

KELLY GLOBAL WORKFORCE INDEX™

# CAREER DEVELOPMENT AND UPSKILLING



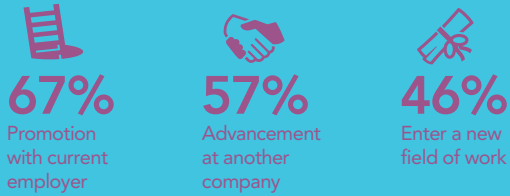
**KELLY**

# THE ULTIMATE PROMOTIONAL TOOL

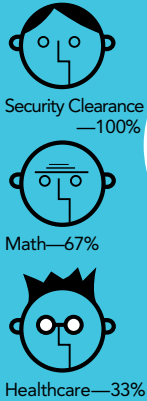
No longer “front-end loaded” onto a career, nor the sole responsibility of the employer, workers recognize that skills are a lifelong pursuit of development and renewal.



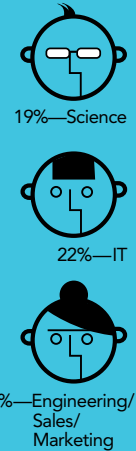
## WHY UPGRADE SKILLS?



## MOST LIKELY

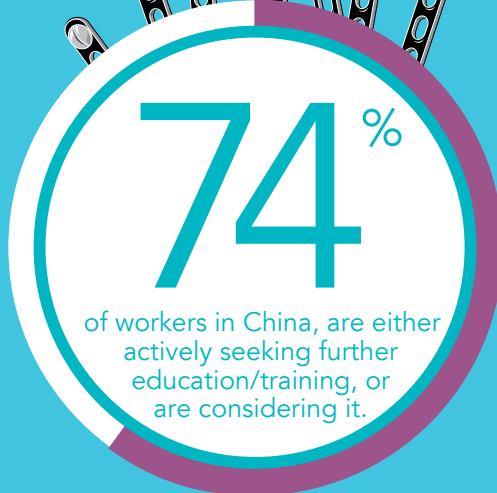
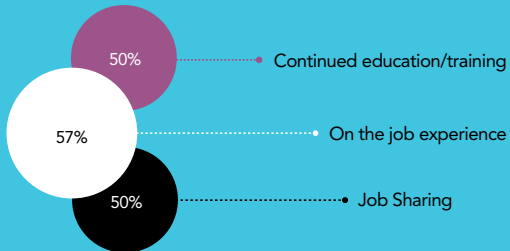


## LEAST LIKELY



WHICH FIELDS ARE UPSKILLING TO PURSUE A NEW FIELD OF WORK?

## MOST VALUED SKILL DEVELOPMENT

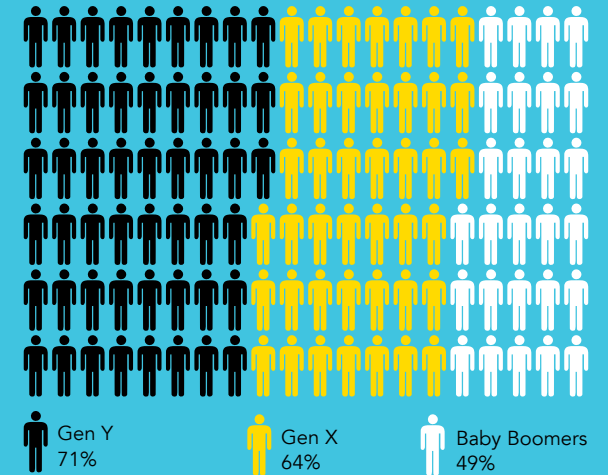


## TRAINING FOR PROMOTION WITH CURRENT EMPLOYER, BY REGION



The prime reason for undertaking training in the Americas and APAC is to gain promotion with their current employer. However, it's a different story in EMEA, where about half of employees focus on gaining a promotion, and are almost equally motivated by a desire to switch employers or even enter a new field of work.

## GEN Y IS MORE LIKELY TO BE MOTIVATED BY THE PROSPECT OF A PROMOTION WITH THEIR CURRENT EMPLOYER



## THE KELLY GLOBAL WORKFORCE INDEX 2013

The 2013 Kelly Global Workforce Index (KGWI) brings work and workplace insights sourced from more than 120,000 respondents from 31 countries across the Americas, EMEA and APAC regions.

It takes the form of an annual survey that canvasses a wide spectrum of opinions on issues impacting the contemporary workplace, with a particular focus on the perspectives from different generations, industries, occupations and skill sets.

Topics covered in the 2013 KGWI survey include:

- Career Development and Upskilling
- Employee Engagement and Retention
- Social Media and Technology
- Global Mobility
- Workplace Changes

This first installment, on the topic of *Career Development and Upskilling*, explores the changing focus on training and skills development, as employees become more proactive and self-reliant in managing their careers.

Once the preserve of the employer, responsibility for training and skills development is shifting to employees, who are dictating the way that training is designed, provided and funded.

There is also some reassurance for employers who often fear that any investment in training will be lost when staff depart. The good news is that the majority of employees who are seeking training are motivated by a desire to stay with their current employer.

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Note: Regional differences in results may be attributed in part to the generational composition of the survey samples, with the APAC region having a larger portion of Gen Y respondents (53% APAC, 35% Americas, 48% EMEA).

## THE CHANGING FACE OF SKILLS AND TRAINING

Training is an investment. For individuals, it builds skills and lifts earnings potential, while for businesses it contributes to a more productive workplace.

The actual motivation to undertake training may come from the individual, the employer, or a combination. Some employers fear that the benefits of investing in training are lost when employees leave and take their newly developed skills to another employer.

Meanwhile, many employees clearly see the benefit in taking charge of this investment in their future, setting clear goals as to the nature and content of the training that will best suit their career plans.

