

Below the Surface: EMERGING GLOBAL MOTIVATORS & JOB SEARCH PREFERENCES



This is the first in a series of four reports by ManpowerGroup Solutions analyzing the results of a proprietary Global Candidate Preferences Survey



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Introduction

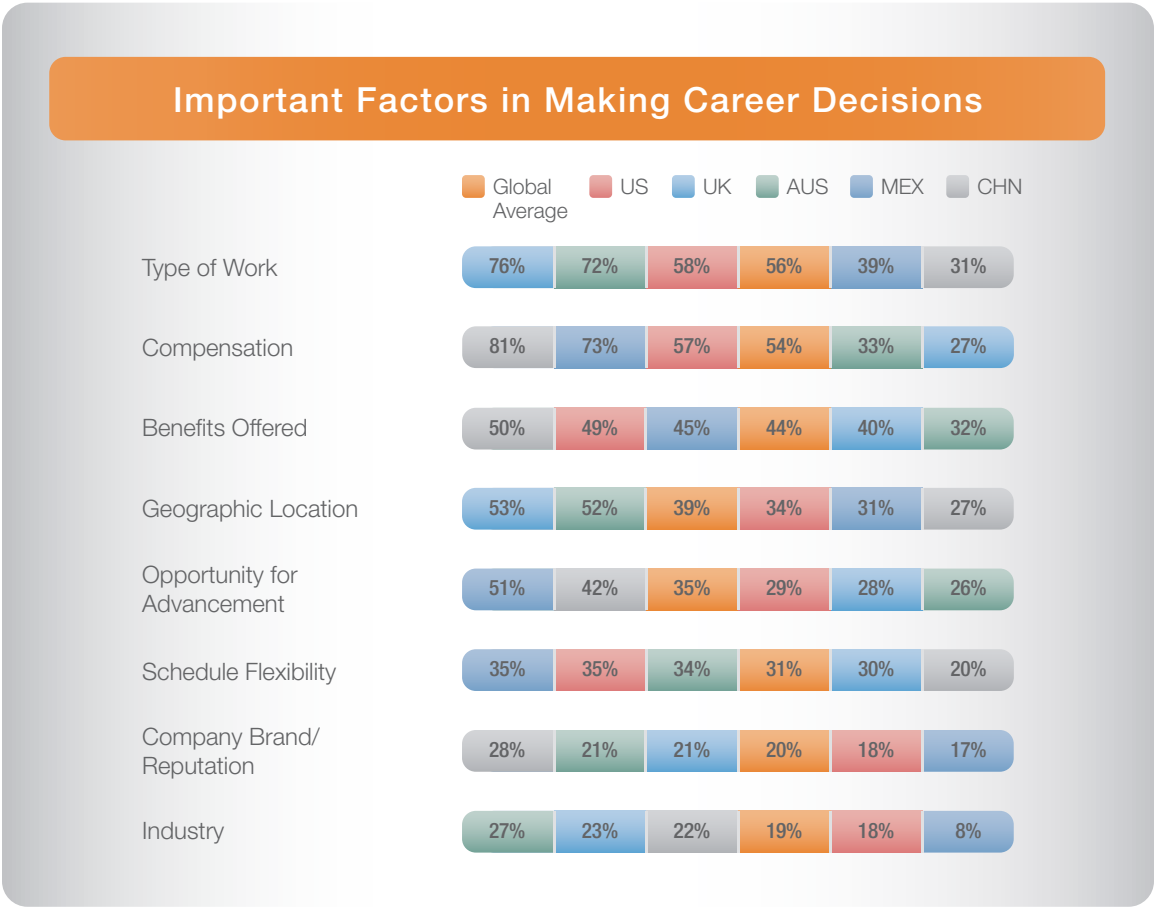
In today's competitive environment, global corporations and other employers are searching for ways they can attract and retain the world's top talent. To understand how employers can leverage global candidate preferences, **ManpowerGroup Solutions, the world's largest Recruitment Process Outsourcing (RPO) provider, surveyed nearly 4,500 job seekers in October 2015.** The global candidate preferences survey was fielded in five influential employment markets around the world (United States, United Kingdom, Australia, China and Mexico) and questions ranged from job search practices and preferences to motivators for change. A number of important trends and market-based differences emerged along with insights about how global companies and other employers can recruit and retain the best talent.

