

RELEASE: NOVEMBER 2011
SURVEY POPULATION: 97,000
LOCATION: 30 COUNTRIES

Kelly Global Workforce Index™

Effective Employers

THE EVOLVING WORKFORCE



KELLY®

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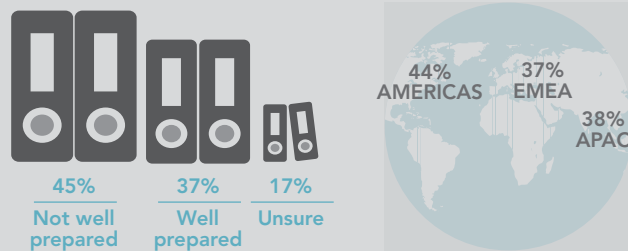


EFFECTIVE EMPLOYERS

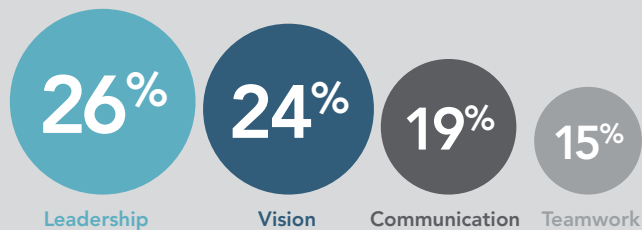
When asked to rate their bosses, employees have delivered a modest passing grade for the performance of their leaders, with a score of 6.4 out of 10.

PREPARATION FOR FUTURE SUCCESS

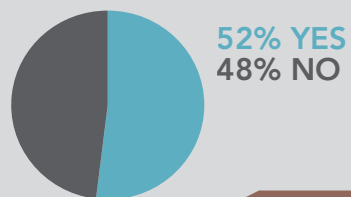
Worldwide, only 37% say their bosses have done a good job in preparing them for the future. However, 44 percent in the Americas believe their bosses have done a good job preparing them for success.



MOST IMPORTANT QUALITY OF A GOOD BOSS



WILL EMPLOYEES RECOMMEND EMPLOYERS?



RECOGNITION AND REWARDS AT WORK

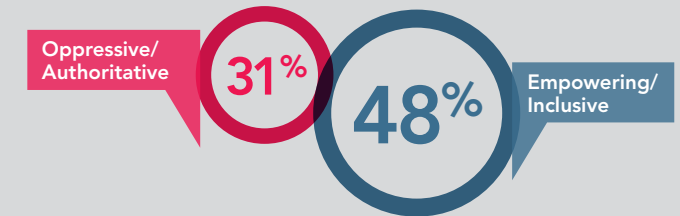


Less than half (44%) of respondents say their efforts at work are recognized and rewarded. Of those recognized, they say it takes the form of:



LEADERSHIP CULTURE

While nearly one-third of all respondents describe their organization's leadership culture as oppressive or authoritative, it is the younger workers who are more likely to view their employers in a positive light.



THE LEADING GENERATION

Members of **GEN X** are considered to be the best leaders by both Gen Y and Gen X, while **BABY BOOMERS** strongly believe that they make superior business leaders.



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 **Effective Employers/Employer of Choice**. The questions focused on:

- The key factors that make a good employer
- The particular generational age group that makes the best leaders
- The prevailing leadership culture from an employee perspective
- The incidence and nature of employee rewards and recognition
- Employee willingness to recommend their employer



KEY FACTORS IN A GOOD EMPLOYER

WHAT FACTOR DO YOU CONSIDER THE MOST IMPORTANT IN A GOOD BOSS?

(BY GENERATION AND REGION)

According to the Kelly Global Workforce Index, the most important quality in a good boss is leadership style, nominated by 26 percent, slightly ahead of vision/clear direction (24 percent), communication style (19 percent), and teamwork (15 percent). Other qualities such as personality (10 percent) and experience (4 percent) rate relatively low.

Gen Y tends to rate leadership style more important than older workers, who place at least as much weight on vision and clear direction.

