

Understanding Candidate Demand for Flexibility



Insights from ManpowerGroup Solutions' Global Candidate Preferences Survey

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Introduction

GLOBAL CANDIDATE PREFERENCES SURVEY

We asked
14,000
currently in
the workforce

ages **18-65**

in **19** influential
employment countries across the globe

*Candidates shared what matters most
to them in the job search process*



Workplace flexibility as a talent management policy is no longer an option; it is an essential practice that enables organizations to attract and develop skilled talent. The practice is rapidly becoming a win-win: reflective of employee and employer needs. According to the Alfred P. Sloan Center on Aging and Work at Boston College, “As companies become multinational in their scope of services, suppliers and products, the ability to interact with customers and clients all around the world requires a workforce that can operate flexibly in terms of hours and locations.”¹

Candidates today report a dramatic increase in the importance of schedule flexibility in their career decisions. In many countries, this factor has risen between 20 and 30 percent in just one year. **In fact, nearly 40 percent of global candidates report that schedule flexibility is now among the top three factors they consider when making career decisions.**

Historically, workplace culture has valued presenteeism over results and output. But two-thirds (63 percent) of today's candidates do not believe they need to be sitting at their desk to get their work done. Technology has

irreversibly shifted the paradigm in many workplaces. In response, more companies are implementing some type of flexibility policy than ever before. As a result, companies that are proactively creating flexible work arrangements may be at an advantage in recruiting and retaining in-demand talent.

To better understand how employers can leverage global candidate preferences and perceptions, ManpowerGroup Solutions, the world's largest Recruitment Process Outsourcing (RPO) provider, went directly to the source — candidates. In the Global Candidate Preferences Survey, nearly 14,000 individuals in the workforce between the ages of 18 and 65 shared what matters to them in the job search process. The study was fielded in 19 influential countries across the globe.

Flexible work arrangements are no longer just a concern of working mothers. **People of all ages are interested in the blend of work and home that technology affords and society demands.** This report provides new insights into schedule flexibility preferences across the globe.

¹ “Why Society Needs Workplace Flexibility,” *The Sloan Center on Aging & Work at Boston College.*”

Time to be Flexible

When candidates refer to flexibility, what do they really mean?

- Definitions
- A Call for Flexibility
- Flexibility Preferences Vary

Defining Flexibility

Workplace flexibility includes a broad spectrum of work arrangements. They range from employees having control over when they take breaks to full work-from-home programs or caregiving leave. We defined eight types of flexible work arrangements:

- 1 Flexible arrival and departure times
- 2 Full-time work from home/ location independence
- 3 Choice and control in work shifts
- 4 Part-time work from home
- 5 Compressed shifts/work week
- 6 Opportunity for sabbaticals or career breaks (e.g., extended time off)
- 7 Unlimited paid time off
- 8 Caregiving leave

While not all workplaces are able to accommodate all of these options, they provide a range of practices to appeal to candidates at various stages of their lives.



Defining Work Model

A variety of new work models have been added to the traditional 40-hour, 50-week standard. In the Global Candidate Preferences Survey, respondents could choose from six scenarios to identify their current or preferred work models:

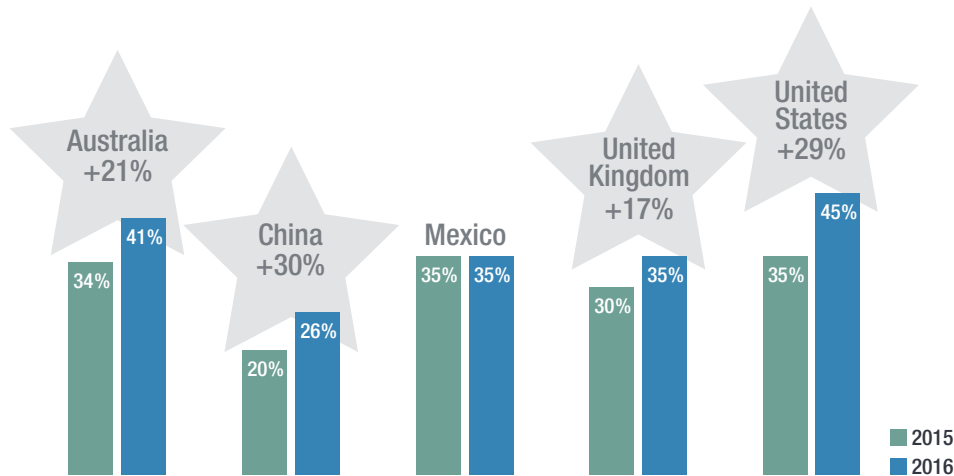
- 1 Full-time work
- 2 Part-time work
- 3 Contract work (a designated contract period)
- 4 Project work (freelance work based on a predetermined scope)
- 5 Temporary work (short-term, non-contracted)
- 6 Seasonal work (an established period of time associated with a business cycle)

A Call for Flexibility



In four of the five talent markets tracked over the past two years, (China, United States, Australia, and United Kingdom) there is an increase in the number of candidates reporting that schedule flexibility is a top-three motivator when making career decisions. **In a single year, the number of candidates who cited the importance of flexible work options rose 30 percent in China, 29 percent in the United States and 21 percent in Australia.**

