



ManpowerGroup®
Solutions

How We Want To Work:

What Employers Need To Know About
Candidate Work Model Preferences



Insights From The 2018 Global Candidate Preferences Survey

How organizations get work done and how people choose to work is changing. Employers are evaluating the work to be done and assessing a wide range of options including artificial intelligence, robotics and, of course, humans. The choices for hiring employees have evolved well beyond traditional full-time workers. HR managers can choose from independent contractors, freelancers, part-time workers, seasonal employees, temporary workers and platform-based on-demand workers (e.g., Lyft, Uber, Postmates, Task Rabbit). Effective workforce planning needs to account for how people want to work.

We asked candidates:

- How do you **want to work?**
- What type of work would you **prefer?**
- How are you **currently working?**
- What **motivates** you and what **influences** your work preferences?



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Introduction

GLOBAL CANDIDATE PREFERENCES SURVEY

We asked nearly **18,000** candidates in the workforce

across **24** influential employment markets around the globe¹

ages **18-65**

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

CANDIDATE: a job seeker currently in the workforce

The results are clear: **nearly half (45 percent) of all global candidates prefer something other than a full-time job.** In some markets, the number of candidates who prefer contract, project, part-time, seasonal and temporary work exceeds 60 percent.

The way people choose to work is changing more rapidly in some places than others. Candidate preferences and the current workforce mix may vary by market, but themes of flexibility, One Life,² autonomy and continuous learning underlie how candidates want to work. Employers should factor how people want to work into their workforce planning if they expect to recruit and retain top talent. NextGen Work (see callout box to the right for definition) is a choice, not a last resort, for candidates around the globe.

¹ Uruguay and Paraguay have been combined in this survey, as have Guatemala, Panama and Costa Rica (Central America) to obtain a significant sample size for these markets.

² The integration of work and home and the flexibility to manage both.

³ ManpowerGroup, #GigResponsibly: The Rise of NextGen Work, 2017.

⁴ In many markets, "gig workers" is not a term widely used. "Informal workers" may be more common in some markets.



Defining New Work Models

In this paper "alternative work model" includes contract work, project work, part-time work, seasonal work, temporary work, or "gig" work - all of these new work types are also known as NextGen Work.³ Non-traditional workers include those who are formally contracted for a period of time or an engagement (contingent workers) and those who accept engagements on a task basis, commonly referred to as 'Gig Economy' workers.⁴

When interpreting the results of this survey, it is important to remember that candidates around the globe define alternative work models in different ways and this can affect the survey findings. The Candidate Preferences Survey was translated into the local language for each market. Candidates selected their answers based on their understanding of the work type. Survey respondents were given the following options to choose from: contract work, project work, full-time permanent work, part-time work, seasonal work, temporary work, "gig" work (e.g., Uber driver, Postmates, etc.) or other. When asked to classify how they were currently employed, they were offered the following options: contract work (e.g., 1099 or project/scope of work-based/consulting), full-time permanent work, part-time work, seasonal work, temporary work, a "gig-based job where I can turn work on and off (e.g., Uber driver, Postmates)" and other.