This first report explores the trends that employers need to keep top of mind and highlights a number of universal motivators among candidates around the world. A deeper analysis of the results exposes unique differences between markets and generations that can make employers more effective in attracting, motivating and retaining top talent.

UNDERSTANDING CANDIDATE MOTIVATORS – GLOBALLY AND LOCALLY

The global candidate preferences survey reveals that motivations for making career decisions and immediate job switching strongly correlate with market location. However, job search behaviors and preferences are more closely tied to age. For example, beyond the issue of compensation, what motivates candidates in the UK is very different from what motivates them in China and other markets. Understanding these nuances enables savvy employers to tailor their recruitment and retention programs to attract and keep the best and brightest employees without having to rely on a recruiter to present new career opportunities to them.

ManpowerGroup Solutions’ recent survey showed that **“type of work” is now equal to “compensation” as a motivator for career decisions among candidates globally.** While money still talks, today’s candidates are equally interested in how work integrates with their daily lives. No longer are jobs just cash machines that facilitate the golden years of retirement. Today, candidates’ complex motivations vary with their country’s culture, economic conditions and job market dynamics.



“ People used to be motivated by climbing the corporate ladder. Now people are looking for quality of life...candidates are asking ‘what can I gain out of this and how will this impact my family?’ ”

YVETTE MONCRIEFFE,
Director, Client Delivery ManpowerGroup Solutions/North America

UNIVERSAL MOTIVATORS

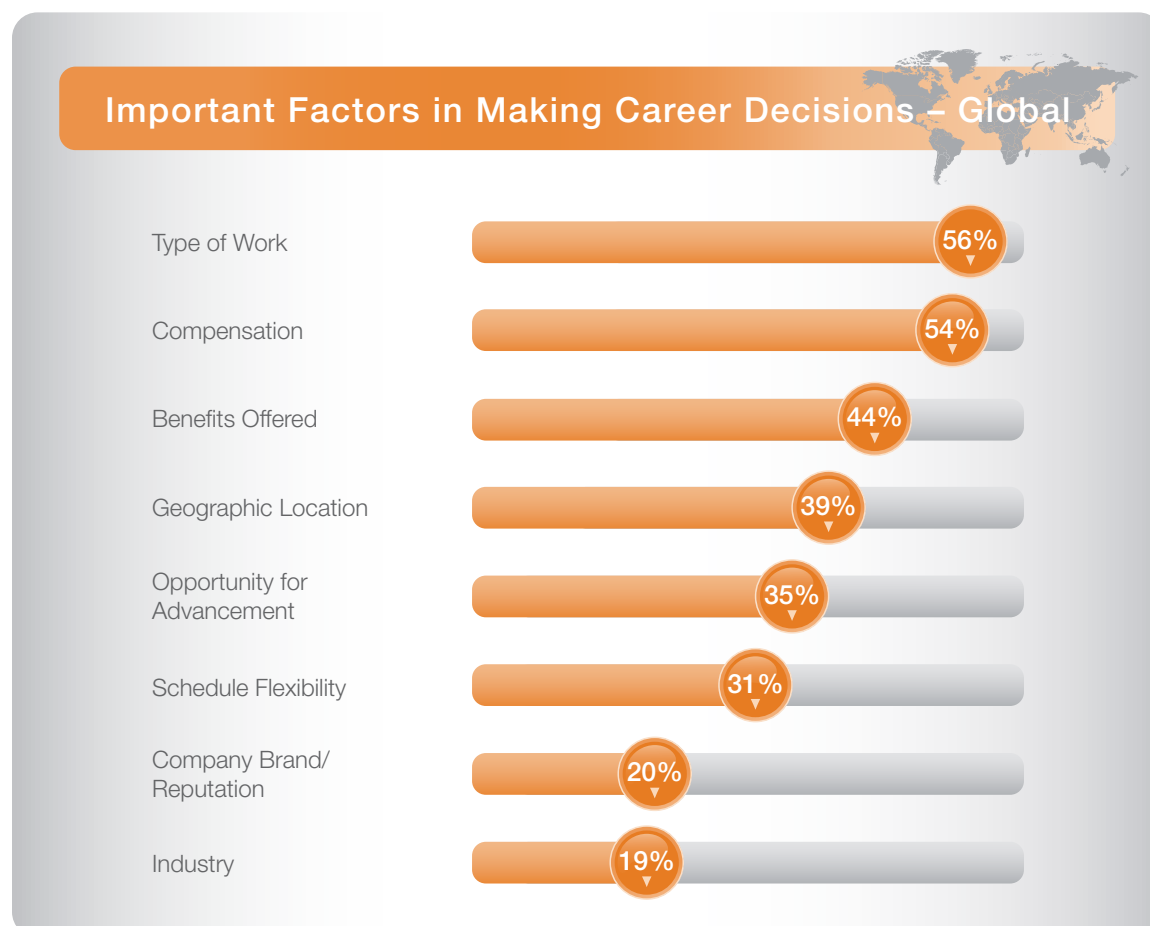
The data revealed several trends that extend across country borders. Candidates around the world are remarkably similar in the career challenges they face, their motivations to pursue new opportunities and their job search methods.