Schedule Flexibility Increasing as a Top-Three Motivator for Career Decisions

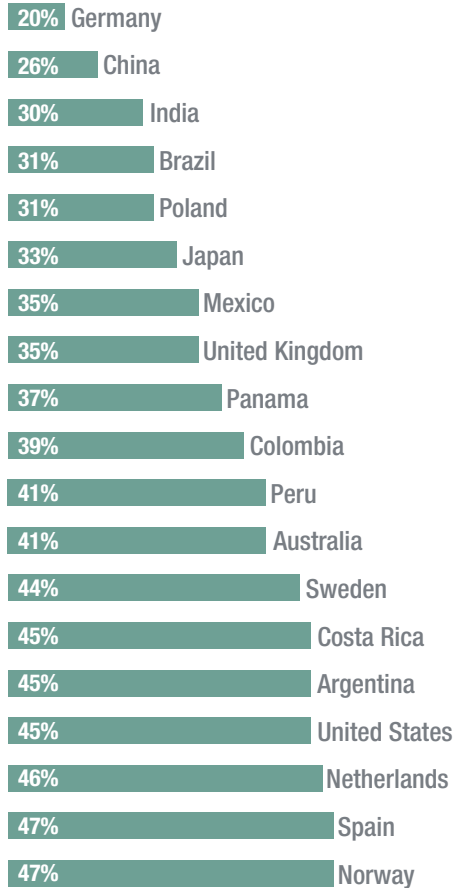


The rise in importance of schedule flexibility is driven by a wide range of local factors including the presence of multinational companies, workforce composition (such as a large number of Millennials), the presence of unions, the influence of technology firms in the marketplace, economics and employment levels, and lengthy commuting times due to congestion, poor infrastructure or lack of public transportation.

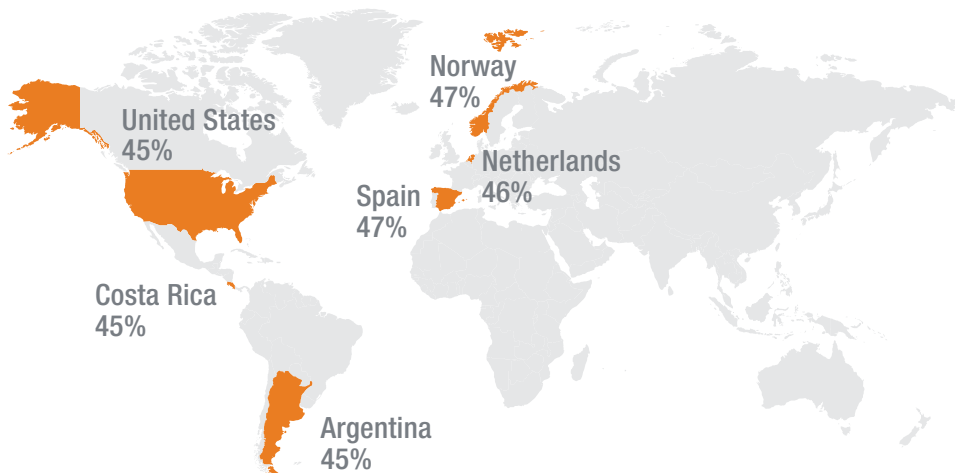
Global Comparison: Schedule Flexibility is a Top-Three Motivator in Making Career Decisions

Global Average

38%



Countries above the Global Average in terms of Wanting Schedule Flexibility



In Poland, we see a significant difference between the local companies and new western employers coming into the market. New companies offer more flexible work arrangements as an incentive to recruit and retain top talent. Many established local companies are lagging behind in this important area.

Alex Bojarski, RPO Leader
ManpowerGroup Solutions, Poland

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In Argentina, the public transportation system causes commuting headaches. The reliability of the trains is unpredictable. Being able to work from home is like heaven.

Marcela Romero, Manager, Permanent Recruitment ManpowerGroup Solutions, Argentina