Leadership style and vision are considerably more of a focus in APAC than they are elsewhere. Communication style in bosses is a significantly more important factor for employees in the Americas.

01

LEADERSHIP STYLE



VISION/CLEAR DIRECTION



COMMUNICATION STYLE



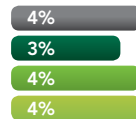
TEAMWORK



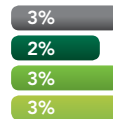
PERSONALITY



EXPERIENCE



OTHER



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

KEY FACTORS IN A GOOD EMPLOYER

WHAT FACTOR DO YOU CONSIDER THE MOST IMPORTANT IN A GOOD BOSS?

(BY REGION)

Leadership style and vision are considerably more of a focus in APAC than they are elsewhere. Communication style in bosses is a significantly more important factor for employees in the Americas.

02

LEADERSHIP STYLE



VISION/CLEAR DIRECTION



COMMUNICATION STYLE



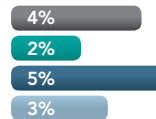
TEAMWORK



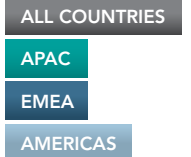
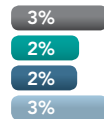
PERSONALITY



EXPERIENCE



OTHER



BOSS RATING

HOW WOULD YOU RATE YOUR BOSS ON A SCALE OF ONE TO TEN? (1 = LOWEST, 10 = HIGHEST) (BY GENERATION AND REGION)

Globally, bosses have been given a modest passing grade for their performance, with an average score of 6.4 out of 10.

The highest score is in the Americas (6.8), followed by APAC (6.5) and EMEA (6.1).

Gen Y is more generous in assessing their bosses, with a mark of 6.6, compared with 6.3 from Gen X and Baby Boomers.

03

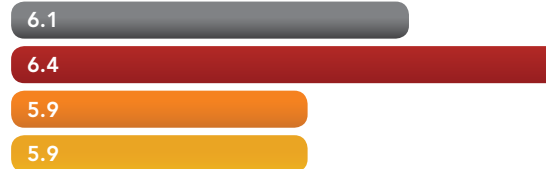
AMERICAS



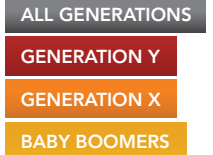
APAC



EMEA



ALL COUNTRIES



**WHICH GENERATION MAKES THE BEST LEADERS?
IN YOUR OPINION, WHICH GENERATION
MAKES THE BEST LEADERS?**

(GLOBAL RESULT BY GENERATION)

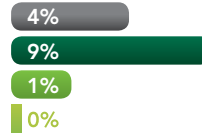
There is broad agreement across the globe that Gen X makes the best leaders, nominated by 44 percent of respondents, compared with 21 percent who prefer Baby Boomers, and 4 percent who opt for Gen Y. One-quarter say it makes no difference.

Both Gen Y and Gen X agree that Gen X makes the best leaders, but Baby Boomers believe that members of their own generation are superior business leaders.

Across the globe, there are significant differences as to which generation makes the best leaders. APAC has the strongest attachment to Gen X leaders, with more than three times as many people opting for Gen X than Baby Boomers. In EMEA, Gen X is also overwhelmingly favored, but in the Americas, support for Gen X and Baby Boomer bosses is almost evenly divided.

04

GEN Y (AGE 18–29)



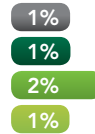
GEN X (AGE 30–47)



BABY BOOMERS (AGE 48–65)



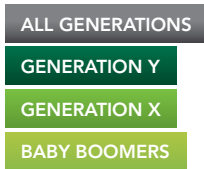
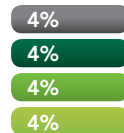
SILENT GENERATION (AGE 65+)



MAKES NO DIFFERENCE



DON'T KNOW



LEADERSHIP CULTURE

HOW WOULD YOU DESCRIBE YOUR ORGANIZATION'S LEADERSHIP CULTURE?