The Importance of “Type of Work”

56 percent of global candidates identified “type of work” as one of the top three factors in making career decisions — overtaking “compensation” at 54 percent. That means **nearly six out of ten candidates believe that *what they do* is as important as *how much they get paid*.**

When it comes to motivating candidates to switch jobs, however, compensation gets their attention — an increase in pay is twice as powerful as type of work. The exception to this rule is in the UK and Australia, where type of work exceeds compensation as a reason to switch jobs.

For many, technology has blurred the lines between work and leisure time. Employees are often expected to be available 24-7 to their employers and work-life balance has become a challenge for a majority of the workforce. As a result, employees’ relationship with their jobs is shifting. While it was previously a means to an end (e.g., weekends, vacations, retirement), a job is now a more integrated part of a holistic way of life.



Self-Reliance in Job Searching

Applying to jobs online via laptop/desktop computer is the number one method (34 percent) global candidates use in their job searches. And although the majority of those surveyed (77 percent) had previously worked with a recruiter on a job search, **nearly one in four candidates prefer to search, identify and pursue job opportunities on their own from start to finish — five times as many who prefer to solely use a recruiter.**

One of the impacts of technology and the Internet has been to devalue the middleman in most purchases or transactions. The rise of websites such as Travelocity and Expedia, for example, has made the travel agent a thing of the past. And e-tailing is forever changing the dynamics of retailing. Job searching is no different. Popular job search sites such as LinkedIn in the US, Reed/Jobsite/Indeed in the UK, Seek in Australia, OCC in Mexico and Zhaopin in China were visited by between 23 percent and 45 percent of survey respondents in the two weeks prior to completing the survey.

Moreover, technology has enabled less enterprising recruiters to bombard candidates with emails and solicitations in a quantity versus quality numbers game. That trend was likely a factor in respondents to the global survey identifying “customization” as key to their engagement with a recruiter. Nearly half of all candidates (42 percent) said that being presented with a role that was interesting and targeted to them was key. Today’s candidates enjoy the freedom to seek out jobs on their own without having to rely on a recruiter to present new career opportunities to them.



“We now have a two-tier candidate market driven by technology and professional services companies offering candidates projects rather than long-term employment. These new types of relationships are affecting candidates’ motivations, and subsequently, how we engage with prospects.”

GUY BRYANT-FENN,
Sales Director Manpower Group Solutions/Australia

Company Brand is Important

Global candidates overwhelmingly pointed to the increasing importance of company brand when making career decisions. Over half of all candidates (56 percent) said brand is more important to them than it was five years ago.

The 2014 ManpowerGroup Solutions Candidate Preference Survey (which was limited to North America) found that increasing years of candidates’ experience in the workforce was positively correlated with the importance of brand reputation. And while this appears to be the case in the 2015 global survey, the recent survey also showed a correlation between the importance of company brand and younger, Gen Y candidates (18-34 years old).¹ Regardless, the data shows **companies can benefit from building and embracing a strong employer value proposition (EVP), or a unique set of offerings, associations and values that positively influence target candidates and employees.**

Continuous Candidates: From Stigma to Badge of Honor

Globally, over one third of candidates (37 percent) self-identified as “continuous candidates” — those who agree with the statement “I am always looking for the next job opportunity.”