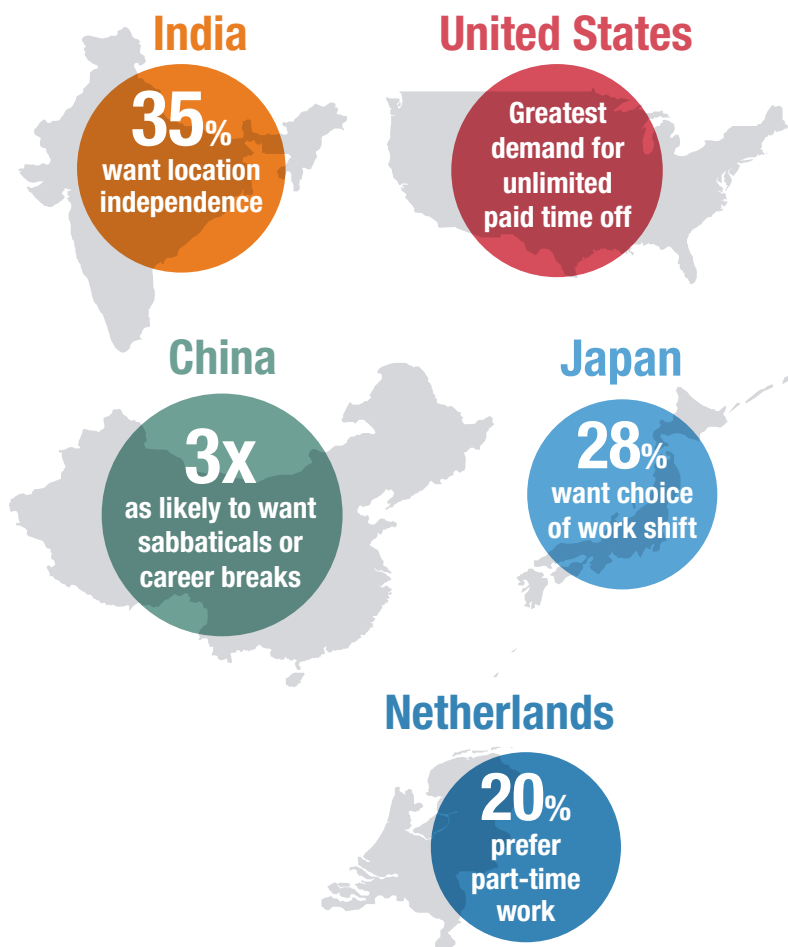
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Flexibility Preferences Vary

Generally, flexible arrival and departure times and full-time work from home/location independence are the most desired types of flexible workplace policies. Twenty-six percent of global candidates say flexible arrival and departure times are most important, followed closely by the ability to work from home or any other place they choose at 22 percent. Choice in the timing of work shifts is considered third most desirable (15 percent). Caregiving leave sabbaticals and unlimited paid time off are popular with approximately five percent of global candidates.

Candidates' Flexibility Preferences Vary by Country



In each country, a complex dynamic between logistical, economic, cultural and idealistic factors drive candidate preferences for flexible work arrangements.



Many large companies have moved away from the city into the suburbs resulting in longer commute times and in some areas the public transportation system can be unreliable. As a result, flexibility in arrival and departure times and the ability to work from home is highly prized.



Local economic factors are at play in China, for example, where companies are growing very fast and success requires dedication, long hours and hard work. The stress leads many employees to desire the opportunity for sustained break periods from employment to rest, recharge and skill up — confident that a thriving economy will make finding a new job easy.



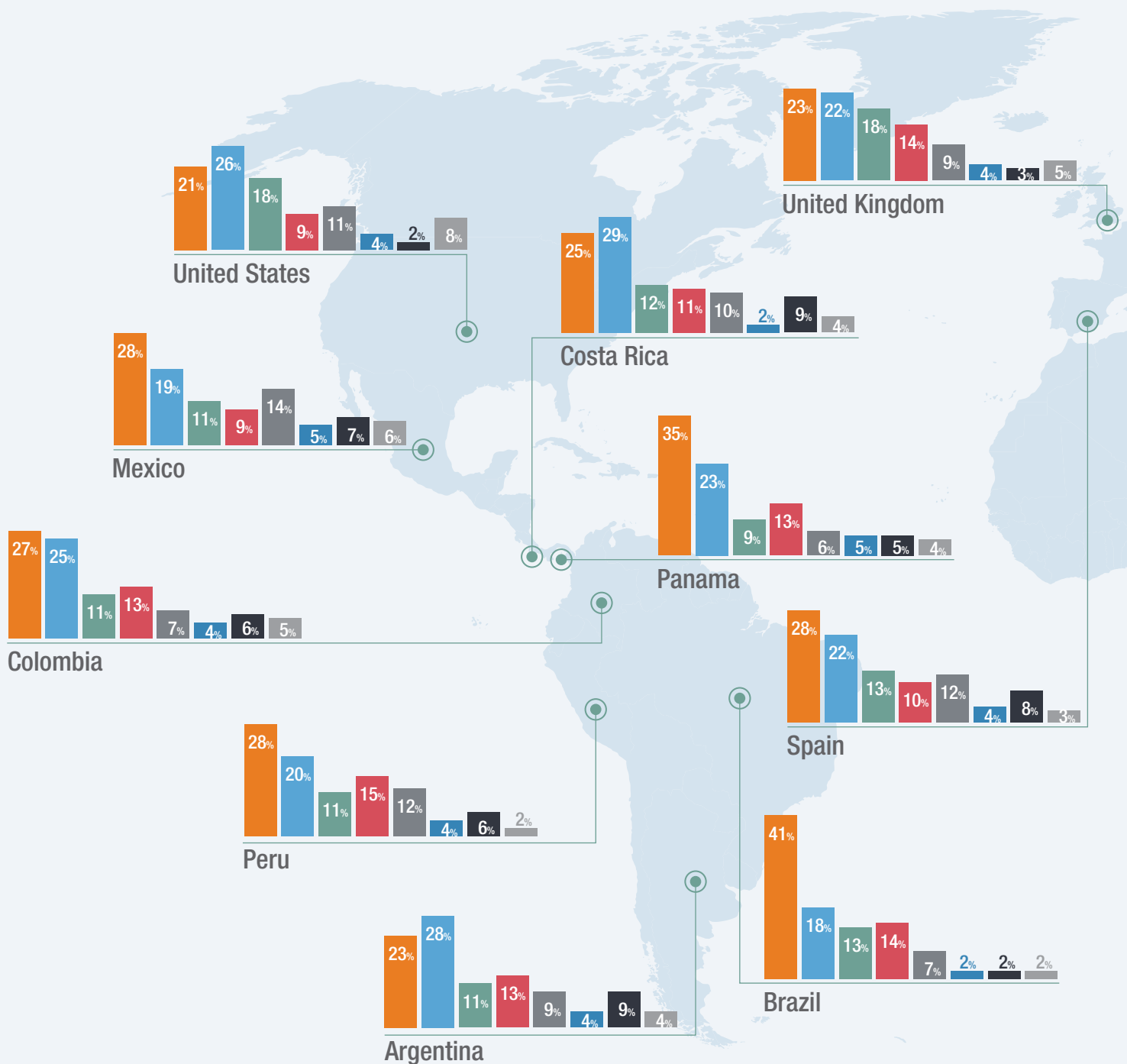
Another driving force across markets is the presence of multinational corporations. Large companies — specifically tech firms — are bringing flexible work arrangements to the marketplace. Their leadership creates new expectations of flexibility among candidates and often makes local and/or more traditional companies less competitive for talent.