(BY GENERATION)

Almost one-half of respondents (48 percent) describe their organization's leadership culture as either empowering or inclusive.

A total of 31 percent describe it as authoritative or oppressive. Some 15 percent are undecided.

Younger workers are more likely than older workers to view their organization's leadership culture as either empowering or inclusive.

05

EMPOWERING



INCLUSIVE



AUTHORITATIVE



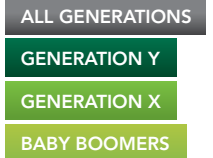
DON'T KNOW



OPPRESSIVE



OTHER



LEADERSHIP CULTURE

HOW WOULD YOU DESCRIBE YOUR ORGANIZATION'S LEADERSHIP CULTURE?

(BY REGION)

The most collaborative leadership culture is in EMEA with 52 percent describing the prevailing culture as empowering/inclusive, compared with 47 percent in APAC and 43 percent in the Americas.

06

EMPOWERING



INCLUSIVE



AUTHORITATIVE



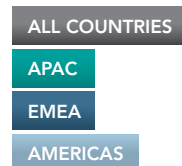
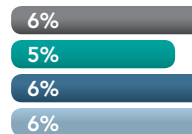
DON'T KNOW



OPPRESSIVE



OTHER



EMPLOYEE REWARDS AND RECOGNITION

DO YOU FEEL THAT YOUR EFFORTS AT WORK ARE RECOGNIZED AND REWARDED?

(BY GENERATION AND REGION)

Globally, only 44 percent of respondents say that their efforts at work are recognized and rewarded.

Approximately one-half of those in the Americas and APAC indicate that they are being given due recognition and reward, compared with only 38 percent in EMEA.

07

AMERICAS



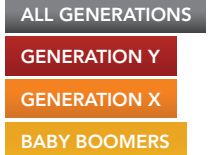
APAC



EMEA



ALL COUNTRIES



FORM OF REWARD AND RECOGNITION IF YOU ARE BEING REWARDED AND RECOGNIZED, HOW?

(BY REGION)

When asked how they are being rewarded and recognized, more than two-thirds (67 percent) say, simply, that their skills are noticed by management.

A further 17 percent say that they receive bonuses or incentives, and 12 percent are formally acknowledged through employee recognition programs.

The findings are broadly consistent across generations and regions.

08

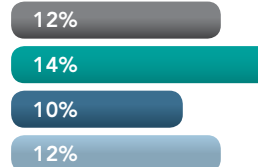
SKILLS NOTICED BY MANAGEMENT



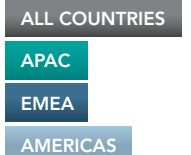
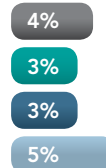
BONUS/INCENTIVES



EMPLOYEE RECOGNITION PROGRAM



OTHER



PREPARATION FOR FUTURE SUCCESS
DO YOU BELIEVE YOUR BOSS HAS
DONE A GOOD JOB PREPARING YOU
FOR FUTURE SUCCESS?
(BY GENERATION AND REGION)

Globally, only 37 percent of respondents say that their bosses have done a good job in preparing them for future success.

Forty-one percent of Gen Y believes their bosses have prepared them for the future, which is slightly higher than Gen X (36 percent) and Baby Boomers (35 percent).

Forty-four percent of respondents in the Americas believe their bosses have prepared them for future success, higher than in APAC (38 percent) and EMEA (33 percent).

09

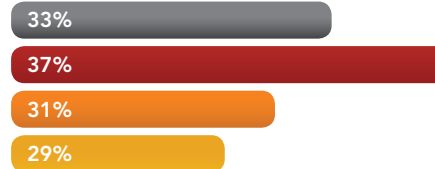
AMERICAS



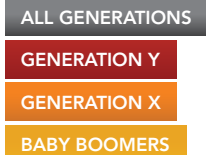
APAC



EMEA



ALL COUNTRIES



**WILLINGNESS TO RECOMMEND
CURRENT EMPLOYER**

**HOW LIKELY WOULD YOU BE TO
RECOMMEND YOUR CURRENT EMPLOYER
TO FRIENDS AND ACQUAINTANCES?**

(BY GENERATION AND REGION)

Slightly more than one-half of all respondents (52 percent) would be prepared to recommend their current employer to friends or acquaintances.

