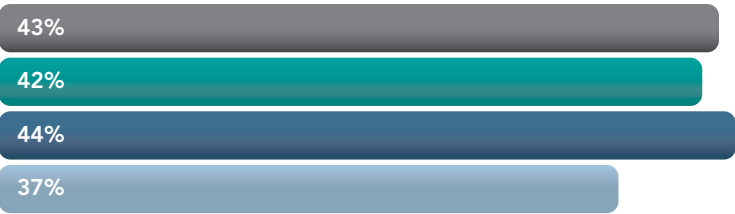
LESS THAN A YEAR



1 – 3 YEARS



3 YEARS OR MORE



ALL GENERATIONS

GENERATION Y

GENERATION X

BABY BOOMERS

OBSTACLES TO MOVING ABROAD
WHICH OF THE FOLLOWING WOULD MOST
LIKELY PREVENT YOU FROM MOVING TO
ANOTHER CONTINENT FOR A JOB?
(BY GENERATION)

Economic times are evidently not the main factor in the decision to move to another continent for a job. Instead, the decision is more emotional than anything else.

Family/friend influences are dominant across all generations and are most likely to prevent survey participants from moving to another continent for their job—according to 58 percent across all regions.

06

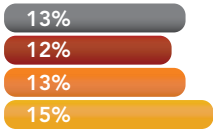
FAMILY/FRIENDS



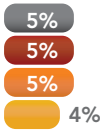
COST OF MOVING



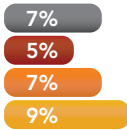
LANGUAGE BARRIERS



CULTURAL DIFFERENCES



OTHER



ALL GENERATIONS
GENERATION Y
GENERATION X
BABY BOOMERS



OBSTACLES TO MOVING ABROAD
WHICH OF THE FOLLOWING WOULD MOST
LIKELY PREVENT YOU FROM MOVING TO
ANOTHER CONTINENT FOR A JOB?
(BY REGION)

Across all countries, nearly three in five survey participants (58 percent) say family or friends would most likely be the reason preventing them from moving to another continent for a job. Less than one in five survey participants (18 percent), across all countries, say they are prevented from moving abroad due to the cost.

Survey participants in the Americas are less impacted by family and friends (50 percent) than their counterparts in EMEA and APAC (61 and 60 percent, respectively).

Those in the Americas are also more inclined to not move abroad due to the costs. More than one in four in the Americas (27 percent) are prevented from moving to another continent due to the costs incurred in moving.

07

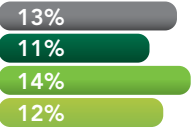
FAMILY/FRIENDS



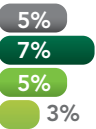
COST OF MOVING



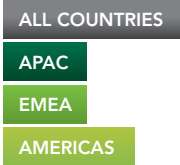
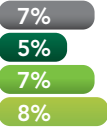
LANGUAGE BARRIERS



CULTURAL DIFFERENCES



OTHER



UNCONVENTIONAL
WORKING ARRANGEMENTS

ARE YOU WORKING IN WHAT
YOU CONSIDER TO BE AN
UNCONVENTIONAL ARRANGEMENT?

E.G., LONG/UNUSUAL HOURS, MULTIPLE JOBS, LIVING AWAY
FROM HOME, EXCESSIVE TRAVEL, ETC.
(BY REGION)

Many consider their working arrangement
unconventional, such as long/unusual hours, multiple
jobs, living away from home, excessive travel, etc.

One-third (34 percent) of survey participants say they
are working unconventionally.

More survey participants in the APAC region report
an unconventional working arrangement than their
counterparts across all other regions.

08

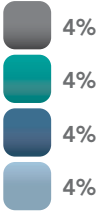
YES



NO



DON'T KNOW



ALL COUNTRIES
APAC
EMEA
AMERICAS

UNCONVENTIONAL
WORKING ARRANGEMENTS

ARE YOU WORKING IN WHAT
YOU CONSIDER TO BE AN
UNCONVENTIONAL ARRANGEMENT?

E.G., LONG/UNUSUAL HOURS, MULTIPLE JOBS, LIVING AWAY
FROM HOME, EXCESSIVE TRAVEL, ETC.
(BY GENERATION)

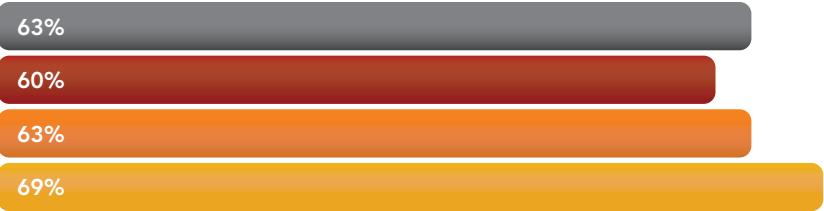
More than one-third of Generations Y and X
(36 and 34 percent, respectively) consider their work
arrangement to be unconventional, while 27 percent
of Baby Boomers are working unconventionally.

09

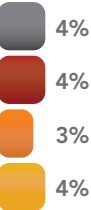
YES



NO



DON'T KNOW



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



UNCONVENTIONAL
WORKING ARRANGEMENTS

WHICH OF THESE APPLIES TO YOU?

(AMONG THOSE WORKING IN AN
UNCONVENTIONAL ARRANGEMENT)

(BY REGION)

Notably, the majority in the Americas who consider themselves in an unconventional arrangement say they are working long or unusual hours (56 percent). In contrast, less than one-half of participants in APAC and EMEA cite working long or unusual hours (46 and 47 percent, respectively).