In the United States where workers regularly forego paid vacation time, the allure of unlimited paid time off (PTO) remains. Some companies offer not only unlimited vacation days but also pay for employees to volunteer at nonprofits or give back to their communities.

Schedule Flexibility Preferences

Regardless of the type of schedule flexibility desired in their countries, candidates are seeking a wider variety of flexible workplace options to help them find a better work-life balance. It is important for employers to be aware of local candidate preferences and leverage these insights for recruiting and retaining top talent.

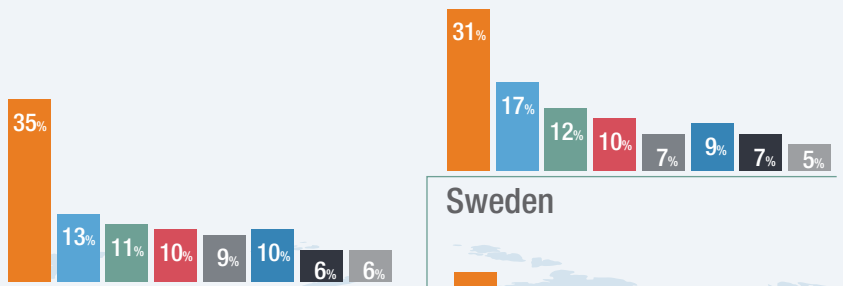
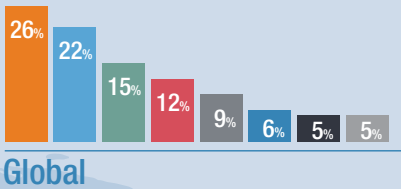


“Schedule flexibility is important for candidates’ career development. Candidates are looking for a career for life, not a just a job. Increasingly, HR professionals understand they need to engage people with flexible work arrangements. Equipping business managers to support such practices is slower in coming.”

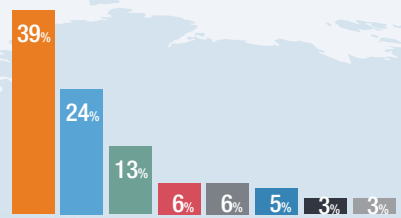
Jacky Qian, Vice President, ManpowerGroup Solutions, China

Most Important Factors For Schedule Flexibility

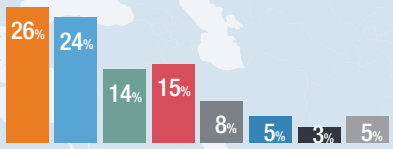
- Flexible arrival and departure times
- Full-time work from home
- Choice in shifts
- Part-time work from home
- Compressed shifts/work week
- Sabbaticals or career breaks
- Caregiving leaves
- Unlimited paid time off



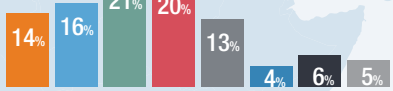
Sweden



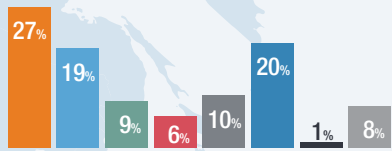
Poland



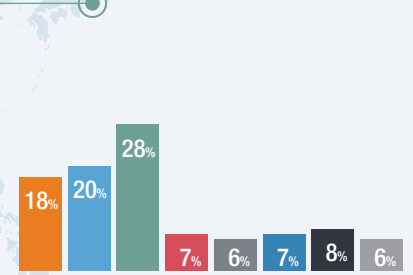
Germany



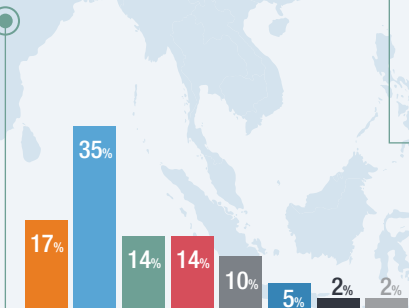
Netherlands



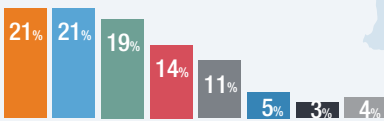
China



Japan



India



Australia

Appealing to the Candidates

Most candidates are interested in some form of workplace flexibility

- Men Want Flexibility Too
- Industry Makes a Difference
- Rejecting Full-Time Job Employment
- Full-Timers Want Flexibility Too