Experts in global markets attribute the rise in continuous candidates to the increasing prevalence of contract work (typically between two and three year engagements with a professional services or technology company) versus long-term employment. **The result is a new generation of employees with planned obsolescence built into their workplace dynamic.** These employees recognize the inevitability of their situation and it drives ongoing networking, job searching and mobility.

In the past, older generation HR managers and employers who averaged 10 to 20 years of tenure with a given employer, considered frequent jumping from job to job a negative on a resume. As described by Victoria Bombas, RPO Director, ManpowerGroup Solutions, Europe, “For some hiring managers, mobility on a CV is a sign that a prospective candidate is not meant to be a ‘lifer.’ These managers do not realize that we are experiencing a generational shift in hiring dynamics.”

Mobile Apps Slow to Blossom

Recently, much press has been devoted to how the job search process will move from desktop to laptop, to tablet to smartphone — and savvy companies should be ready for this evolution. Based on the survey, this has yet to come to fruition. Only 4 percent of global candidates reported having applied to a job online via a mobile app on a smartphone. Those who do are 50 percent more likely to be Gen Y than Gen X and usage was slightly higher among U.S. and Chinese candidates.

However, smartphones are being used globally by candidates to access information about companies they are considering. Twelve percent of candidates globally use their smartphones for this function. In contrast, 22 percent of Chinese candidates used a mobile app in this way. Given this reality, company websites should, at a minimum, be mobile friendly while organizations develop proprietary apps.

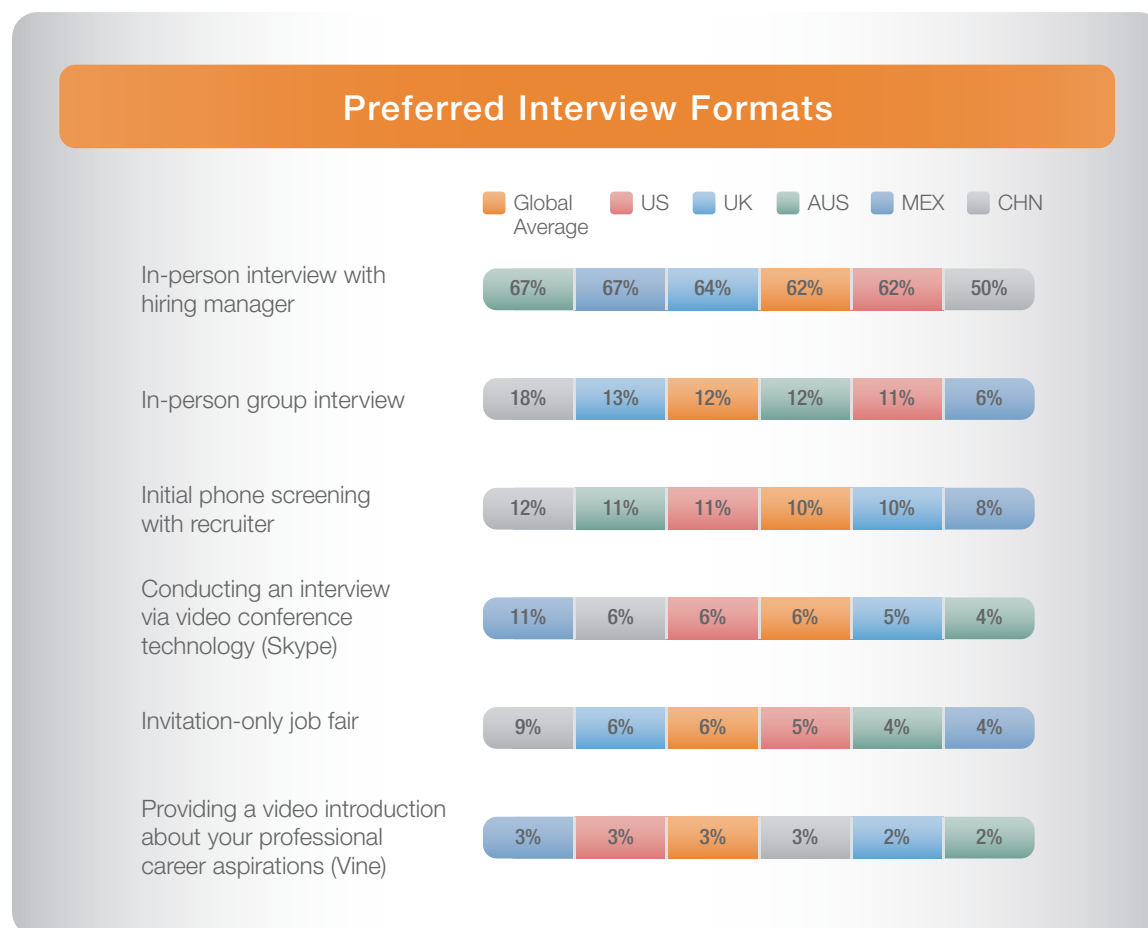
¹ Generation Y is defined as 18-34 years old. Generation X is defined as 35-50 years old.