10

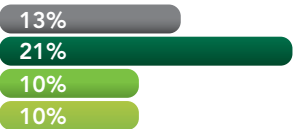
LONG OR UNUSUAL HOURS



MULTIPLE JOBS



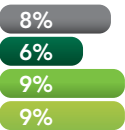
LIVING AWAY FROM HOME



EXCESSIVE TRAVEL



OTHER



ALL COUNTRIES
APAC
EMEA
AMERICAS



UNCONVENTIONAL
WORKING ARRANGEMENTS
WHICH OF THESE APPLIES TO YOU?

(AMONG THOSE WORKING IN AN
UNCONVENTIONAL ARRANGEMENT)
(BY GENERATION)

Across all generations, working long or unusual hours is by far the most common unconventional arrangement.

The Baby Boomer generation ranks highest among those working multiple jobs (21 percent).

One-half of Generation Y respondents who are in an unconventional arrangement are working long or unusual hours. Generation Y is also the highest ranking generation living away from home (15 percent).

11

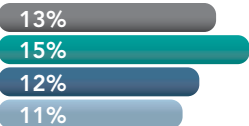
LONG OR UNUSUAL HOURS



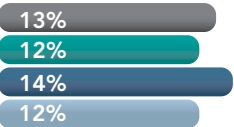
MULTIPLE JOBS



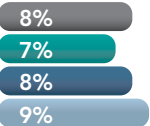
LIVING AWAY FROM HOME



EXCESSIVE TRAVEL



OTHER



ALL GENERATIONS
GENERATION Y
GENERATION X
BABY BOOMERS



ENDURING AN UNCONVENTIONAL WORKING ARRANGEMENT

HOW LONG DO YOU BELIEVE YOU CAN CONTINUE WORKING IN AN UNCONVENTIONAL ARRANGEMENT?

(BY REGION)

More can endure an unconventional working arrangement for the short term.

Almost one-half of those working in these unconventional arrangements (46 percent) believe they can only continue doing this for up to one year. However, one-quarter (24 percent) say they can do it indefinitely.

APAC participants are less likely to endure the unconventional situation indefinitely (14 percent).

12

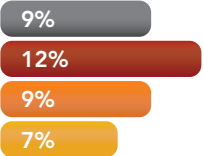
1 YEAR OR LESS



1 – 3 YEARS



3 – 5 YEARS



INDEFINITELY



ALL COUNTRIES
APAC
EMEA
AMERICAS



ENDURING AN UNCONVENTIONAL
WORKING ARRANGEMENT

HOW LONG DO YOU BELIEVE YOU
CAN CONTINUE WORKING IN AN
UNCONVENTIONAL ARRANGEMENT?

(BY GENERATION)

Baby Boomers working in an unconventional arrangement are more likely to say they can endure their situation indefinitely (35 percent), in contrast to less than one in five Generation Y participants (18 percent).

13

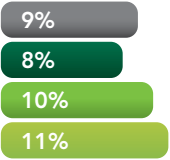
1 YEAR OR LESS



1 – 3 YEARS



3 – 5 YEARS



INDEFINITELY



ALL GENERATIONS
GENERATION Y
GENERATION X
BABY BOOMERS



CONCLUSION

GENERATION Y

Across all regions Generation Y participants are more willing to move for the right job (85 percent). Two in four of these participants (40 percent) are even willing to move to another country or continent. Aside from their own region, about one-half of Generation Y would most want to move to Europe, followed by just 20 percent who would choose North America.

Nearly three in five (58 percent) of Generation Y participants say they could stay a maximum of up to three years in another continent, and the same percentage indicate family/friends are a barrier to making the step to move to another continent. One in five (20 percent) say that cost alone would prevent them from moving to another continent.

More than one-third of Generation Y participants (36 percent) are working in an unconventional arrangement, such as long or unusual hours, multiple jobs, living away from home, excessive travel, etc. One-half of this generation experiencing an unconventional arrangement cite working long and unusual hours.



CONCLUSION

GENERATION X AND BABY BOOMERS

Compared to Generation Y, Generation X and Baby Boomers are less willing to move for the right job. However, willingness to move is cited by the majority of all generations—76 percent of Generation X and 63 percent of Baby Boomers. Baby Boomers are least likely to want to move to another country/continent (21 percent)—versus 33 percent of Generation X. Nearly one-half of Generation X (46 percent) would most want to work in Europe, followed by 36 percent of Baby Boomers.

More than one-half of Generation X participants (56 percent) say they could stay a maximum of up to three years in another continent, and even more Baby Boomers are prepared to stay up to three years (64 percent). Family/friends are a barrier across all generations. Less than one in five participants say that cost alone would prevent them from moving to another continent (17 and 16 percent of Generation X and Baby Boomers, respectively).

More than one-third (34 percent) of Generation X participants (similar to Generation Y) are working in an unconventional arrangement, such as long or unusual hours, multiple jobs, living away from home, excessive travel, etc. More than one-quarter of Baby Boomers (27 percent) are working in what they consider to be unconventional arrangements. Roughly one-half of all generations who are experiencing an unconventional arrangement cite working long and unusual hours (49 percent of Generation X, followed by 47 percent of Baby Boomers).

Baby Boomers working in an unconventional arrangement are more likely to say they can endure their situation indefinitely (35 percent), in contrast to 27 percent of Generation X.



CONCLUSION

TALENT MOBILITY WRAP UP

Most participants of the 2011 Kelly Global Workforce Index are willing to move for the right job.

The desire to move to another continent for a job seems to be more driven by the experience than setting up permanent residence.

Economic times are evidently not the main factor in the decision to move to another continent for a job. Instead, the decision is more emotional than anything else.

Many participants consider their working arrangement unconventional, such as long/unusual hours, multiple jobs, living away from home, excessive travel, etc.

More participants can endure an unconventional working arrangement for the short term—one year or less.



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. Analysis of the 2011 data was conducted by Echo Research. 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, & Twitter.

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