Those in the Americas (55 percent) and APAC (54 percent) are somewhat more likely to recommend their employer than those in EMEA (49 percent).

Gen Y is more likely to make a positive recommendation than either Gen X or Baby Boomers.

10

AMERICAS



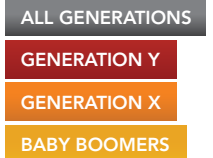
APAC



EMEA



ALL COUNTRIES



REASONS FOR A POSITIVE RECOMMENDATION
WHY WOULD YOU BE *HIGHLY LIKELY* TO RECOMMEND YOUR CURRENT EMPLOYER?
 (BY GENERATION)

The top three reasons for making a positive employer recommendation are the work environment (36 percent), the nature of the work/challenging work (19 percent), and leadership/management (14 percent).

For all generations, the work environment and the nature of the work are the top reasons why they would positively recommend their employer to others.

11

WORK ENVIRONMENT



NATURE OF THE WORK/CHALLENGING WORK



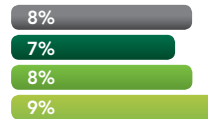
LEADERSHIP/MANAGEMENT



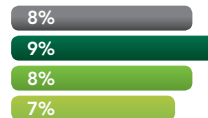
UPWARD MOBILITY/CAREER DEVELOPMENT



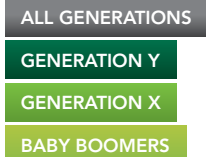
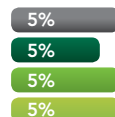
SAME VALUES



TRAINING OPPORTUNITIES



COMPENSATION



REASONS FOR A NEGATIVE RECOMMENDATION
WHY WOULD YOU BE *HIGHLY UNLIKELY* TO RECOMMEND YOUR CURRENT EMPLOYER?
 (BY GENERATION)

The main reason for making a negative employer recommendation is the issue of leadership/management, cited by 28 percent, followed by lack of upward career mobility or career development (23 percent), and a poor work environment (18 percent).

The issue of leadership becomes increasingly important as employees mature, while lack of upward mobility is felt most acutely by younger workers.

12

LEADERSHIP/MANAGEMENT



LACK OF UPWARD MOBILITY/CAREER DEVELOPMENT



POOR WORK ENVIRONMENT



COMPENSATION



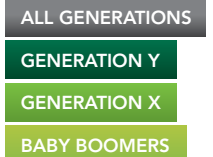
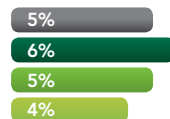
NATURE OF WORK/LACK OF CHALLENGING WORK



DIFFERENCE IN VALUES



LACK OF TRAINING OPPORTUNITIES



CONCLUSION GENERATION Y

Younger workers are bringing a fresh and untarnished perspective to the question of corporate leadership. They are free of many of the burdens of their older, more senior colleagues, and are in a position to assess their managers on the basis of observation and performance. They are marginally more generous than Gen X and Baby Boomers in evaluating their bosses. They also place a greater weight on leadership style as a determinant of an effective leader.

One-half of the Gen Y respondents would prefer a Gen X boss. Only a small percentage wants either a Gen Y or a Baby Boomer boss, but 25 percent say it makes no difference.

Also, slightly more than one-half of the Gen Y respondents are positive about the prevailing leadership culture in their organizations, describing it as either empowering or inclusive. However 18 percent describe their leadership culture as authoritative, and 10 percent say it's oppressive.

When it comes to being appropriately rewarded and recognized at work, Gen Y is no different than their older counterparts. Less than one-half say that they receive the rewards and recognition they deserve. Those in EMEA are more dissatisfied than those in the Americas and APAC.