The Personal Connection in Interviewing

Despite buzz about technology as a tool for company interviewing, global candidate preferences are clear: **62 percent prefer an in-person interview with a hiring manager**. The in-person group interview is a distant second at 12 percent.

These preferences were reinforced by candidates' level of comfort with various types of interview formats. Nearly three quarters (72 percent) are comfortable with an in-person interview with a hiring manager, whereas only 42 percent are comfortable with video-conference technology (e.g., Skype) or 31 percent with a video introduction (e.g., Vine). Fifty-five percent of respondents globally were comfortable with an initial phone screening.

Even as technology — and the awareness of new tools — continues to advance at a rapid pace, the tried and true methods of in-person and phone interviews remain the clear preference for job seekers. But be prepared; this will likely change quickly as young generations who have grown comfortable with video chat, YouTube, and selfie sticks enter into the job force.



UNIQUE MOTIVATORS

While there are a number of universal trends among candidates around the globe, the research also revealed several unique cultural and generational factors that differentiate candidate preferences by country.

Opportunity for Advancement Emerges as a Motivator Among Candidates from Mexico

Although the top motivator for career decisions by Mexican candidates is compensation, Mexico is unique among countries studied. Research revealed it was the only market to indicate “opportunity for advancement” as the second most important motivator. This may be related to the additional finding that 49 percent of candidates from Mexico believe one of their greatest career challenges is the lack of access to quality jobs.

As a result, companies seeking the best and brightest candidates from Mexico should identify clear paths for advancement and communicate them to potential candidates. Including this information in job descriptions can help employers differentiate their job offerings, as well as build their EVP in this market.

Upward Mobility Rather than Loyalty Drives Gen Yers

More than half of candidates (58 percent) who identified “opportunity for advancement” as a top three motivator when making career decisions were Gen Yers. Opportunity for advancement was also the second most important reason (behind compensation) for Gen Yers to immediately look for a new career opportunity.

Gen Y’s perceptions of how to advance their careers are distinctive from their older Gen X counterparts. They are driven by job mobility rather than loyalty. **Nearly two out of three candidates who believe “the best way to advance their careers is to change jobs frequently” are Gen Yers (59 percent).** Also, 60 percent of Gen Yers, globally, identified themselves as continuous candidates — “always looking for the next job opportunity.”

“*Gen Yers are always looking for the next best thing, and they want it right now. They ask questions like ‘How do I succeed?’ and ‘Where am I going to be in three years?’ Companies are just starting to get wise to that now. Managers often do not make the investment in communicating a clear pathway for advancement.*”

YVETTE MONCRIEFFE,
Director, Client Delivery ManpowerGroup Solutions/North America

Given this reality, employers need to proactively develop and tailor employee retention strategies specifically to the needs and interests of Gen Yers. Unlike most Gen Xers who were content to put in the time and patience needed to advance, managers will now have to find new ways to offer a path to upward mobility and clearly communicate it to prospective and current employees.

Opportunity for Advancement Ranked as Top 3 Motivator



Corporate Social Responsibility is an Important Part of Company Brand for Gen Y

Corporate Social Responsibility (CSR) also emerged as an important motivator and an important aspect of an employer's brand for Gen Yers. Among those who identify CSR as one of the three most important aspects of a company's brand, 58 percent are Gen Y. The trend is even stronger in Australia and Mexico. Sixty-two percent of CSR-driven candidates in Mexico are Gen Yers.