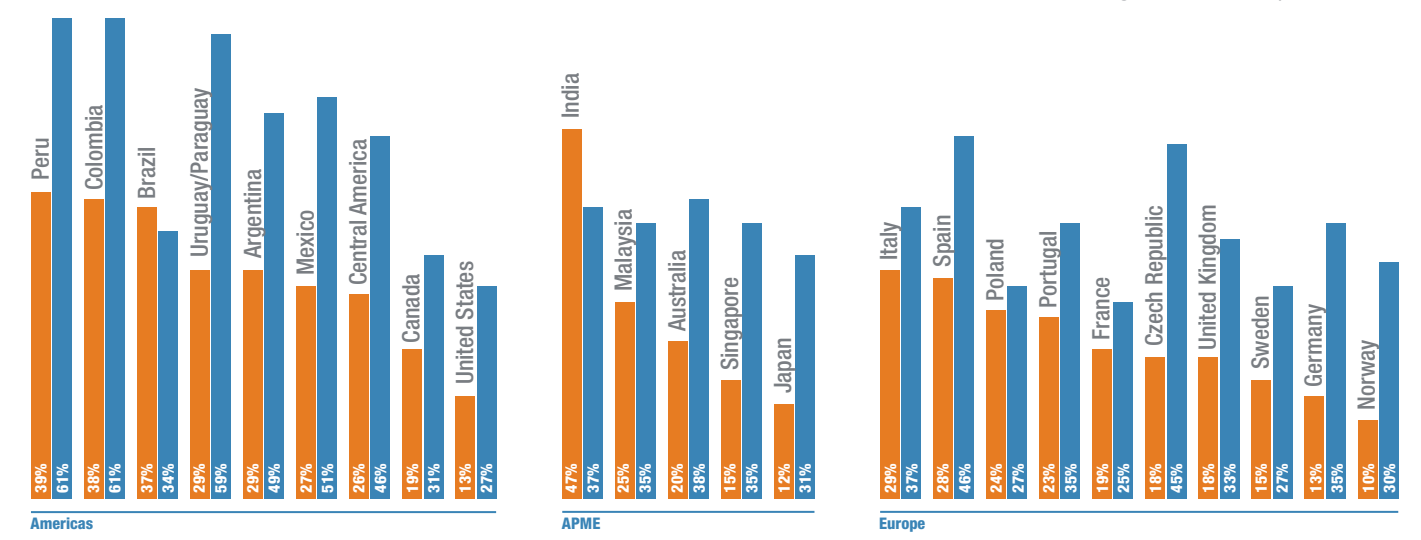


The Gap Between Candidate Preference And Workforce Availability Varies By Market

To better understand the dynamic between the alternative work models preferred by global candidates and the available workforce, the Candidate Preferences Survey results have been juxtaposed with ManpowerGroup Solutions' Total Workforce Index™ (see callout box below), which measures the mix of work models by market. The result is the gap between the type of work candidates prefer and the types of work being offered by local employers. Employers are not offering opportunities for alternative work in the same way and volume that candidates would prefer in a given market.

In 22 of the 24 markets surveyed, candidate preferences for contract work, project work, part-time work, seasonal work and temporary work exceed the supply of jobs in the available workforce. Only India and Brazil have a greater supply of alternative work than candidates desire. Regionally, demand outpaces supply in South American countries such as Colombia, Paraguay/Uruguay, Peru and Central America (Guatemala, Panama and Costa Rica), and Mexico in North America. The lowest gaps are in France, Italy and Poland. In sum, many more people would like alternative work than the availability of those jobs in the marketplace.

Supply And Demand For Alternative Work (Contract, Project, Part-time, Seasonal And Temporary Work)



Manpowergroup Solutions' Total Workforce Index™
The Total Workforce Index™ is a comprehensive workforce analysis tool that allows organizations to determine the relative ease of sourcing, hiring and retaining workforce skills in competing labor markets around the world. The global analysis spans 75 labor markets and evaluates over 90 factors to assess a market, analyzing availability, cost efficiency, productivity and regulation.



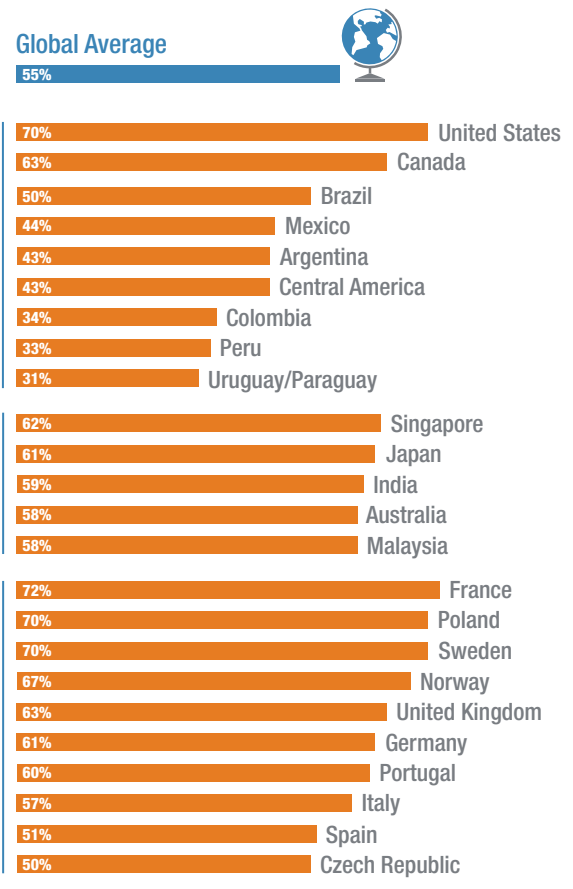
The segmented views of the global workforce provided by the Total Workforce Index™ enable organizations to easily benchmark their own workforce mix and cost efficiency across global operations. For the first time, employers have one resource that provides a global perspective on gender diversity, millennial impact, gig economy workforce participation and the gap between permanent and contingent workers from one market to the next.

Moving Away From Full-Time Permanent Work

Today's global candidates are interested in making work, work for them. Almost half of global candidates (45 percent) prefer an alternative to full-time permanent work. Sixteen percent prefer part-time work, 13 percent prefer contract work and seven percent prefer project work. Only three percent prefer online, platform-based work. These findings are consistent with the #GigResponsibly research, in which **87 percent of candidates said they would consider participating in an alternative work model in the future.**⁵

While full-time work still generally dominates candidate preferences (see bar chart to the right), in some markets, the preference for alternative work models exceeds the preference for full-time work. In Uruguay/Paraguay and Colombia, the preference for full-time positions is only 31 percent and 34 percent, respectively. Yet in markets such as France (72 percent), the United States (70 percent) and Poland (70 percent), seven out of ten candidates still prefer full-time work.