Men Want Flexibility Too



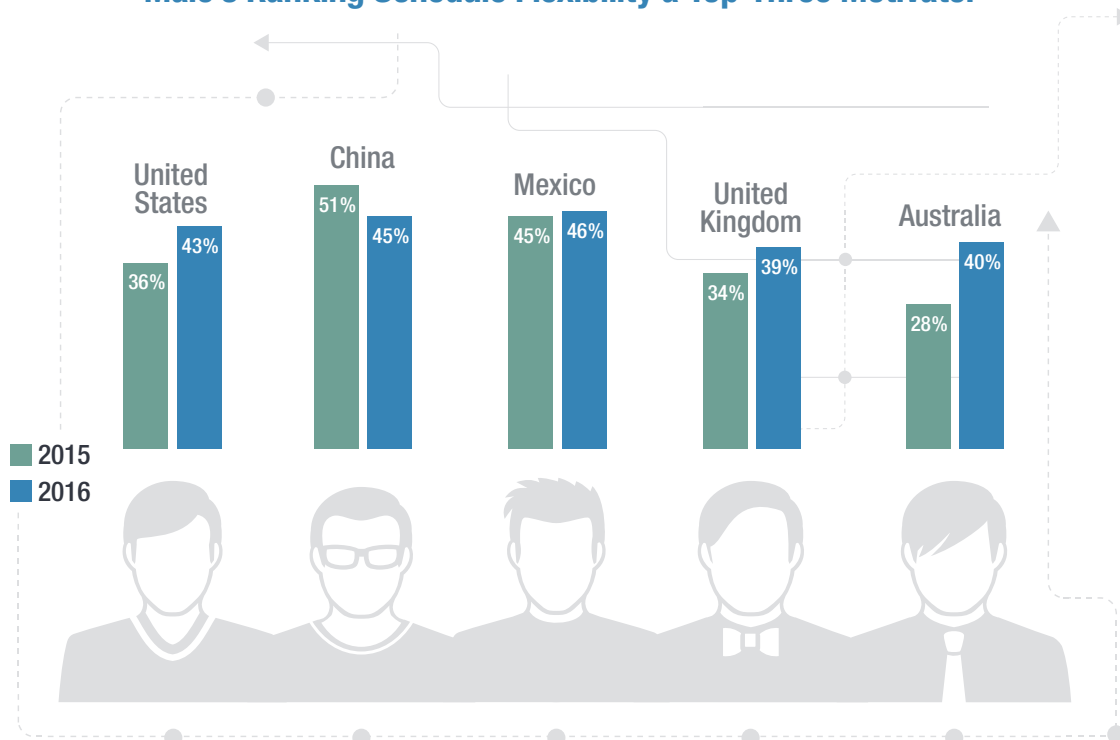
Work-life balance is no longer primarily a women's issue: it is a generational and a societal concern. In *ManpowerGroup's 7 Steps to Conscious Inclusion* report, women believe that to achieve a balance between work and home, flexible location, flexible hours and a focus on performance are essential.² ManpowerGroup's Millennials (candidates aged 18-34) research showed this group views technological advances and the decoupling of work and location as beneficial to both business and family.³

In four of the five markets tracked over the past two years (Australia, Mexico, United Kingdom and United States), the percentage of male candidates indicating schedule flexibility is among their top three considerations when making career decisions has increased significantly. **Flexibility is rapidly becoming a gender-neutral issue.**

For now, however, schedule flexibility remains a slightly higher priority among female candidates. This holds true across all markets except Poland where men desire schedule flexibility at a higher rate than their female counterparts.

“India not only has one of the most generous maternity leave policies in the world, but paternity leave is also standard.”
Sreekanth Ramasubramanian, Head of Recruitment Process Outsourcing, ManpowerGroup Solutions, India

Male's Ranking Schedule Flexibility a Top-Three Motivator



² “07 Steps to Conscious Inclusion: A Practical Guide to Accelerating More Women Into Leadership,” ManpowerGroup, 2015, 6.

³ Ibid

In many countries, Millennials consider schedule flexibility a high priority when making career decisions. This is true in the United States, Panama, China, and Costa Rica. In some other countries, like Brazil, preferences for flexible work arrangements are also a high priority with Baby Boomers (aged 50-65).