As Bombas explains, “Gen Yers in the UK are concerned with a company’s ethical profile. Specifically, they are concerned about sustainability and employment practices. In the UK, the media reports on poor company practices. It not only results in bad publicity, but stocks decline as well.”

“Australian candidates expect more from companies these days when it comes to CSR,” shares Guy Bryant-Fenn. “Inclusivity around the issue of people with disabilities is a big issue here and our recruitment programs are starting to reflect that reality.”

The Use of Job Search Sites may be Universal, but Usage Patterns are Local

In China, Australia and Mexico, the top job search sites are visited nearly 50 percent more often by candidates than their US and UK counterparts.

In some markets, such as Australia, the space is more clearly dominated by one site, Seek. It was visited by 41 percent of candidates. Because it is such a strong market leader and can quickly generate a large quantity of respondents, many Australian employers limit their outreach to this platform...overlooking more traditional and targeted outreach strategies that can yield higher quality candidates.

Chinese candidates are the most active users of job search sites. The landscape in China is far more competitive and research data indicates that users regularly visit a number of sites. In Mexico, four sites dominate (OCC, Computabajo, Empleo.gob.mx and Zona Jobs).

Although employer-rating websites such as Glassdoor have generated concern among employers, usage by candidates appears to be significantly less than other sites. In the UK, just 3 percent of the candidates surveyed had used the site and in the US, only 11 percent. In contrast, 27 percent of US candidates had used LinkedIn during the same time period.

Use of Social Media Networks as a Resource Varies by Region

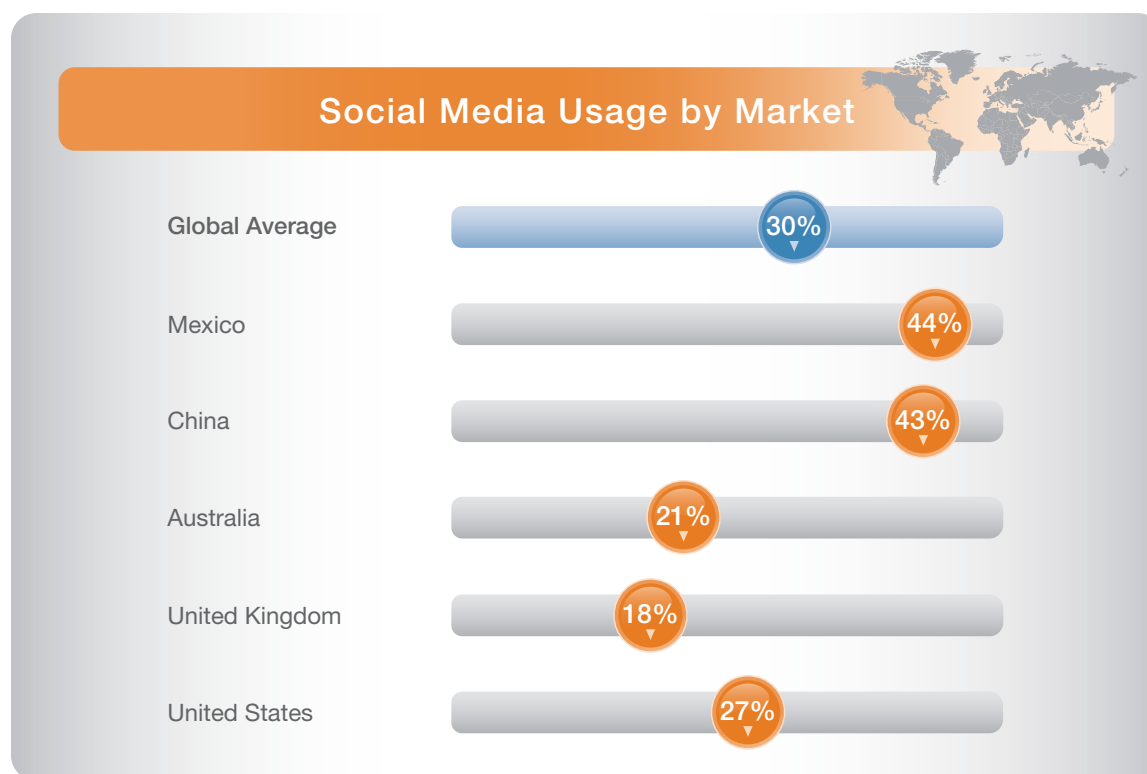
Candidates use a variety of sources to access company information. Not surprisingly, company websites and search engine results prove to be the most widely used. Nearly one in three candidates globally (30 percent) use social media networks to obtain information about companies. Social media sites ranked third behind company websites (53 percent) and search engine results (52 percent).