Prefer Full-Time Work By Market



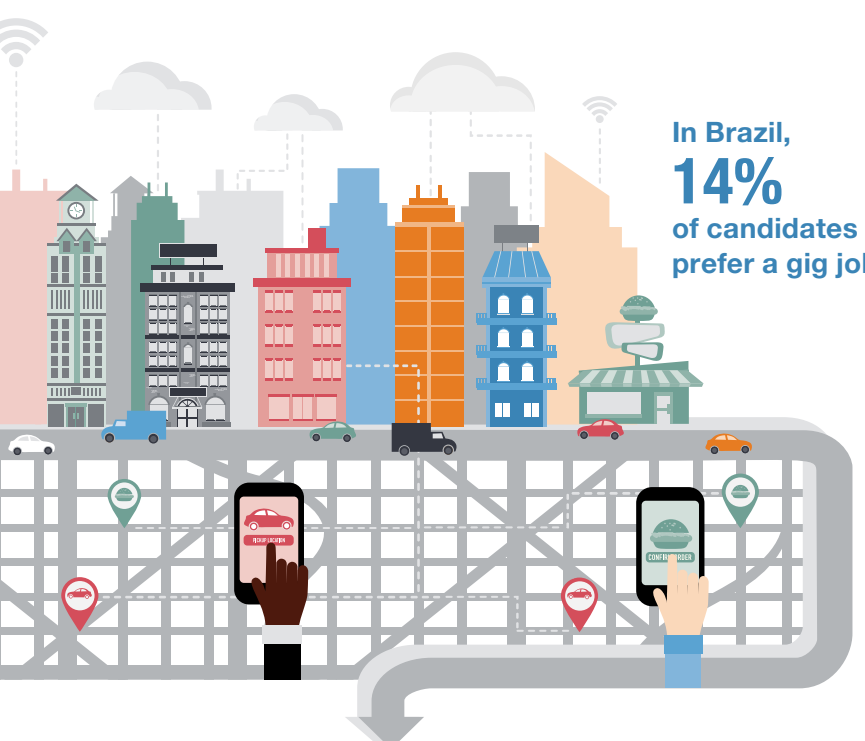
“Candidate work model preferences are a unique combination of that market's economic situation, regulatory environment, lifestyle preferences and cultural values.”
 Victoria Bombas, Vice President, Global Solutions, ManpowerGroup Solutions, United Kingdom

The Mismatch Is Most Pronounced Among Candidates Who Prefer Contract/Project Work

Using the survey results exclusively, the mismatch between candidates' current work models and their preferences is easier to identify. More candidates desire contract and project work than are currently engaged in it in almost every market (see bar chart to the right). The gap is much narrower for those who prefer part-time work. With respect to seasonal work, twice as many candidates are currently employed part-time than those who want to be in Canada, Colombia, Italy and Mexico. As for gig economy work, the number of candidates whose first preference is gig economy work is still rather small. Brazil, however, is one market where it is sizable (with 14 percent of candidates preferring a gig economy job) reflecting the country's long-time association with informal and temporary work, or "bicos," in Portuguese.⁶

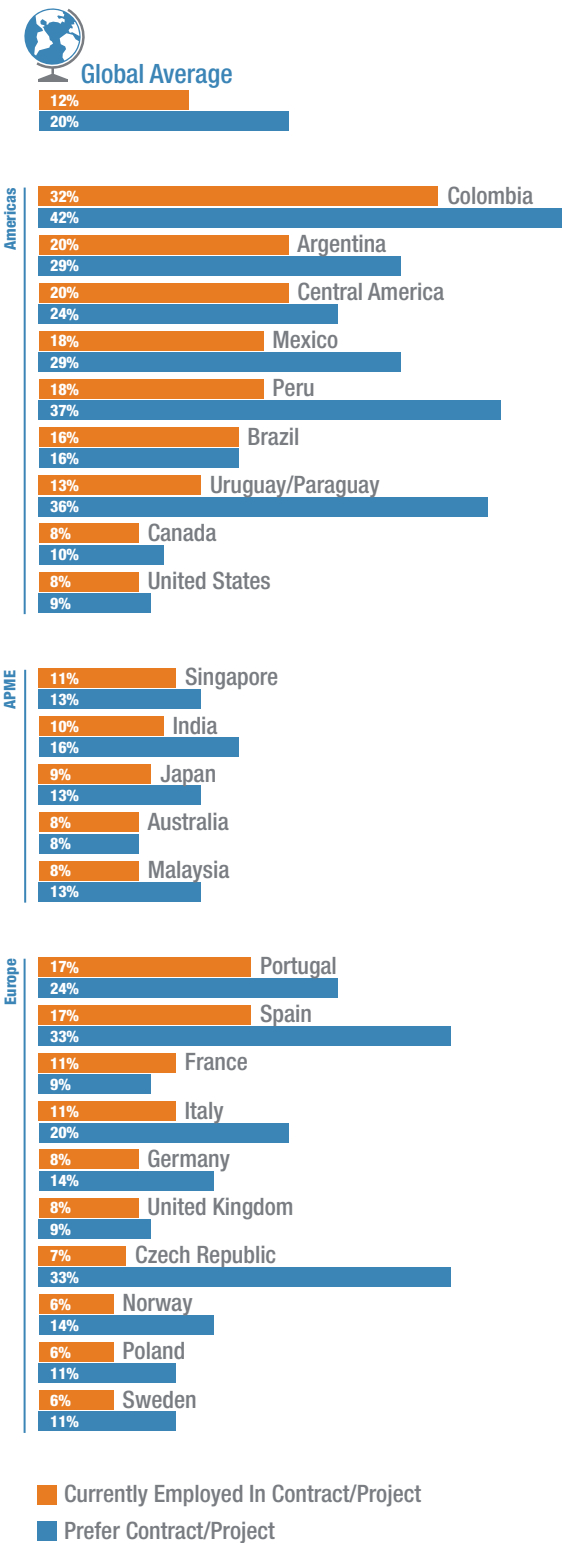
Ridesharing companies are a good example of how the local environment affects work model preference. A stay-at-home mom in Chicago can easily drive for Uber and Lyft while her kids are in school than in the United Kingdom which requires vehicle registration.