Among those who do receive the appropriate rewards and recognition, the most common form in which this occurs is having their skills noticed by management, while a smaller group receives bonuses or incentives.

For Gen Y, the future is critical, but only 41 percent say that their boss has done a good job in preparing them for future success. Yet this is better than the results recorded for Gen X and Baby Boomers.

Slightly more than one-half (55 percent) say they would be prepared to recommend their current employer to friends or acquaintances. When they make a positive recommendation, more than two-thirds base their views on three factors—the work environment, the nature of the work, and the quality of the leadership. When they make a negative recommendation, the most important factor is the lack of upward mobility and career development.



CONCLUSION

GENERATION X

For Gen X, the single most important factor in a good boss is vision and clear direction, followed closely by leadership style. They give their bosses a modest pass mark—6.3 out of 10. They believe that their own generation makes the best bosses. They are more tolerant of Baby Boomer bosses than Gen Y, but overwhelming resistant to the idea of a Gen Y boss.

Almost one-half of the Gen X respondents describe their organizational culture as empowering or inclusive, and a further 20 percent say it's authoritative.

Only 43 percent say that their efforts at work are recognized and rewarded, slightly lower than for Gen Y and Baby Boomers.

Just 36 percent say that their bosses have prepared them well for future success, ranging from 44 percent in the Americas to 31 percent in EMEA.

Exactly one-half would be prepared to recommend their current employer as a place to work. The positive factor for Gen X is the work environment, and the negative is leadership.



CONCLUSION

BABY BOOMERS

For Baby Boomers, leadership style and vision are the most important qualities of strong leaders. They think like Gen X when it comes to rating their bosses.

But they stand in sharp contrast to younger generations, believing that Baby Boomers themselves make the best bosses. Only a small percentage thinks that Gen X makes the best bosses, and scarcely any think Gen Y is cut out for management roles.

When asked about the leadership culture of their own organizations, the majority are evenly split between describing it as empowering, inclusive, or authoritative.

Less than one-half of the Baby Boomers surveyed say that their efforts at work are being rewarded and recognized, and only about one-third say that their bosses have done a good job in preparing them for future success. One-half would be prepared to provide a positive recommendation about their current employer to friends or acquaintances.



CONCLUSION

EFFECTIVE EMPLOYERS WRAP UP

The latest Kelly Global Workforce Index results paint a picture of a workforce that has an ambivalent, and sometimes conflicting, view about the role of managers and executives in modern business.

There is a very clear view about the elements that constitute good management—leadership, vision, and communication all stand out. Other traits such as experience, personality, and even a propensity to encourage teamwork, all rate relatively low.

When employees are asked to give their bosses a simple score out of 10, the results are satisfactory at best. There are very few distinctions, and the message seems to be that employees expect better.

The question of which generation makes the best leaders is particularly polarizing across the age spectrum. Both Gen Y and Gen X say it's Gen X, while Baby Boomers say it's their own generation. And the idea of a Gen Y boss is a curse to both Gen X and Baby Boomers. The stark numbers underscore the real tension that this can cause in the workplace.

Another source of anxiety relates to the way that employees are rewarded and recognized. Across the board, the majority of employees are unhappy. Their responses suggest that it's not necessarily more money that they are seeking, but simple efforts to acknowledge where exemplary work is performed.

When workers are asked how well their employers have prepared them for future success, the results are sobering. On average, only slightly more than one-third say they have been well prepared, with quite divergent outcomes across the globe.

There will inevitably be a question as to how much responsibility falls to employers and how much rests with employees for issues affecting career development and future success. In reality, shorter career spans and higher job turnover probably mean that more of the burden rests with individual employees.

Yet there is no less pressure on organizations, their managers, and executives to create the conditions that will draw talent, ignite a spark, and encourage excellence in a difficult economic climate.

The message from the workplace seems clear; employees recognize real leadership, they know it's pivotal for their own success, and they want their bosses to provide it.



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

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