# REASON FOR TRAINING

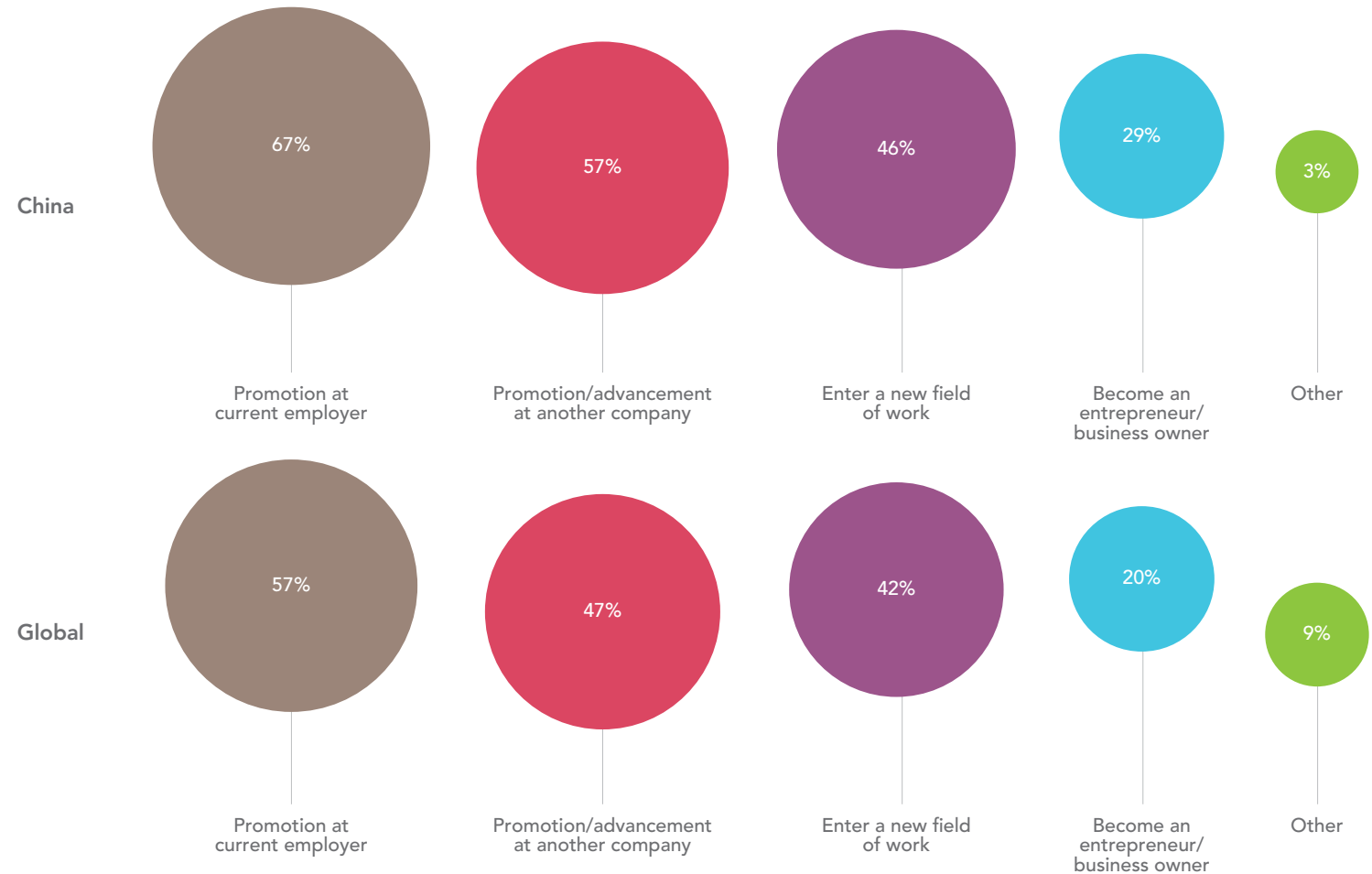
→ In China, when asked to identify the main motivation for learning new skills or undertaking training, the largest share of employees (67%) cite the opportunity for promotion with their current employers. A further 57% cite the opportunity for promotion/advancement at another company, and 46% plan to enter a new field of work.

Globally however, the percentage decreased slightly for all three with only 57%, 47% and 42% respectively.

In essence, in both China and globally, the largest group of employees are motivated to undertake additional training or skills development by a desire to stay in their current job.

At the same time, a smaller but still significant number are keeping their options open to a diverse range of opportunities outside their current employment.

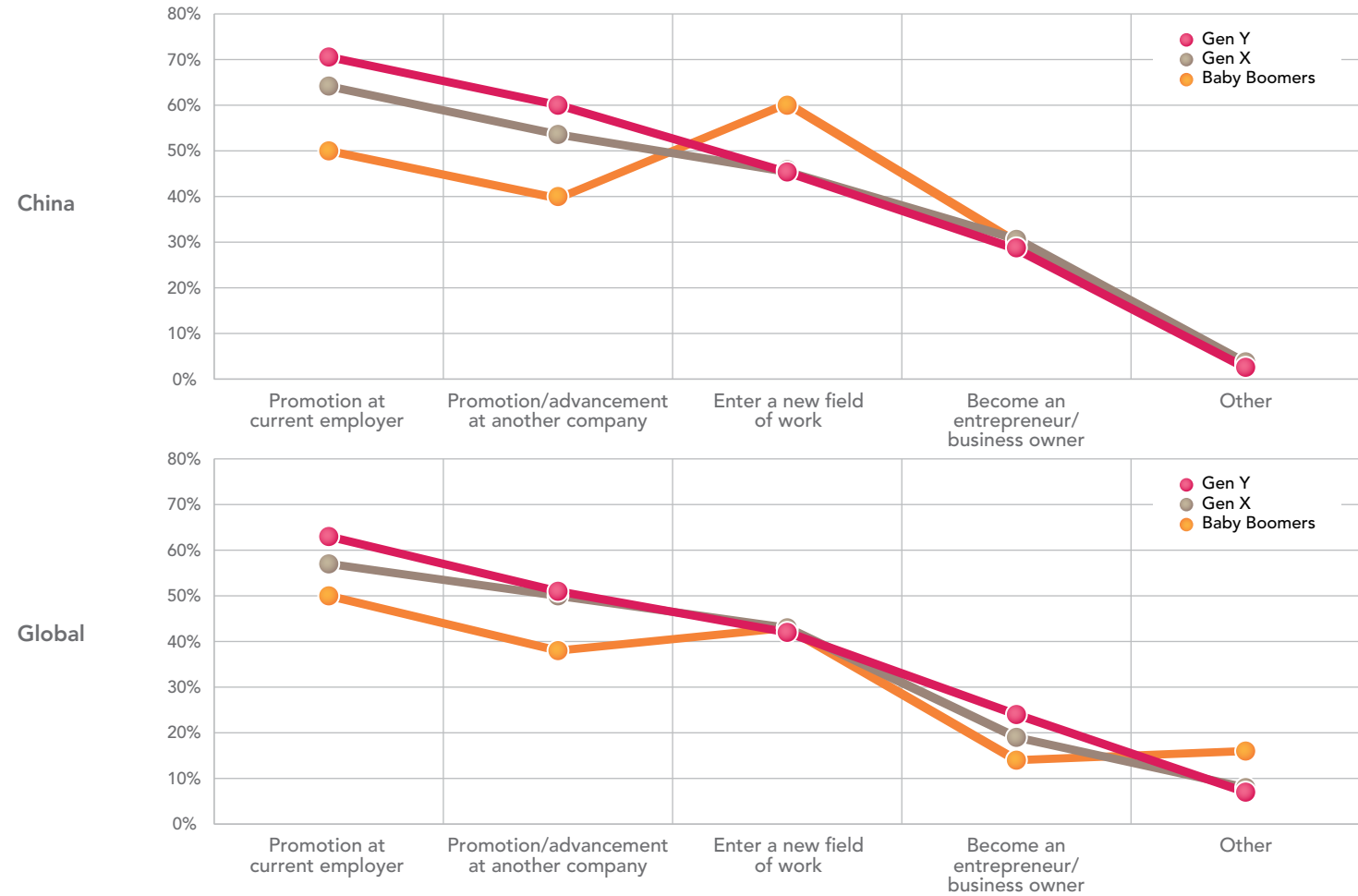
What motivates you to learn new skills or seek additional training? (% , multiple responses allowed)



# REASON FOR TRAINING (BY GENERATION)

→ Clearly from an employer's perspective, one of the key motivations behind the investment in training is to lift staff retention. But the likelihood of higher retention may not be uniform across the workplace. There is a noticeable difference between the generations when it comes to the main factors that influence their training decisions. Similar to other regions globally, Gen Y in China is significantly more likely than Gen X and Baby Boomers to be motivated by the prospect of a promotion with their current employer.