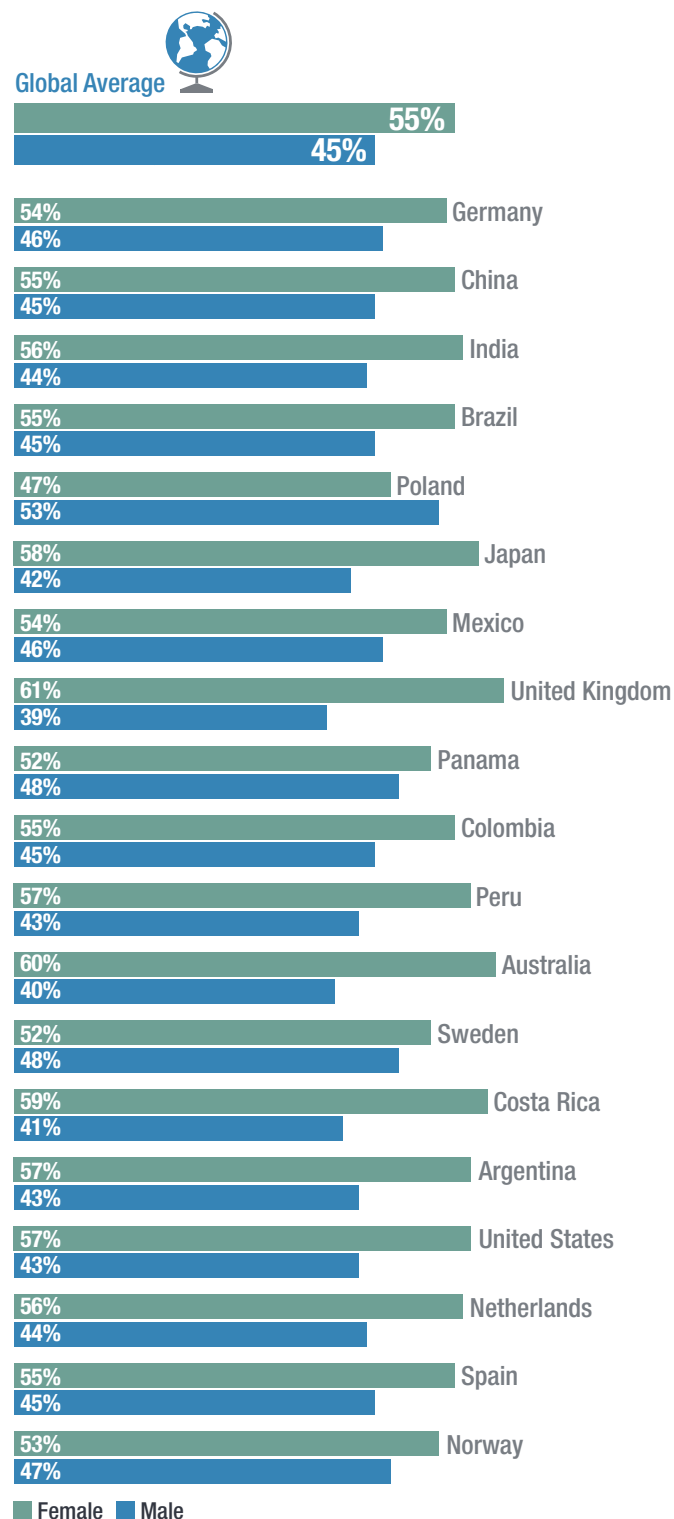
Millennials, only knowing a world in which nearly anything is possible anywhere, feel less tied to a physical workplace. Eighty-four percent of global Millennials foresee significant breaks over the course of their working life — “career waves” are replacing the career ladders of previous generations.⁴

On the other hand, flexibility has enabled a generation of Baby Boomer retirees to maintain ties to the workplace by working seasonally, part-time or on a contract basis — which are often enabled by flexible workplace policies.

“A desire for flexible work arrangements transcends age and gender. Working parents need flexibility to attain work-life balance. Older workers need flexibility to accommodate part-time work interests or desires. And Millennials expect flexibility because they are generationally predisposed to the liberating qualities that technology enables.”

April Savino, Vice President, Client Delivery
ManpowerGroup Solutions, North America

Candidate Preferences for Schedule Flexibility by Gender



⁴ “Millennial Careers: 2020 Vision,” ManpowerGroup, 2016, 6.



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Working from home is an option demanded in many new technology job or management position and a growing trend among non-technology companies. It is a new type of benefit.

Alex Bojarski, RPO Leader ManpowerGroup Solutions, Poland

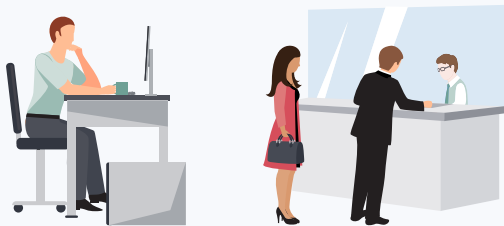
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Industry Makes a Difference

It has long been argued that some industries better lend themselves to flexible work arrangements than others. While it may be possible to work remotely as a programmer, a doctor or nurse may not have this option — although the rise of telemedicine technology may position traditional healthcare for disruption. Still, when it comes to candidate preferences, the types of flexible work arrangements they desire varies by industry.

The pressures driving the need for schedule flexibility are universal; type of work, outputs and performance measurement are key to how flexible work arrangements can be aligned with the needs of both employers and candidates.