However, use of social media networks by candidates from China and Mexico is significantly higher than the global average: 43 percent versus 30 percent in China where it ranks #2 as a source of information and 44 percent versus 30 percent in Mexico.

Although the reason for this phenomenon is unknown, it may be due to a lack of information provided by Mexican and Chinese companies and their websites. Nine out of ten candidates in China and Mexico use WeChat and Facebook, respectively, for this purpose. In the US, UK and Australia, that number is significantly lower with only 7 out of 10 candidates using Facebook in this way.

Employers should recognize the power of social media among today's global candidates, specifically markets such as China and Mexico where social media sites are almost equally as influential as company websites.



The Type of Information Available to Candidates Varies Widely on a Regional Basis

Although the information contained in job descriptions does not appear to differ significantly between markets, information about other aspects of the jobs varies widely by country.

In Mexico and China, the survey revealed candidates acquired less information after the application than candidates in the US, UK and Australia. In the US, UK and Australia, the information gap narrows between application and interview/offer.

In China, nearly twice as many people have compensation information early in the application process as the global average: 66 percent versus 36 percent pre-application. This is in keeping with compensation being Chinese candidates' number one motivation factor. The story is quite different in the UK and Australia, however, where less than 20 percent of candidates have compensation information pre-application. Relatively speaking, UK and Australian applicants

also had less information about the benefits offered, which according to the research, is an important component of the package.

With respect to corporate brand information, company mission and CSR information, UK and Australian applicants have less of this information than their global counterparts. This is troubling given the fact that these markets index above average on the importance of such information.

While many companies may still struggle with the disclosure of compensation early in the hiring process, the survey shows employers may be better served to share this information. According to Moncrieffe, it is often easier to engage candidates in the US versus the UK without the full details of compensation — particularly variable compensation. "In European markets," explains Moncrieffe, "people are reluctant to leave their current employers and it is difficult to move forward with recruitment without that information." Earlier and fuller disclosure may also increase the efficiency in hiring as candidates will self-select out of the process when one of their primary motivators for career decisions and job switching is not met.

7 KEYS TO ATTRACTING AND RETAINING TALENT GLOBALLY

ManpowerGroup Solutions' research results point to the importance of several emerging best practices among employers. These practices include a wide range of strategies that all place the candidate at the center of the process — appealing both to the universal and unique motivators rooted in cultural, regional and generational preferences. From bold new strategies that involve collaboration (versus competition) within industries, to old-fashioned boots-on-the ground tactics, employers need to customize their outreach to attract and retain the best talent across the globe.

“*Geographic location is extremely important in the UK. For urbanites the commute across London is a huge issue. Outside of London, in the rural and suburban areas, people don't like to travel far. Reducing the commute may be a strong reason for people to switch jobs. In contrast, in other European job markets geographic location is often less of a factor.*”

VICTORIA BOMBAS,
RPO Director, ManpowerGroup Solutions, Europe



Be Candidate Driven

Effective recruiting in a global environment means tailoring the message by country and customizing the technology to the generation. For example, recruiting and training entry-level workers in China will be vastly different from attracting new mid-level managers in the US. Based on the survey data, Chinese candidates will be largely motivated by compensation and more likely to be comfortable with video interviewing technologies. Mid-level American managers will want information about work/life balance and expect one-on-one interviews with hiring managers.



Improve Onboarding for Gen Y Hires

If companies want to retain the Gen Y hires, employers must improve the onboarding process. Normally reactive managers focused on filling empty positions need to properly get the new hires up to speed, set the expectations and clearly identify the path for advancement. Otherwise, capable new hires may defect to companies promising a shorter, clearer pathway or higher compensation levels. Gen Y is a generation that will not stick around to receive a gold watch at their 20th anniversary.