Victoria Bombas, Vice President, Global Solutions, ManpowerGroup Solutions, United Kingdom



⁶ "The Return of Brazil's Gig Economy," BBC News, October 9, 2016.

Employed Contract/Project Vs. Prefer Contract/Project For Survey Candidates



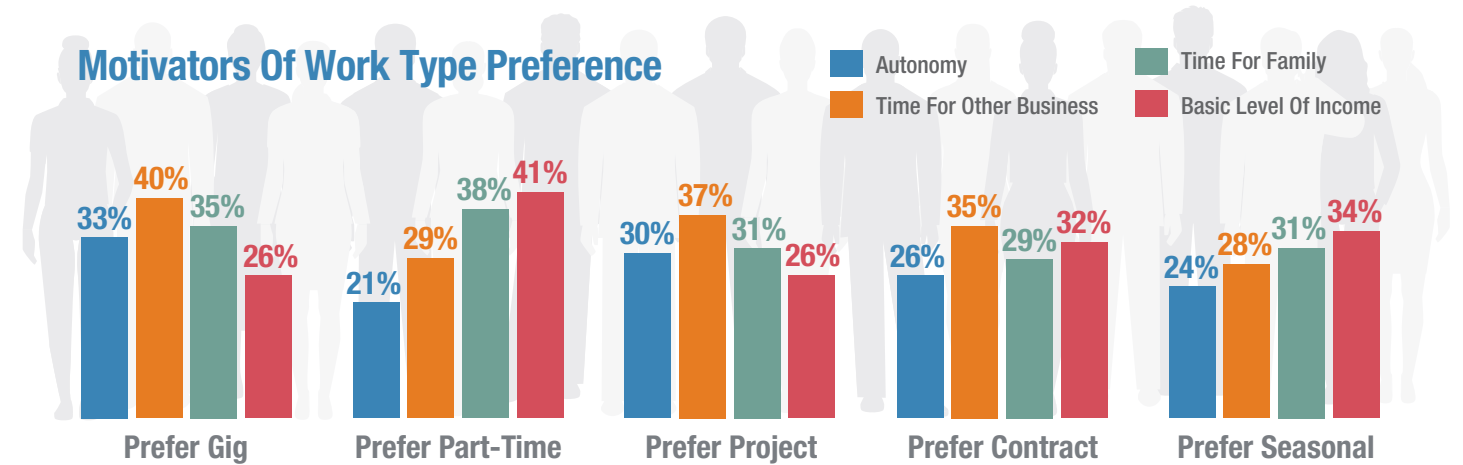
Autonomy And Risk Management Are Key Motivators

An examination of candidate work model preference reveals the unique factors driving the way candidates want to work. The data suggests that it is a combination of circumstance, attitudes and aspirations. Candidates' interest in alternative work types is strongly linked to their interest in schedule flexibility. Although candidates still value compensation and type of work the most, schedule flexibility is the next important driver for those who prefer alternative work models. ManpowerGroup's report #GigResponsibly: The Rise of Next Gen Work confirms the link between alternative work models and flexibility. For seasonal workers, motivation is tied to geographic location. And for candidates who prefer project work, opportunity for advancement ranks directly beneath compensation and type of work — suggesting that career path still plays an important part for these candidates.



Willingness to take risks and the degree of autonomy candidates desire are also important. When asked about the reasons behind their interest in an alternative work model, those who preferred contract, project and gig economy work cited entrepreneurial pursuits as key (35 percent, 37 percent and 40 percent, respectively). Autonomy is also a major motivator for candidates who prefer project, contract or gig economy work for not having a clock to punch and being responsible for outcomes (see bar graph below). Those who prefer seasonal or part-time employment appreciate the income stability provided, but trade off autonomy, typically to meet the responsibilities of children, eldercare or education.