What motivates you to learn new skills or seek additional training? (% by Generation, multiple responses allowed)

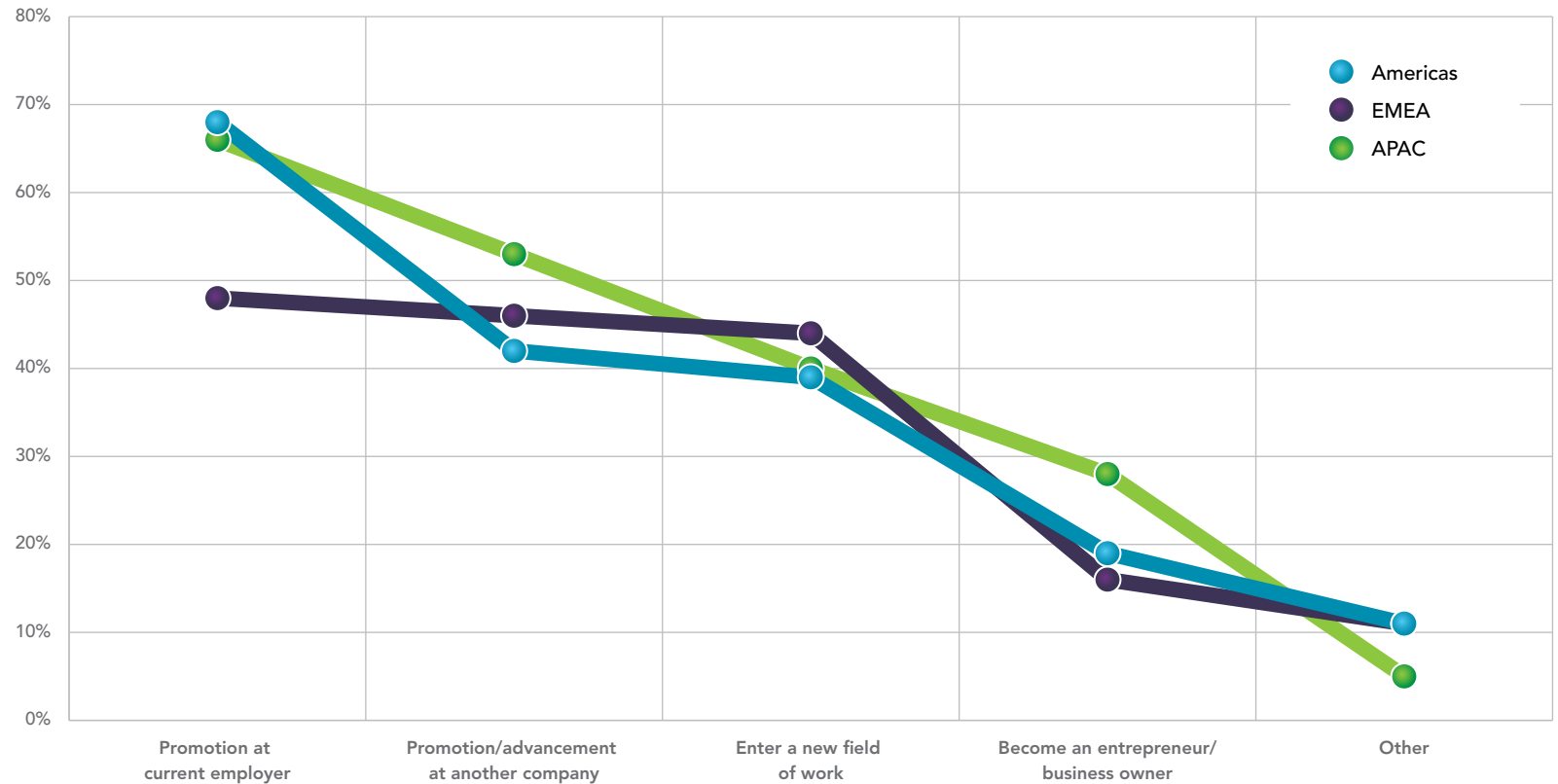


# REASON FOR TRAINING (BY REGION)

→ The link between training and staff retention varies across the globe. In the Americas and APAC, the prime reason employees undertake training is to gain promotion with their current employer, meaning employers will have a good chance of recouping the investment in their newly trained workers. However, in EMEA, employees who are seeking training are not overwhelmingly focused on staying with their current employer, being almost equally motivated by a desire to switch employers or even enter a new field of work.

The desire to use training as a launchpad to start a business is significantly more in APAC as it is in the Americas and EMEA.

What motivates you to learn new skills or seek additional training? (% by Region, multiple responses allowed)

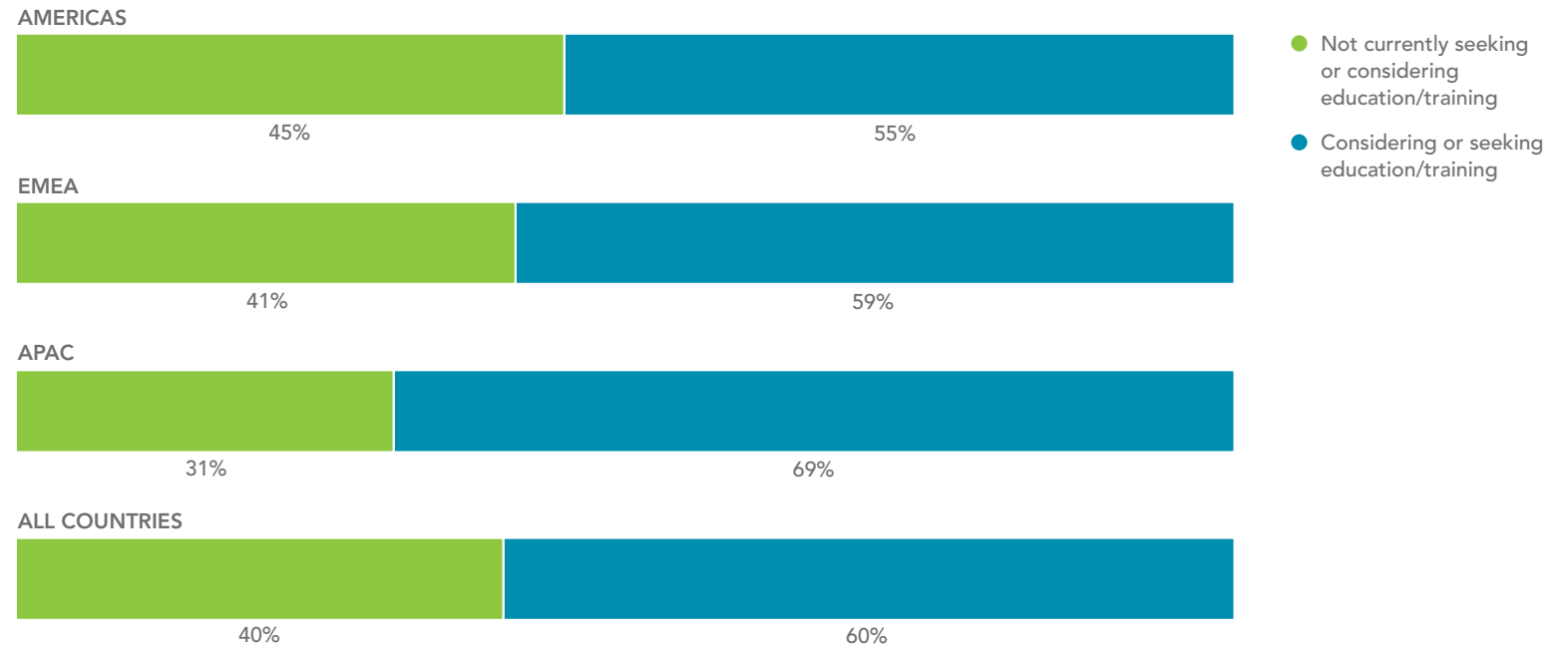


# TO TRAIN OR NOT TO TRAIN? (BY REGION)

→ The upheaval in labour markets over recent years and business cutbacks in funding of professional development have changed the way that many employees view the need for upskilling. Rather than relying on their employer, they are taking control of their own career development.

Globally, 60% of workers are either actively seeking further education or training (23%), or considering it (37%) to pursue a new field of work. The APAC region stands out as a skilling hotspot, with 69% of those surveyed either considering or seeking further training.