Individuals with desk jobs, such as those in IT or financial services



32% *prefer full-time work from home*

27% *prefer location independence*

People working in healthcare or retail



12% *prefer compressed shifts or work-weeks*

23% *prefer choice and control in work shifts*

“

Brazil has more unionized employees than many other countries in Latin America. Jobs where people have to clock in and out on a specific daily schedule make it more difficult to implement flexible work options. As a result, few employees, other than those in managerial positions, have yet to experience the benefits of schedule flexibility.

Flor Alvarez, RPO Regional Sales Manager, ManpowerGroup Solutions, Latin America

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Rejecting Full-Time Job Employment

The rise of the gig economy has been a topic of much interest in the media. Thirty-six percent of respondents prefer a work model other than full-time permanent employment. For employers, hiring for project or contract workers can make organizations more agile and responsive to the market. Hiring in this way is often faster, requires fewer approvals from managers and human resources executives and leap-frogs traditional job postings.

There is a growing interest in non-full time work universally, especially in Latin American countries. Poland, India and China have the largest percentages of candidates who prefer traditional, full-time work models. This may be due to less robust economic opportunity and mobility for workers in these countries historically, which reinforces the perceived need for stability and continuity of employment, or as a recent report by McKinsey & Company suggests, working part-time by choice versus necessity can affect preferences.⁵

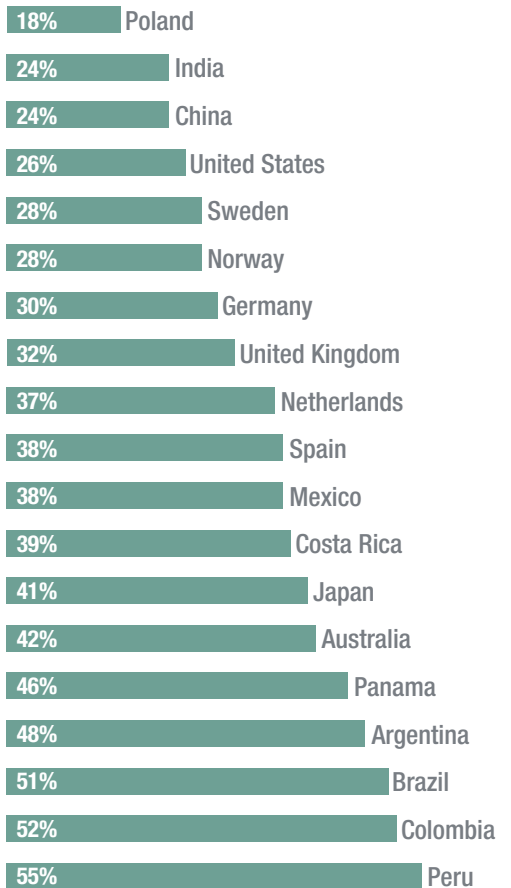
“Virtual call centers where people work from home have been enabled by both telephony technology and by tracking systems that monitor key strokes and the number of calls coming in or out. But flexible work arrangements mean that employers can tap into profile pools of qualified workers that they have never been able to access before.”

April Savino, Vice President, Client Delivery ManpowerGroup Solutions, North America

Global Comparison: Candidates Preferring Part-Time Work

Global Average

36%



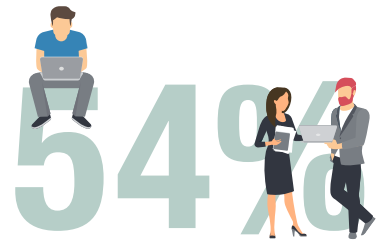
⁵ McKinsey Global Institute, “Independent Work: Choice, Necessity and the Gig Economy,” 11.



Full-Timers Want Flexibility Too

Because schedule flexibility is often correlated with part-time work and the gig-economy has enabled new work models other than full-time permanent employment, it would be easy to assume that flexible work arrangements are not important to individuals with full-time employment. This is not the case. **Among those who prioritize flexibility as a top-three motivator, the majority (54 percent) currently prefer full-time work arrangements to meet their needs.** Employers who rely on full-time employees should recognize that flexible work arrangements are important to them: they want to work full time — but they need flexibility that can accommodate their work-life balance.

There also appears to be a strong correlation between schedule flexibility and project work. Those who prefer project work index higher when it comes to wanting to work from home some or all of the time. Those who prefer contract work often get to benefit from time and location independence to manage their workloads, allowing them to integrate their professional and personal priorities.



of those who prioritize flexibility, prefer full-time work arrangements

Flexibility Stigma



Many companies struggle with entrenched company cultures that emphasize presenteeism and unknowingly cultivate flexibility stigma, a workplace phenomenon that measures success based on attendance rather than performance and quality of outcomes.

Yet, employers have a right to be concerned about the productivity of their employees. Business publications and newspapers are littered with the stories of companies that adopted flexible workplace policies only to revoke them at a later date. How can companies straddle the best of both worlds? How can they be responsive to the needs of the most talented candidates and maximize productivity?

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In Brazil, it is commonplace for people to think that people who work from home are ‘on vacation’ all the time. In Sao Paulo specifically, conventional wisdom is the longer hours you work, the harder you work. People often stay later in the evening just to impress.