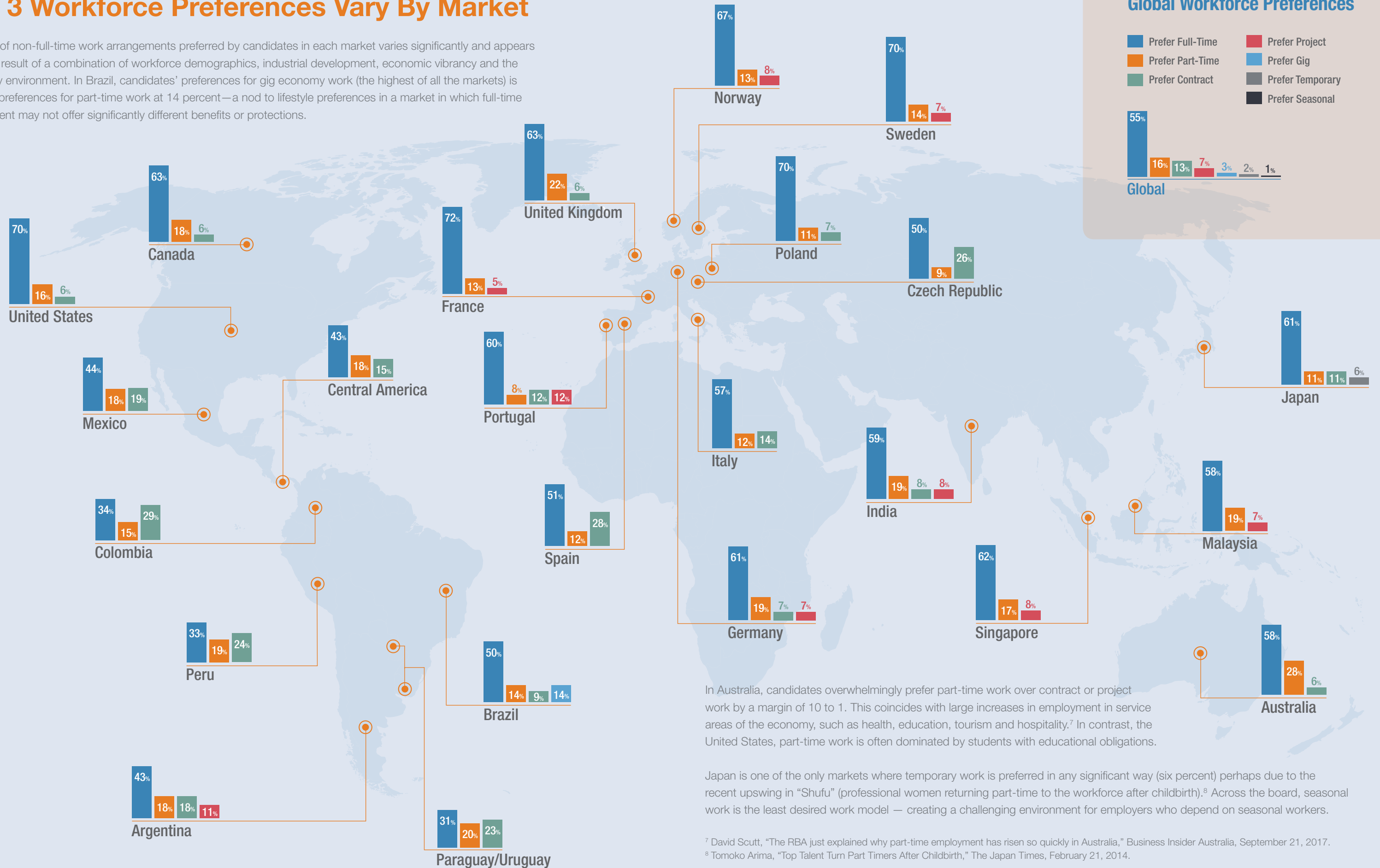
Motivators Of Work Type Preference



Job Satisfaction: Candidates who prefer contract and part-time work have relatively higher job satisfaction, at 34 and 33 percent respectively, than gig economy (29 percent), temporary (28 percent) or seasonal workers (27 percent), suggesting that their choices are driven more by circumstance and responsibilities.

Top 3 Workforce Preferences Vary By Market

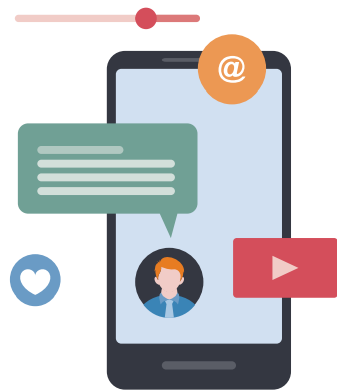
The type of non-full-time work arrangements preferred by candidates in each market varies significantly and appears to be the result of a combination of workforce demographics, industrial development, economic vibrancy and the regulatory environment. In Brazil, candidates' preferences for gig economy work (the highest of all the markets) is tied with preferences for part-time work at 14 percent—a nod to lifestyle preferences in a market in which full-time employment may not offer significantly different benefits or protections.



In Australia, candidates overwhelmingly prefer part-time work over contract or project work by a margin of 10 to 1. This coincides with large increases in employment in service areas of the economy, such as health, education, tourism and hospitality.⁷ In contrast, the United States, part-time work is often dominated by students with educational obligations.

Japan is one of the only markets where temporary work is preferred in any significant way (six percent) perhaps due to the recent upswing in “Shufu” (professional women returning part-time to the workforce after childbirth).⁸ Across the board, seasonal work is the least desired work model — creating a challenging environment for employers who depend on seasonal workers.