Are you currently seeking/considering additional education or training to pursue a new field of work? (% by Region)





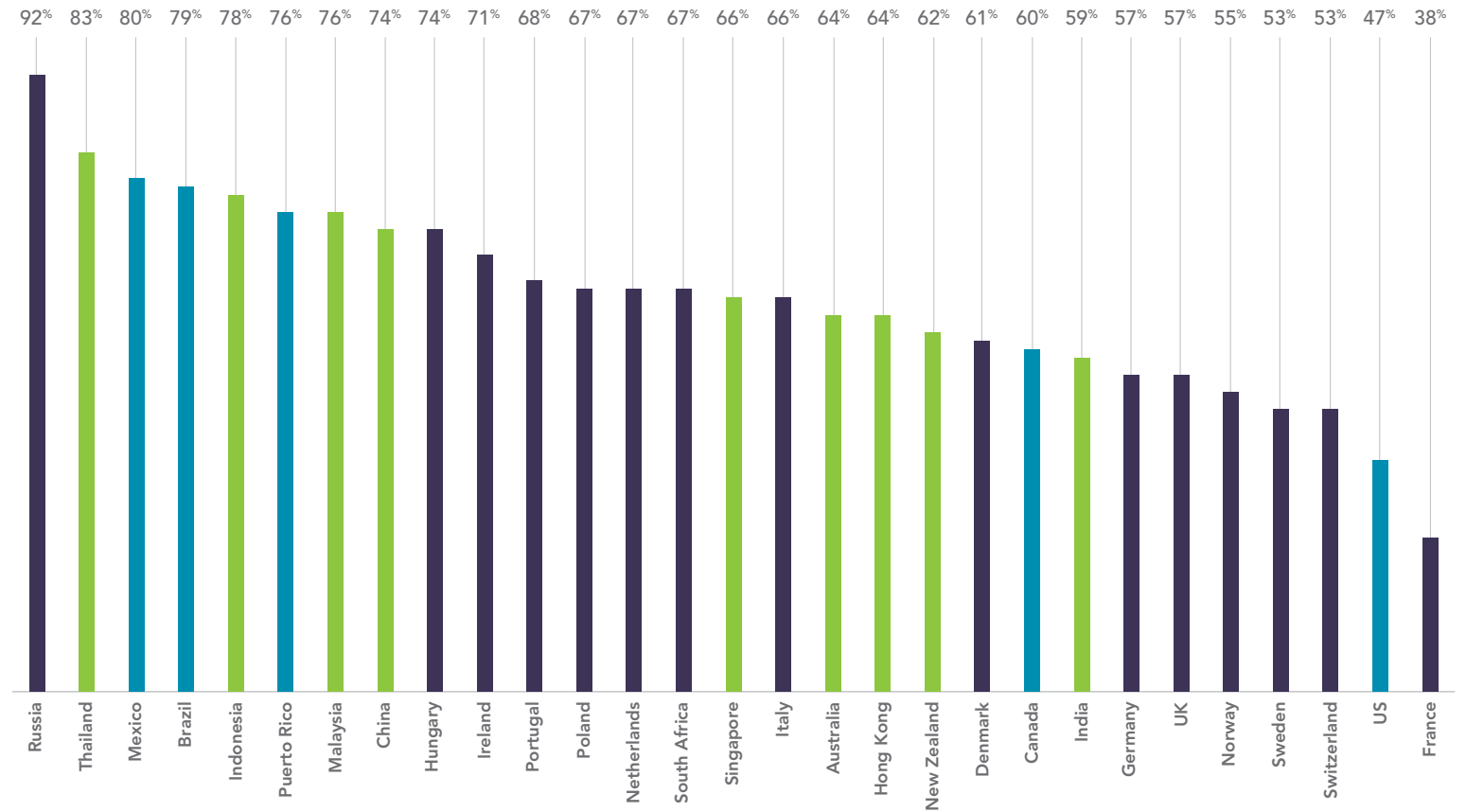
# TO TRAIN OR NOT TO TRAIN? (BY COUNTRY)

→ Across the globe, there are markedly different approaches to the notion of additional training and professional development. The highest rates of planned upskilling are predominantly in developing economies, while the lowest rates tend to be in some of the most prosperous nations.

Russia heads the list for training intensity, with an astonishing 92% planning some form of training. Also high on the list are Thailand, Mexico, Brazil, Indonesia, Puerto Rico and Malaysia.

The lowest rates of planned training are in France, the US, Switzerland and Sweden.

Are you currently seeking/considering additional education or training to pursue a new field of work? (% "Yes" by Country)



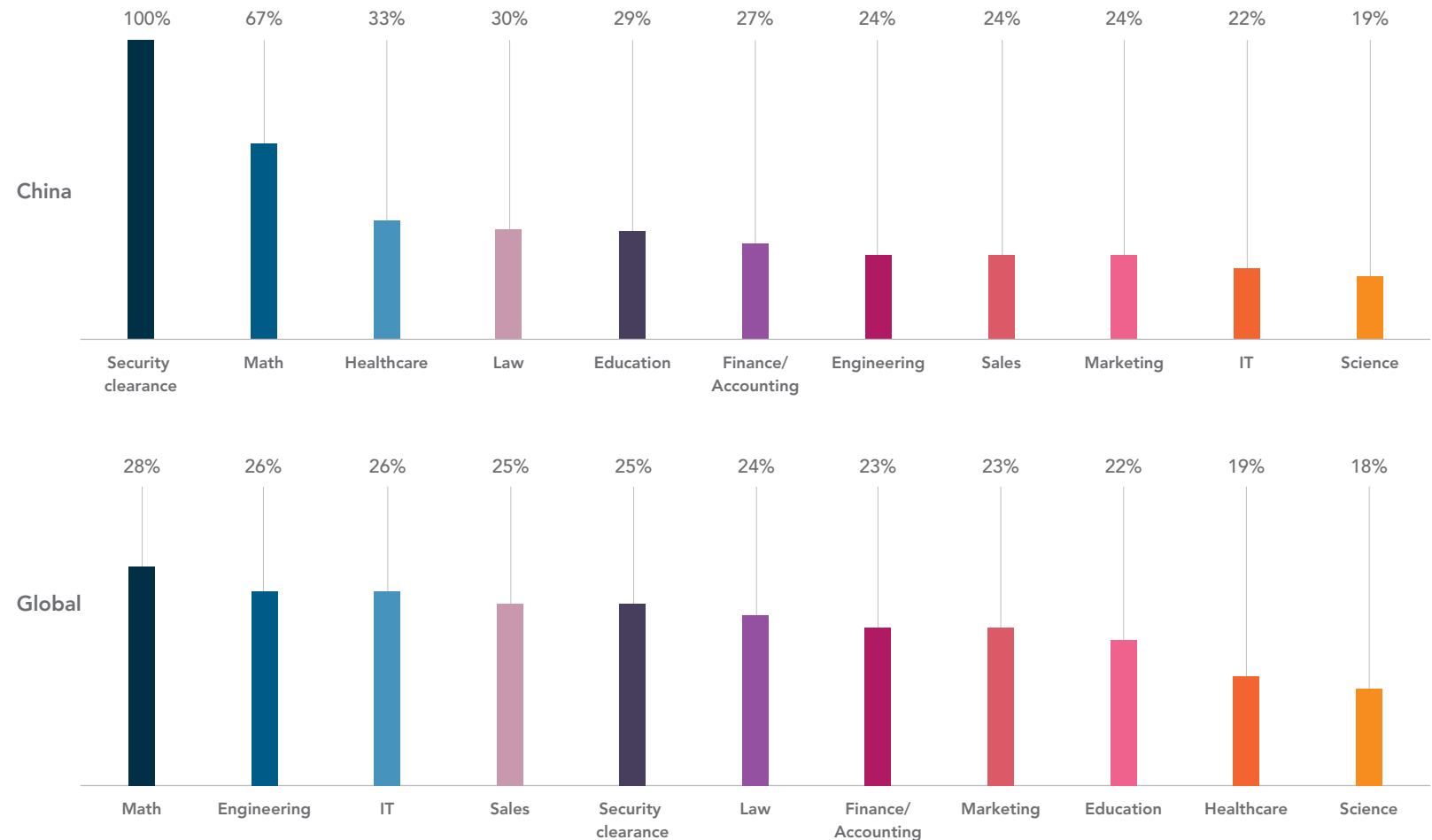
# SEEKING TRAINING (BY PROFESSION)

→ The propensity for individuals to undertake fresh training or education will depend on a host of factors, including industry dynamics, the state of competition in the jobs market, and the likelihood of the training “investment” producing a payoff in the form of salary or promotion.