Good Recruiting Practices Outweigh Self-Reliance

Candidates will respond to recruiters if the opportunities are customized and tailored to their interests. Good recruiting practices include broad data mining to identify candidates with the right skills, yet there is no substitute for doing one's homework. Good recruiters quickly become experts in the specifics and nuances of their industries then leverage personal phone outreach and network through industry bodies.



Do Not Abandon Traditional Outreach Strategies

Although job boards are prevalent and widely used, do not abandon traditional outreach strategies — especially in rural areas or for high-volume roles like call centers and manufacturing. In a recent effort to recruit correctional officers in Australia, employers found that a two-pronged approach yielded the best results. Posting to Seek and social media was effective in urban areas, but newspaper ads, flyers and radio spots were far more effective in rural locations. In high-volume cases like recruiting for distribution centers in the US, calling churches, hanging flyers in supermarkets, conducting in-person information sessions and other “boots on the ground” efforts proved successful in reaching people with limited access to technology or time spent online.



Build a Talent Pipeline

While a talent pool can be stagnant, a talent pipeline is fluid and active. A pipeline is a conduit to an ever-changing mix of qualified potential hires. Employers need talent pipelines that engage with tens of thousands of candidates on a continuous basis. Some companies are creating them on their own. Others are combining forces with industry competitors. Still others are using talent hubs like Australia’s LiveHire. LiveHire created a real-time marketplace directly linked to Google with millions of digitized CVs optimized for effective search and match with open positions. Employers need to consider which of these options will work best for their organization.



Be Transparent About Compensation

Few companies use compensation as a means of differentiating them from their competition for talent. Employers can level the playing field by increasing transparency about compensation and highlighting other important motivators like type of work, opportunity for advancement, schedule flexibility, geographic location and brand reputation to differentiate one company’s employer value proposition from the next.



Be Cognizant of New Technology

Many articles have been written about the use of video technologies or smartphone apps to make the recruitment process more efficient. ManpowerGroup Solutions research shows candidate usage and preferences for these technologies lags behind the industry buzz — largely because of generational comfort levels and the perception that they benefit the employers more than the prospective employees. Even today, many company websites are not yet mobile friendly. But the usage of apps for application submittal is bound to evolve as Gen Yers become more dominant in the workforce. Consider this: the Australian Armed Forces has recently used technology to improve the quality of their recruitment efforts for women. When the organization found that many women applicants could not meet the minimum fitness requirements, it cultivated a talent pipeline and offered a personal training bracelet and app with motivating prompts for daily exercise.

“ Acceptable recruiting practices vary significantly by market. In China, it is a cultural faux pas to work with more than one recruiter. Here in the US a candidate can work with several and no one gives it a second thought. Understanding that cultural/regional dynamic is essential for employers who are keen to hire the best and the brightest. ”

YVETTE MONCRIEFFE,
Director, Client Delivery ManpowerGroup Solutions/North America

[Conclusion]

For global corporations and other employers with overseas hiring needs, the lesson is clear: global candidate motivators and preferences may be similar but it is the differences that really matter. Human Resource professionals who dig below the surface and resist the impulse to take a homogenized approach to talent recruitment and retention will have the competitive advantage in today's global marketplace.

MORE ABOUT THE RESPONDENTS

Overall, the job seekers surveyed were 18-65 years old and currently in the workforce (not retired or homemakers). In total there were 4,479 respondents from the UK (18.6%), US (28.8%), China (17.7%), Australia (17.6%) and Mexico (17.4%). They represented a cross-section of age, income, employment status (i.e. full-time, part-time, contract), career level and industry. With respect to career level, experienced non-managers accounted for the largest group at 33 percent followed by managers (26 percent), entry-level employees (9 percent), students (8 percent), executives (5 percent) and senior-level executives (4 percent).

About ManpowerGroup Solutions

ManpowerGroup Solutions is a global leader in outsourcing services for large-scale recruiting and workforce-intensive initiatives. Our offerings include Recruitment Process Outsourcing, TAPFIN-Managed Service Provider, and Talent Based Outsourcing. Facing increasingly complex challenges, our clients rely upon our innovative workforce models and outsourcing solutions to deliver measurable results and business success.

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