⁷ David Scutt, “The RBA just explained why part-time employment has risen so quickly in Australia,” Business Insider Australia, September 21, 2017.
⁸ Tomoko Arima, “Top Talent Turn Part Timers After Childbirth,” The Japan Times, February 21, 2014.

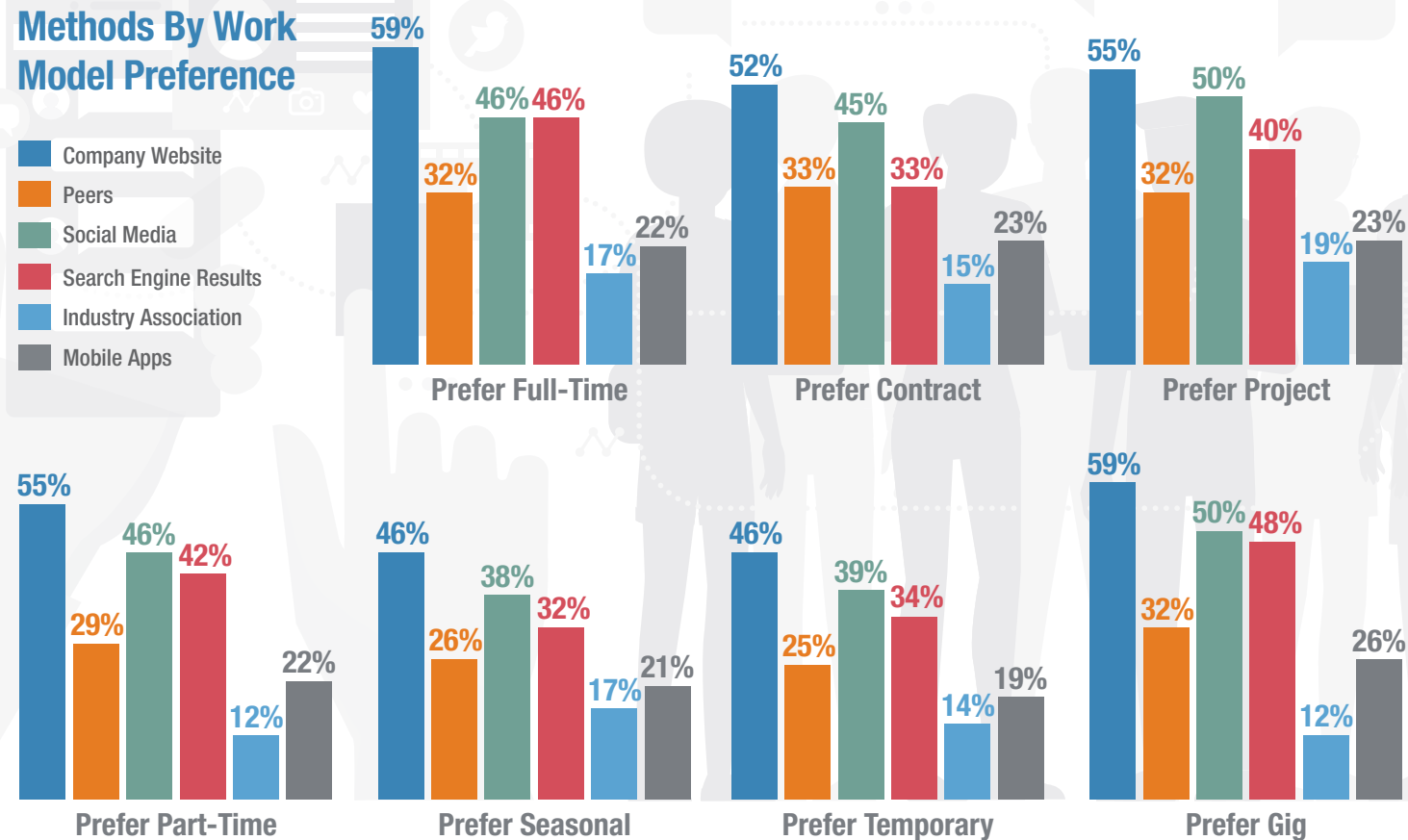


The Importance Of Social Networks

Candidates who prefer non-full-time work models are less likely to search for jobs at the employer's website than those who are seeking full-time positions. The exception here is gig economy workers whose interface with an app or the company website directly matches them with their gigs. Candidates who prefer contract and project work tend to leverage social media to look for jobs.

Job Search Methods By Work Model Preference

- Company Website
- Peers
- Social Media
- Search Engine Results
- Industry Association
- Mobile Apps



In Latin America, many small employers do not invest in their company websites. Social media is the number one way we recruit candidates. For seasonal workers, where geographic location is key, we send recruiters into the community to physically engage and recruit workers.

Francisco Javier Diaz Ortega, Director, ManpowerGroup Solutions, Mexico

5 Practical Suggestions

Innovative HR professionals can leverage the Candidate Preferences Survey results to better plan their workforce needs in the future and retain top talent. Here are five suggestions:



Do Not Take A "One-Size Fits All" Approach

With so much variation by market in how candidates want to work, employers would be wise to create workforce strategies that match the candidate preferences in that market. Multi-national corporations should be particularly sensitive in recognizing that duplicating a recruiting strategy in European and South American markets, for example, will likely not yield equally strong results.