Among professional and technical employees in China, those most likely to be actively seeking to upgrade their skills are in Security clearance, Math and Healthcare while the least likely are in Marketing, IT and Science.

Globally, the results differ quite vastly with those most likely to be actively seeking to upgrade their skills are in Math, Engineering and IT. The least likely are in Education, Healthcare and Science.

Are you currently seeking additional education or training to pursue a new field of work? (% “Yes” by Profession)



## INVESTING IN TRAINING THAT WORKS

For training to be meaningful it needs to be relevant and practical — not “training for training’s sake”.

In an era when employees are embracing the notion of self-directed training and continuing education, there is a new focus on providing the most appropriate type of training.

Employees seem to possess an inherent understanding of what works best in terms of the development of their skills.

For the majority of workers, the most desirable training is that provided by their employer: training that is centered on the real and practical elements of the job at hand.

# MOST VALUED SKILL DEVELOPMENT

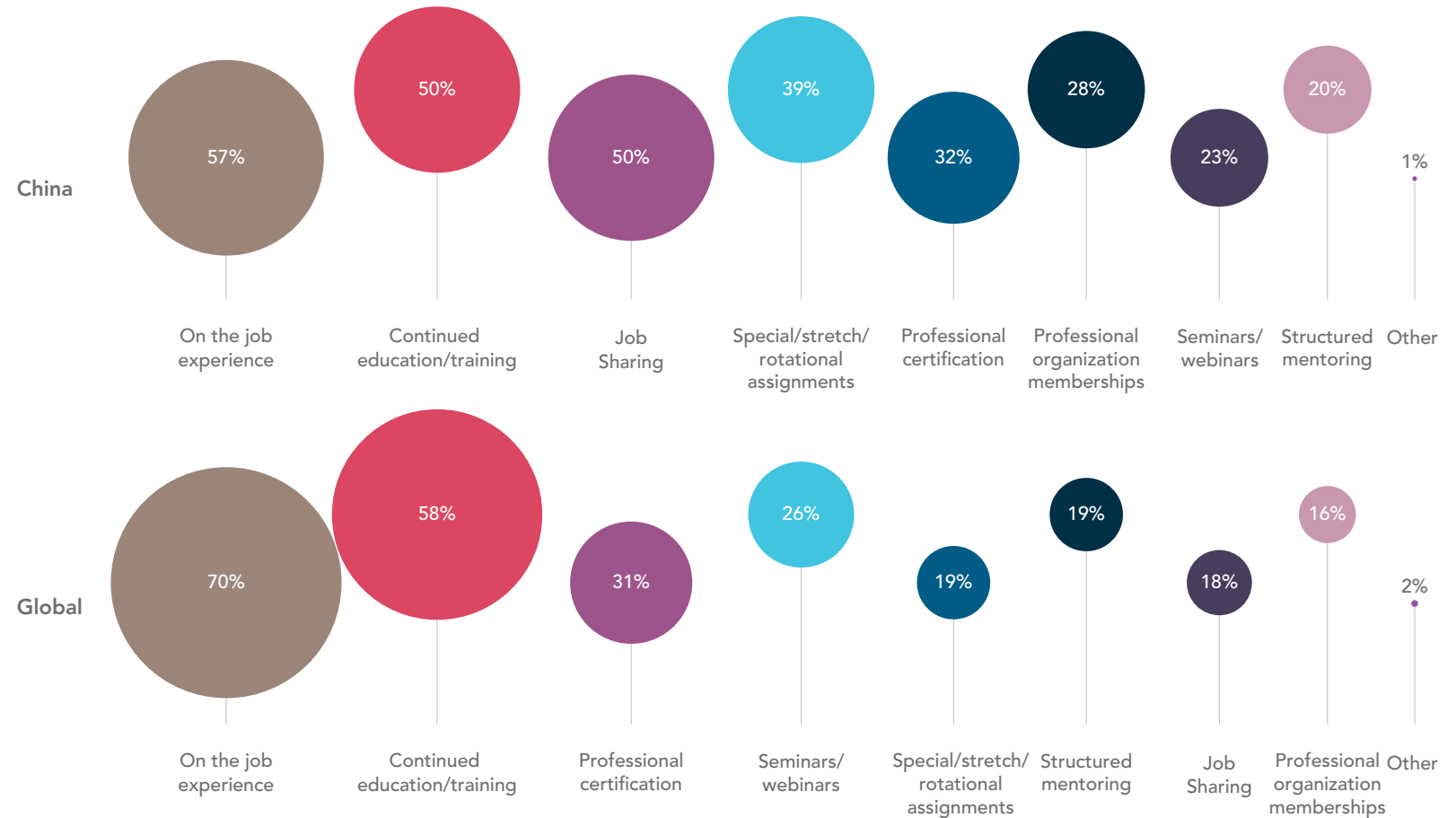
→ When asked to identify the most desirable means of furthering their skills, the overwhelming preference both globally and in China are for on-the-job experience, identified by 70% and 57% respectively. The next highest ranked was “Continued education and training” and “Job Sharing” with both fairing 50% in China. Globally however, stated “Continued education/ training” as the second most desirable means of furthering skills (58%) while “Job Sharing” on the contrary was one of the least desirable identified by only 18%.

All other avenues of professional development in China and globally, including professional certification, seminars, webinars, mentoring, and association memberships, rate relatively lower.

For employers, it seems that sophisticated and costly exercises in professional development may not be as well-received as hands-on workplace experience.

For employees though, they would prefer to explore a variety of different methods to up-skill in a bid to increase their market value in the workplace.

Which of the following methods are most desirable to you in terms of your skill development? (% , multiple responses allowed)