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Flor Alvarez, RPO Regional Sales Manager, ManpowerGroup Solutions, Latin America

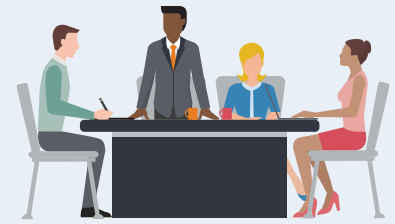
Key Considerations

Key considerations for employers in a world of flexible workplaces

There are several immediate steps and longer-term actions employers, recruiters and hiring managers can take to better meet the demand for flexibility.

ATTRACTING AND RETAINING TOP TALENT:

Six ways employers can tap into candidate preferences



1 Align Incentives With Outcomes

It is basic human nature to reward behaviors to increase the likelihood that they will be repeated. Consider creating a results-oriented work environment where incentives are aligned with outcomes or outputs, not just inputs.

Replacing face-time requirements with logged hours on a VPN (virtual private network) can be perceived by employees as inauthentic. Set goals and deadlines. If employees meet them, managers can worry less about clocking in and out.

2 Normalize Existing Flexibility Policies

Changing company culture to make working outside the office acceptable can neutralize flexibility stigma. Internal educational campaigns can be used to normalize location independence for all employees.

One national accounting firm used posters of satisfied employees spending flextime outside the office (e.g., fishing in Oregon, ballroom dancing) with testimonials linking location independence with productivity and satisfaction. The results demonstrated real perceptual change among employees — over a five-year period, the number of employees who believed working remotely could also lead to promotion increased from 30 to 65 percent.

3 Take Baby Steps

A company does not have to force the transition from traditional to virtual workplace overnight. In markets with long commute times, worsening traffic problems or insufficient transportation infrastructure, companies might consider shifting to a 10 a.m. to 7 p.m. schedule or designated number of flex days when employees can work remotely. Changing old habits and learning new ways to work is hard for employees who have been working one way for decades.

Evolution rather than revolution will also help bridge the gap between traditional styles of management and more autonomous teamwork, as well as any generational gaps that may arise. Understanding the specific factors that drive increasing demands by candidates for schedule flexibility will help management and human resources professionals craft meaningful flexible work arrangements that support the employer brand. Companies should engage their employees in the discussion to ensure flexibility policies actually mesh with employee needs.

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⁶ Amy Doyle, "Collaborating With Competitors: Sharing Talent Pools to Meet Workforce Challenges," ManpowerGroup Solutions, 2015, 7.

Conclusion

Candidate demands for schedule flexibility show little sign of abating. Employees who have experienced the opportunity to work remotely or adjust their arrival and departure times to fit their personal needs rarely want relinquish the privilege. Organizations seeking to recruit and retain the world's top talent must effectively respond to candidate interests. Yet, candidate preferences and an increasingly global economy are symbiotically creating a perfect storm. Pressures for companies to be more multinational in their scope of services and have the ability to interact with clients and suppliers around the globe means that business models, not just candidates, are driving the trend toward schedule flexibility.

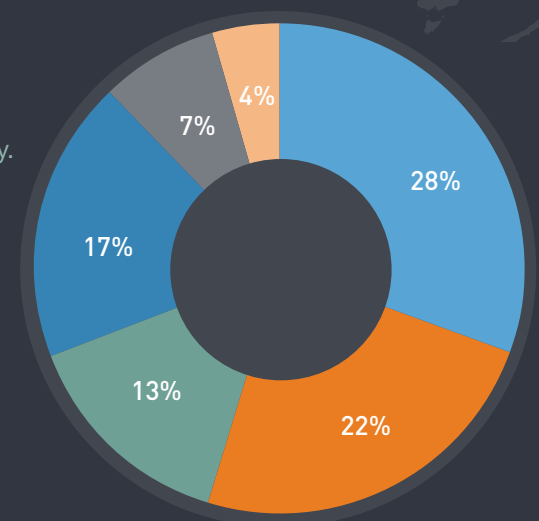
More About the Respondents

Overall, the survey respondents were between **18 and 65 years old** and currently **in the workforce** (not retired or homemakers). In total there were **13,961 global respondents**.

MARKET BREAKDOWNS WERE AS FOLLOWS:

Argentina (n=731), Australia (n=748), Brazil (n=751), China (n=725), Colombia (n=747), Costa Rica (n=248), Germany (n=785), India (n=752), Japan (n=775), Mexico (n=761), Netherlands (n=753), Norway (n=794), Panama (n=248), Peru (n=731), Poland (n=749), Spain (n=750), Sweden (n=763), United Kingdom (n=766) and United States (n=1,384).

They represented a cross-section of age, income, employment status (i.e., full-time, part-time, contract), career level and industry.



About ManpowerGroup Solutions

ManpowerGroup Solutions provides clients with outsourcing services related to human resources functions, primarily in the areas of large-scale recruiting and workforce-intensive initiatives that are outcome-based, thereby sharing in the risk and reward with our clients. Our solutions offerings include TAPFIN-Managed Solution Provider, Strategic Workforce Consulting, Borderless Talent Solutions, Talent Based Outsourcing and Recruitment Process Outsourcing, where we are one of the largest providers of permanent recruitment and contingent management in the world. ManpowerGroup Solutions is part of the ManpowerGroup family of companies, which also includes Manpower, Experis, and Right Management.



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