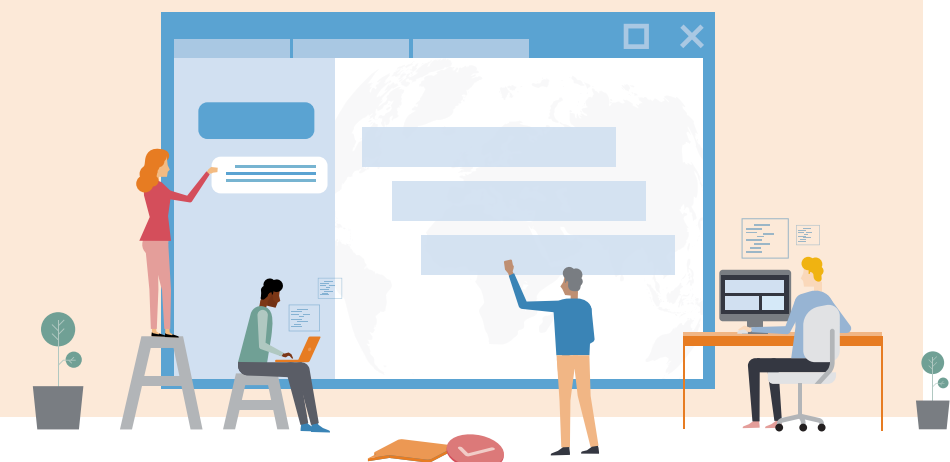
Success Story

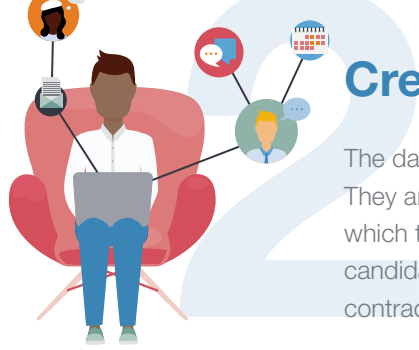
Customizing Workforce Strategies By Location

CHALLENGE: A major oil and gas company lacked visibility into contract and full-time employee roles across different locations — both in North America and Asia. A decentralized hiring process led to numerous challenges including hiring managers selecting titles and paying rates arbitrarily. A skills shortage and a tight labor market created additional challenges.

SOLUTION: The ManpowerGroup Solutions team created separate approaches to assess the client's compensation across job families in each market. In the United States, the analysis looked at each role, assessed job titles and descriptions, and aligned them to the market. In Singapore, the project detailed hourly contract worker costs and the annual salaries of employees. It also annualized the cost of the hourly workers so the client could see the potential out-of-pocket expenses for both sides of the workforce categories, to support workforce mix analysis in the local market.

RESULTS: The job taxonomy provided insight into how the company's worker rates aligned to each market and guided the client's workforce planning process for the future, helping determine optimal workforce mix, headcount changes, worker classifications, and resource allocations in the U.S. and Singapore.



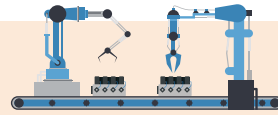


Create More Flexibility In Full-Time Positions

The data emphasizes the importance of flexibility for candidates who prefer non-full-time positions. They are increasingly willing to trade job security for flexible hours, project selection and One Life in which they can better balance their personal and professional lives. Employers who want to recruit candidates for full-time positions should look at ways they can make these positions look more like contract or project work with location independence.

Success Story

When Production Workers Want Flexibility



CHALLENGE: Skilled workers drive the assembly line for one diesel engine company, but finding employees with the right skills for the engine block assembly work was an ongoing challenge. Fluctuating production demands and a shortage of available technical skills made it difficult for the company to maintain a skilled workforce.

SOLUTION: Manpower has led the company's skilled workforce strategy through targeted recruiting of associates who prefer the flexibility of non-permanent positions. An on-site team at the plant manages the entire flexible workforce. On average, 300 Manpower flex associates work side by side with the company's staff, though the number fluctuates as assembly needs change.

RESULTS: With a staffing partner that understands its culture and priorities, the company is able to maintain a blended workforce of up to twenty percent Manpower associates who have the skills to contribute to assembly goals, but want the flexibility of non-permanent positions. The program also allows for flexibility as associates' preferences evolve. For example, the company has hired nearly 200 Manpower associates for its permanent positions.

Prioritize Advancement And Upskilling

Candidates looking at alternative work models such as project work and contract work also place a high priority on opportunities for advancement and upskilling. Some candidates may even convert to full-time employees if the employer can deliver a career path that offers a trajectory of personal growth and innovation.

Success Story

Advancement and Upskilling Keep Seasonal Recruiters Coming Back



CHALLENGE: A global Fortune 500 technology firm needed to fill specialized recruiting and sourcing roles on a fluctuating basis — often related to tax filing deadlines. The company needed a solution that could scale up and down with short notice and enable highly experienced recruiters to quickly ramp up on proprietary, company-specific processes. However, due to the limited-term nature of the assignment, the company struggled to bring back high-performing contract recruiters each year.