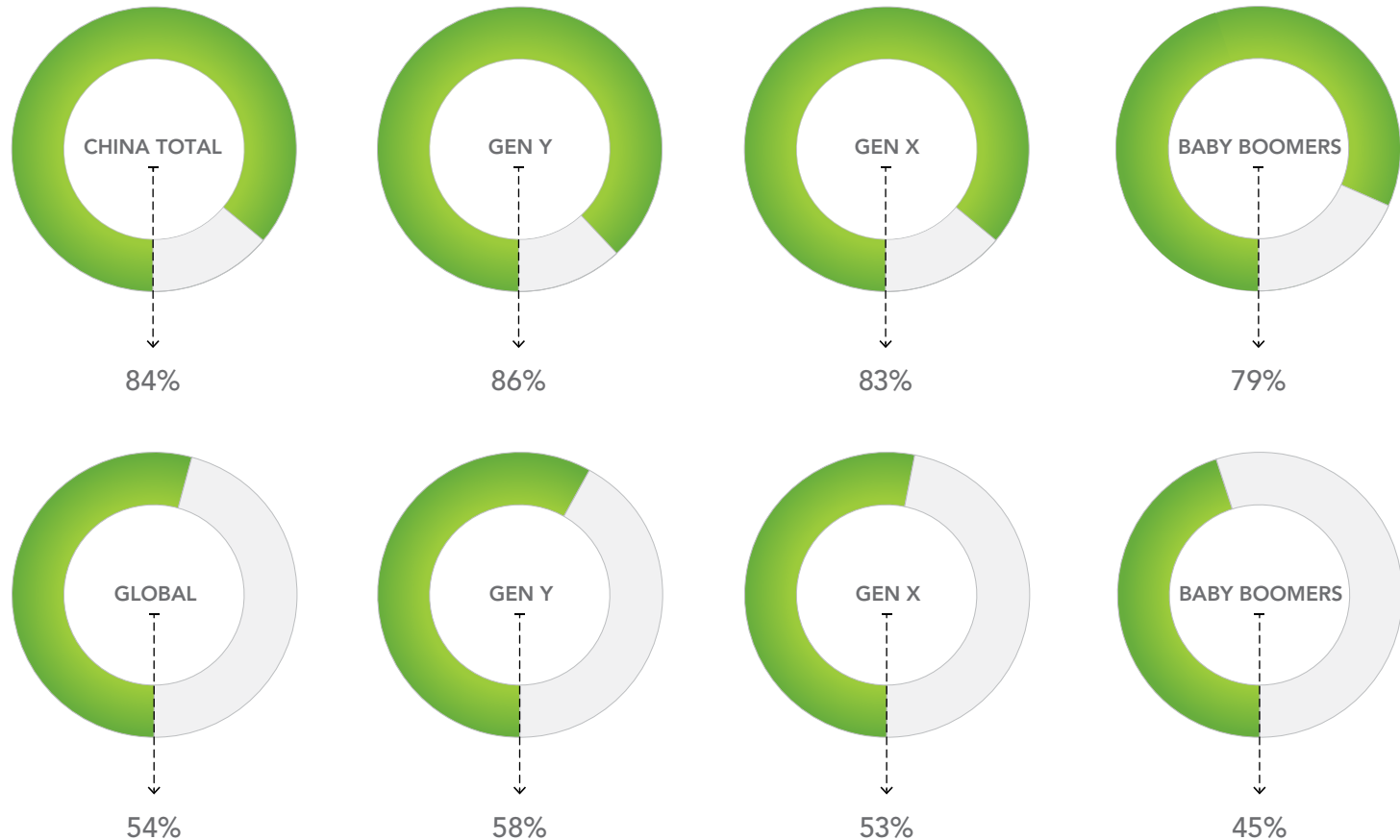
# SATISFACTION WITH EMPLOYER TRAINING

→ Training and further education can be provided in a number of ways, including in the workplace or through specialist colleges and institutions.

When asked to evaluate the effectiveness of the training provided by employers in the workplace, there is a relatively high degree of satisfaction. A total of 84% of respondents in China agree that employer-provided training is effective in building skills whereas globally in total only 54% agree.

This form of training is preferred among Gen Y but becomes less supported among Gen X and Baby Boomers.

To what degree do you agree or disagree that the training provided by your employer allows you to upgrade your skills and progress in your career? (% "Agree" & "Strongly Agree")



# CONFRONTING THE SKILLS GAP

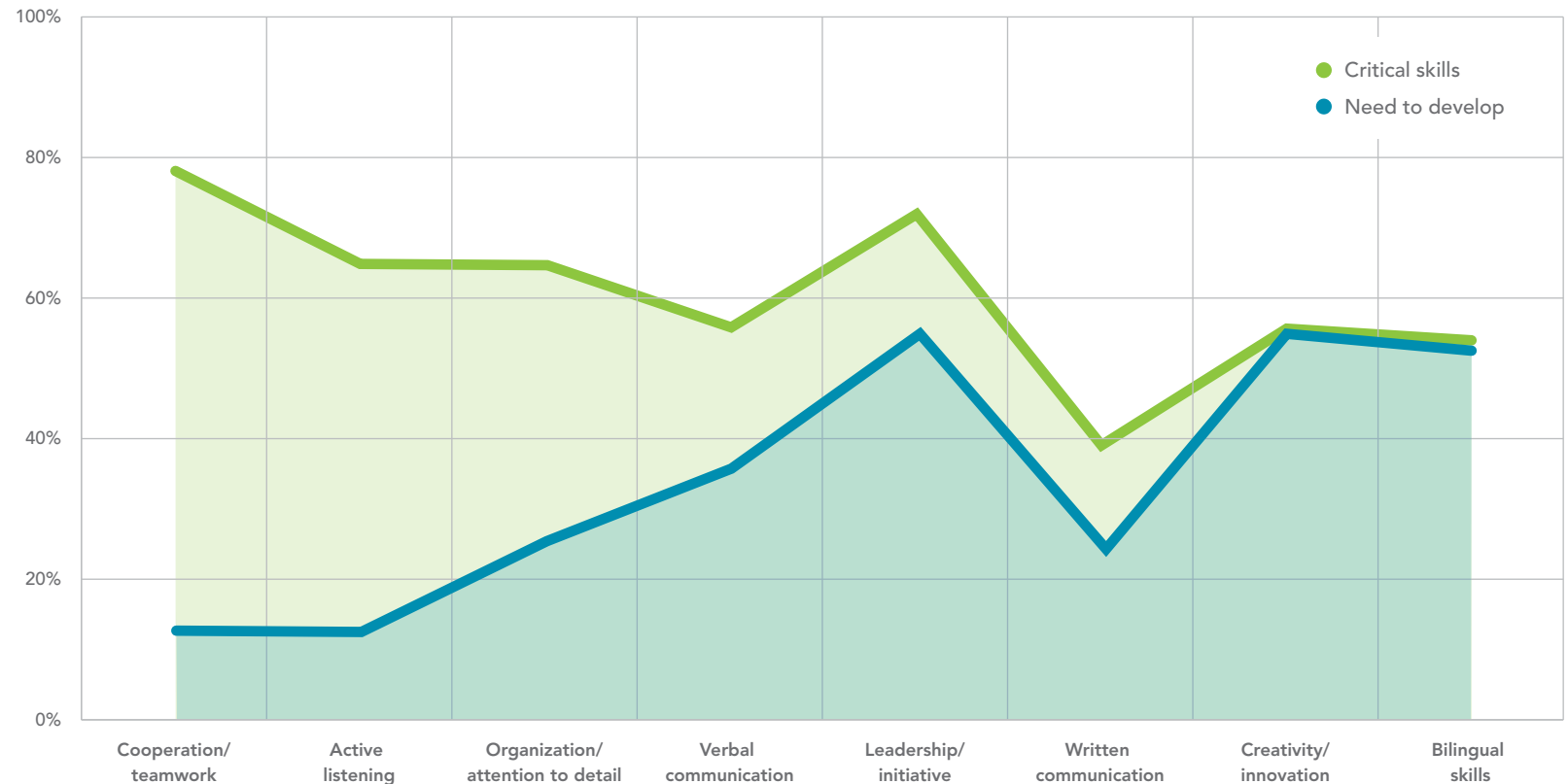
→ When we drill further into the skill sets that are critical to job success, employees identify a range of “soft skills” that they believe underpin organizational achievement.

In China, these are headed by Cooperation/teamwork, cited by 79%, Leadership/initiative (72%), Organization/attention detail (64%), and Active listening (64%).

For the most part, workers feel they are proficient in the most critical soft skills. When asked to nominate the skills they really need to develop, the most striking is Leadership/initiative (56%), followed by Creativity/innovation (54%), and Bilingual skills (53%). With increased MNCs relocating their APAC headquarters to China, we see a surge in Chinese employees taking on regional management roles. This could be the reason workers feel the need to develop these skills as it becomes essential for professionals to communicate within a diverse workplace.

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Skills identified as “critical” for job success versus those needing development (% China)

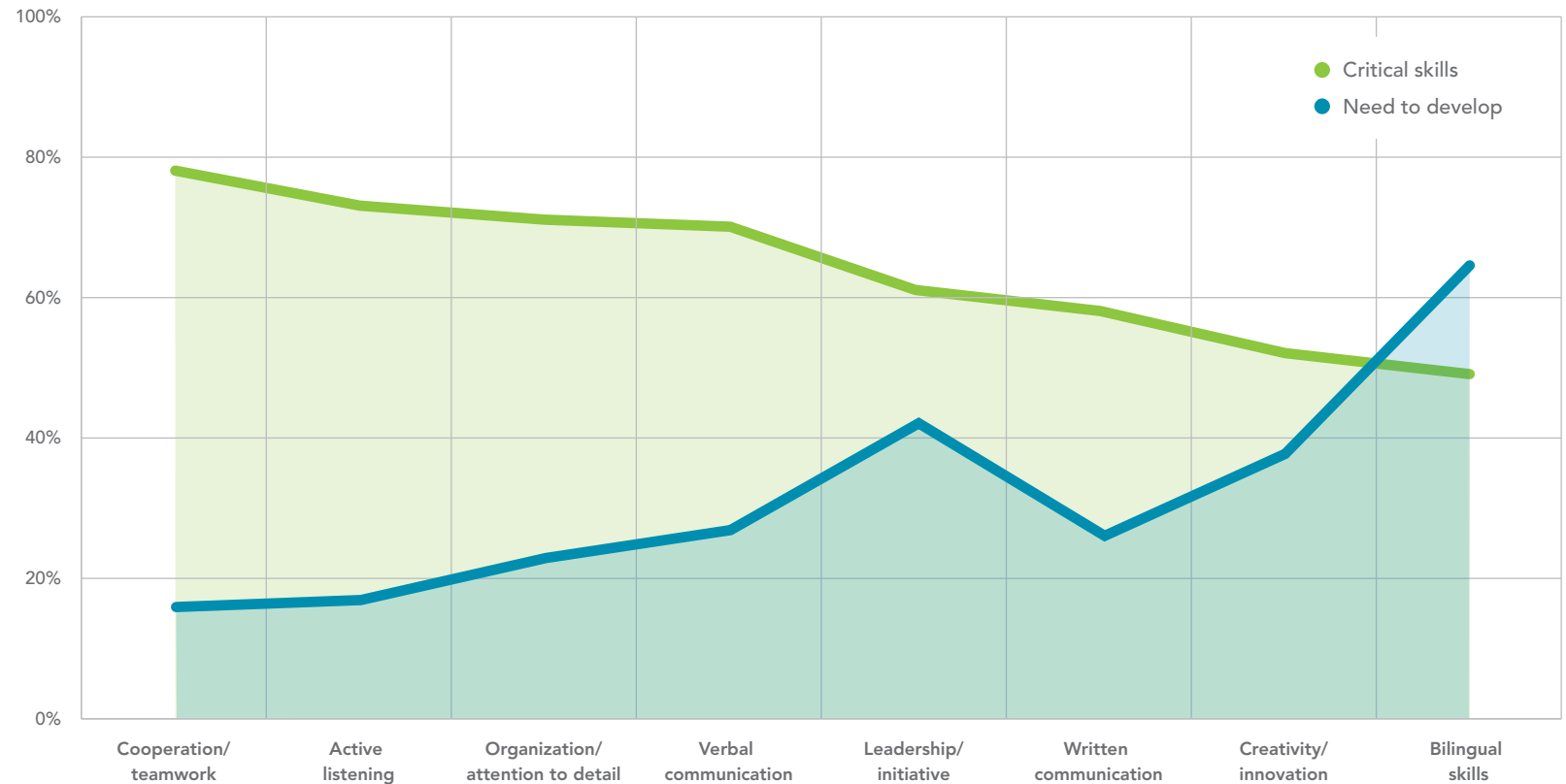


# CONFRONTING THE SKILLS GAP (CONT'D)

→ Globally however, the “soft skills” that employees believe are critical to job success are Cooperation/teamwork (77%), Active listening (72%), Organization/attention to detail (70%), and Verbal communication (69%). The most striking skill that workers feel they need to develop is Bilingual skills (64%).

The intriguing question is whether employees, in general, are truly proficient in the most critical soft skills, as they suggest, and whether some of the training effort is actually being misplaced.

Skills identified as “critical” for job success versus those needing development (% Globally)



# CLOSING THE “HARD SKILLS” GAP

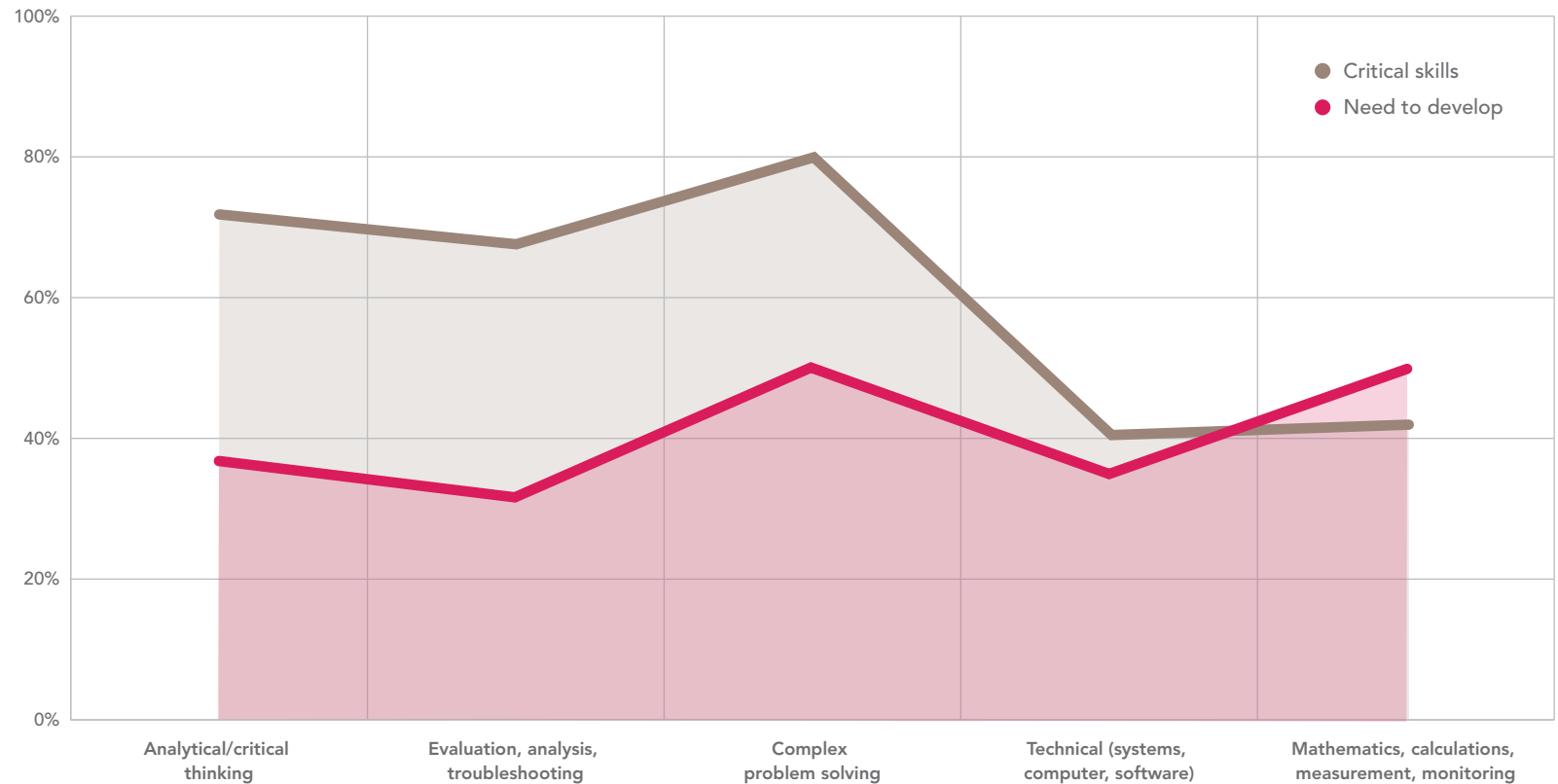
→ Among some of the most skilled employees, known as STEM professionals (Science, Technology, Engineering and Mathematics), there is a more acute focus on specific skills needs. In China and globally, this group identifies the critical set of skills necessary for job success as Complex problem solving, Analytical/critical thinking, and Evaluation, analysis, troubleshooting - although not particularly in that order.