SOLUTION: To ensure recruiters are fully up to speed on the latest skills, ManpowerGroup Solutions delivers the client's trainings and onboards the seasonal team. Advancement opportunities include joining a core set of recruiters with cross-functional expertise who flex across the enterprise based on evolving business needs outside of tax season, ensuring a level of consistency and engagement year-round.

RESULTS: By ensuring adequate skills-building, engagement and advancement opportunities, the program has generated an exceptionally high return rate for top-tier seasonal recruiters. In addition, the company's internal talent acquisition team reports increased quality of hire and hiring manager satisfaction.



Start Networking

Candidates who prefer project or contract work rely on their networks for their next position. And due to less formal hiring practices for these work models, they may not use the company website in the same way as those who are seeking full-time employment. Savvy HR professionals will seek to leverage the formal and informal networks of candidates who prefer project or contract work as well as create streamlined pathways for submitting their qualifications to the company. These candidates prefer to work in new ways, and employers should reflect that in every aspect of their candidate experience.

Success Story

Meeting Candidates Where They Are: Social Media

CHALLENGE: A global consumer goods company sought to revive its management training program for young people, beginning with an effort in the Philippines. The intensive week-long program was the first business simulation course in the Philippines that offered a unique, world-class learning experience for those with strong leadership potential. In a span of just 30 days, the company needed to invite 1,500 students to apply to the program.

SOLUTION: ManpowerGroup Solutions established a specialized team to design and execute a solution focused on creative sourcing and digital/social media outreach. Among other tactics, the team used its extensive knowledge of local sourcing channels and social media to define the most efficient outreach strategies, including a targeted outreach via Facebook. A dedicated account serves as an official program recruiter with a growing network of contacts while still remaining distinct from the company's overall brand.

RESULTS: All of the company's targeted students were contacted and 1,500 were directly invited to apply to the program. By targeting highly qualified applicants, the solution increased passed applicants from 100 students to 500.





Seek Expertise From Professionals Who Know The Landscape

Recruitment professionals can help employers anticipate and manage their workforce needs because they understand the available workforce and the demand for contingent workers with various skill sets. For example, recruiters know when specific tech projects may be drawing to a close and are able to move workers from one company to another. Retail in-store and warehouse workers hired for high-traffic shopping event days can be placed in hospitality positions during peak tourism periods.

ManpowerGroup Solutions' Alternative Workforce Solutions⁹ (AWS) provides strategies to help businesses engage talent outside of traditional contingent workforce, services procurement, and in-house employment channels by providing companies and workers with increased flexibility and convenience, usually through dedicated cloud-based interfaces. Progressive solutions include online staffing firms, freelancer management systems, public talent marketplaces, crowdsourcing, micro-tasks, and private talent clouds.

Tapping Into Talent Communities To Support Seasonal Hiring

CHALLENGE: A large retailer required a forward-looking recruiting function that could support its aggressive growth plans. At the same time, the company's fluctuating seasonal demands and everyday volume hiring created significant near-term challenges that impacted long-term objectives.

SOLUTION: ManpowerGroup Solutions designed a flexible program that could respond to the client's evolving needs. The solution covers multiple RPO projects and includes a seasonal solution to create an engaged talent pool using WorkMyWay.com – a talent community powered by ManpowerGroup Solutions that connects 250 companies to people looking for flexible work.

RESULTS: Using WorkMyWay.com, the company was able to increase seasonal return candidates and loyalty through regular communication between recruiters, candidates and opportunities for seamless seasonal employment.



Success Story

⁹ ManpowerGroup Solutions/TAPFIN Alternative Workforce Solutions (AWS)



For Further Reading: Learn more about alternative work arrangements and how companies can better understand how people want to participate in the labor market. ManpowerGroup's [#GigResponsibly: The Rise of NextGen Work](#) offers more insight on how to combine the choice and flexibility of new work models with the security of traditional work.



For more insight on how to attract the best and brightest candidates, visit manpowergroupsolutions.com/candidatepreferences



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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.

More About The Respondents

Overall, the job seekers surveyed were between 18 and 65 years old and currently in the workforce. In total there were 17,995 global respondents. Market breakdowns were as follows: Argentina (n=747), Australia (n=756), Brazil (n=753), Canada (n=750), Central America (Guatemala, Panama and Costa Rica, n=742), Colombia (n=742), the Czech Republic (n=747), France (n=751), Germany (n=749), India (n=751), Italy (n=761), Japan (n=751), Malaysia (n=756), Mexico (n=755), Norway (n=750), Paraguay/Uruguay (n=752), Peru (n=747), Poland (n=748), Portugal (n=755), Singapore (n=752), Spain (n=740), Sweden (n=755), the United Kingdom (n=740) and the United States (n=745).

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

Experienced non-managers accounted for the largest group at 28%, followed by managers (18%), entry-level employees (16%), undergraduate/graduate students (20%), executives (6%) and senior-level executives (4%).

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