However, both STEM professionals in China and globally in total agree problem solving and analytical/critical thinking are important for personal growth and organization success. Mid to senior level professionals realize they must be able to look at all the factors, evaluate options and risks as well as solve complex issues which do not always have just one solution or a “right” answer to make the business strategy happen.

As is the case with soft skills, there is a perception by most employees in this STEM category that they are proficient in these critical, high-level skills.

> Continued

Technical skills identified as “critical” for job success versus those needing development (% STEM Professionals, China)



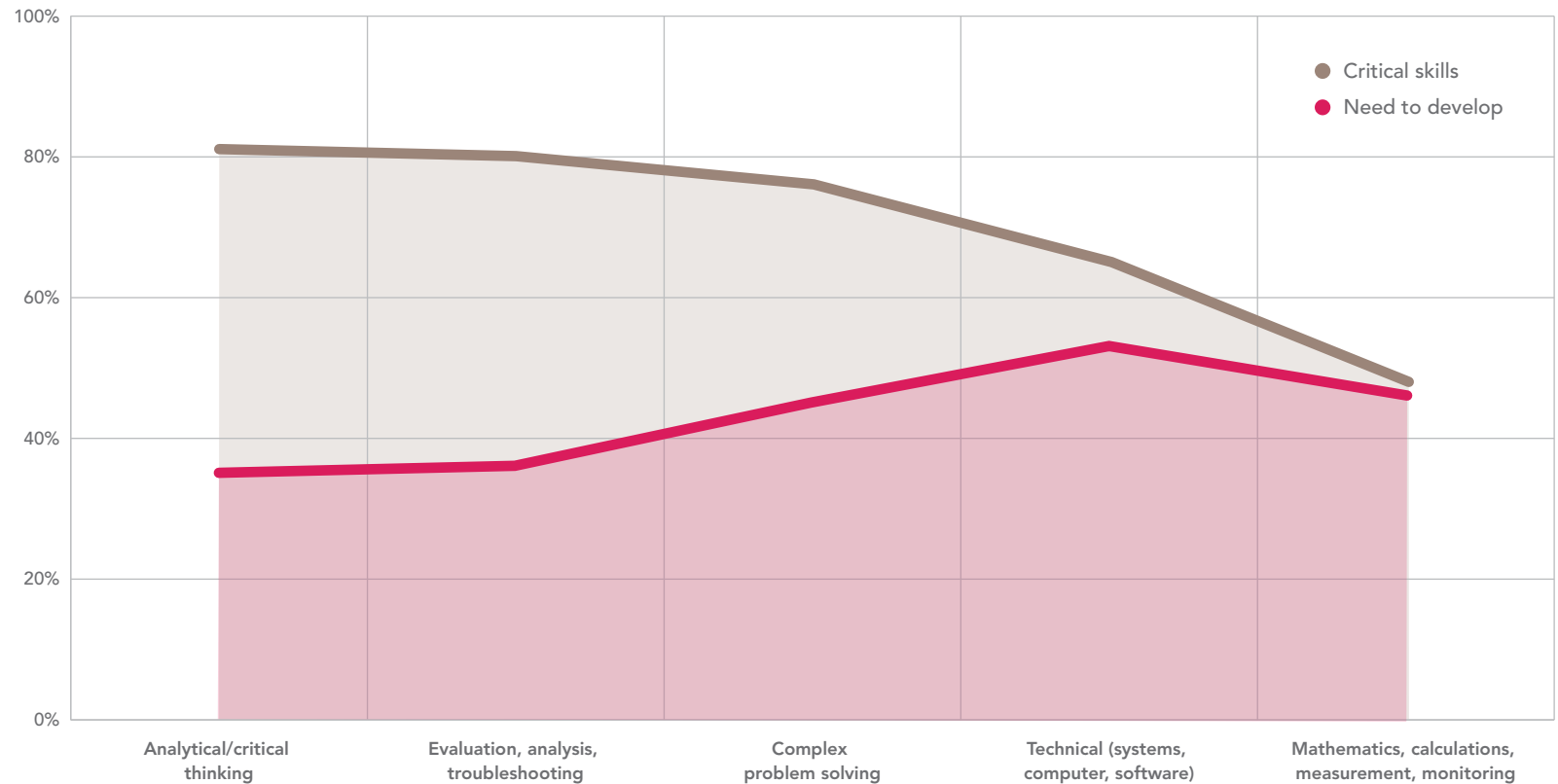


# CLOSING THE "HARD SKILLS" GAP (CONT'D)

→ The areas in which the whole global STEM professionals believe they require skill upgrades are in the more intensive, technical competencies - Mathematics, calculations, measurement and monitoring (45%) and Technical (systems, computer and software)(52%). However, in China particularly, it leaned towards Complex problem solving (49%); and Mathematics, calculations, measurement, monitoring (44%).

With STEM professionals in high demand around the globe, their perceptions about their own skill set gaps are highly relevant to the training agenda.

Technical skills identified as "critical" for job success versus those needing development (% STEM Professionals, Globally)



### BUILDING A DURABLE SKILL BASE

The last two decades have radically altered the way skills are acquired and developed. Skills are no longer “front-end loaded” onto a career. Rather they are characterized by lifelong development and renewal. Most skill sets have a finite life.

The upgrading and renewal of skills plays a critical role in personal and professional development. It also has a vital role in broader workforce development, which is the cornerstone of organizational efficiency and productivity.

The responsibility for managing skills development no longer resides solely with the employer. Employees recognize that they need to take control of this important

aspect of their careers, and think strategically about how they invest in the development of their intellectual and professional capital.

What is clear is that personal decisions about training and professional development are now an integral part of the employment equation, and have an important bearing on employee morale, performance and retention.

### ABOUT THE KELLY GLOBAL WORKFORCE INDEX

The *Kelly Global Workforce Index* (KGWI) is an annual global survey revealing opinions about work and the workplace. Approximately 122,000 people across the Americas, EMEA and APAC regions responded to the survey. This survey was conducted online by RDA Group on behalf of Kelly Services.

### ABOUT KELLY SERVICES® CHINA

Kelly Services (NASDAQ: KELYA, KELYB) has maintained leadership position in workforce solutions since 1946 based on a valuable premise: Investing in people. Serving clients around the globe, Kelly provides employment to more than 560,000 employees annually. Kelly has been active in the China market since 2007. The seven offices in Greater China provide specialist mid to senior permanent recruitment and Recruitment Process Outsourcing.

Specializations in recruitment cover Accounting, Automotive, Banking & Finance, Chemical, Consumer & FMCG, Healthcare & Life Science, General Industrial & Manufacturing, Human Resources, IT&T and other main industries.

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